

Release Notes

Release Notes - Version 23.09.02
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Welcome to TaxWise® for Tax Year 2008

We look forward to working with you this tax season. If you need assistance, contact Customer Service:

- * Online at <http://support.taxwise.com>
- * By e-mail at customer.support@cchsfs.com
- * By phone at (866)-641-9473. If you are a Pay-Per-Return customer, please call (706)-290-7201.

Before contacting Customer Service, try searching our Knowledge Base. It is continuously updated and may help you find the answer you need- quick and easy. You can access the Knowledge Base at <https://support.taxwise.com>.

23.09.02 Minor Update

Purpose of Update

This update enables Form 1041 and Form 990 e-filing. Form 5405 has been updated to reflect the changes from recently enacted tax legislation. Puerto Rico Short Form is delivered with efile creation enabled.

Individual Update

- * Form 5405: Preparers should be aware that previously prepared returns with a purchase date after December 31, 2008 will automatically calculate the new credit amount once the return is opened. Previous maximum credit amount was \$7500. New maximum is \$8000.
- * DCR and Ack Report now distinguish more clearly between the MN and the MNPR returns
- * Minor changes to various reports..

Business Update

- * Enables e-filing for the following forms:

Form 1041 - Estates and Trusts

Form 990 - Exempt Organizations

Puerto Rico Update

- * Short Form delivered with e-filing enabled. Communications module can be downloaded from the Customer Support Site.
- * Long Form is delivered for Print Only. E-filing not yet approved.