



Financial & Corporate Compliance

Release Notes

TSoftPlus™

December 2023

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Contents

TSoftPlus 2023 Release Schedule	5
Complimentary Custom One-on-one Training	5
TSP Build number: 1.0.0.5442—December 14, 2023	6
ETRAN Submission Error	6
SBA LGPC Submission Checklist Link	6
RMA Annual Statement Studies.....	6
TSP Build number: 1.0.0.5413—November 16, 2023	6
E-Tran Optional Terms and Conditions Data document.....	6
Form 1050-Settlement Sheet Supplement	6
E-Tran-Additional Required Data.....	7
Form 1919 Borrower Information Form.....	7
TSP Build number: 1.0.0.5370—October 19, 2023	8
TSP Build number: 1.0.0.5357—October 2, 2023 (Hot Fix)	8
SBA 7(a) Loans – Guaranty Fees.....	8
SBA Application Number.....	9
TSP Build number: 1.0.0.5288—September 21, 2023	9
IRS W9 Request for Taxpayer ID	9
Loan Authorization Wizard.....	9
Request for Transcript of Tax Return IRS 4506C IVES	9
SBA 7(a) Loans – E-Tran Loan Duplicate	9
TSP Build number: 1.0.0.5171—August 17, 2023	10
Leasehold Improvements Owned by Applicant.....	10
Loan Information Page – Requested Tax Forms Section	10
Optional Terms and Conditions Data for E-Tran.....	10
Removing Standby Creditors.....	10
Request for Transcript of Tax Return IRS 4506C IVES	11
SBA 7(a) Loans - Updated Credit Scoring.....	11
SBA Form 1919 – SBA 7(a) Borrower Information Form	11
Summary Page – E-Tran Status.....	11
TSP Build number: 1.0.0.5112—July 20, 2023	12

Home Page – Resources and Important Links Section.....	12
Eligibility Page – Credit Alert Verification Reporting System (CAIVRS) Numbers (Codes).....	12
TSP Build number: 1.0.0.5053—June 15, 2023	12
Collateral Information Page	12
Collateral Information/Aircraft Engine/Propeller Collateral.....	12
Collateral Information/Collateral Details Page.....	13
TSoftPlus Forms List New Forms Added	13
North American Industry Classification System (NAICS) Code Updates.....	13
TSP Build number: 1.0.0.4956—May 18, 2023.....	14
TSP Build number: 1.0.0.4956—April 20, 2023	14
SBA Form 1919 – SBA 7(a) Borrower Information Form	14
TSP Build number: 1.0.0.4922—March 16, 2023	14
TSP Build number: 1.0.0.4841—February 16, 2023.....	14
2022 NAICS Code Updates	14
Request for Transcript of Tax Return IRS 4506C IVES	14
SBA Form 1059 – Security Agreement.....	14
SBA Form 160A – Certificate As To Partners.....	15
TSP Build number: 1.0.0.4806—January 28, 2023.....	15
Loan Authorization.....	15

This document lists the product changes made over the current calendar year with the most recent listed at the top.

TSoftPlus 2023 Release Schedule

The following is a list of planned releases for 2023. When necessary, this schedule may be adjusted according to business needs or deploy additional releases outside of this schedule.

January 28
February 16
March 16
April 20
May 18
June 15
July 20
August 17
September 21
October 19
November 16
December 14

Complimentary Custom One-on-one Training

You are invited to join us for a TSoftPlus™ training opportunity. This complimentary offering is designed for customers who desire a customized training package to meet your specific institution's needs. A Wolters Kluwer representative will contact you to discuss, develop, and design the event, which can be delivered in multiple 2-hour blocks via the web at no charge.

To request an assessment, please send an email request to sues@wolterskluwer.com, and a Wolters Kluwer representative will contact you within 24 hours.

TSP Build number: 1.0.0.5442—December 14, 2023

ETRAN Submission Error

Corrected an issue that caused *ETRAN submissions* to fail when the transaction included a subject individual who was also identified as the owner of the business. The issue was resolved by modifying the transaction submission so that if the subject individual is also the owner of the building they are recognized as a single entity and not duplicates.

SBA LGPC Submission Checklist Link

Updated the link available from the **Submission Tools** button on the *Summary Documents* page to open the revised *LGPC Submission Checklist* webpage on the SBA website.

RMA Annual Statement Studies

RMA Annual Statement Studies® data for 2023-24 is now available in TSoftPlus. The Risk Management Association (RMA) releases industry benchmark data in the Annual Statement Studies. The 2023-2024 data set is now available as a supplement for use in performing financial analysis.

TSP Build number: 1.0.0.5413—November 16, 2023

E-Tran Optional Terms and Conditions Data document

E-Tran Optional Terms and Conditions Data document has been updated to show the *Personal Property Hazard Insurance?* row for each *Collateral* type. The row can be entered if needed.

Form 1050-Settlement Sheet Supplement

The *Form 1050-Settlement Sheet Supplement* has been added on the *Document List*. The supplement is used to print additional *Use of Proceeds* when there are more than one in the *Other* category. It is used only in situations in which the *SBA Form 1050 Settlement Sheet* is used.

The document is available on the *Closing Phase* for transactions with loan amount over \$350,000 and for the first or full disbursement on all standard 7(a) loans. The form must be used for the first or final disbursement on all standard 7(a) loans with a loan amount over \$350,000 and may be used for all 7(a) loans for all disbursements.

The *SBA Disbursement Type* is selected on the *Options Data Fill-in* page. The document can also be selected if more than one of the following use of proceeds included in the transaction: Pay Trade or Accounts Payable, Pay Notes Payable (not Same Institution Debt), Pay Notes Payable (Same Institution Debt), Refinance SBA Loan

(Not Same Institution Debt), Refinance SBA Loan (Same Institution Debt), Other and if the Provide the Settlement Sheet Document checkbox is selected on the Options Data Fill-in page.

E-Tran-Additional Required Data

The *E-Tran-Additional Required Data* document has been updated as follows:

- Gender, Race, and Ethnicity fields have been added for each owner who has less than 20% ownership. For owners who have greater than 20% ownership, this information is collected on Form 1919.
- Updated the following questions to only be addressed to owners who have less than 20% ownership. For owners who have greater than 20% ownership, this information is collected on Form 1919.
 - Presently subject to indictment criminal information arraignment or other formal criminal charges?
 - Arrested in past six months for criminal offense?
 - Convicted, pleaded guilty, pleaded nolo contendere, placed on pretrial diversion or placed on parole or probation?
 - Involved In Bankruptcy/Insolvency?
 - Are you, or any business you control, presently involved in any legal action (including divorce)?
- Employees Prior to This Loan, Jobs Created, Jobs Retained fields have been removed from the document.
- Subject Individuals will no longer print on the document if they are also owners or borrowers.
- Added questions for owners who have less than 20% ownership. For owners who have greater than 20% ownership percent this information, this information is collected on Form 1919.
 - Are you presently suspended, debarred, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency? (If "Yes," the application is not eligible for SBA financial assistance)
 - If you are a 50% or more owner of the Applicant, are you more than 60 days delinquent on any obligation to pay child support arising under an administrative order, court order, repayment agreement between the holder and a custodial parent, or repayment agreement between the holder and a state agency providing child support enforcement services. (If "Yes," the application is not eligible for SBA financial assistance)
 - Are you, or any business you control, presently involved in any legal action (including divorce)?

Form 1919 Borrower Information Form

Updated to support recent changes to *Form 1919 Borrower Information*. The update ensured that the new version of the form is used in the application; the changes to the form itself do not require any revisions to the form description in the *Document List*.

- The logic of creating one instance for each borrower or guarantor that is an operating company in scope has been removed from the document.
- Section I will print for each borrower or guarantor that is an operating company.
- Section I.
 - If there is an EPC, check the EPC checkbox and print name on Applicant Business Legal Name section and print name of OC in the Operating Business Legal Name section.

-
- If there is no EPC, check the OC checkbox and print name on the Applicant Business Legal Name section (whether OC is co-borrower or guarantor) and print the name of an OC in the Operating Business Legal Name section.
 - The Applicant Legal Name field in Section I was revised to remove the use of SBA Combined Applicant Name because the field is specific to the party it is generated for.
 - The Ownership of the Applicant table in Section I was updated to include subject individuals and to print EIN if the party is an entity (including a sole proprietorship that uses an EIN) and print the SSN for other parties.
 - Section II will print for owners with ownership percentages of 20% or higher. Also, Section II will print for subject individuals if they are not also owners with ownership percentages of 20% or higher.

TSP Build number: 1.0.0.5370—October 19, 2023

There are no changes impacting the user interface or documents.

TSP Build number: 1.0.0.5357—October 2, 2023 (Hot Fix)

SBA 7(a) Loans – Guaranty Fees

PBI 790854 S18

The SBA published *Information Notice 5000-848801: 7(a) Fees Effective October 1, 2023, for Fiscal Year 2024*, announcing the annual service fee (also known as the “on-going guaranty fee”) and the upfront guaranty fee for 7(a) loans for fiscal year 2024 (FY 2024).

In accordance with this notice, Wolters Kluwer has updated the Guaranty Fee calculations in TSoftPlus when the **Export Working Capital** checkbox on the Loan Information screen is selected as follows:

- If the loan amount is equal \$1,000,000 or less: 0.00%.
- If the loan amount is greater than \$1,000,000 AND loan term is 12 months or less: 0.25% of the guaranteed portion (SBA guarantee).
- If the loan amount is greater than \$1,000,000 AND loan term is between 13 and 24 months – 0.525% of the guaranteed portion (SBA guarantee).
- If the loan amount is greater than \$1,000,000 AND loan term is between 25 and 36 months – 0.80% of the guaranteed portion (SBA guarantee).

For **all other 7(a) loan types excluding 504, SBA Veterans Advantage and Export Working Capital** the rates for calculation the Upfront Guaranty fee will be calculated according to the following conditions:

- If the loan term is 12 months or more:
 - If the loan amount is equal \$1,000,000 or less: 0.00%.

-
- If the loan amount is from \$1,000,001 to \$2,000,000: 1.45% of the guaranteed portion of the loan up to and including \$1,000,000, plus 1.70% of the guaranteed portion of the loan over \$1,000,000.
 - If the loan amount is from \$2,000,001 and greater: 3.5% of the guaranteed portion up to \$1,000,000, plus 3.75% of the guaranteed portion over \$1,000,000.
 - If the loan term is 12 months or less:
 - For loans of \$1,000,000 or less: 0.00%.
 - For loans \$1,000,001 and greater: 0.25% of the guaranteed portion.

SBA Application Number

Updated the *Summary Documents* panel and *Manage Transactions* (transaction grid) page to now include the **SBA Application Number** in the presentation of loan information.

The **SBA Application Number**, obtained from the SBA's E-Tran loan guaranty origination/servicing solution, is displayed on the *Summary Documents* panel as a read-only value and is also included as a data field on the transaction grid on the *Manage Transactions* page. On the *Manage Transactions* page, the **SBA Application Number** is available as a searchable option (filter) in the search feature.

TSP Build number: 1.0.0.5288—September 21, 2023

IRS W9 Request for Taxpayer ID

The IRS W9 Request for Taxpayer ID has been updated to print the EIN if provided, otherwise, the SSN will print to the Taxpayer Identification Number field if a party is a sole proprietor. Previously, only SSN was printed on the form for sole proprietors.

Loan Authorization Wizard

Removed the Loan Authorization Wizard from the **Financial Analysis & Authorization** screen. The new SBA E-Tran submission process no longer requires submission of the Loan Authorization document.

Request for Transcript of Tax Return IRS 4506C IVES

The Request for Transcript of Tax Return IRS 4506C IVES has been updated to allow a user to enter the *First Wage And Income Form Series* directly on the form. Previously, the field could be completed from the Tax Form section of the Options Data Fill-In page.

Also, the document has been updated to print the EIN if provided, otherwise, the SSN will print to the Taxpayer Identification Number field if a party is a sole proprietor. Previously, only SSN was printed on the form for sole proprietors.

SBA 7(a) Loans – E-Tran Loan Duplicate

Previously, when a loan was credit scored and the user submitted it to E-Tran, a duplicate of the loan was created in the SBA. TSoftPlus has been updated and the issue resolved.

TSP Build number: 1.0.0.5171—August 17, 2023

Leasehold Improvements Owned by Applicant

Previously, the Leasehold Improvements Owned by Applicant value from TSoftPlus was populated in the **Others** field on the E-Tran. TSoftPlus has been updated to populate the section Leasehold Improvements with the sum of both values - Leasehold Improvements Owned by Applicant and Leasehold Improvements Owned by Others.

Loan Information Page – Requested Tax Forms Section

The Requested Tax Forms section has been updated and the following has been added to the 4506-C Transcript IVES column:

- A new "Tax Form Number" prompt.
- A new checkbox "Wage and Income transcript only".

When the "Wage and Income transcript only" checkbox is selected, then the **Tax Form Number** field in column 4506-C Transcript IVES will become non-editable. If the **Tax Form Number** field is filled in first, then the "Wage and Income transcript only" checkbox will become non-editable.

NAME	4506-C TRANSCRIPT IVES	4506 TAX RETURN	W9
Andrew Anderson	<input type="text" value="Tax Form Number"/> 1020 <input type="checkbox"/> Wage and Income transcript only		<input type="checkbox"/>
Ida Affiliate	<input type="text" value="Tax Form Number"/> <input checked="" type="checkbox"/> Wage and Income transcript only	<input type="text" value="Tax Form Number"/>	<input type="checkbox"/>

Optional Terms and Conditions Data for E-Tran

The Small Business Administration (SBA) is removing the requirement for a loan authorization and will instead rely on the use of the terms and conditions of the loan application as submitted by the SBA Lender into E-Tran. As a result of SBA changes, the Loan Authorization document has been replaced with a new Terms and Conditions document.

As part of this change, the E-Tran Optional Loan Authorization Data document has been renamed to E-Tran Optional Terms and Conditions Data. Also, the LoanAuthOrigination method has been replaced with a new GenerateLoanAuth method to get Terms and Conditions document. The Forms List has been updated to reflect this change.

Removing Standby Creditors

Previously, there was an issue preventing the removal of a standby creditor on the **Parties** page. When attempting to remove a standby creditor from the **Parties** page, a system error message was displayed, and you were unable to remove the creditor. TSoftPlus has been updated and the issue resolved.

Request for Transcript of Tax Return IRS 4506C IVES

Previously, there was an issue that allowed account information stored in the Google Password Manager to autofill on certain pages, including the **Requested Tax Form** section on the **Loan Information** page. In certain cases, your account name or email address automatically entered into the **Requested Tax Forms** fields from the Google Password Manager feature. TSoftPlus has been updated and the issue resolved.

Previously, there was an issue that prevented data entered in the **Requested Tax Form** section on the **Loan Information** page from saving properly. In certain cases, when you navigated away from the page, the entered values were not saved as expected. TSoftPlus has been updated and the issue resolved.

SBA 7(a) Loans - Updated Credit Scoring

SBA announced new Standard Operating Procedure (SOP) where the amount of 7a and 7a small loans has been increased.

Standard 7(a) loans as 7(a) loans that are greater than \$500,000.

7(a) Small and SBA Express are combined in one 7(a) delivery method chapter. 7(a) Small loans are loans that are \$500,000 or less and may be processed under Preferred Lender Program (PLP) authority or non-delegated through the Loan Guaranty Processing Center (LGPC). 7(a) Small loans exclude: Standard 7(a) loans, SBA Express, Export Express, CAPLines, Export Working Capital Program (EWCP), and Community Advantage Pilot Program loans.

SBA Form 1919 – SBA 7(a) Borrower Information Form

Previously, there was an issue where the title defined for a related party on the Options Data Fill-In page was not populating on the SBA Form 1919. TSoftPlus has been updated and the issue resolved.

Summary Page – E-Tran Status

The Summary page has been updated to display the E-Tran status of a loan.

Below is an example of application status values.

Application Status
IP- Application in-Process
AP- Approved Pending Funding
FD- Funded
WD- Withdrawn
R0- In Compliance Review
R1- In Review Reviewer 1
AD- Awaiting Documents
SO- Screened Out
PS- Poor Score

TSP Build number: 1.0.0.5112—July 20, 2023

Home Page – Resources and Important Links Section

Previously, on the home page of the **Resources and Important Links** section, the text was not displaying correctly on each line. TSoftPlus has been updated and the issue resolved to ensure the content is not broken up on the page.

Eligibility Page – Credit Alert Verification Reporting System (CAIVRS) Numbers (Codes)

Previously, there was an issue where the CAIVRS Number (code) was not properly saving on the **Eligibility** page/**CAIVRS** section for borrowers and other parties on a transaction. TSoftPlus has been updated and the issue resolved.

TSP Build number: 1.0.0.5053—June 15, 2023

Collateral Information Page

On the **Collateral Information** page, the Collateral "All Assets (commercial only)" has been updated to allow a user to enter a location.

Collateral Information/Aircraft Engine/Propeller Collateral

New checkbox "Is this engine part of Aircraft Collateral?" has been added to the **Collateral Information** section for **Aircraft Engine/Propeller Collateral**. This checkbox has two states:

- Editable
 - If there is Aircraft Collateral, then the checkbox is editable and can be checked/unchecked.
- Disabled
 - If there is no Aircraft Collateral in the transaction, then it will be disabled.

Collateral Information/Collateral Details Page

On the **Collateral Information/Collateral Details** page, a new drop-down field for **Aircraft Collateral Type** has been added to the Collateral types "Aircraft" and "Aircraft Engine/Propeller Only". This field also has blank "Engine" and "Propeller" options.

TSoftPlus Forms List New Forms Added

The following forms have been added to TSoftPlus:

- Multi State:
 - UCC Financing Statement Addendum IACA
 - UCC Financing Statement Addendum IACA 2013
 - UCC Financing Statement Collateral Description
 - UCC Financing Statement Filing Authorization
 - UCC Financing Statement IACA
 - UCC Financing Statement IACA 2013
- State specific:
 - UCC Financing Statement Collateral Description Growing Crops-GA (Georgia)
 - UCC Financing Statement IACA 2013 Growing Crops-GA (Georgia)
 - Effective Financing Statement Overflow-LA (Louisiana)
 - Effective Financing Statement-LA (Louisiana)
 - UCC Financing Statement Addendum IACA 2013 DBA-SD (South Dakota)
 - UCC Financing Statement Collateral Description DBA-SD (South Dakota)
 - UCC Financing Statement IACA 2013 DBA-SD (South Dakota)

North American Industry Classification System (NAICS) Code Updates

SBA Size Standards

TSoftPlus has updated the **Industry Codes** section and corresponding NAICS codes to reflect the most recent size standards published by the SBA (March 2023). Size standards are updated annually as a guideline for determining business size standards set forth by the SBA. In this annual update, commas are removed from numeric values and all code exceptions are listed in the search results. Size standards are established under the North American Industry Classification System (NAICS) for type of economic activity or industry.

TSP Build number: 1.0.0.4956—May 18, 2023

There are no changes impacting the user interface or documents.

TSP Build number: 1.0.0.4956—April 20, 2023

SBA Form 1919 – SBA 7(a) Borrower Information Form

Previously, some customers were having an issue where the title defined for a related party on the **Options Data Fill-In** page was not populating on the SBA Form 1919. TSoftPlus has been updated and the issue resolved.

TSP Build number: 1.0.0.4922—March 16, 2023

There are no changes impacting the user interface or documents.

TSP Build number: 1.0.0.4841—February 16, 2023

2022 NAICS Code Updates

Included the new set of size standards as published by the SBA for use with the 2022 NAICS codes included in the E-Tran submission. These standards will print on Form 1920, Lender's Application for Guaranty.

Request for Transcript of Tax Return IRS 4506C IVES

An update to the Request for Transcript of Tax Return IRS 4506C IVES document is now available. The updated version includes changes and additions to the form and enables support for authorized representatives including:

- Modified line 1a Current Name for the first and second filer to split into First Name, Middle Name, and Last Name.
- Added a section Previous Name (line 1c) used to list a previous name present on the last tax return if different from the current name (line 1a). The previous name can be entered directly on the form.
- Added a section Client Company (line 5d). The list of alternate addresses in Administration has been extended to support a new type, Client Company on the IRS Tax Return.
- The general layout of the form has been updated to match the model form.

More information about the new structure and data on the revised form is available in the general and specific instructions on page 2.

SBA Form 1059 – Security Agreement

The Form 1059 Security Agreement has been updated to allow a specific collateral description or the general collateral description for goods, farm products, and timber. The general collateral description can be entered directly on the form (Farm Products Description, Goods Description, Timber Description).

SBA Form 160A – Certificate As To Partners

The Form 160A - *Certificate As To Partners* has been removed from the system. The form is no longer available on the SBA website.

TSP Build number: 1.0.0.4806—January 28, 2023

Loan Authorization

Previously, when the user opened Loan Authorization wizard the macros were disabled, and the user could not update the Loan Authorization. TSoftPlus has been updated and the issue has been resolved.

Note: The *Loan Authorization Wizard* feature was removed in the subsequent September 21, 2023, release.

Wolters Kluwer

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Customer Service: (800) 552-8410 Available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern time.

TSoftPlus SupportLine:

Phone: 800-274-2711 ext. 1124028

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