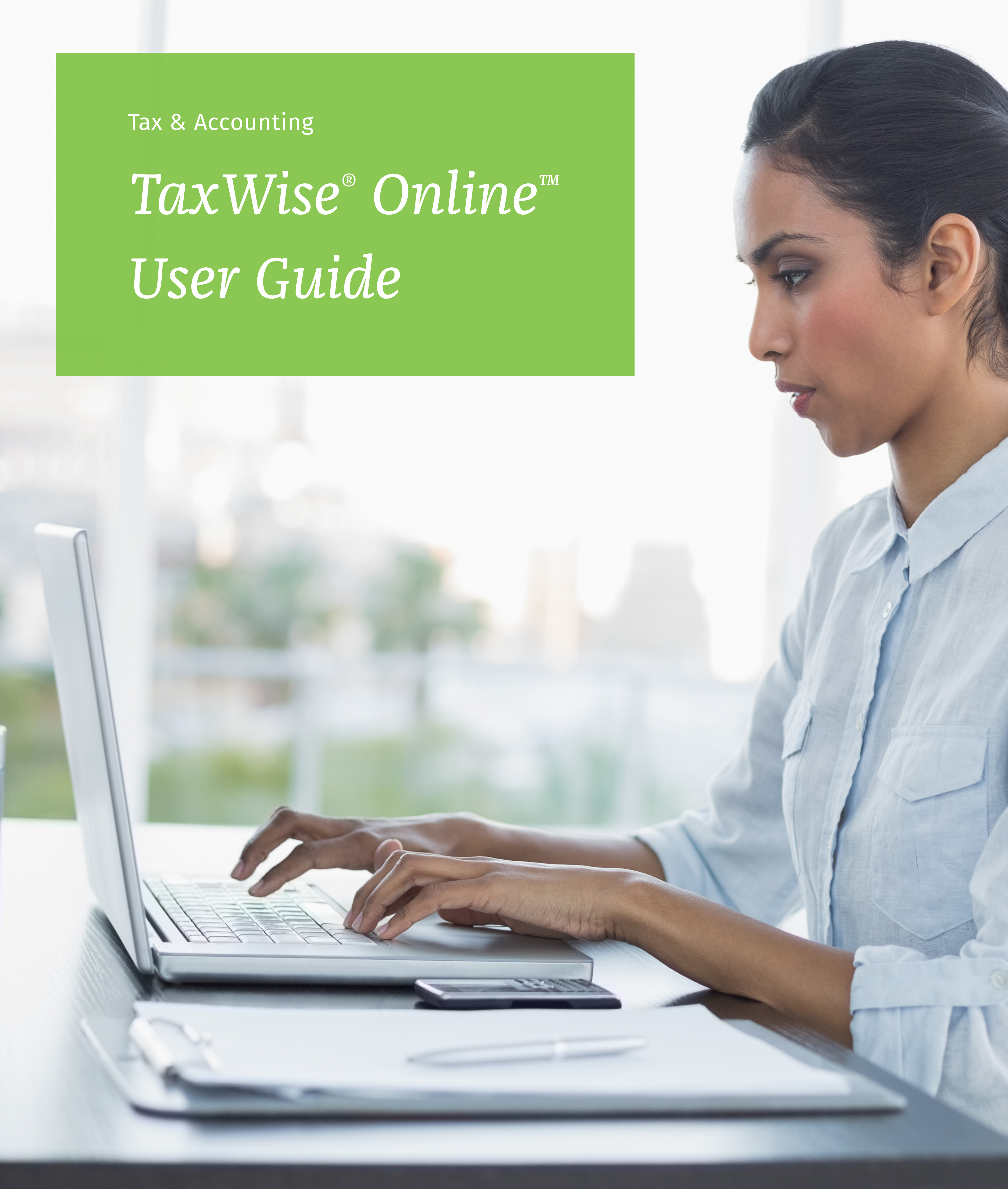
Wolters Kluwer

When you have to be right



Tax & Accounting

# TaxWise® Online™ User Guide

TAXWISE ONLINE

# User Guide

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November 2016

**This User Guide contains information similar to that in the Program Help provided with TaxWise Online. Because this User Guide is published only once at the beginning of the tax season, you should consider using Program Help as your primary resource during tax season. Program Help contains the most up-to-date information on the product.**

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# Chapter

# 1

## TaxWise Online 2016

TaxWise Online brings the power and ease-of-use of TaxWise Desktop to the user's web browser. The flexibility and convenience of working with tax returns anywhere, anytime makes TaxWise Online the best option for tax professionals and tax preparers who need a powerful tax preparation program combined with the mobility of a web-based product. TaxWise Online utilizes broadband internet to access our secured servers for online return preparation and submission.

### System requirements

For best performance, follow the "**Best**" (recommended) system requirements.

| | **Base** | **Better** | **Best** |
|---|---|---|---|
| **Operating System** | Windows® 7 | Windows® 8.1 | Windows® 10 |
| **Processor** | 1.0 GHz processor | 2.8 GHz processor | Intel® Core™ i5 is better and equivalent processors |
| **Memory (RAM)** | 1GB | 4GB | 8GB |
| **Available Hard Disk Space** | 1GB | 3GB | 3GB on solid state drive |
| **Computer Monitor (Display)** | 1024x768 | 1024x768 or higher | 1920x1080 (1080p or 1080i) |
| **Internet Browser** | Internet Explorer® 11.0 or Chrome | Internet Explorer® 11 or Chrome | Internet Explorer® 11 or Chrome |
| **Printer (Microsoft Windows Compatible)** | Inkjet (non- W2/1099 forms);<br>Laser (W-2/1099) | Inkjet (non- W2/1099 forms);<br>Laser (W-2/1099) | Laser |

### What's the difference in configurations?

- **Base**: TaxWise will install and run correctly in this minimal configuration, but performance may not be suitable for some users
- **Better**: Enhances performance and application response times to meet the needs of most TaxWise users
- **Best**: Recommended for optimum performance, especially for users who prepare complex returns or large numbers of returns

### Browser Support

- Internet Explorer 11
- Google Chrome
- Microsoft Edge
- Safari

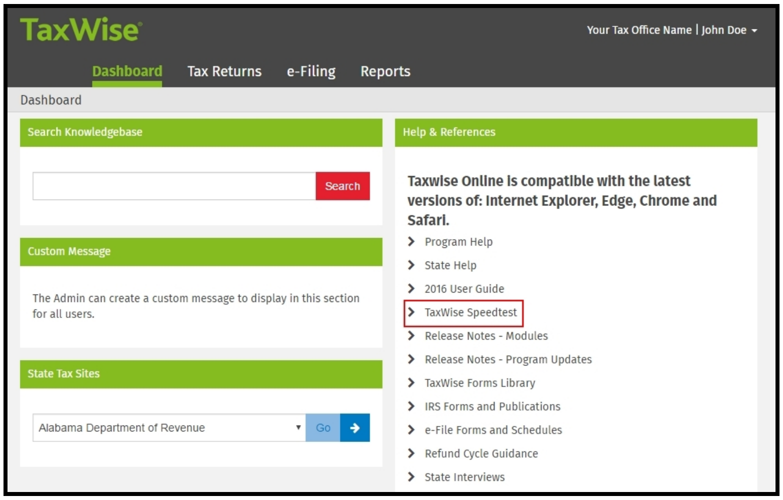
## Types of internet connections

Common types of high speed internet connections and how they may affect your facility:

- **Cable Hi-Speed** - This is shared technology among an area, not a one to one internet connection. If the site is in an area that has heavy internet usage in the afternoon, internet speed will be faster in the morning and slow down in the afternoon.
- **DSL** - This is a one to one internet connection, but the speed per computer is going to be dependent upon how many computers are accessing the internet at one time. For example: I have DSL with a connection speed of 2.1 MBS, but if all three of my computers are accessing the internet at the same time, my speed can drop to 500KBS. Most companies that offer DSL have pricing options. Typically, the cheaper the monthly rate, the slower the connectivity.
- **T1** - This is typically used on a campus or shared between businesses. This type of internet connection can accommodate 200+ users. T1 providers typically guarantee a high level of service, speed, and consistency.

## Test your internet connection

To get the most out of TaxWise Online, your minimum internet connection speed should be 800 KBS. Your connection speed can be verified by accessing http://speedtest.TaxWise.com or by clicking **TaxWise Speedtest** from the Dashboard.


TaxWise
Your Tax Office Name | John Doe
Dashboard
Tax Returns
e-Filing
Reports
Dashboard
Search Knowledgebase
Search
Help & References
Custom Message
State Tax Sites
Alabama Department of Revenue
Go
Program Help
State Help
2016 User Guide
TaxWise Speedtest
Release Notes - Modules
Release Notes - Program Updates
TaxWise Forms Library
IRS Forms and Publications
e-File Forms and Schedules
Refund Cycle Guidance
State Interviews

The Admin can create a custom message to display in this section for all users.

Taxwise Online is compatible with the latest versions of: Internet Explorer, Edge, Chrome and Safari.

## Advantages of TaxWise Online

**Reduced tax preparation burden:**

- No installation on individual computers - program maintained on Wolters Kluwer servers
- No updated required - program updated by Wolters Kluwer
- No need to backup and restore returns to a central computer for transmission - data already resides as Wolters Kluwer

**Improved security:**

- No data stored on individual computers - the Wolters Kluwer secured facility stores all data
- Intrusion detection - Wolters Kluwer uses software to reduce threat of hackers

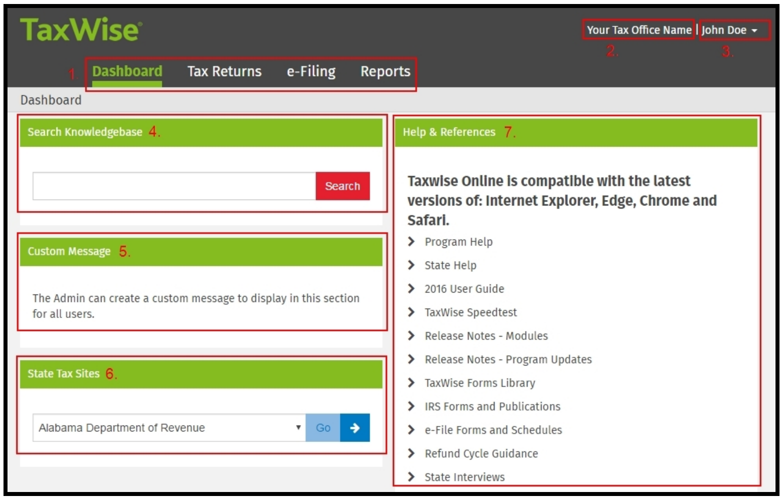
**Greater mobility:**

- With proper log in credentials, TaxWise Online can be accessed from any computer with a broadband internet connection
- Troubleshoot problems remotely
- Immediate availability - nothing to ship

## Learn about TaxWise Online

Navigating within TaxWise Online is easy and intuitive. When you first log on to TaxWise Online you will see the dashboard, along some menus and links.

Use the image below to learn how to navigate within TaxWise Online.


TaxWise
Your Tax Office Name
John Doe
2.
3.
1.
Dashboard
Tax Returns
e-Filing
Reports
Dashboard
Search Knowledgebase 4.
Search
Custom Message 5.
State Tax Sites 6.
Alabama Department of Revenue
Go
Help & References 7.
Program Help
State Help
2016 User Guide
TaxWise Speedtest
Release Notes - Modules
Release Notes - Program Updates
TaxWise Forms Library
IRS Forms and Publications
e-File Forms and Schedules
Refund Cycle Guidance
State Interviews

The Admin can create a custom message to display in this section for all users.

Taxwise Online is compatible with the latest versions of: Internet Explorer, Edge, Chrome and Safari.

1. These links allow you to navigate to the following areas:
    - **Dashboard** - On the dashboard your able to search the Knowledgebase, create a custom message, link to state websites, help, and link to many other references.
    - **Tax Returns** - On the Tax Returns page you are able to create, view and access returns.
    - **e-Filing** - On the e-Filing page you can submit e-File, print reject details, and view acknowledgements.
    - **Reports** - On the Reports page you can generate and view reports.
2. The firm name that is entered in the **User Settings** or **Return Templates** is displayed.
3. The current user's name is displayed. Clicking on your name allows you to access **Settings** or **Log Out**. Your user role(s) will determine what is shown on the **Settings** page.
4. **Search Knowledgebase** - This section allows you to search the TaxWise Online knowledgebase.
5. **Custom Message** - This section lets the Administrator or user with Administrator rights to create a custom message to be displayed for all users.
6. **State Tax Sites** - This section allows you to visit state websites.
7. **Help & References** - This section provides link to the program and state help, user guide, release notes and much more.

## What's new for TaxWise Online 2016

The new changes in TaxWise Online, listed in this section, are designed to help you improve the speed and accuracy with which you deliver your final product to the customer.

### New Look and Feel

TaxWise Online has been updated with a new modern look and feel throughout the application. This includes the following:

- A new dashboard that provides quick access to the program help, the TaxWise Blog, and other resources
- useful during return preparation.
- Tax Returns, e-Filing and Reports are now organized into top level menus.
- Product settings, including Manage Users and Return Templates, have been organized into a common location.
- The pre-defined return list views (All Returns, Accepted Returns, Active Returns, etc.) are now easily accessible above the relocated Search box.
- You are now able to choose one of the two color themes of the product for personalization and visibility.

### Browser Support

TaxWise Online now supports Microsoft Edge and Safari.

### User and role change

The Admin user may now create returns in TaxWise Online. This functionality is not available to users only assigned the Administrator role.

### Return creation

Returns can now be created with the initial release of TaxWise Online. If the tax forms are not finalized by the federal or state taxing authority, any returns created might not be compatible with the next release and could result in the loss of some data or the need to create a new return.

**Vault**

TaxWise Online now provides a secure, fast way to capture and store the documents and files associated to a client's return. You can use most built-in cameras (or purchase a USB camera from any retailer) to snap pictures of any document presented to you by a taxpayer. You can also import files provided to you electronically (PDFs, pictures, document). These files are stored securely alongside the return (Loaded Forms), and are managed from within the tax return.

**Export returns**

The new export returns feature generates a secure backup file of your client data if you want to keep an offline copy of your client information.

**Multi-office management quick view**

If you manage multiple offices, you will now see new dashboard widgets that provide a quick view of the e-File status and Settlement Solutions enrollment status for all your sub-offices.

**Co-branding**

The co-branding is only available to Service Bureaus, and allows you to configure certain elements of TaxWise Online to align with your business practices.

## Differences between TaxWise and TaxWise Online

The following table displays the main differences between TaxWise Online and TaxWise Desktop:

| TaxWise Online | TaxWise Desktop |
|---|---|
| Inserts a row on a multi-line statement or worksheet: **Ctrl+I**<br>Removes a row on a multi-line statement or worksheet: **Ctrl+R** | Insert Row: **Alt+Insert**<br>Delete Row: **Alt+Delete** |
| Prior Year Carry Forward: No preliminary steps. Prompted to carry forward data when starting a new return. | Prior Year Carry Forward: Must carry forward data prior to creating returns. |
| Printing: Three (3) pre-defined PDF form sets, plus the ability to customize federal and/or state print sets. | Printing: Ability to customize print packets |
| Internet: High-Speed required | Internet: High Speed Recommended |
| Return Storage: All return are stored on Wolters Kluwer servers. | Return Storage: Local |
| Updates: Federal, state and module updates apply automatically at 7am EST | Updates: Federal, state and module updates must be downloaded and manually applied to all computers |
| Client Letter: Limited client letters | Client Letter: Wide variety of client letters |
| Training: Year-round via twonline.taxwise.com/training | Training: Year-round training via the Training user name |

TaxWise Desktop users can switch to TaxWise Online and carry forward prior year data, as long as they performed regular or archive backups during the prior filing season.

The following shortcut keys function the same for TaxWise and TaxWise Online:

- **F1** - Opens program help
- **F3** - Toggle Estimated for the selected field
- **F8** - Override the selected field
- **F9** - Link to a form

# Chapter

# 2

## Access TaxWise Online 2016

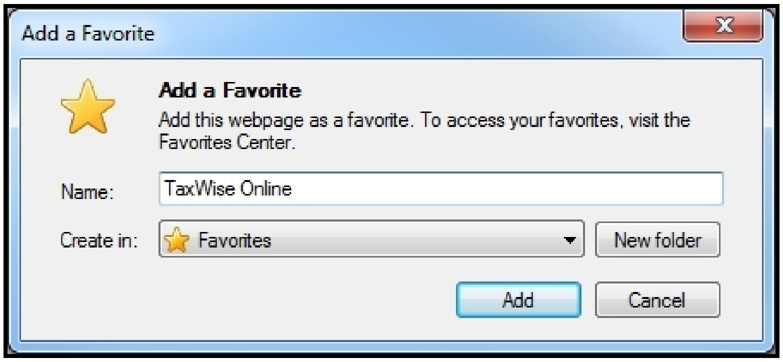
To access TaxWise Online 2016, type https://twonline.taxwise.com in the address bar of your internet browser and press **Enter**.

TaxWise Online 2016 will be activated approximately November 22, 2016. Prior to November, the application will be the 2015 version. You must disable all pop-up blockers to use TaxWise Online.

### Create a favorite in Internet Explorer

**To create a favorite link in Internet Explorer, use the following steps:**

1. Open Internet Explorer.
2. Type https://twonline.taxwise.com in the address bar of the internet browser and press **Enter**.
3. Click the **Favorites** menu and select **Add to Favorites**.


Add a Favorite

**Add a Favorite**

Add this webpage as a favorite. To access your favorites, visit the Favorites Center.

Name: TaxWise Online

Create in: Favorites

4. Enter the name you want the **Favorites** menu to display for TaxWise Online.

   The Name box displays User Management – Login by default. Other TaxWise login screens also display this name. TaxWise recommends changing the name to TaxWise Online.

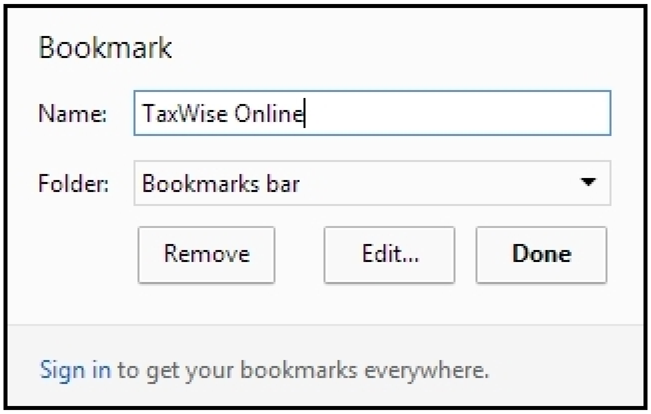
5. Click **Add**.

   To open the Favorites list, click the **Favorites** button on the toolbar.

### Create a bookmark in Google Chrome

**To create a bookmark in Chrome, use the following steps:**

1. Open Google Chrome.
2. Type https://twonline.taxwise.com in the address bar of the internet browser and press **Enter**.
3. Click the star button ☆ in the address bar.


Bookmark

Name: TaxWise Online

Folder: Bookmarks bar

Remove
Edit...
Done
Sign in to get your bookmarks everywhere.

4. Enter the name you want the bookmark to display for TaxWise Online.
5. Select the folder where the bookmark should be and click **Done**.

## TaxWise Online 2015

To access TaxWise Online 2015 after November 2016, type https://twonline.taxwise.com/15 in the address bar of your browser, then press **Enter**.

# Chapter

# 3

## TaxWise Online training resources

The training site allows users to go through the entire process of creating returns, running diagnostics, creating and submitting e-Files, and viewing acknowledgements.

### TaxWise Online training site

The TaxWise Online Training Site allows you to prepare practice returns and simulate transmitting returns and receiving acks through our Training EFC. In order to practice tax preparation under the Training EFC, you must log in to the TaxWise Online training website: https://twonline.taxwise.com/training.

The training site shares the same log in information as the production site. It has a green background, so it can easily be distinguished from the production site which has a blue background, Returns created in the training site will not show up in the production site.

### Create training returns

To create training returns, the primary SSN entered must end with the last four digits of the EFIN used for that office or user. For exampe, for EFIN 123456, an acceptable primary SSN could be 111-11-3456.

If there are several preparers using the same EFIN to transmit, assigning a unique range of numbers for each user for the first 5 digits of the primary SSN will provide a way to track each users' progress and avoid duplicate return messages.

### Simulated ackowledgments

Practice e-Files, once created, can be sent to our Training Electronic Filing Center and processed. Users then receive either acknowledgements showing their returns as Accepted or Rejected.

Users have the ability to control whether the acknowledgement is 'IRS Accepted' or 'IRS Rejected'. If the primary SSN for the return begins with an even number (0, 2, 4, 6, or 8), the return will be 'IRS Accepted'. If the primary SSN for the return begins with an odd number (1, 3, 5, 7, or 9), the return will be 'IRS Rejected'.

This allows users to view and print acknowledgements for both accepted and rejected returns.

The simulated IRS acknowledgement for each rejected return will provide an IRS reject code that gives the reason for the rejection. For training returns, reject codes are assigned based on the first digit of the primary SSN rather than any actual information within the return.

You cannot correct a rejected training return. Even if errors are found and corrected and the return is resubmitted, it will be rejected again because the primary SSN begins with an odd number.

# Chapter

# 4

## Log in

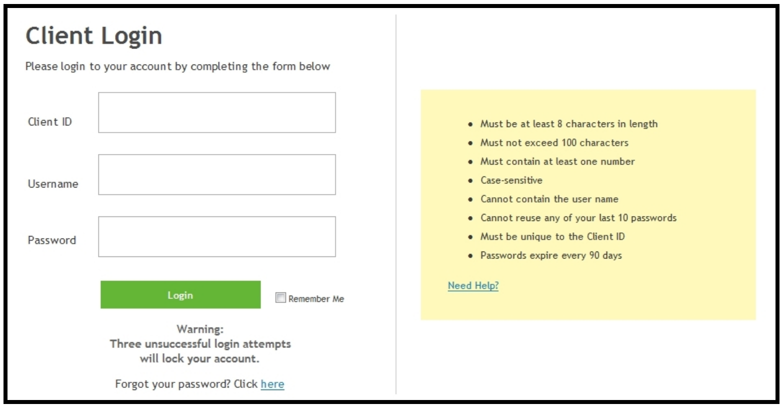
In order to begin working in TaxWise Online, you must first log in to the site. The Admin user's initial password will be your **Registration Code** if you are a first time TaxWise Online user. Upon logging in for the first time, you will be prompted to change your password immediately. If you already have a password for Admin, you will use it.

### Log in as the Admin user

Each user must have a unique user name and password and can only be utilized on one device at a time. If the same user name and password are logged in at the same time, one user will automatically be logged out of the application.

**To log in to TaxWise Online 2016 for the first time as the Admin user, use the following steps:**

1. Do one of the following:
   - Double-click the TaxWise Online icon on the desktop.
   - Double-click the internet browser icon, click the **Favorites/Bookmark** button and select TaxWise Online.
   - Type https://twonline.taxwise.com in the address bar of the internet browser and press Enter.



Please login to your account by completing the form below

Warning:
Three unsuccessful login attempts
will lock your account.

Forgot your password? Click here

- Must be at least 8 characters in length
- Must not exceed 100 characters
- Must contain at least one number
- Case-sensitive
- Cannot contain the user name
- Cannot reuse any of your last 10 passwords
- Must be unique to the Client ID
- Passwords expire every 90 days

2. Enter the **Client ID**.
3. Enter **Admin** in the User Name box.
4. Enter the **Registration Code** or established password in the **Password** box.

Your Client ID and Registration Code can be obtained from your Site Administrator/Office Manager.

5. Click **Login**.

Immediately upon your first login, TaxWise Online prompts you to change your password.

6. Enter a new password in the **New Password** box.
7. Re-enter a new password in the **Confirm Password** box.

The Administrator password must be at least 8 alpha-numeric characters with at least one number and must be changed every 90 days.

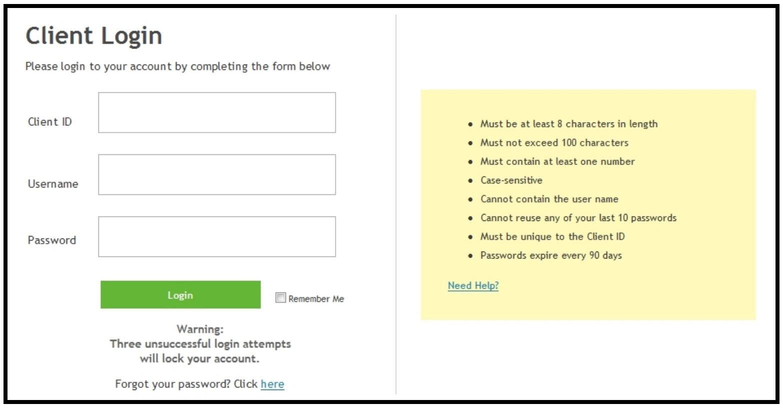
9. Click **Change Password**.
10. Click **Continue**.
11. Choose a **Security Question** from the drop-down list.
12. Enter an answer in the **Security Answer** box and click **OK**.

## Log in as a created user

Each user must have a unique user name and password and can only be utilized on one device at a time. If the same user name and password are logged in at the same time, one user will automatically be logged out of the application.

**To log in to TaxWise Online 2016, use the following steps:**

1. Do one of the following:
   - Double-click the TaxWise Online icon on the desktop.
   - Double-click the internet browser icon, click the **Favorites/Bookmark** button and select TaxWise Online.
   - Type https://twonline.taxwise.com in the address bar of the internet browser and press **Enter**.



Client Login

Please login to your account by completing the form below

Warning:
Three unsuccessful login attempts
will lock your account.

Forgot your password? Click here

- Must be at least 8 characters in length
- Must not exceed 100 characters
- Must contain at least one number
- Case-sensitive
- Cannot contain the user name
- Cannot reuse any of your last 10 passwords
- Must be unique to the Client ID
- Passwords expire every 90 days

Need Help?

2. Enter the **Client ID**.
3. Enter the **User Name**.
4. Re-enter your **User Name** in the **Password** box.

The first time you log in to TaxWise Online as the created user, the password is the user name.

5. Click **Login**.

Immediately upon your first login, TaxWise Online prompts you to change your password.

6. Click **Change Password**.
7. Enter the new password in the **New Password** box.
8. Re-enter the new password in the **Confirm New Password** box.

The password must be at least 8 alpha-numeric characters with at least one number and must be changed every 90 days.

9. Click **Change Password**.
10. Click **Continue**.
11. Choose a **Security Question** from the drop-down list.
12. Enter an answer in the **Security Answer** box and click **OK**.

## Password requirements for new users

Passwords assigned to new users must meet the following requirements:

- Password must contain at least 8 characters.
- Must not exceed 100 characters.
- Must contain at least one number.
- Passwords are case-sensitive.

- Cannot contain the user name.
- Cannot reuse any of your last 10 passwords.
- Must be unique to the Client ID.
- Passwords must be changed every 90 days.

The Admin user can reset password for users. When a password is reset, it reverts to the user name and will immediately require the user to change the password upon logging in.

## Reset a locked account

When a user fails to provide the correct password in three consecutive attempts, TaxWise Online locks the account. Once the account is locked, you need to reset the password so you are able to log in.

If **non-Admin** users are unable to reset the password, they should contact the **Administrator (Admin)**. After the **Administrator** (**Admin**) resets the password the user will enter their user name in the user name and password boxes. TaxWise Online will prompt the user to change the password.

To reset the **Admin** password you must contact Customer Support. An electronic authorization will be sent to the email address on file for the account.

**To unlock the account, use the following steps:**

1. Click the **Click here to reset your locked account** link.
2. Enter the **Client ID** and **User Name** of the locked account.
3. Click **Next**.
4. Enter the answer to the security question.
5. Click **Next**.
6. Enter a new password in the **New Password** box.
7. Re-enter the new password in the **Confirm New Password** box.
8. Click **Change Password**.
9. Click **Continue**.
10. Select a security question and enter the answer.
11. Click **OK**.

TaxWise Online sends an email reporting the change of password to the email address provided when the user name was set up.

# Chapter 5

## Administrator functions

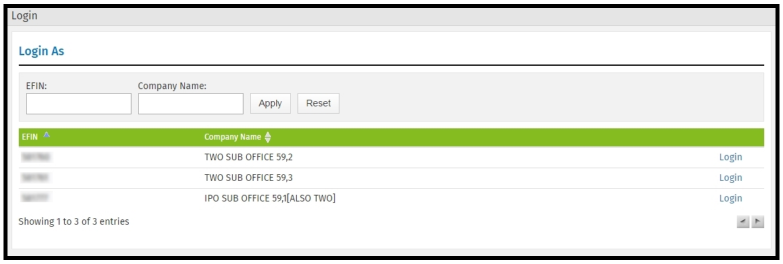
The **Admin** user name gives the administrator/office manager complete control over TaxWise Online. The following functions are available to any user who is assigned the **Administrator** role:

- Create user names and assign user roles.
- Enable override function for user roles.
- Create return templates (Tax Form Defaults) for all user names in the system.
- Lock fields and entries in Return Templates.
- Open, edit, print, and if applicable, create and submit e-Files under any user name.
- Delete or move tax returns under any user name.
- Assign or restrict user privileges.
- Set general settings.
- Create federal and state print sets for sub-offices.
- Send settings to designated offices.
- Force preparer(s) to use interview before tax forms.
- Clear sent e-File status.

### Login As

If you are the **Administrator** (**Admin**) of a location that has multiple offices, you can use **Login As** to access those sites without having to log out of the Main Office's site of TaxWise Online.

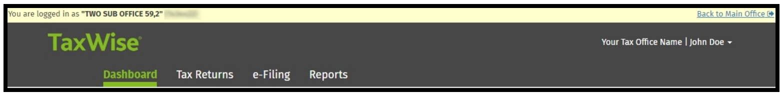
1. Log in as the **Administrator** (**Admin**). This option is only available to the root **Admin**, not a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Login As**.



| EFIN | Company Name | |
|---|---|---|
| [redacted] | TWO SUB OFFICE 59,2 | Login |
| [redacted] | TWO SUB OFFICE 59,3 | Login |
| [redacted] | IPO SUB OFFICE 59,1[ALSO TWO] | Login |

Showing 1 to 3 of 3 entries

3. Locate the office you want to login as and click **Login**.


You are logged in as **"TWO SUB OFFICE 59,2"** [redacted]

When logged in as a sub-office you will see a ribbon located at the top of TaxWise Online, detailing the office you are logged in as.

4. Click **Back to Main Office**, to return to TaxWise Online for the Main Office

## Multi-office quick view

If you manage multiple offices, you will now see new dashboard widgets that provide a quick view of the e-File status and Settlement Solutions enrollment status for all your sub-offices.

## General Settings

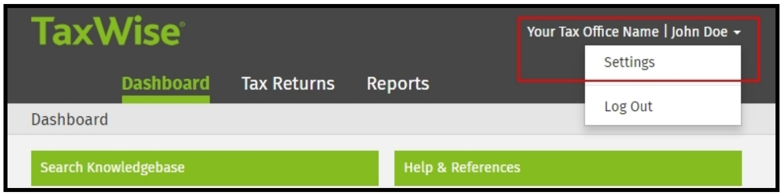
In the **General Settings**, each user can set up their **User Settings**, which includes their Tax Preparer Information and their ERO information. The **Administrator** (**Admin**) or a user with the **Administrator** role will have additional settings they can use to create and edit settings for all users.

## User Settings

The **User Settings** function in TaxWise Online allows you to customize data; program behavior and display settings to carry over to all returns. The settings are saved under the user name and are placed into effect on new subsequent returns.

**To access your user settings, use the following steps:**

1. Click your name on the top right of the screen and select **Settings**.


TaxWise
Your Tax Office Name | John Doe
Settings
Log Out
Dashboard
Tax Returns
Reports
Dashboard
Search Knowledgebase
Help & References

2. Click **General Settings**.
3. Click **Tax Preparer** or **ERO** in the **User Settings**.

The following table describes each settings function available under the **User Settings** dialog:

| Settings | Description |
|---|---|
| **Tax Preparer** | Allows you to input information about the tax preparer. You do not need to use this setting if you have the information set in return templates. This feature is for offices using multiple paid preparers. |
| **ERO** | Allows you to input information about the Electronic Return Originator. You do not need to use this setting if you have the information set in return templates. |

You have the option to override default **Return Template** values with information entered in the **User Settings**.

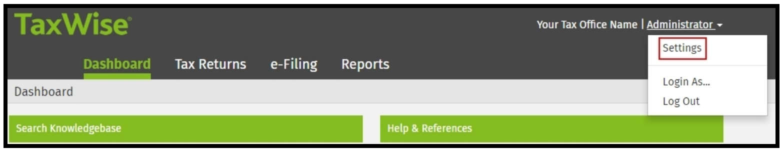
## Administrator Settings

The **Administrator Settings** allow the **Administrator** (**Admin**) user to create and subsequently edit settings for all users.

You must be logged in as the **Administrator** (**Admin**) or a user with the **Administrator** role to have access to the Administrator Settings.

**To access Administrator Settings:**

1. Click your name on the top right of the screen and select **Settings**.
2. Click **General Settings**.


TaxWise
Your Tax Office Name | Administrator
Settings
Login As...
Log Out
Dashboard
Tax Returns
e-Filing
Reports
Dashboard
Search Knowledgebase
Help & References

The following table describes each setting's function available under **Administrator Settings**:

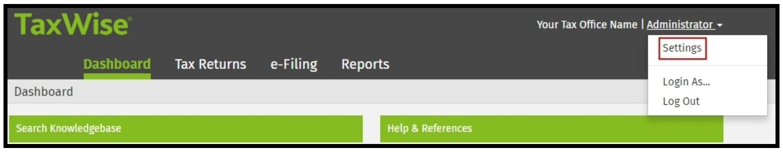
| Settings | Description |
|---|---|
| **Custom Fields** | Allows you to create custom questions associated with the **Preparer Use Form**. |
| **Return Stages** | Allows you to create progress levels (stages) that can be assigned to returns. |
| **Print Sets** | Allows you to create custom Federal and state print sets or select 'sets' of forms to be printed. |
| **Advanced** | Allows you the option to enable the override feature for roles and the option to carry forward the preparer use form. |
| **Salutations** | Allows you to create and edit salutations to be selected in the salutation fields of the Main Info Sheet. |
| **Themes** | Allows the Admin user to select between using the Gray or Green theme. |

## Create custom fields and pick lists for preparer's use

The **Administrator** (**Admin**) or a user with the **Administrator** role can create up to 25 questions for use in your office. These questions will be displayed in the **Custom Questions** of the interview or on the **Preparer Use Form (Prep Use)** form inside a tax return.

**To create preparer use questions, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.

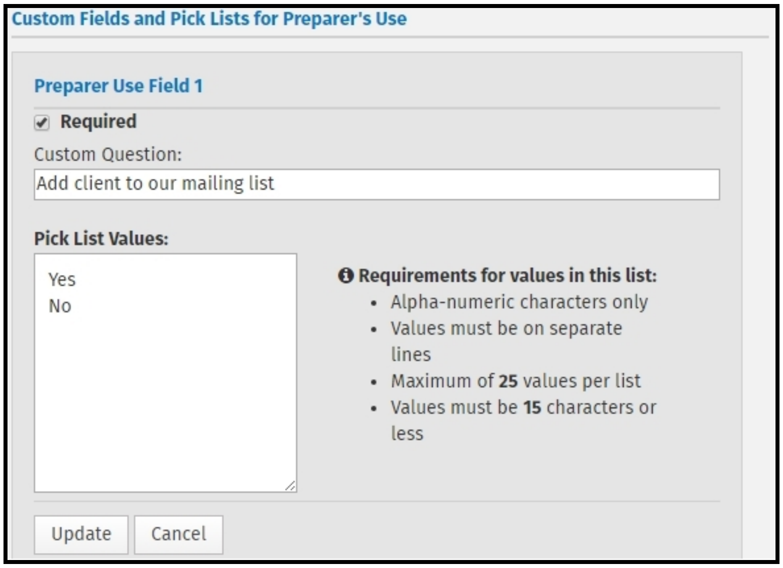


3. Click **General Settings**.
4. Click **Custom Fields** in the **Administrator Settings**.

If the **Check here if using the Preparer Use Form** is selected, the form will be included in every new return.

5. Click the **Edit** button on the row you want to edit.
6. You can customize each field as follows:
   - Make a field required by selecting the **Required** check box.
   - Assign a custom question for each field under **Custom Questions**.
   - Assign a standard set of values for each field in the **Pick List Values**.

Below is an example of a custom question you might enter:



**Custom Fields and Pick Lists for Preparer's Use**

**Preparer Use Field 1**

☑ **Required**

Custom Question:

Add client to our mailing list

**Pick List Values:**

Yes
No

**Requirements for values in this list:**

- Alpha-numeric characters only
- Values must be on separate lines
- Maximum of **25** values per list
- Values must be **15** characters or less

Update
Cancel

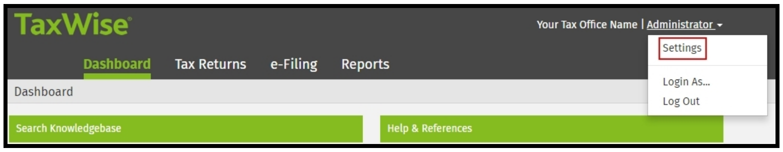
7. Click **Update**.
8. The Preparer Use Field 1 is now complete. You can edit another **Preparer Use** field and repeat step 5 to add more user fields.
9. Click **Save and Close**.

## Create return stages

The **Administrator** (**Admin**) or a user with the **Administrator** role can create return stages to assign to tax returns in the return list. This list enables your preparers to assign a stage to a return, such as Missing W-2, Missing Spouse Signature, Paid in Full, or whatever meets your business needs.

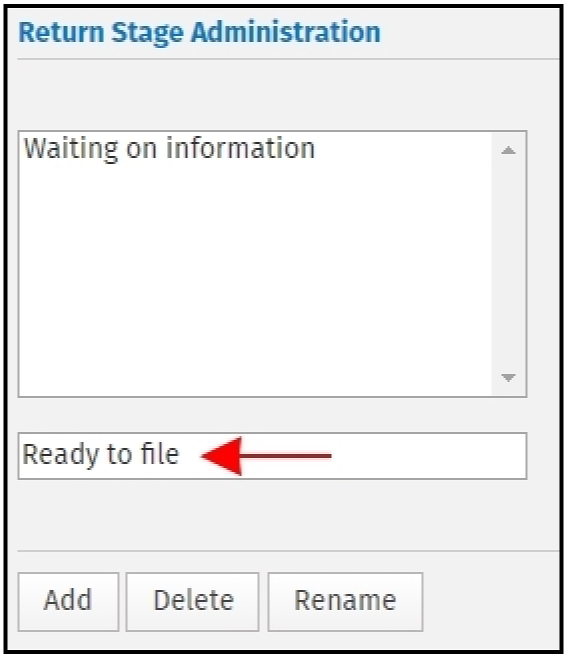
**To create return stages, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.



TaxWise
Your Tax Office Name | Administrator
Settings
Login As...
Log Out
Dashboard
Tax Returns
e-Filing
Reports
Dashboard
Search Knowledgebase
Help & References

3. Click **General Settings**.
4. Click **Return Stages** in the **Administrator Settings**.
5. Enter a return stage in the lower field (one return stage at a time).



6. Click **Add**.

You can delete or rename a particular return stage by selecting the desire stage and click **Delete** or **Rename**.

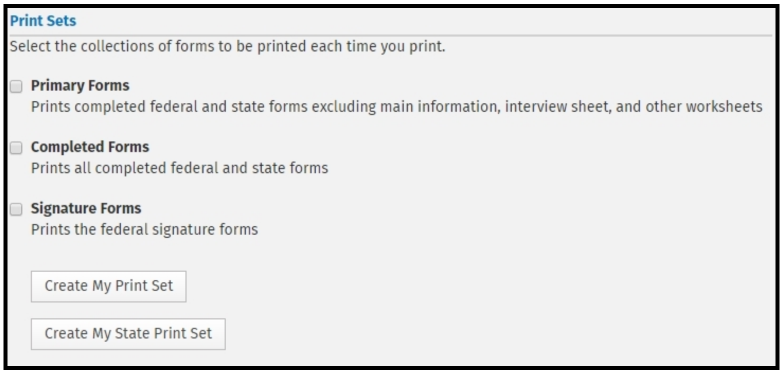
7. Click **Save and Close** once all the stages are added.

## Print sets

TaxWise Online allows you to print a pre-defined set of forms every time a printing job is performed.

**To determine print sets, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.
3. Click **General Settings**.
4. Click **Print Sets** in the **Administrator Settings**


**Print Sets**

Select the collections of forms to be printed each time you print.

☐ **Primary Forms**
Prints completed federal and state forms excluding main information, interview sheet, and other worksheets

☐ **Completed Forms**
Prints all completed federal and state forms

☐ **Signature Forms**
Prints the federal signature forms

There are three default settings:

- **Primary Forms** - prints completed federal and state forms excluding main information, interview sheet, and other worksheets.
- **Completed Forms** - prints all completed federal and state forms.
- **Signature Forms** - prints the federal signature forms.

5. Select the check box(es) next to any, all, or none of the print sets desired.

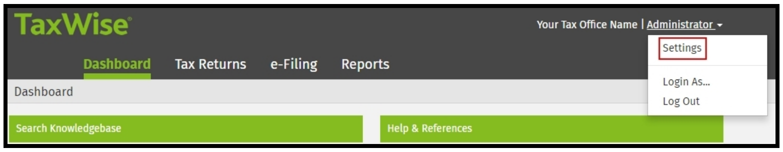
The **Administrator** (**Admin**) or a user with the **Administrator** role can also customize federal or state print sets.

## Custom print sets

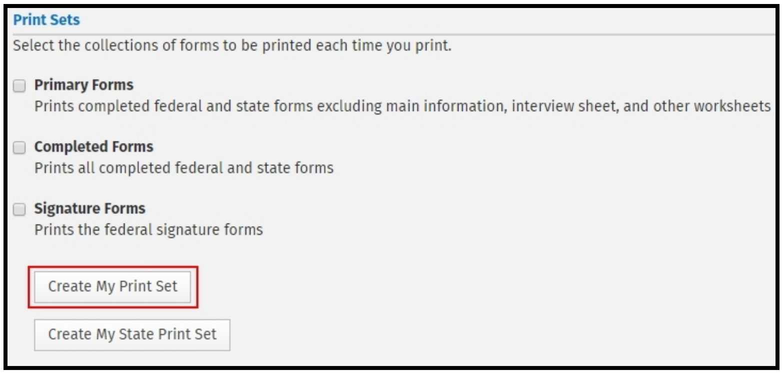
By default, TaxWise Online prints one copy of each form, schedule, worksheet, statement, scratch pad, and client letter in a tax return when you print a return. If this meets your business needs, you do not have to change the default print settings. If this does not meet your needs, you can edit the print sets to create your own set to include the forms and the number of each form that you need.

**To create a custom print set, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.



3. Click **General Settings**.
4. Click **Print Sets** in the **Administrator Settings**.
5. Click **Create My Print Set**.



**Print Sets**

Select the collections of forms to be printed each time you print.

☐ **Primary Forms**
Prints completed federal and state forms excluding main information, interview sheet, and other worksheets

☐ **Completed Forms**
Prints all completed federal and state forms

☐ **Signature Forms**
Prints the federal signature forms

6. In the **Available Forms** window, select the form(s) you would like to print.

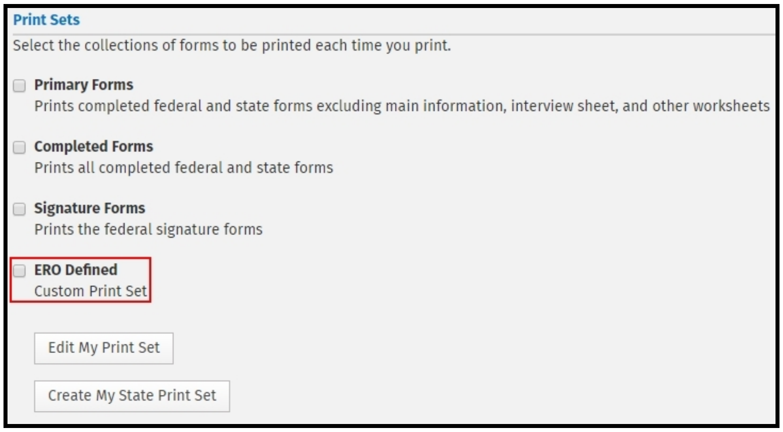
   You can select a range of forms by holding the **Shift** key while selecting.

7. Move the selected form(s) to the **Selected Forms** window by clicking the **Add >** button..

   Once the desired 'set' of forms is displayed in the **Selected Forms** window, you can determine how many copies of each form to print by selecting the form(s) and clicking **+1 Copy** to add copies or **-1 Copy** to subtract copies. You can also change the print order of your forms by selecting the desired form(s) and clicking **Up** or **Down** to move the selected form(s) higher or lower in the print order.

8. When you have determined which forms and how many copies of each are to be printed in which order, click **Done**.

The **Print Sets** dialog will now show another option for printing:


Print Sets
Select the collections of forms to be printed each time you print.

☐ **Primary Forms**
Prints completed federal and state forms excluding main information, interview sheet, and other worksheets

☐ **Completed Forms**
Prints all completed federal and state forms

☐ **Signature Forms**
Prints the federal signature forms

☐ **ERO Defined**
Custom Print Set

Edit My Print Set
Create My State Print Set

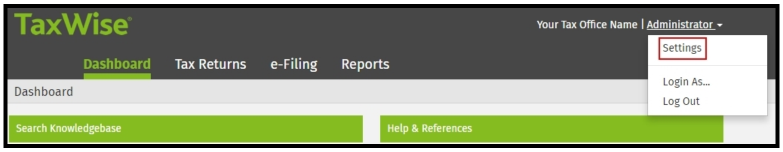
The ERO Defined custom print set can be edited at any time by clicking the **Edit My Print Set** button.

## State print sets

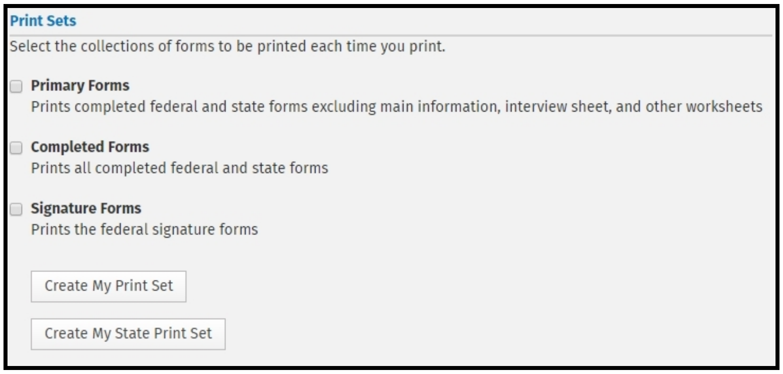
State print sets allow you to create a collection of forms to print for your state returns. The **Administrator** (**Admin**) or a user with the **Administrator** role can determine which forms and how many of each form to print.

**To create a state print set, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.


TaxWise
Your Tax Office Name | Administrator
Settings
Dashboard
Tax Returns
e-Filing
Reports
Login As...
Log Out
Dashboard
Search Knowledgebase
Help & References

3. Click **General Settings**.
4. Click **Print Sets** in the **Administrator Settings**.


Print Sets
Select the collections of forms to be printed each time you print.

☐ **Primary Forms**
Prints completed federal and state forms excluding main information, interview sheet, and other worksheets

☐ **Completed Forms**
Prints all completed federal and state forms

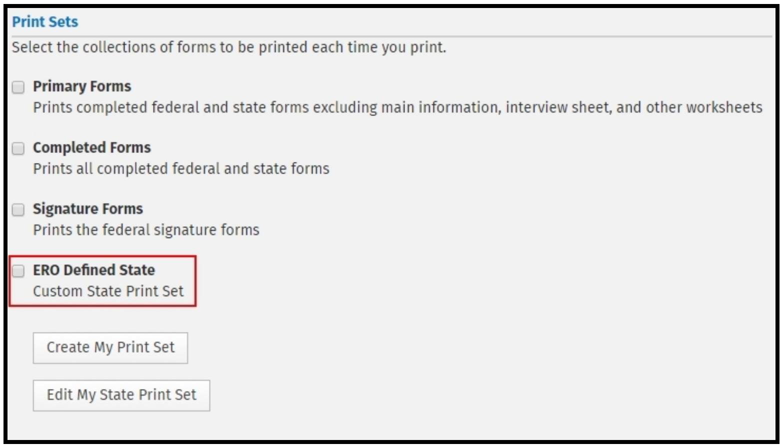
☐ **Signature Forms**
Prints the federal signature forms

Create My Print Set
Create My State Print Set

5. Click **Create My State Print Set**.
6. Expand the desired state(s) by clicking the plus (+) icon to the left of the state abbreviation.
7. Select the check box(es) next to the form(s) desired for your state print set or select the check box next to the state abbreviation to include all forms for that state.
8. Move the selected forms from the **Available Forms** window to the **Selected Forms** window by clicking the **Add >** button.

Once the desired 'Set' of forms is displayed in the **Selected Forms** window, you can determine how many copies of each form will be printed by selecting the form(s) and clicking **+1 Copy** to add copies or **-1 Copy** to subtract copies. You can also change the print order of your forms by selecting the desired form(s) and clicking **Up** or **Down** to move the selected form(s) higher or lower in the print order.

9. Click **Done**.


Print Sets
Select the collections of forms to be printed each time you print.
☐ Primary Forms
Prints completed federal and state forms excluding main information, interview sheet, and other worksheets
☐ Completed Forms
Prints all completed federal and state forms
☐ Signature Forms
Prints the federal signature forms
☐ ERO Defined State
Custom State Print Set
Create My Print Set
Edit My State Print Set

Your custom state print set may be edited at any time by clicking the **Edit My State Print Set** button.

## Advanced settings

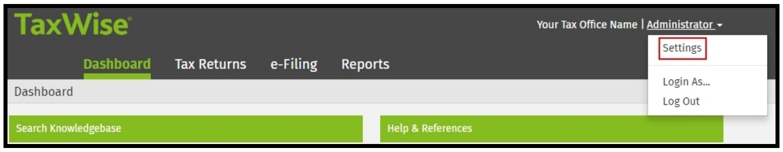
TaxWise Online allows you the option to enable the override feature for certain roles and the option to carry forward the preparer use form.

## Add and edit salutations

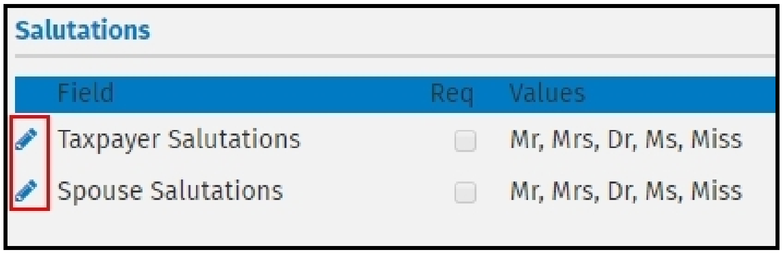
The salutation fields on the **Main Information Sheet** have default values of Mr, Mrs, Dr, Ms, and Miss, which may be selected from the list when preparing a return. The options available in the list are editable.

**To edit salutations, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.

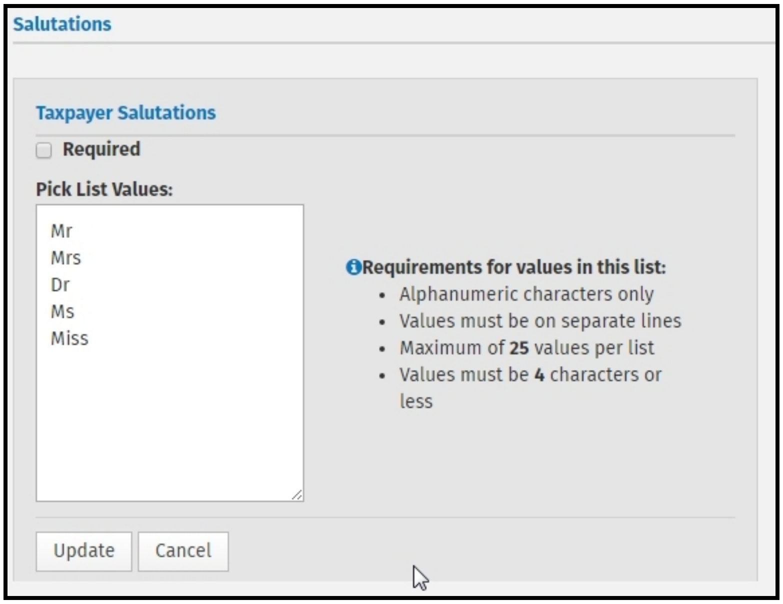

TaxWise
Your Tax Office Name | Administrator
Settings
Login As...
Log Out
Dashboard
Tax Returns
e-Filing
Reports
Dashboard
Search Knowledgebase
Help & References

3. Click **General Settings**.
4. Click **Salutations** in the **Administrator Settings**.
5. Click the **Edit** button ✎ on the row you want to edit.


Salutations

| Field | Req | Values |
|---|---|---|
| Taxpayer Salutations | ☐ | Mr, Mrs, Dr, Ms, Miss |
| Spouse Salutations | ☐ | Mr, Mrs, Dr, Ms, Miss |

6. If the salutation should be required for all returns, select the **Required** check box.
7. Enter the salutations you need in the **Pick List Values** list.



**Salutations**

**Taxpayer Salutations**

☐ **Required**

**Pick List Values:**

Mr
Mrs
Dr
Ms
Miss

**Requirements for values in this list:**

- Alphanumeric characters only
- Values must be on separate lines
- Maximum of **25** values per list
- Values must be **4** characters or less

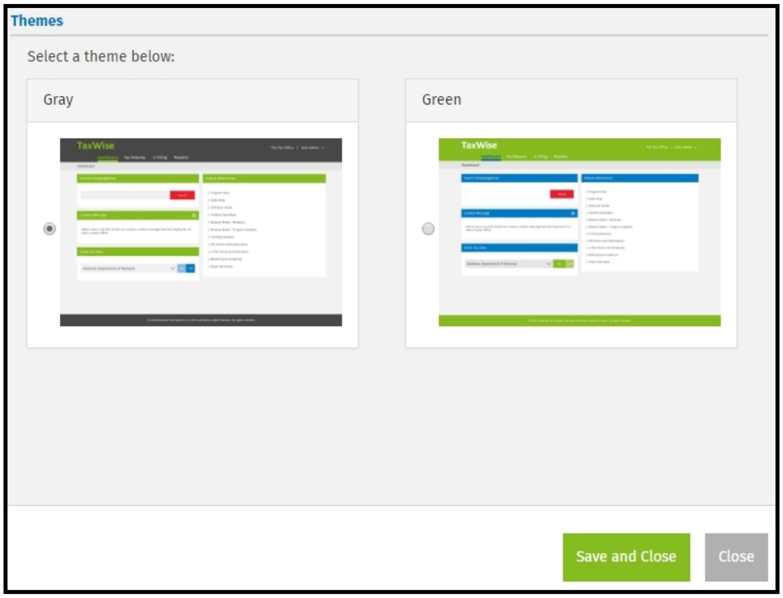
When adding salutations, you must observe the **Requirements for values in this list** rules (listed to the right of the **Pick List Values**).

8. Click **Update** to add the new salutations to the list located on the Main Information Sheet.

## Themes

In the **Administrator Settings**, TaxWise Online allows you to select a theme for your users. The gray theme is selected by default.

This option is only available to the root **Admin**, not a user with the **Administrator** role.



Select the theme you want to use and click **Save and Close**.

## Return Templates

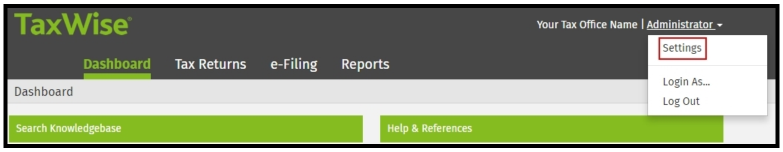
Return Templates allow any user with **TemplateManager** rights to complete common information that will show in all subsequently created tax returns. Entering information into a return template saves you from re-keying the same information over and over again. This is especially useful for entering prices on the Price Sheet, Preparer Information, and your EFIN on Form 8879.

## Create Return Templates

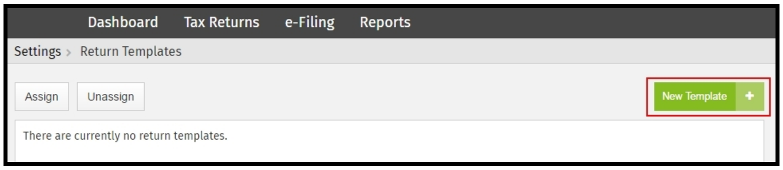
The steps below will walk you through creating a new template, once the template is created you will need to edit and assign the return template.

**To create a new return template, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.



3. Click **Return Templates**.
4. Click **New Template**.



There are currently no return templates.

5. Enter a name and description for the template.
6. Select the **Set as default** check box, if you want this to be the default template.
7. If you choose to base this template on an existing template, select the template from the list.
8. Click **OK**.

TaxWise Online allows you to create templates in training and publish to production.

## Edit Return Templates

In the return template, you can open any form and enter information that you want to appear in all new returns. Open and close forms just as you would in a regular tax return.

**What type of information should be in a Return Template?**

You should fill out the Price Sheet. On the Price Sheet, enter the price you charge for each form in the package. TaxWise Online then calculates the tax preparation fee automatically for each return based on the forms used in the return. If you charge by the hour, enter your price per hour. Within each return, you enter the chargeable time and TaxWise Online calculates the fee.

Depending on what is appropriate for your business, you may also want to:

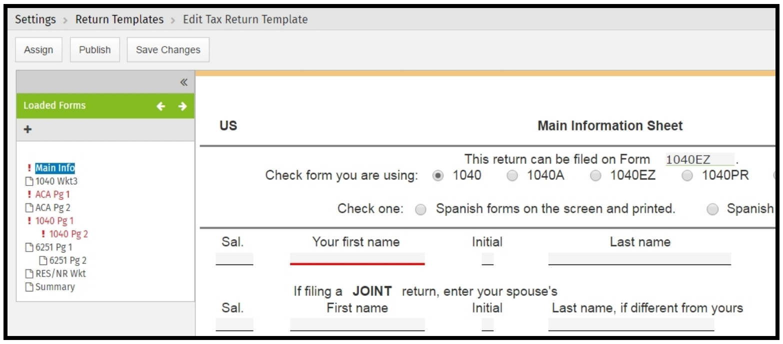
- Main Information Sheet, which allows you to:
  - Exclude or include income from Puerto Rico, depending on your location.
  - Select the check for no state return or enter a two letter state abbreviation in the resident state box.
  - Define your type of return, such as Bank Products, e-File ONLY, or Paper.
  - Select Bank, if applicable.
  - Enter preparer's PIN information.
  - Change third party designee selection.
  - Enter your Paid Preparer information.
- If you are offering bank products, you should enter the SFS technology fee and Service Bureau fee on the application form for your bank. You **must** match the fee amounts that are on your ERO Bank Application. To load the bank forms, select the **Type of Return** on Main Info as **Bank Products** and select your bank.
- Form 8879, which allows you to enter your EFIN and your ERO or preparer information.

Press **Ctrl+Spacebar** to make an entry required.

**To edit return templates, use the following steps:**

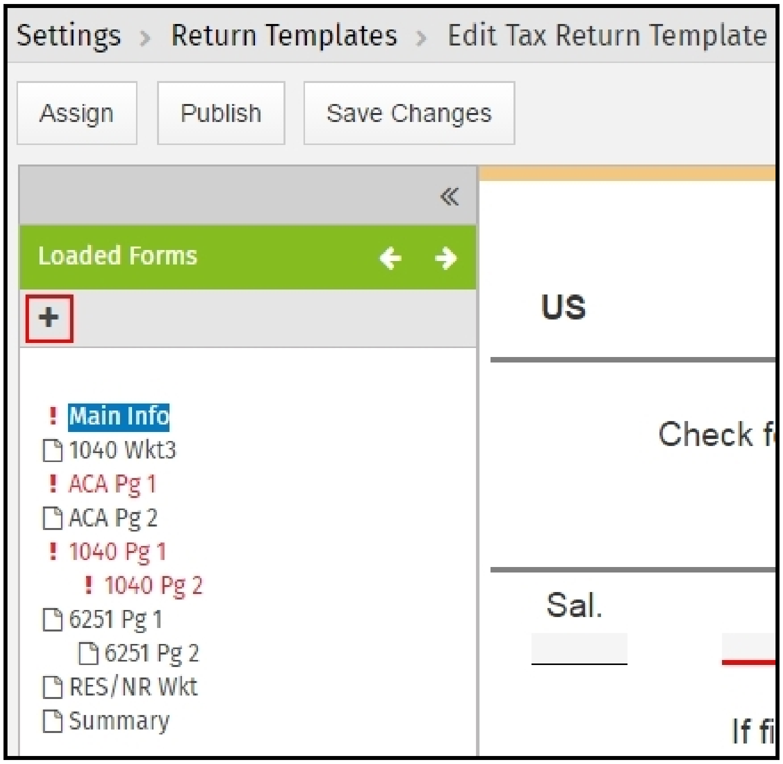
1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.

3. Click **Return Templates**.
4. Click the **Edit** button on the row you want to edit.


Settings > Return Templates > Edit Tax Return Template
Assign
Publish
Save Changes
Loaded Forms
Main Info
1040 Wkt3
ACA Pg 1
ACA Pg 2
1040 Pg 1
1040 Pg 2
6251 Pg 1
6251 Pg 2
RES/NR Wkt
Summary
US
Main Information Sheet
This return can be filed on Form 1040EZ
Check form you are using: 1040 1040A 1040EZ 1040PR
Check one: Spanish forms on the screen and printed. Spanish
Sal.
Your first name
Initial
Last name
If filing a JOINT return, enter your spouse's
Sal.
First name
Initial
Last name, if different from yours

The light orange background indicated that you are in **Return Templates** mode and any changes made to this template will only affect new returns.

5. Click **Add a form** above the loaded forms to load any additional forms.


Settings > Return Templates > Edit Tax Return Template
Assign
Publish
Save Changes
Loaded Forms
+
Main Info
1040 Wkt3
ACA Pg 1
ACA Pg 2
1040 Pg 1
1040 Pg 2
6251 Pg 1
6251 Pg 2
RES/NR Wkt
Summary
US
Check f
Sal.
If fi

6. Click the **Add** button on the **Add a Form** dialog to select the appropriate form.

The Preparer Use form cannot be added in templates.

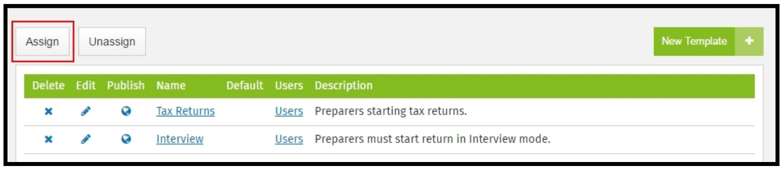
7. After adding the forms needed in your template, click **Save & Close**.

## Assign Return Template(s) to user(s)

**To assign a return template to a user, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.

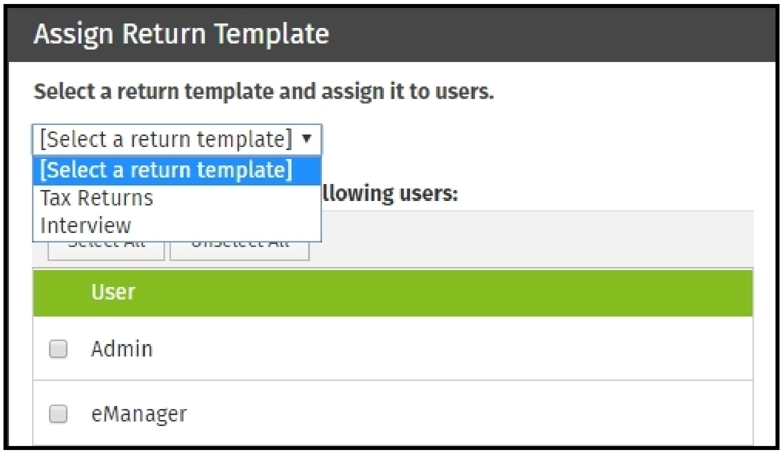
3. Click **Return Templates**.
4. Do one of the following:
   - Click **Assign**.


Assign
Unassign
New Template +

| Delete | Edit | Publish | Name | Default | Users | Description |
|---|---|---|---|---|---|---|
| × | ✎ | ◉ | Tax Returns | | Users | Preparers starting tax returns. |
| × | ✎ | ◉ | Interview | | Users | Preparers must start return in Interview mode. |

   - Click **Edit** ✎ on the row of the template you want to assign, and then click **Assign**.

5. Select the appropriate return template from the list.


Assign Return Template
[Select a return template] ▾
[Select a return template]
Tax Returns
Interview
llowing users:

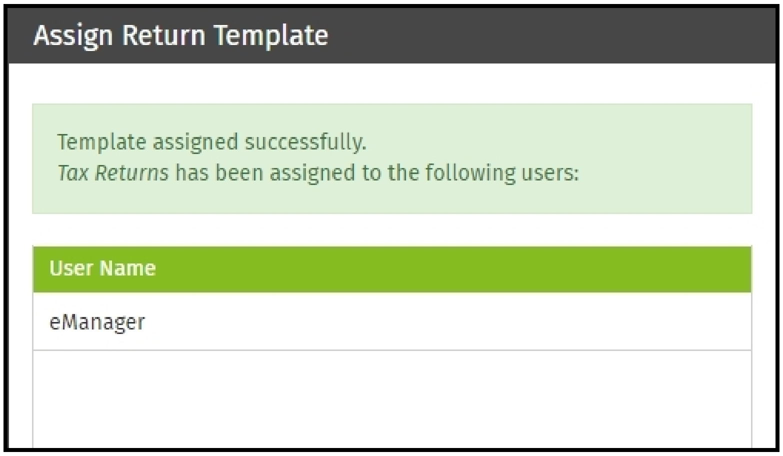
Select a return template and assign it to users.

| | User |
|---|---|
| ☐ | Admin |
| ☐ | eManager |

6. Select the check box next to the user to assign the return template.

Click **Select All** to select all users in the list.

7. Click **Assign** .


Assign Return Template

Template assigned successfully.
*Tax Returns* has been assigned to the following users:

| User Name |
|---|
| eManager |

8. Do one of the following:
   - Click **Assign More** to assign a return template to another user.
   - Click **Close**.

## Unassign Return Template(s) to user(s)

1. Log in as the **Administrator** or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.
3. Click **Return Templates**.
4. Click **Unassign**.
5. Select the check box next to the user to remove their currently assigned return template.

Click **Select All** to select all users in the list.

6. Click **Unassign** .
7. Do one of the following:
    - Click **Unassign More** to remove the current return template from other users.
    - Click **Close**.

## Publish Return Templates

After you create, edit, and assign your return templates, you will need to publish them for your preparers to use.

**To publish return templates, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.
3. Click **Return Templates**.
4. Do one of the following:
    - Click the **Publish** button 🌐.
    - Click **Edit** ✎ on the row of the template you want to publish, and then click **Publish**.

## Lock and unlock Return Template fields

The **Administrator** (**Admin**) or a user with the **Administrator** role has the ability to lock and unlock fields or entries on the return template, by doing one of the following:

- Lock/unlock any field in a return by doing **Ctrl+L** while the field is focused.
- Lock/unlock all fields by clicking the appropriate button in the upper right portion of the form.

Lock/unlock any field or all fields in return templates, and any new return based on the template will have the same fields locked.

# Manage users

The management of users is handled by the **User Manager** tool. The **Administrator** (**Admin**) user has full access to this manager module.

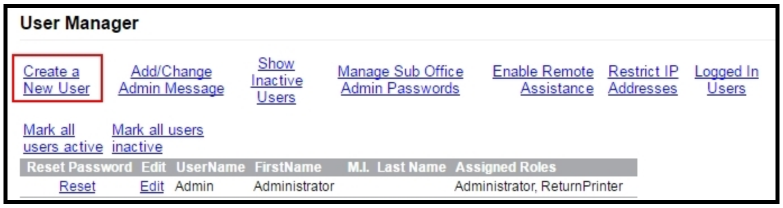
The **User Manager** tasks are:

- **Create and manage users in the system**: Including the assignment of user roles and password resets.
- **Add/Change Admin Message**: The **Admin** user creates custom messages for users in case their account becomes locked.
- **Show Inactive/Active Users**: Allows the **Admin** to view the inactive or active users list.
- **Manage Sub Office Admin Passwords**: Assign or change passwords for sub-offices, if you are designated as the Main Office.
- **Enable/Disable Remote Assistance**: Creates a user account for the TaxWise Customer Care Representative to remotely log in to the system.
- **Restrict IP Addresses**: Allows the **Admin** to designate the IP addresses that are allowed to use TaxWise Online.
- **Logged In Users**: Allows the **Admin** user to view the last log in for each user name.
- **Mark all users active**: Allows the **Admin** user to restore access to TaxWise Online for all users.
- **Mark all users inactive**: Allows the **Admin** user to deactivate access to TaxWise Online for all users.

## Add new users

**To add new users to TaxWise Online, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.
3. Click **Manage Users**.

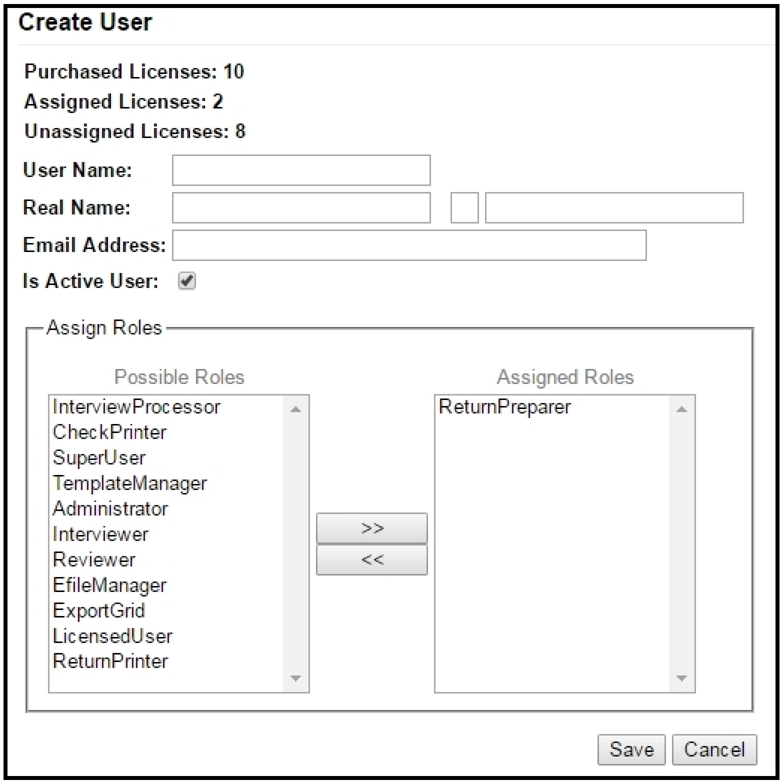


User Manager

Create a New User
Add/Change Admin Message
Show Inactive Users
Manage Sub Office Admin Passwords
Enable Remote Assistance
Restrict IP Addresses
Logged In Users
Mark all users active
Mark all users inactive

| Reset Password | Edit | UserName | FirstName | M.I. | Last Name | Assigned Roles |
|---|---|---|---|---|---|---|
| Reset | Edit | Admin | Administrator | | | Administrator, ReturnPrinter |

4. Click **Create a New User**.



Create User

Purchased Licenses: 10
Assigned Licenses: 2
Unassigned Licenses: 8

User Name:
Real Name:
Email Address:
Is Active User: ☑

Assign Roles

Possible Roles: InterviewProcessor, CheckPrinter, SuperUser, TemplateManager, Administrator, Interviewer, Reviewer, EfileManager, ExportGrid, LicensedUser, ReturnPrinter

Assigned Roles: ReturnPreparer

>>
<<
Save
Cancel

5. Enter a user name in the **User Name** box. The user names are case-sensitive and should be entered exactly the same way each time.

All preparers must have their own unique user name.

6. Enter the user's first, middle initial and last name in the **Real Name** box.
7. Enter the user's e-mail address. in the **Email Address** box.

If the user does not have an e-mail address, enter the e-mail address of the site administrator/ office manager. An e-mail address is required to reset a new user's password.

By default, the check box **Is Active User** is selected.

8. Assign user role(s) for the user by selecting the desired user role(s) in the **Possible Roles** window and clicking the **Arrow** button **>>** to move the user role to the **Assigned Roles** window.

To assign more than one role to a new user, hold down the **Ctrl** key and select each additional role, then click the **Arrow** button **>>** to move the selected roles in the **Assigned Roles** window.

9. Click **Save**.

User roles can be removed by highlighting the desired role(s) to be removed in the **Assigned Roles** window, then clicking the **Arrow** button **<<** to move them to the **Possible Roles** window.

## User roles

The **Administrator** (**Admin**) or a user with the **Administrator** role assigns user roles to each preparer based on which job functions they will perform and which parts of the program they need to access. Some forethought may be required to determine who will do what tasks and what resources they will need access to in order to accomplish them. There are twelve possible roles available for each user and they can be assigned individually or in any combination desired by the **Administrator**.

The **Admin** user must assign the **LicensedUser** role to all users in order for them to have access to TaxWise Online. The LicensedUser role can only be assigned to as many users as you have purchased (e.g., if you purchased 5 users, only 5 users can have that role and therefore have access to TWO).

The items available for each user role is listed below.

### Admin (this is the root administrator)

- Dashboard
- Tax Returns
  - Return Query
  - Print Checks
  - Create New Return
  - Print Returns
  - View More Actions > Move Returns
  - View More Actions > Delete Returns
  - View More Actions > Restore Returns
  - View More Actions > Import Returns
  - View More Actions > Resolve Import Duplicates
  - View More Actions > Export Returns
  - View More Actions > Export Returns Status
  - View More Actions > Export Return List
- e-Filing
  - Submit e-Files
  - Print Reject Details
  - Clear Sent e-Files
  - View Acknowledgements
- Reports
- Settings
  - General Settings > User Settings
  - General Settings > Administrator Settings
  - Return Templates
  - Manage Users
  - Client Letter Templates
  - Partner Verification
  - Send Settings

### Administrator

- Dashboard
- Tax Returns
  - Return Query
  - Print Returns
  - View More Actions > Move Returns
  - View More Actions > Delete Returns
  - View More Actions > Restore Returns
  - View More Actions > Import Returns
  - View More Actions > Resolve Import Duplicates
  - View More Actions > Export Returns
  - View More Actions > Export Returns Status
  - View More Actions > Export Return List
- e-Filing
  - Submit e-Files
  - Print Reject Details
  - Clear Sent e-Files
  - View Acknowledgements

- Reports
- Settings
    - General Settings > User Settings
    - General Settings > Administrator Settings
    - Return Templates
    - Manage Users
    - Client Letter Templates
    - Send Settings

### SuperUser

- Dashboard
- Tax Returns
    - Return Query
    - Create New Return
    - Print returns
    - View More Actions > Move returns
- e-Filing
    - Submit e-Files
    - Print Reject Details
    - View Acknowledgements
- Reports
- Settings
    - General Settings > User Settings

### ReturnPreparer

- Dashboard
- Tax Returns
    - Return Query
    - Create New Return
- Settings
    - General Settings > User Settings

### TemplateManager

- Dashboard
- Settings
    - General Settings > User Settings
    - Return Templates

### EfileManager

- Dashboard
- e-Filing
    - Submit e-Files
- Settings
    - General Settings > User Settings

### Interviewer

- Dashboard
- Tax Returns
    - Return Query
    - Create New Return (The Interviewer only has the option to “Go to Interview” when creating a new return.)
- Settings
    - General Settings > User Settings

### Reviewer

- Dashboard
- Tax Returns
    - Return Query

    - Create New Return
    - View More Actions > Move Returns
- e-Filing
    - Print Reject Details
    - View Acknowledgements
- Settings
    - General Settings > User Settings

The following user roles must be assigned in addition to one of the following user roles: SuperUser, Return Preparer, Interviewer, or Reviewer.

### CheckPrinter

This role will have access to the following items along with the items available for the other user role assigned. For example, if you assign the CheckPrinter role and SuperUser role, you will have the items listed below and the items listed for the SuperUser.

- Tax Returns
    - Print Checks

### ReturnPrinter

This role will have access to the following items along with the items available for the other user role assigned. For example, if you assign the ReturnPrinter role and ReturnPreparer role, you will have the items listed below and the items listed for the ReturnPreparer.

- Tax Returns
    - Print Returns

### ExportGrid

This role will have access to the following items along with the items available for the other user role assigned. For example, if you assign the ExportGrid role and ReturnPreparer role, you will have the items listed below and the items listed for the ReturnPreparer.

- Tax Returns
    - View More Actions > Export Return List

### InterviewProcessor

This role will have access to the following items along with the items available for the other user role assigned. For example, if you assign the InterviewProcessor role and SuperUser role, you will have the items listed below and the items listed for the SuperUser.

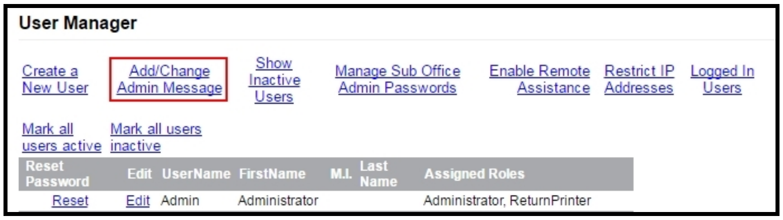
- Tax Returns
    - Import Interviews (This button will only be available when there are pending interviews to be imported)

## Create a custom message

The **Administrator** (**Admin**) has the ability to create a custom message in the event a user is locked out of the system and requires assistance.

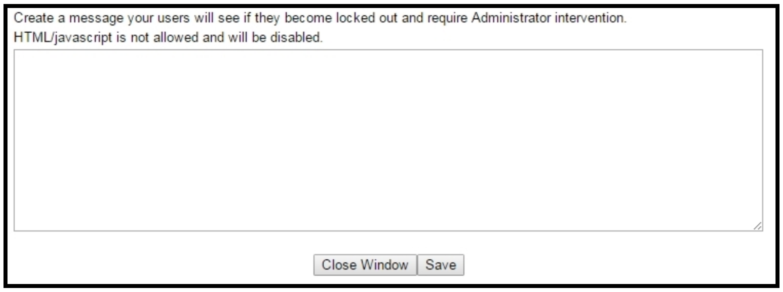
**To add or change the Administrator screen message, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.
3. Click **Manage Users**.
4. Click **Add/Change Admin Message**.



| Reset Password | Edit | UserName | FirstName | M.I. | Last Name | Assigned Roles |
|---|---|---|---|---|---|---|
| Reset | Edit | Admin | Administrator | | | Administrator, ReturnPrinter |

5. Type a new message or edit the existing message.



Create a message your users will see if they become locked out and require Administrator intervention.
HTML/javascript is not allowed and will be disabled.

Close Window
Save

6. Click **Save**.

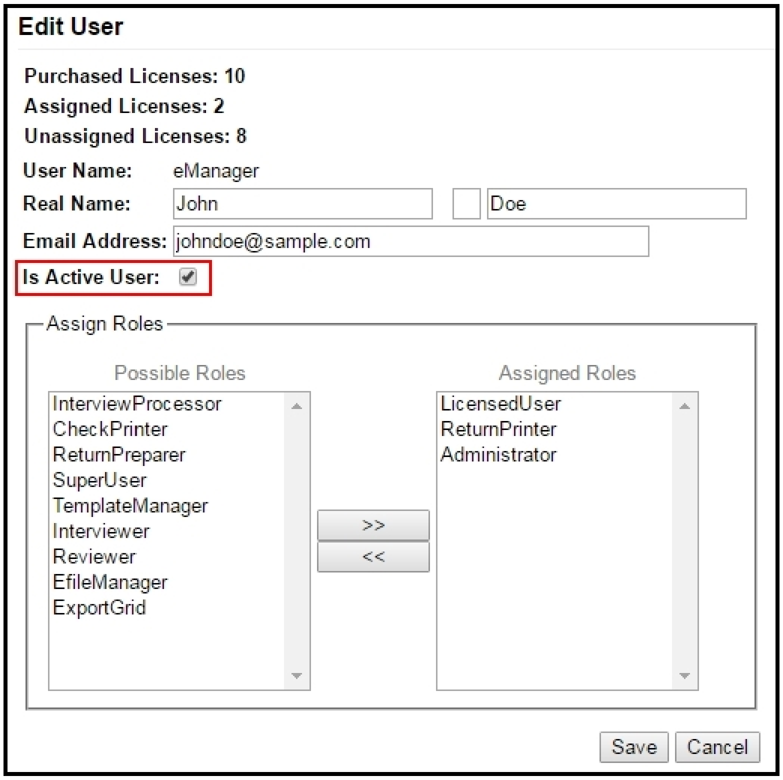
When users attempt to log in to a locked account, they will see the message that was created.

## Inactivate a user

The **Administrator** (**Admin**) or a user with the **Administrator** role should inactivate a user if that user is no longer working in the office. An inactive user no longer has access to any TaxWise Online application. The **Administrator** (**Admin**) or any user assigned the **Administrator** role can still access the returns created by the inactive user.

**To inactivate a user, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.
3. Click **Manage Users**.
4. Click **Edit** on the row of the appropriate user.
5. Clear the **Is Active User** check box.



**Edit User**

Purchased Licenses: 10
Assigned Licenses: 2
Unassigned Licenses: 8

User Name: eManager
Real Name: John Doe
Email Address: johndoe@sample.com
Is Active User: ☑

Assign Roles
Possible Roles
InterviewProcessor
CheckPrinter
ReturnPreparer
SuperUser
TemplateManager
Interviewer
Reviewer
EfileManager
ExportGrid
>>
<<
Assigned Roles
LicensedUser
ReturnPrinter
Administrator
Save
Cancel

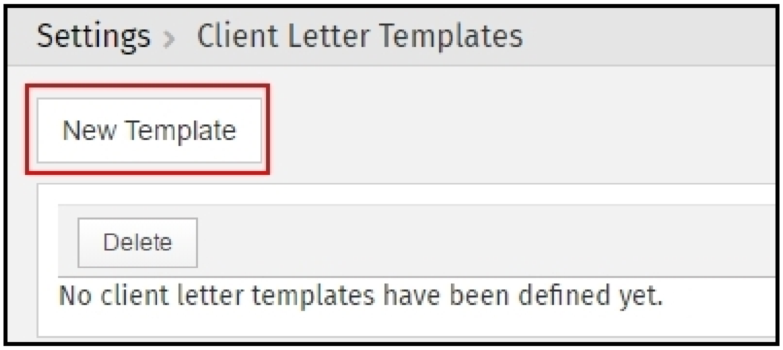
6. Click **Save**.

# Client letter templates

Predefined client letter templates are included in TaxWise Online. If the predefined templates do not meet your business needs, you can edit them to suit your tax practice.

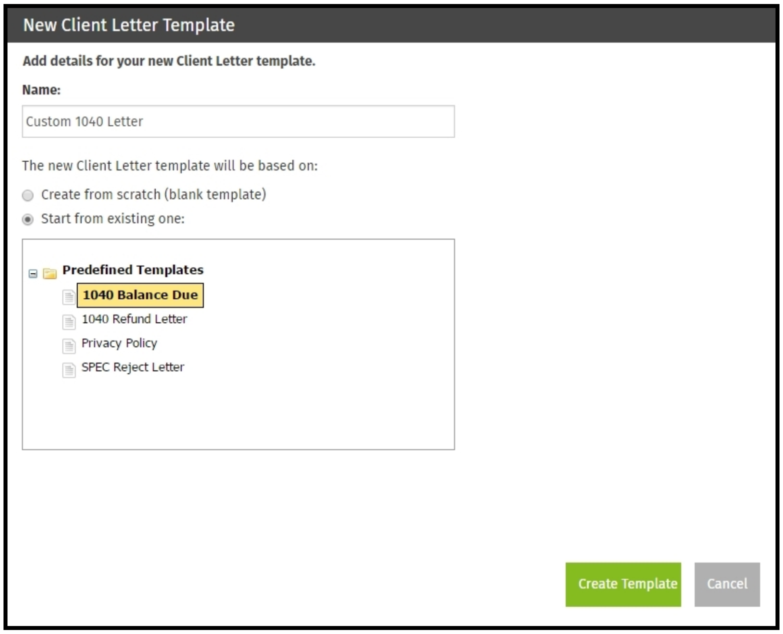
**To create a new client letter template, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.
3. Click **Client Letter Templates**.
4. Click **New Template**.


Settings › Client Letter Templates
New Template
Delete

No client letter templates have been defined yet.

5. Enter a name for your client letter in the **Name** box.
6. Do one of the following:
   - Select **Create from scratch (blank template)** to start with a blank letter.
   - Select **Start from existing one** and select a letter from the **Predefined Templates**.


New Client Letter Template
Predefined Templates
1040 Balance Due
1040 Refund Letter
Privacy Policy
SPEC Reject Letter
Create Template
Cancel

Add details for your new Client Letter template.

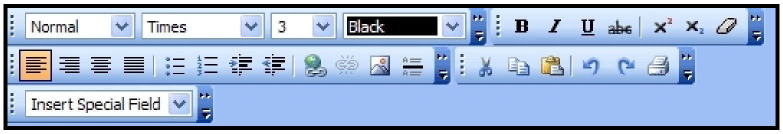
Name: Custom 1040 Letter

The new Client Letter template will be based on:

○ Create from scratch (blank template)

● Start from existing one:

7. Click **Create Template**.
8. In the template you are able to, do the following:
   - Add text to the body of the letter.
   - Data fields can be added by double-clicking the field in the Special Fields section.
   - Use the editor's toolbar to change font size and indent text.


Normal
Times
3
Black
B
I
U
abc
Insert Special Field

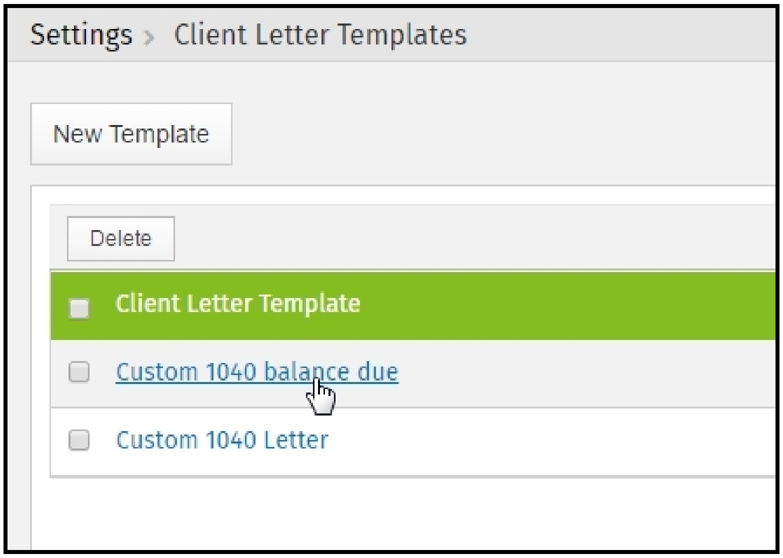
9. Click **Save**.
10. Click **Close**.

11. Click **OK** on the confirmation.

## Edit a client letter template

**To edit a client letter template, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.
3. Click **Client Letter Templates**.
4. Click on the name of the template you want to edit.

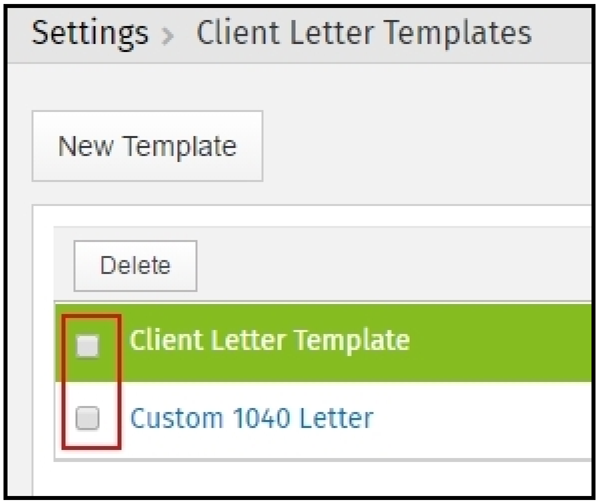

Settings › Client Letter Templates
New Template
Delete
Client Letter Template
Custom 1040 balance due
Custom 1040 Letter

5. Make any necessary changes to the letter template.
6. Click **Save**.
7. Click **Close**.
8. Click **OK** on the confirmation.

## Delete a client letter template

**To delete a client letter template, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.
3. Click **Client Letter Templates**.
4. Select the check box on the row of the template you want to delete. To select all templates, select the check box next to **Client Letter Template**.


Settings › Client Letter Templates
New Template
Delete
Client Letter Template
Custom 1040 Letter

5. Click **Delete**.
6. Click **Delete** to confirm the deletion.

## Partner Verification

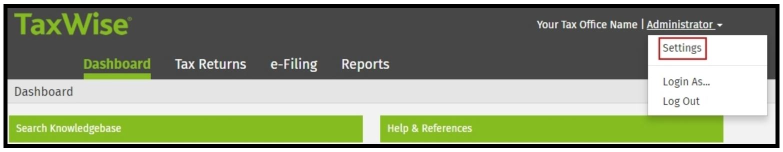
Partner Verification allows you to view information for Settlement Solutions and additional services. These additional services include Versicom and Protection Plus. The options on this page depend on what you are currently enrolled in.

If you are enrolled in a Settlement Solution the agreed upon fees will be shown on this page and will automatically be displayed within your tax returns. This will prevent users from getting rejects due to mismatched fees. If you are not enrolled in any additional services a link is provided where you are able to learn more about the service.

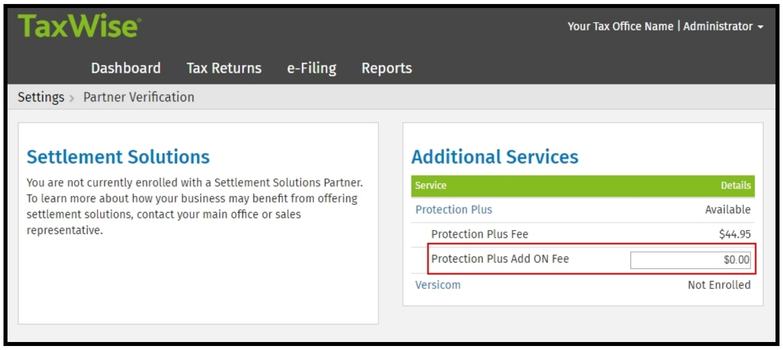
The Protection Plus Add On Fee (up to $55.00) can be entered directly on this screen.

**To access the Partner Verification information, use the following steps:**

1. Log in as the **Administrator** (**Admin**). This option is only available to the root **Admin**, not a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.


TaxWise
Your Tax Office Name | Administrator
Dashboard
Tax Returns
e-Filing
Reports
Settings
Login As...
Log Out
Dashboard
Search Knowledgebase
Help & References

3. Click **Partner Verification**.


TaxWise
Your Tax Office Name | Administrator
Dashboard
Tax Returns
e-Filing
Reports
Settings › Partner Verification

Settlement Solutions

You are not currently enrolled with a Settlement Solutions Partner. To learn more about how your business may benefit from offering settlement solutions, contact your main office or sales representative.

Additional Services

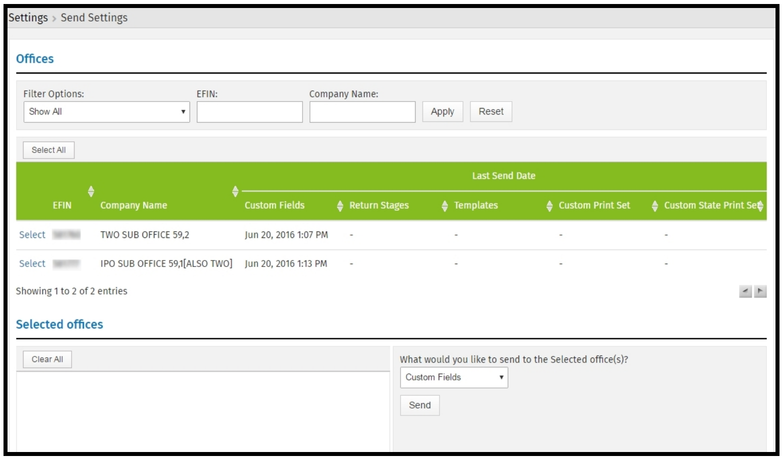
| Service | Details |
|---|---|
| Protection Plus | Available |
| Protection Plus Fee | $44.95 |
| Protection Plus Add ON Fee | $0.00 |
| Versicom | Not Enrolled |

## Send settings

If you have multiple offices, you can create custom fields, return stages, templates, print sets and then send them to your other offices. This will save you time when setting up all your offices.

**To send custom fields, return stages, templates, custom print sets, and/or custom state print sets, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click your name on the top right of the screen and select **Settings**.
3. Click **Send Settings**.


Settings > Send Settings
Offices
Apply
Reset
Select All
Selected offices
Clear All
Send

Filter Options: Show All

EFIN:

Company Name:

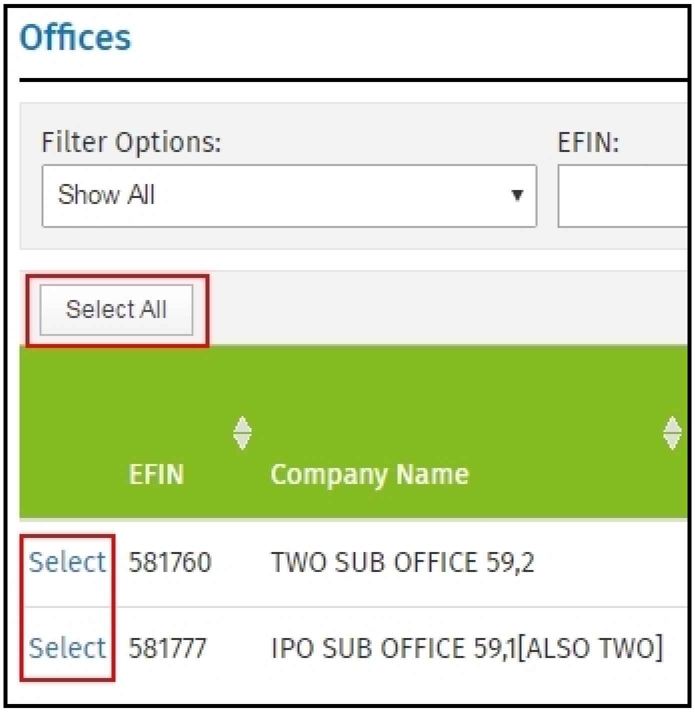
| | | Last Send Date | | | | |
|---|---|---|---|---|---|---|
| EFIN | Company Name | Custom Fields | Return Stages | Templates | Custom Print Set | Custom State Print Set |
| Select [redacted] | TWO SUB OFFICE 59,2 | Jun 20, 2016 1:07 PM | - | - | - | - |
| Select [redacted] | IPO SUB OFFICE 59,1[ALSO TWO] | Jun 20, 2016 1:13 PM | - | - | - | - |

Showing 1 to 2 of 2 entries

What would you like to send to the Selected office(s)? Custom Fields

The list of sub-offices can be filtered by selecting an item from the list, or entering the EFIN or company name.

4. Do one of the following to select the sub-office(s):
   - To add individual sub-offices, click **Select**.
   - To add all sub-offices, click the **Select All**.


Offices
Select All

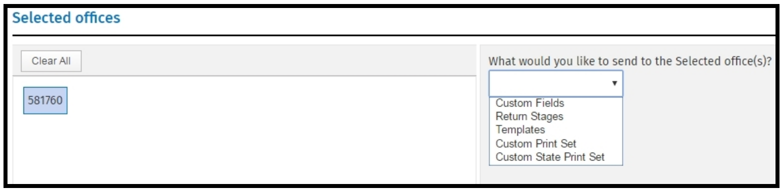
Filter Options: Show All

EFIN:

| | EFIN | Company Name |
|---|---|---|
| Select | 581760 | TWO SUB OFFICE 59,2 |
| Select | 581777 | IPO SUB OFFICE 59,1[ALSO TWO] |

5. Select which item you would like to send from the list in the **Selected offices** section.

If you choose to send **Templates**, you will need to select the templates to send. You can select the **Default Template** from the list, then select the check box on the row of any additional templates to send.


Selected offices
Clear All
581760
Custom Fields
Return Stages
Templates
Custom Print Set
Custom State Print Set

What would you like to send to the Selected office(s)?

6. Click **Send**.

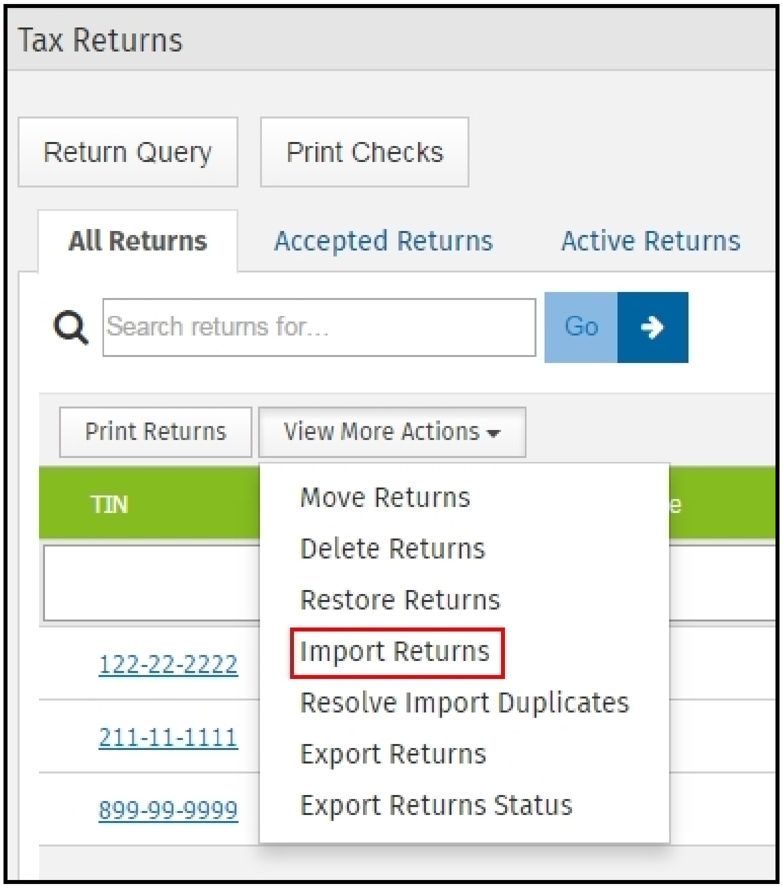
## Import returns (Alternative Preparation Solution)

TaxWise Online allows you to import returns that were created and uploaded by TaxWise Desktop to a user name under your client ID.

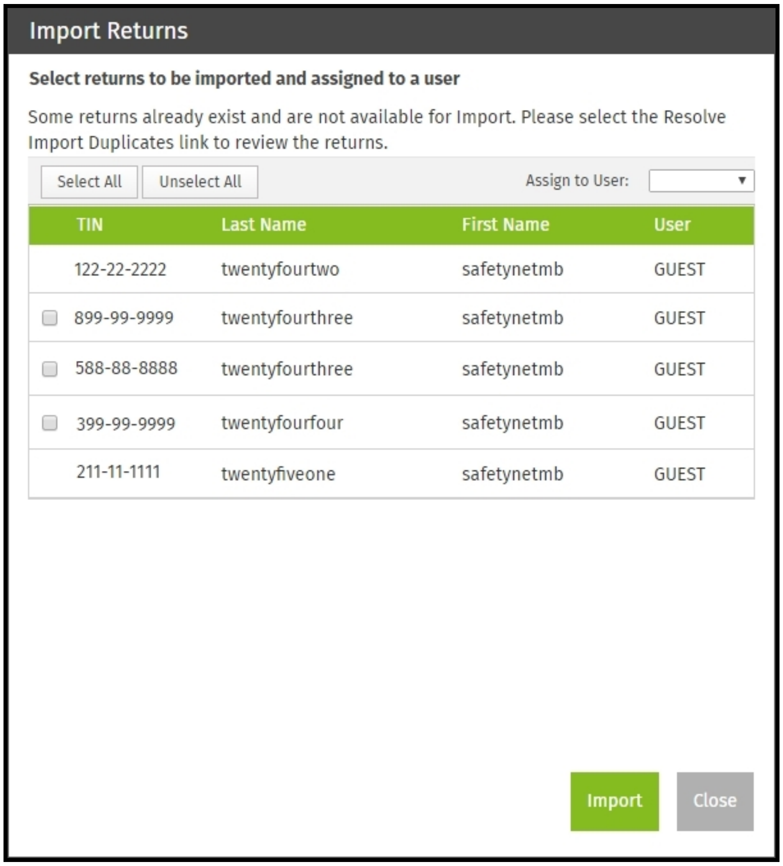
TaxWise Desktop must be registered with the same EFIN.

**To import returns, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click **Tax Returns**.
3. In the **View More Actions** list, click **Import Returns**.


Tax Returns
Return Query
Print Checks
All Returns
Accepted Returns
Active Returns
Search returns for...
Go
Print Returns
View More Actions
TIN
Move Returns
Delete Returns
Restore Returns
Import Returns
Resolve Import Duplicates
Export Returns
Export Returns Status
122-22-2222
211-11-1111
899-99-9999

4. From the **Assign to user** list, select the user where you want the return(s) imported.



**Select returns to be imported and assigned to a user**

Some returns already exist and are not available for Import. Please select the Resolve Import Duplicates link to review the returns.

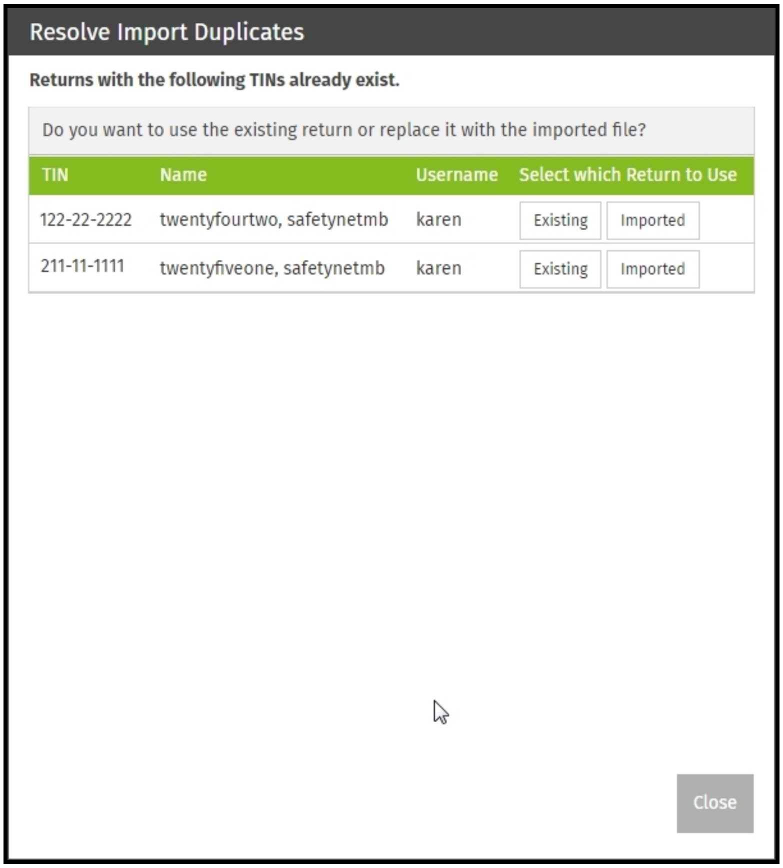
| | TIN | Last Name | First Name | User |
|---|---|---|---|---|
| | 122-22-2222 | twentyfourtwo | safetynetmb | GUEST |
| ☐ | 899-99-9999 | twentyfourthree | safetynetmb | GUEST |
| ☐ | 588-88-8888 | twentyfourthree | safetynetmb | GUEST |
| ☐ | 399-99-9999 | twentyfourfour | safetynetmb | GUEST |
| | 211-11-1111 | twentyfiveone | safetynetmb | GUEST |

5. Select the check box(es) beside the return(s) to be imported.
6. Click **Import**.
7. Click **OK** to confirm the import.
8. Click **Close** on the dialog displaying the status of the import.

If a return already exist in TaxWise Online, you will not be able to import a return with the same SSN from TaxWise Desktop using the above steps. You will need to resolve the import duplicates.

**To resolve import duplicates, use the following steps:**

1. In the **View More Actions** list, click **Resolve Import Duplicates**.



Returns with the following TINs already exist.

Do you want to use the existing return or replace it with the imported file?

| TIN | Name | Username | Select which Return to Use |
|---|---|---|---|
| 122-22-2222 | twentyfourtwo, safetynetmb | karen | Existing Imported |
| 211-11-1111 | twentyfiveone, safetynetmb | karen | Existing Imported |

2. Click one of the following options:
    - **Existing**: This allows you to keeps the existing return in TaxWise Online, but deletes the attempted import from TaxWise Desktop.
    - **Imported**: This deletes the existing return in TaxWise Online and imports the return from TaxWise Desktop.
3. Click **OK** on the confirmation.

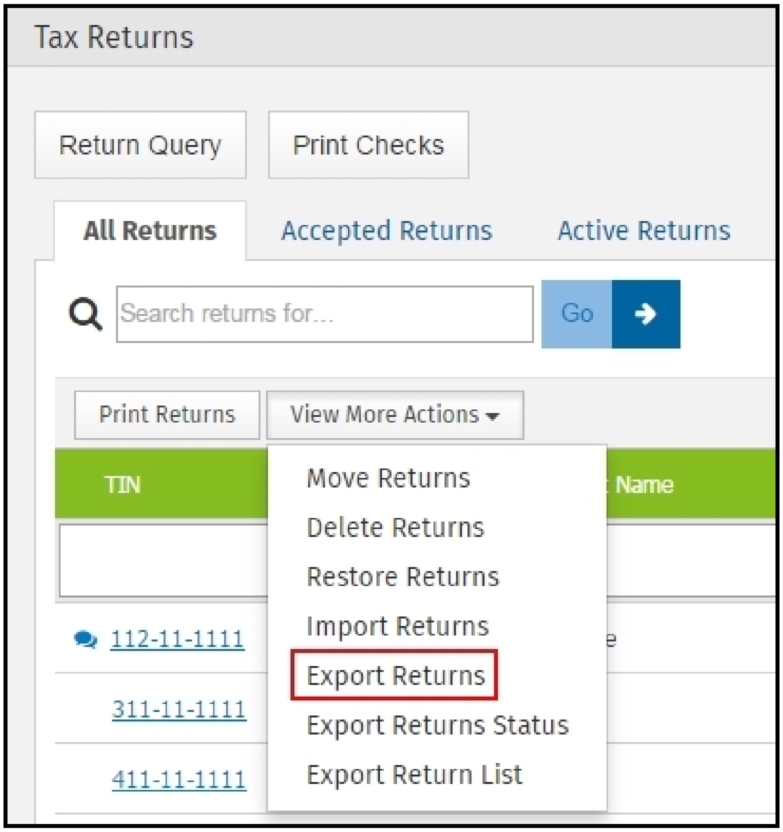
## Export returns

TaxWise Online gives you the ability to export your return data and those files can then be used in TaxWise Desktop. The export file will be password protected and encrypted. An email containing the password will be sent to the email address on record for the **Administrator** (**Admin**).

The email address for the **Admin** user can be verified in **Settings** > **Manage Users**. Click **Edit** on the row for the **Admin** user name. The email can be changed on this dialog.

**To export returns, use the following steps:**

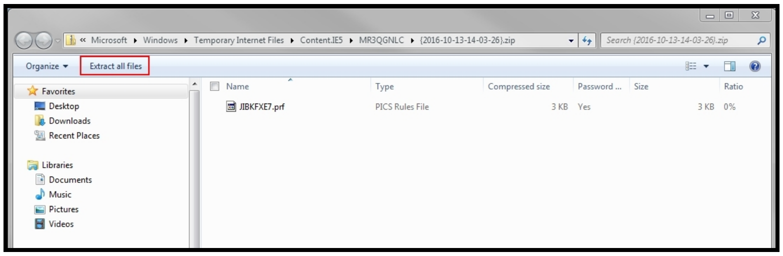
1. Log in as the **Administrator** (**Admin**). This option is only available to the root **Admin**, not a user with the **Administrator** role.
2. Click **Tax Returns**.
3. In the **View More Actions** list, click **Export Returns**.


Tax Returns
Return Query
Print Checks
All Returns
Accepted Returns
Active Returns
Search returns for...
Go
Print Returns
View More Actions
TIN
Name
112-11-1111
311-11-1111
411-11-1111
Move Returns
Delete Returns
Restore Returns
Import Returns
Export Returns
Export Returns Status
Export Return List

4. Select the returns and click **Export**.

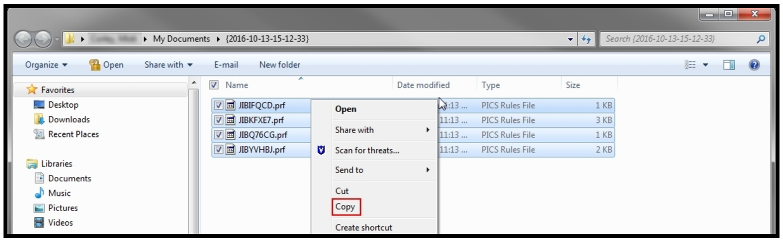
If all returns need to be exported, click **Select All**. To clear all the check boxes, click **Unselect All**.

5. Click **OK** to confirm the export.
6. On the **Export Return Status** dialog, do one of the following:
    - Click **Close** if you want to continue working in TaxWise Online and let the export run in the background. Continue to step 7.
    - Wait till the export completes and click the link to download the export. The name of the zip file will contain a date and time stamp showing when the export was created. If the status of the export is not **Complete**, then click **Close** and start at step 3 again. Continue to step 9.
7. In the **View More Actions** list, click **Export Returns Status**.
8. Click the link to download the completed export. The name of the zip file will contain a date and time stamp showing when the export was created. If the status of the export is not **Complete**, then click **Close** and start at step 3 again.
9. Depending on your browser the steps will vary to open the downloaded files. Once the files are opened, click **Extract all files**. Depending on your settings the files may look differently than what is displayed below.


« Microsoft ▸ Windows ▸ Temporary Internet Files ▸ Content.IE5 ▸ MR3QGNLC ▸ {2016-10-13-14-03-26}.zip
Search {2016-10-13-14-03-26}.zip
Organize
Extract all files
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos

| Name | Type | Compressed size | Password ... | Size | Ratio |
|---|---|---|---|---|---|
| JIBKFXE7.prf | PICS Rules File | 3 KB | Yes | 3 KB | 0% |

10. Click **Extract**.
11. From the email that is sent to the email address on record for the **Admin** user in **Manage Users** > **User Manager**, copy the password into the **Password needed** dialog.
12. Click **OK**. If TaxWise Desktop is installed and you want to make the return export data available, continue to step 13. If not, make note of where the files are saved or copy them to a new location.
13. Select and copy all the files in the folder. Depending on your settings the files may look differently than what is displayed below.


My Documents
(2016-10-13-15-12-33)
Search (2016-10-13-15-12-33)
Organize
Open
Share with
E-mail
New folder
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos
Name
Date modified
Type
Size
JIBIFQCD.prf
JIBKFXE7.prf
JIBQ76CG.prf
JIBYVHBJ.prf
PICS Rules File
1 KB
3 KB
1 KB
2 KB
Open
Share with
Scan for threats...
Send to
Cut
Copy
Create shortcut

14. Browse to the drive where TaxWise Desktop is installed and double-click on the **UTS16** folder.
15. Double-click on the **PROFORMA** folder.
16. Right-click and paste the files.
17. You are now able to complete the carryforward in TaxWise Desktop and start a new return.

The export file that you created will be available in TaxWise Online for 5 days, or until a new **Export Returns** session is initiated. It's available on the **View More Actions** list as **Export Return Status**.

# Chapter

# 6

## TaxWise Online Dashboard

Whether you are the **Admin** user or another user, the Dashboard is the first thing you see when you log in to TaxWise Online. From the Dashboard, you can search the knowledge base, link to state tax sites, link to the program and state help, link to the IRS forms and publications, and much more.

### Use the Dashboard

TaxWise Online condenses all available help resources into one central location called the Dashboard.

- **Search Knowledgebase** - provides direct access to the Knowledgebase (without having to log in to the support site).
- **Custom Message** - allows the Administrator or user with Administrator rights to create a custom message to be displayed for all users.
- **State Tax Sites** - provides links to all state tax sites.
- **Help & References** - offers links to a wide range of tax resources available on the internet, including the program and state help.

# Chapter

# 7

## Settlement Solutions (Bank Products)

This section applies only to TaxWise 1040 users who have been accepted to participate in a bank product program with one of the participating banks. To apply for the bank product program you must complete the ERO Application on the Customer Support website. Be sure to read the procedures guide provided by your bank and know the procedures. You are responsible for understanding and applying the procedures.

### ERO Application

To apply for the bank product program you must complete the ERO Application on the Customer Support website.

### Know Your Bank Procedures

Be sure to read the procedures guide provided by your bank and know the procedures. You are responsible for understanding and applying the procedures.

## Access your ERO application

1. From the TaxWise Online Dashboard, click the **Hot Topics** button.
2. Click the **My Information** link on the bar near the top of the window.
3. Click the **Settlement Solutions** link on the left side of the window.
4. Click the **Enroll/Notify Bank** link for the bank with which you wish to apply.
5. From this point, follow the on-screen prompts and instructions to complete and submit your ERO application.

## Fix rejected bank application

A return with a rejected bank application will display a **Fix** button in the US e-File column of the Return List. You will need to click the **Fix** button to correct the information listed in the acknowledgement on the **Fix Rejected Bank Application** dialog and click **Resubmit Bank App**.

If corrections are made in the fees section of the **Fix Rejected Bank Application** dialog, click the **Update Calculations** button before resubmitting the bank application.

# Chapter

# 8

## Tax returns

From beginning to end TaxWise Online is built to save you valuable time, that you can use to be more productive and increase your business. TaxWise Online uses state of the art programming and software tools to minimize the amount of time required to build a return, from getting started to sending off the final product to the IRS.

### Return List

TaxWise Online gives you the ability to search, sort and filter the return list for each type of view (All Returns, Accepted, Active, etc.) listed on the **Tax Returns** page.

The view filter offers you the following options:

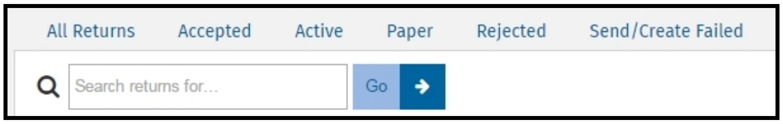
- All Returns
- Accepted
- Active
- Paper
- Rejected Returns
- Send/Create Failed (allows you to view the returns that failed when creating or submitting the e-File)

### Search for returns

TaxWise Online allows you to search for a particular return by SSN or user name.

**To search for a return, use the following steps:**

1. Enter the **SSN** or **user name** in the **Search returns for...** box.



2. Click **Go**.

   TaxWise Online displays any returns matching the entered criteria in the window.

### Reorder the columns

To reorder the columns, click the desired column heading and drag it to the new location.

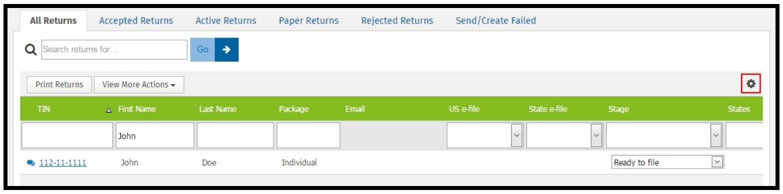
### Sort the columns

By default the returns are sorted by the first column, **TIN**. To sort by a different column, click the column heading you want to search by. The returns will be sorted in ascending order. To sort the list in descending order, click the column heading again.

TaxWise Online remembers the last sort option you selected when returning to the return list.

## Filter the list

Each column is able to be filtered by typing in the field or selecting an option from the available list. To remove the filters, click the **Gear** button ⚙, then click **Clear Filters**.


All Returns
Accepted Returns
Active Returns
Paper Returns
Rejected Returns
Send/Create Failed
Search returns for...
Go
Print Returns
View More Actions

| TIN | First Name | Last Name | Package | Email | US e-file | State e-file | Stage | States |
|---|---|---|---|---|---|---|---|---|
| | John | | | | | | | |
| 112-11-1111 | John | Doe | Individual | | | | Ready to file | |

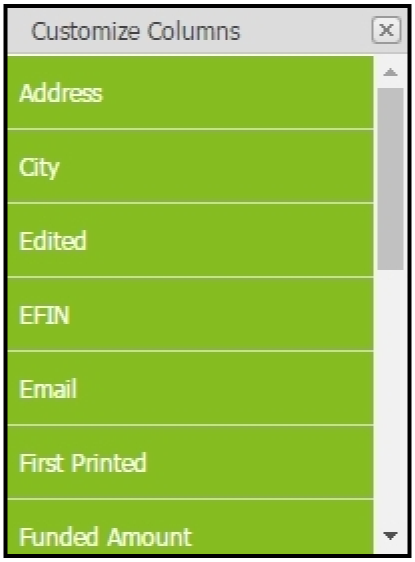
## Customize columns

On the return list you have the option to show or hide all the columns, except the **TIN** column. By default, the columns listed are TIN, First Name, Last Name, Package, US e-File, State e-File, Stage, States, Telephone and Username.

The customization of columns has to be done for each tab listed on the **Tax Returns** page. For example, if you want to customize the **All Returns** tab and the **Accepted** tab you will need to select the tab you wish to customize and follow the steps below.

**To show additional columns, use the following steps:**

1. Click the **Gear** button ⚙.
2. Click **Customize Columns**.


Customize Columns
Address
City
Edited
EFIN
Email
First Printed
Funded Amount

3. Select the column name from the box, then drag and drop to the desired location in the return list.
4. Click the **Close** button ☒ on the **Customize Columns** box.
5. Click the **X** to close the **Return List Options**.

**To hide columns, use the following steps:**

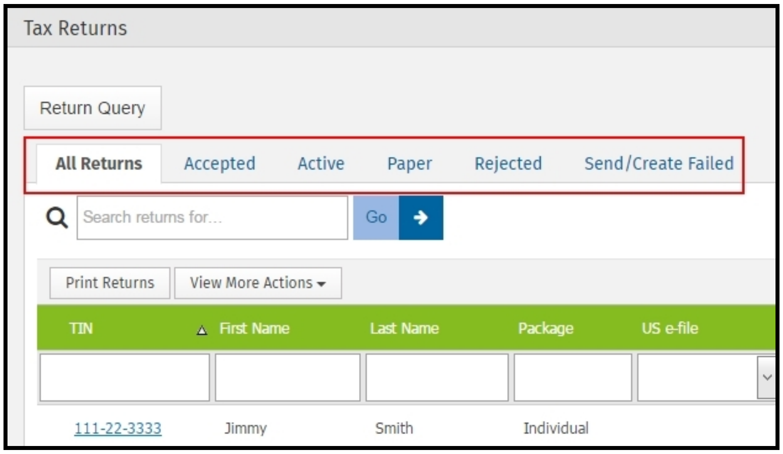
1. Click the **Gear** button ⚙.
2. Click **Customize Columns**.
3. Select the column name from the return list, then drag and drop to the **Customize Columns** box.
4. Click the **Close** button ☒ on the **Customize Columns** box.
5. Click the **X** to close the **Return List Options**.

# Export return list

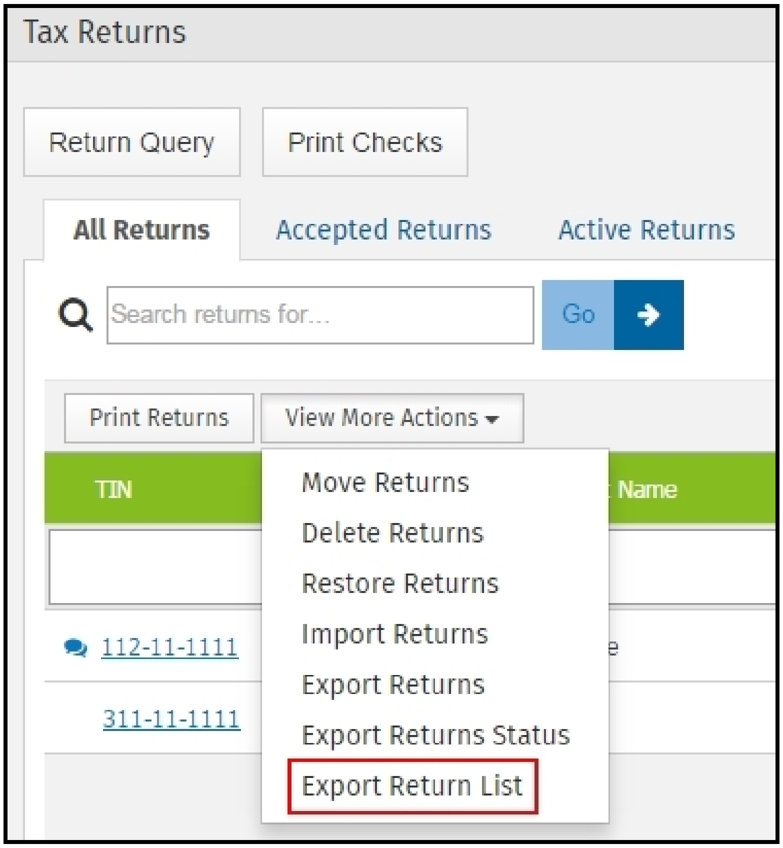
If a user is assigned the **ExportGrid** user role they have the ability to export the return list.

**To export the return list, use the following steps:**

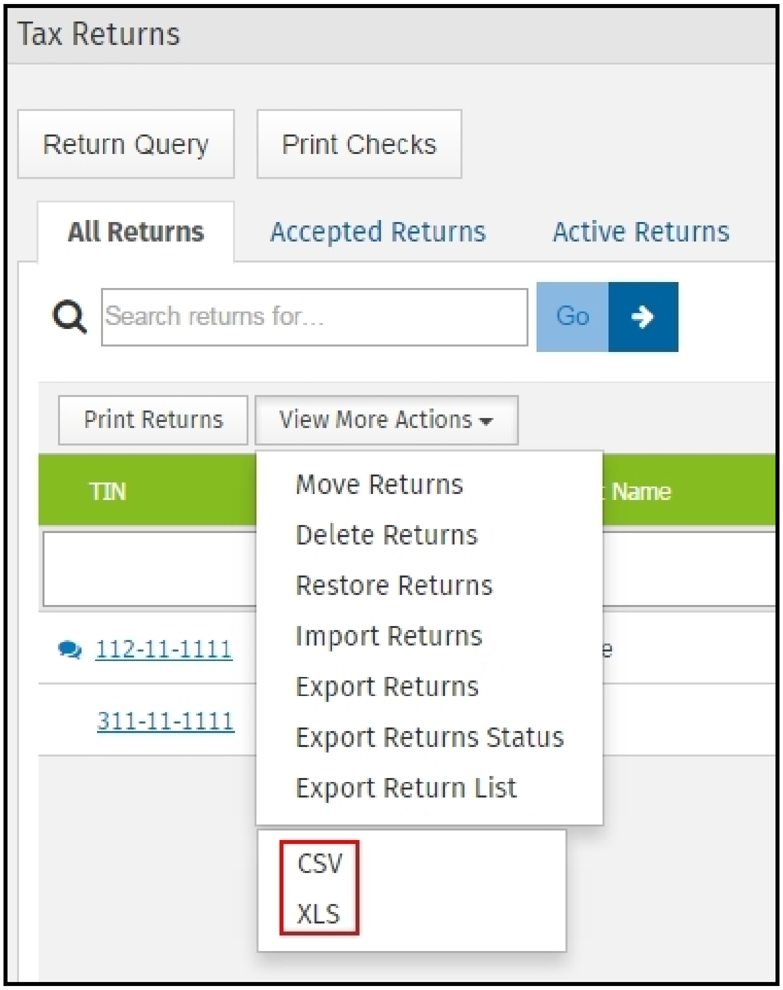
1. Click **Tax Returns**.
2. Select the tab representing the view you want to export.


Tax Returns
Return Query
All Returns
Accepted
Active
Paper
Rejected
Send/Create Failed
Search returns for...
Go
Print Returns
View More Actions
TIN
First Name
Last Name
Package
US e-file
111-22-3333
Jimmy
Smith
Individual

3. In the **View More Actions** list, click **Export Return List**.


Tax Returns
Return Query
Print Checks
All Returns
Accepted Returns
Active Returns
Search returns for...
Go
Print Returns
View More Actions
TIN
Name
Move Returns
Delete Returns
Restore Returns
Import Returns
Export Returns
Export Returns Status
Export Return List
112-11-1111
311-11-1111

4. Click **CSV** or **XLS** depending on the type of report you want.


Tax Returns
Return Query
Print Checks
All Returns
Accepted Returns
Active Returns
Search returns for...
Go
Print Returns
View More Actions
TIN
Name
112-11-1111
311-11-1111
Move Returns
Delete Returns
Restore Returns
Import Returns
Export Returns
Export Returns Status
Export Return List
CSV
XLS

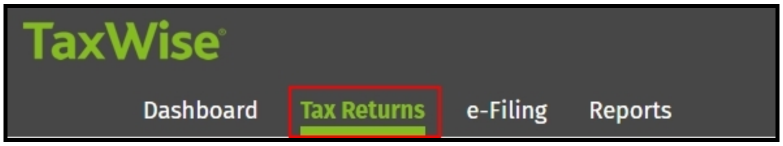
5. Depending on your browser, you will be prompted to **Open** or **Save** the file.

## Start a new return

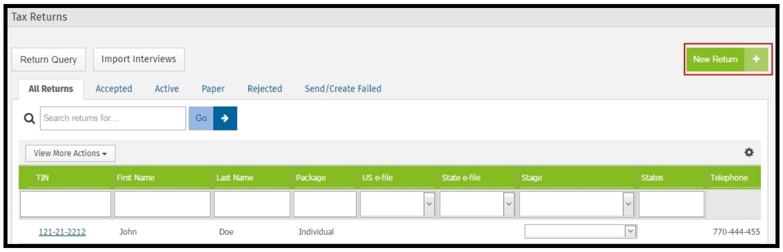
When you start a new return you have the option of starting in the tax forms or the interview wizard depending on the rights of the user. You can easily switch between the Interview Wizard and the tax return by clicking either the **Switch to Forms** button or **Switch to Interview** button.

**To start a new return using the tax forms, use the following steps:**

1. Click **Tax Returns**.


TaxWise
Dashboard
Tax Returns
e-Filing
Reports

2. Click **New Return.**


Tax Returns
Return Query
Import Interviews
New Return
All Returns
Accepted
Active
Paper
Rejected
Send/Create Failed
Search returns for...
Go
View More Actions

| TIN | First Name | Last Name | Package | US e-file | State e-file | Stage | States | Telephone |
|---|---|---|---|---|---|---|---|---|
| 121-21-2212 | John | Doe | Individual | | | | | 770-444-455 |

3. Do one of the following:
   - Enter the taxpayer's **Social Security Number** and press the **Tab** key. Re-enter the **SSN** to confirm.

     If the SSN matches one that has information from the prior year, you will be prompted after entering the SSN the first time to carry forward return data.

   - If no SSN is available, choose **Apply for ITIN** to create a tax return based on a pending ITIN.
4. Click **Go to Tax Forms**.

The tax return opens, displaying the Main Information Sheet in the workspace and forms in the forms tree.

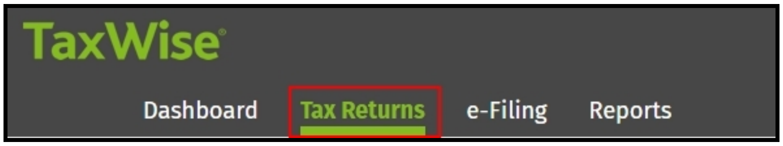
## Use the Interview Wizard

The Interview Wizard allows you or your office staff to quickly interview your clients and enter basic information. You can use it to:

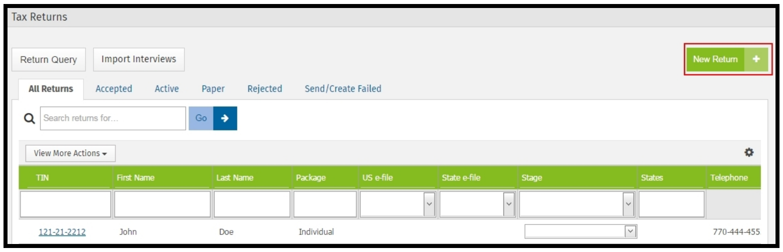
- Quickly determine whether a client qualifies for a refund.
- Provide incentives for new customers or price shoppers by offering a free tax interview to get people in your door.
- Answer telephone queries from prospective customers who want an estimate of their refund.

**To start a return using the interview process, use the following steps:**

1. Click **Tax Returns**.


TaxWise
Dashboard
Tax Returns
e-Filing
Reports

2. Click **New Return.**


Tax Returns
Return Query
Import Interviews
New Return +
All Returns
Accepted
Active
Paper
Rejected
Send/Create Failed
Search returns for...
Go
View More Actions

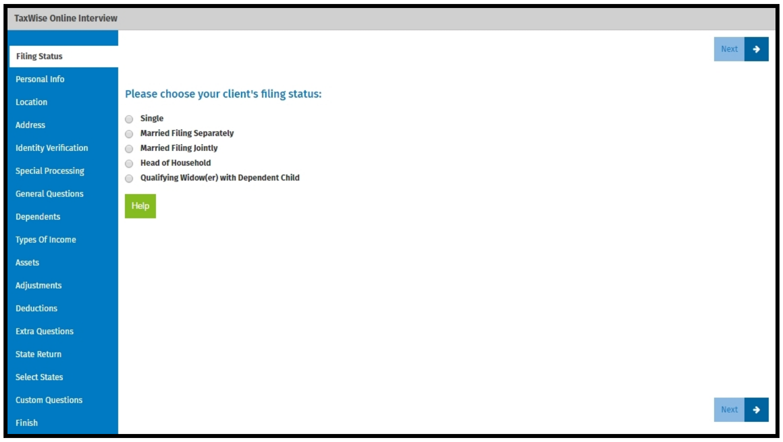
| TIN | First Name | Last Name | Package | US e-file | State e-file | Stage | States | Telephone |
|---|---|---|---|---|---|---|---|---|
| 121-21-2212 | John | Doe | Individual | | | | | 770-444-455 |

3. Do one of the following:
   - Enter the taxpayer's **Social Security Number** and press the **Tab** key. Re-enter the **SSN** to confirm.

     If the SSN matches one that has information from the prior year, you will be prompted after entering the SSN the first time to carry forward return data.

   - If no SSN is available, choose **Apply for ITIN** to create a tax return based on a pending ITIN.
4. Click **Go to Interview**.

There are two ways you can maneuver through the **Interview Wizard**. You can click **Next** or **Previous** or click the links in the left-hand panel. The recommended method is using **Next** and **Previous** to ensure all pages are viewed before finishing.


TaxWise Online Interview
Filing Status
Personal Info
Location
Address
Identity Verification
Special Processing
General Questions
Dependents
Types Of Income
Assets
Adjustments
Deductions
Extra Questions
State Return
Select States
Custom Questions
Finish
Next
Help
Next

Please choose your client's filing status:

- ○ Single
- ○ Married Filing Separately
- ○ Married Filing Jointly
- ○ Head of Household
- ○ Qualifying Widow(er) with Dependent Child

The following table details the sections of the TaxWise Online interview page:

| Section | Description |
|---|---|
| **Filing Status** | Select the appropriate filing status for the taxpayer. More than one status may apply. Select the one that provides the lowest tax. |
| **Personal Info** | Enter the taxpayer's (and spouse's, if applicable) name, Social Security Number, date of birth, occupation, date of death (if applicable) and e-mail address. |
| **Location** | Select whether the taxpayer lived in the United States or outside the United States. |
| **Address** | Enter the taxpayer's address, daytime phone number and evening phone number for the taxpayer and spouse (if applicable). |
| **Identity Verification** | Enter the requested information from the driver's license or state issued identification card for the taxpayer and spouse (if applicable). |
| **Special Processing** | If the taxpayer was on active duty military service in a designated combat zone during 2016, select the combat zone from the list.<br>This information is included in the IRS e-File and prints at the top of the 1040 form you file. |
| **General Questions** | Answer the general questions for the taxpayer and spouse (if applicable). |
| **Dependents** | Indicate if the taxpayer is claiming any dependents. |
| **Dependent List** | The Dependent List page displays the information you enter on the Dependent Details page. |
| **Types of Income** | Select the check box(es) for any type of income the taxpayer might have received.<br>Enter the income amount, tax withheld and tax ID for the type of income statement.<br>To add lines for additional income statements, select the type of income from the drop-down list and click the Add button. |
| **Assets** | If the taxpayer sold or otherwise disposed of any stocks, mutual funds, bonds or other non-business securities, a personal residence, rental property, or property related to a business or farm, including land and equipment, select the appropriate check box(es). |
| **Barter** | Indicate if the taxpayer and/or spouse (if applicable) had property sales that involved a barter agreement and/or if installment payments were received for any property sold. |
| **Adjustments** | Select any adjustments to income that apply to the taxpayer or spouse, if applicable, for 2016. |

| Section | Description |
|---|---|
| **IRA Contributions** | Enter the amount of IRA or Roth IRA contributions and indicate if the taxpayer or spouse (if applicable) was a full time student. |
| **Student Loan Interest** | Enter the amount of qualified student loan interest paid for postsecondary education. |
| **Education Credits** | For each eligible student, the taxpayer can only elect to take one of these credits. Refer to IRS Pub 17 for 2016 for more information. |
| **Moving Expenses** | Enter the amount of travel and moving expenses. |
| **Alimony** | If you made payments to or for your spouse or former spouse under a divorce or separation instrument you may be able to take this deduction. Alimony deductible to the payer is also taxable to the recipient. |
| **Deductions** | Select the applicable check box(es) to indicate the types of deductions the taxpayer might have received. |
| **Medical Expenses** | Enter the amounts of unreimbursed medical expenses you paid in 2016. |
| **Taxes Paid** | Enter the amount of taxes paid in 2016. |
| **Mortgage Interest** | Enter the amount of home mortgage interest from Form 1098 and real estate taxes. |
| **Gifts to Charity** | Enter the amount of gifts to charity. |
| **Extra Questions** | Select any check boxes that might apply to the taxpayer or spouse, if applicable. |
| **State Return** | Select the appropriate button indicating if the taxpayer needs to file a state return. |
| **Select States** | For each state the taxpayer needs to file a return for enter the two letter abbreviation |
| **State Questions** | Enter all applicable information for the state questions. |
| **Custom Questions** | The custom questions page located in the Interview Wizard are created by the Admin user. These questions allow you and the processing location to gather consistent information for reporting purposes. |
| **Finish** | Click the **Finish** button at the bottom of the page when you have completed the Interview. |

Based on the answers entered in the Interview, TaxWise Online loads the return complete with all necessary forms. Forms may be added by clicking the **Add a form** button in the **Loaded Forms** pane or you can change any of the answers in the interview (and any accompanying forms) by clicking **Switch to Interview**.

## Navigate the tax return

To navigate the tax return, use the TaxWise Online navigational buttons (above the **Forms Tree** or on the left panel when the **Forms Tree** is minimized). Do not use the browser's buttons.

In Google Chrome, you must use the **Tab** button to move from field to field within a tax return.

To hide the browser toolbar, press **F11**.

The following table describes the buttons used when completing a return from the tax forms:

| Option | Description |
|---|---|
| 🗋 | Allows you to add additional forms to the active return. |
| 🖨 | Prints a single form from the active return. |

| Option | Description |
|---|---|
| 🗋 | Allows you to delete forms from the active return. |
| 🗃 | Allows you to capture an photo, import a file or export a file attached to the active return. |
| ← | Opens the previous form of the active return. |
| → | Opens the next form of the active return. |

## Understand color coded entries

TaxWise Online uses color coding to identify types of entries on forms.

| Option | Description |
|---|---|
| **Green** | These entries are calculated by TaxWise Online from information on supporting forms. You cannot type data directly into a calculated entry or delete the calculated value unless you override the calculation. |
| **Black** | These entries are non-calculated, and you can type data directly into them. |
| **Red** | These entries are required for e-Filing. TaxWise Online marks certain entries as required to assist you with preparing a complete and accurate tax return. You must complete entries for TaxWise to check off the form as “complete” on the list of forms in the Tree. When you type data in a required entry, TaxWise Online displays the text in green and converts the entry to a non-calculated entry when you refresh the return. |
| **Blue** | These entries are calculated entries that have been overridden by the preparer. |

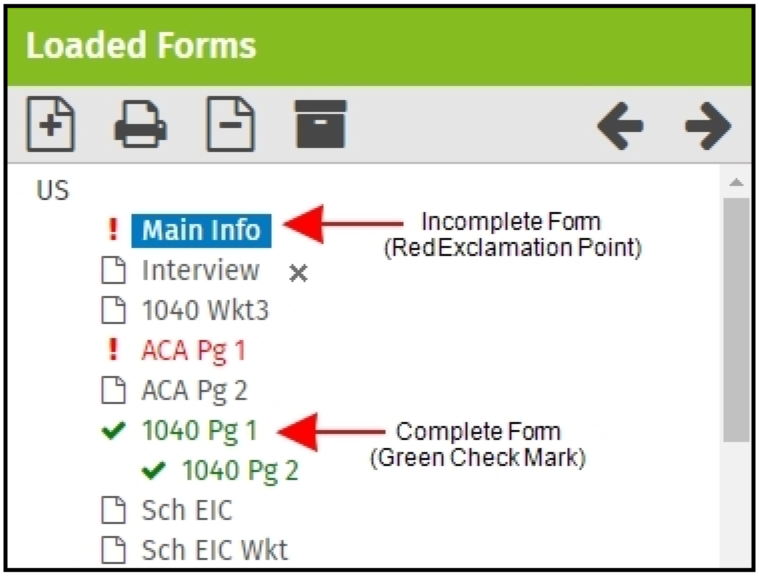
## Shortcut keys

The following table details the shortcut keys available in TaxWise Online:

| Command | Description |
|---|---|
| **F1** | Opens the TaxWise Online help file. |
| **F3 or Ctrl+Spacebar** | Estimates and un-estimates an entry. |
| **F8 or Ctrl+Enter** | Overrides an entry (Override rights must be enabled). |
| **F9** | Links the current line on the current form to another form. |
| **F11** | Hides the internet browser toolbar. |
| **Ctrl+C** | Copies the information from an entry box for future placement elsewhere in TaxWise Online. |
| **Ctrl+E** | Jumps to next required entry. |
| **Ctrl+I** | Inserts a row on a multi-line statement or worksheet. |
| **Ctrl+P** | Generates a pdf to print. |
| **Ctrl+R** | Refreshes the page if not on a multi-line statement or worksheet. |
| **Ctrl+R** | Removes a row on a multi-line statement or worksheet. |
| **Ctrl+V** | Pastes information copied from a previous entry box into the current entry box. |

### Forms Tree

The **Forms Tree** (Loaded Forms section) to the left of the return shows all the forms that are currently loaded for the active return. The icons next to the forms indicate whether a form has been loaded, is complete or needs completion.


Loaded Forms
US
Main Info
Interview
1040 Wkt3
ACA Pg 1
ACA Pg 2
1040 Pg 1
1040 Pg 2
Sch EIC
Sch EIC Wkt
Incomplete Form
(Red Exclamation Point)
Complete Form
(Green Check Mark)

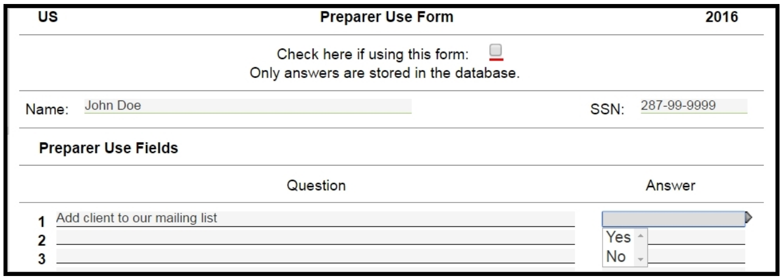
## Preparer Use fields in a return

Once the **Administrator** (**Admin**) or a user with the **Administrator** role has created pick list for use on the Preparer Use form they are available for new and existing returns.

**To use the user defined fields, use the following steps:**

1. Create a new return or edit an existing return.
2. Select the **Prep Use** form to view the **Preparer Use Fields** section.

If you made the fields required, they will display with a red underline.



US Preparer Use Form 2016

Check here if using this form: ☐
Only answers are stored in the database.

Name: John Doe SSN: 287-99-9999

**Preparer Use Fields**

| | Question | Answer |
|---|---|---|
| 1 | Add client to our mailing list | Yes<br>No |
| 2 | | |
| 3 | | |

3. Click on the appropriate **Answer** field for each custom question.

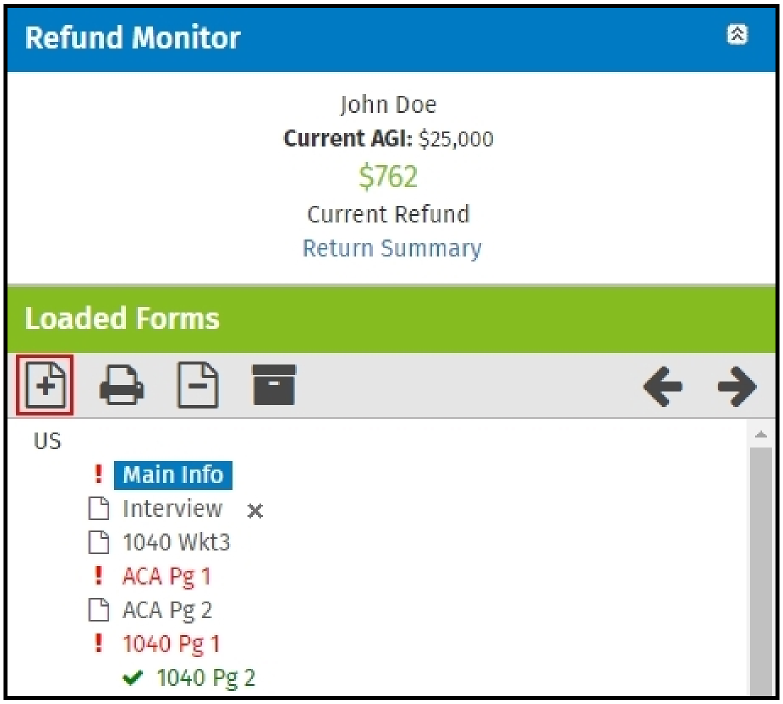
If the field contains a history list, it will change to a drop-down box.

4. Select the appropriate entry.
5. Press **Tab** to move to the next entry.

## Add forms to a return

**To add a form to an open return, use the following steps:**

1. Click the **Add** button in the **Loaded Forms**.



Refund Monitor

John Doe

**Current AGI:** $25,000

$762

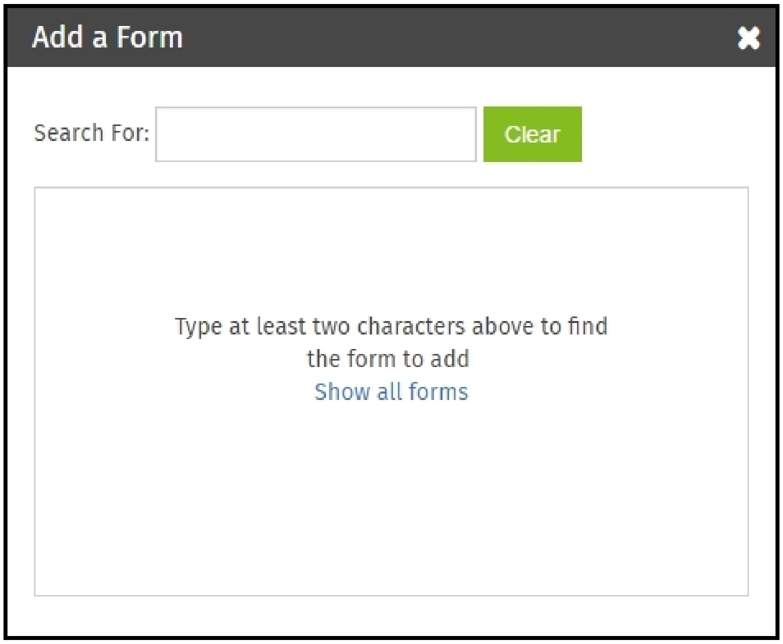
Current Refund

Return Summary

Loaded Forms

US

2. Do one of the following:
   - Enter the form name, form number or a brief description in the **Search For** box.
   - Click **Show all forms** and scroll through the list to find the form.
3. Click the **Add** button + to the left of the form.



Add a Form

Search For:

Type at least two characters above to find the form to add

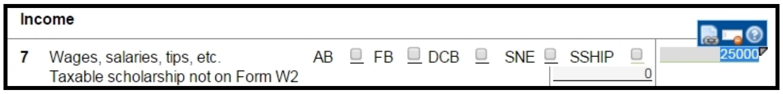
Show all forms

## Link Forms

TaxWise Online allows you to link different compatible forms within the return. When available, the **Link** icon appears when an active entry can be linked to another form.

**To link forms, use the following steps:**

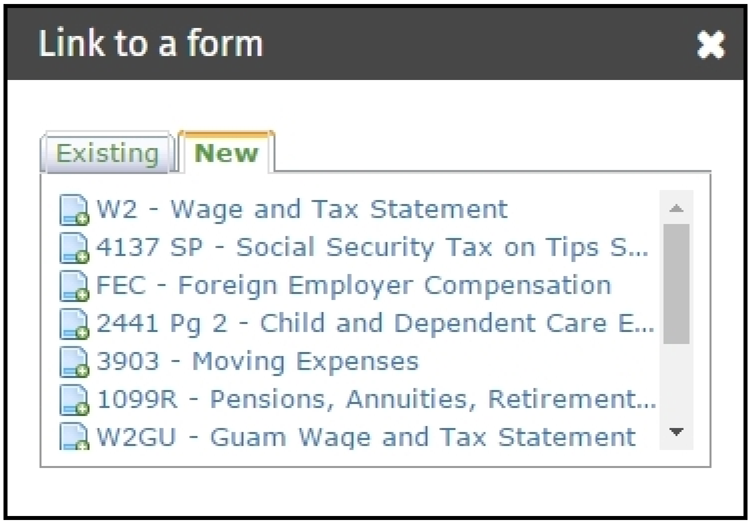
1. Open a return.
2. Go to a field within the return, for example, Form 1040 pg. 1, line 7.



**Income**

7 Wages, salaries, tips, etc. AB ☐ FB ☐ DCB ☐ SNE ☐ SSHIP ☐ 25000
Taxable scholarship not on Form W2 0

3. Do one of the following:
   - Press **F9**, or
   - Click the **Entry Link** to display the smart bar, and then click the **Link** button.



Link to a form

Existing | New

W2 - Wage and Tax Statement
4137 SP - Social Security Tax on Tips S...
FEC - Foreign Employer Compensation
2441 Pg 2 - Child and Dependent Care E...
3903 - Moving Expenses
1099R - Pensions, Annuities, Retirement...
W2GU - Guam Wage and Tax Statement

4. Select the form to link to from the list of available forms on the **New** tab.

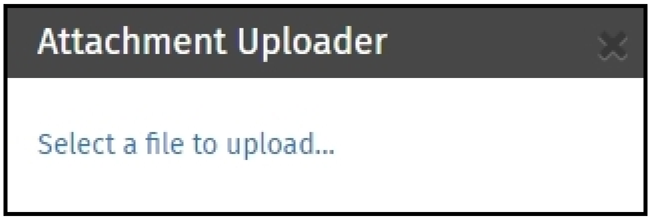
If the form has already been added to the return, click the form in the **Existing** tab.

## PDF attachments

PDF files may be attached to a return. Wherever an attachment may be uploaded, a check box will be presented.

**To attach a PDF file to a return, use the following steps:**

1. Select the check box to indicate an attachment will be uploaded.



Attachment Uploader

Select a file to upload...

2. Click **Select a file to upload**.
3. Navigate to the file to be attached and click **Open**, or simply double-click the file.
4. Click the "**X**" to close the dialog.

Clearing the check box after a PDF has been uploaded will result in the removal of the attachment.

## Vault

TaxWise Online provides a secure, fast way to capture and store the documents and files associated to a client's return. You can use most built-in cameras (or purchase a USB camera from any retailer) to snap pictures of any document presented to you by a taxpayer. You can also import files provided to you electronically (PDFs, pictures, document). These files are stored securely alongside the return (Loaded Forms), and are managed from within the tax return.

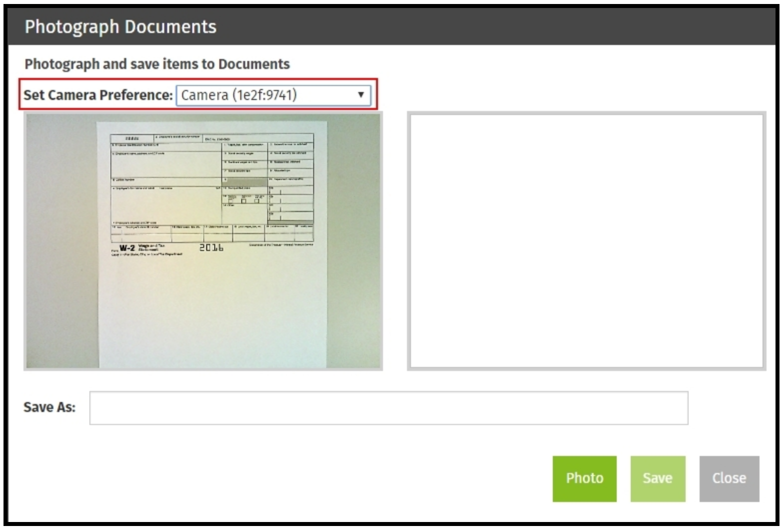
⚠ If a return is deleted any stored documents will also be deleted.

The following file types are supported: .xls, .xlsx, .doc, .docx, .pdf, .png, .jpeg, .txt

## Snap a photo image using Google Chrome or Microsoft Edge

**To snap a image using an USB camera, use the following steps:**

1. Inside a return, click the **Documents** button located in the **Loaded Forms**.
2. Click **Photo**.
3. Select your camera from the **Set Camera Preference** list. If prompted, click **Allow** to allow TaxWise Online access to your camera.



Photograph Documents

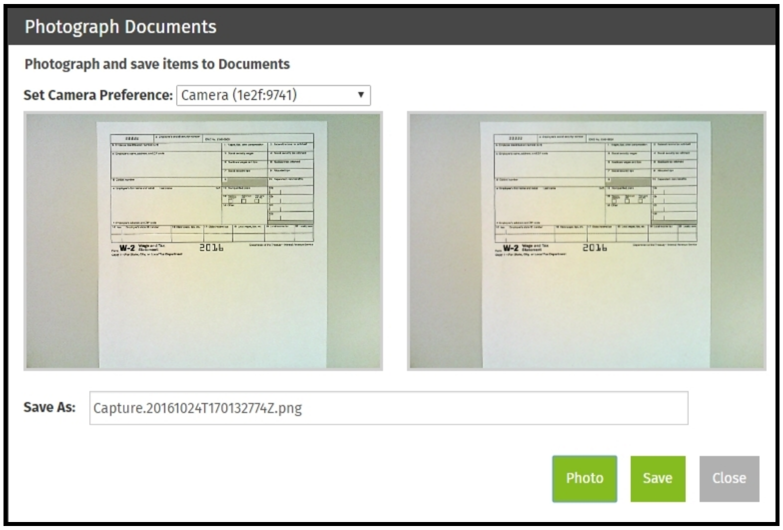
Photograph and save items to Documents

Set Camera Preference: Camera (1e2f:9741)

Save As:

4. Make sure the document is placed so the camera can take a picture to store.
5. Click **Photo**. The live image is on the left and the photo is on the right.

If necessary, you can move the document beneath the camera around for better placement and click the **Photo** button. Don't continue to step 6 before you have an acceptable image.



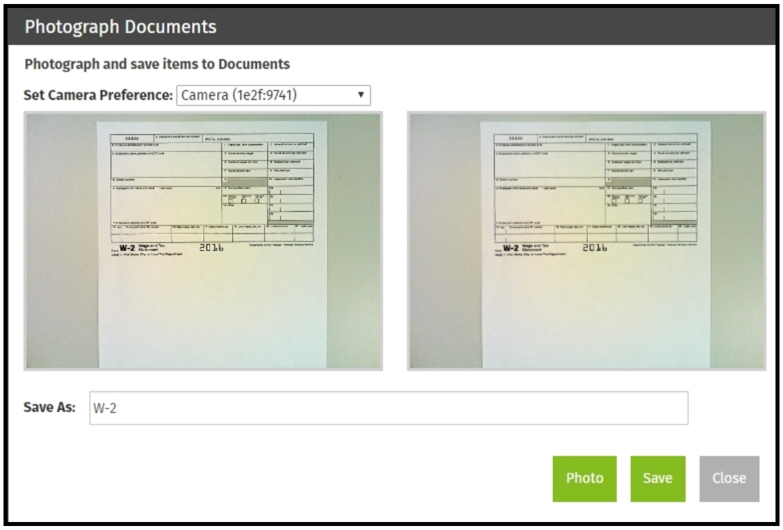
Photograph Documents

Photograph and save items to Documents

Set Camera Preference: Camera (1e2f:9741)

Save As: Capture.20161024T170132774Z.png

6. The file name by default will be a time and date stamp, but you can highlight the default name and enter your own file name.
7. Click **Save**.



Photograph Documents

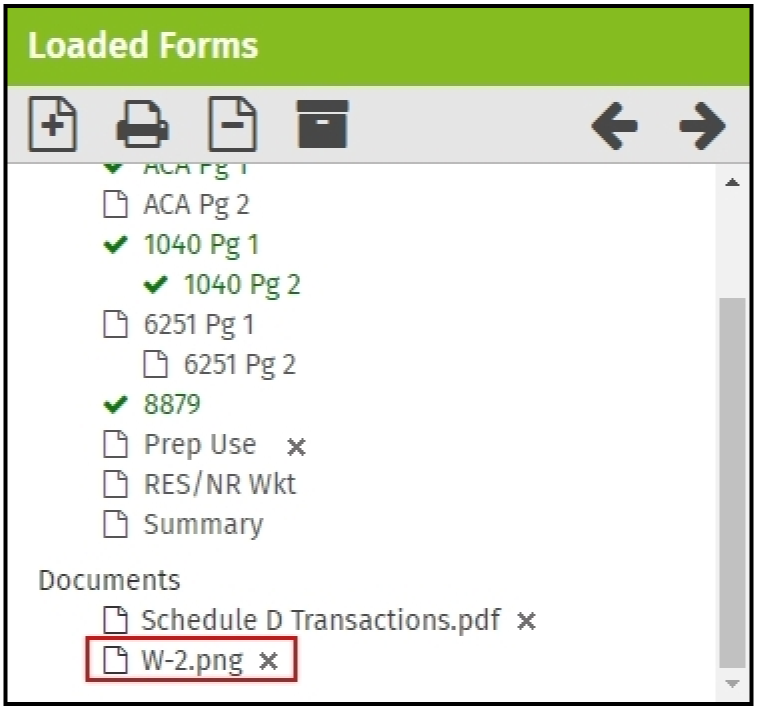
Photograph and save items to Documents

Set Camera Preference: Camera (1e2f:9741)

Save As: W-2

8. Click **OK** on the save confirmation.
9. Take any additional photos or click **Close** to exit the **Photograph Documents** dialog.
10. Click **Close** to exit the **Documents** dialog.

The image(s) will be displayed in the **Loaded Forms**. If you click on the file in the **Loaded Forms**, it will open in a new browser window.



Loaded Forms

- ✓ ACA Pg 1
- ACA Pg 2
- ✓ 1040 Pg 1
  - ✓ 1040 Pg 2
- 6251 Pg 1
  - 6251 Pg 2
- ✓ 8879
- Prep Use ×
- RES/NR Wkt
- Summary

Documents

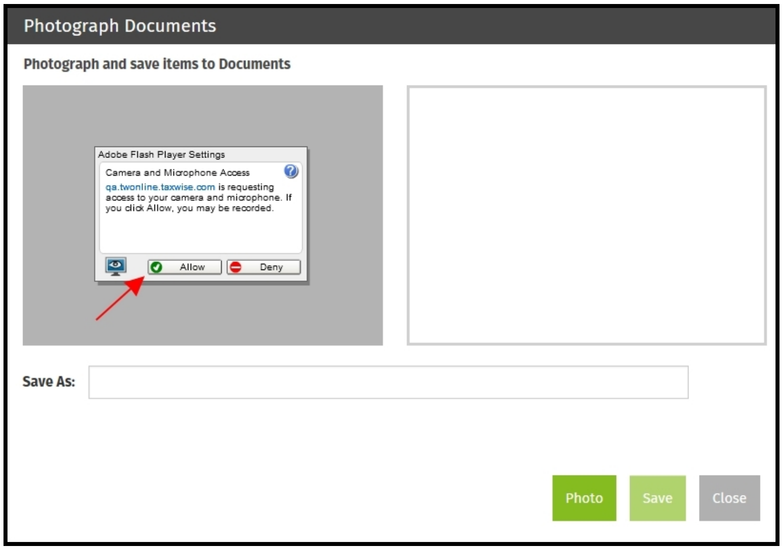
- Schedule D Transactions.pdf ×
- W-2.png ×

## Snap a photo image using Internet Explorer (IE) or Safari

In order to store a photo image using Internet Explorer, you must have Adobe Flash Player installed.

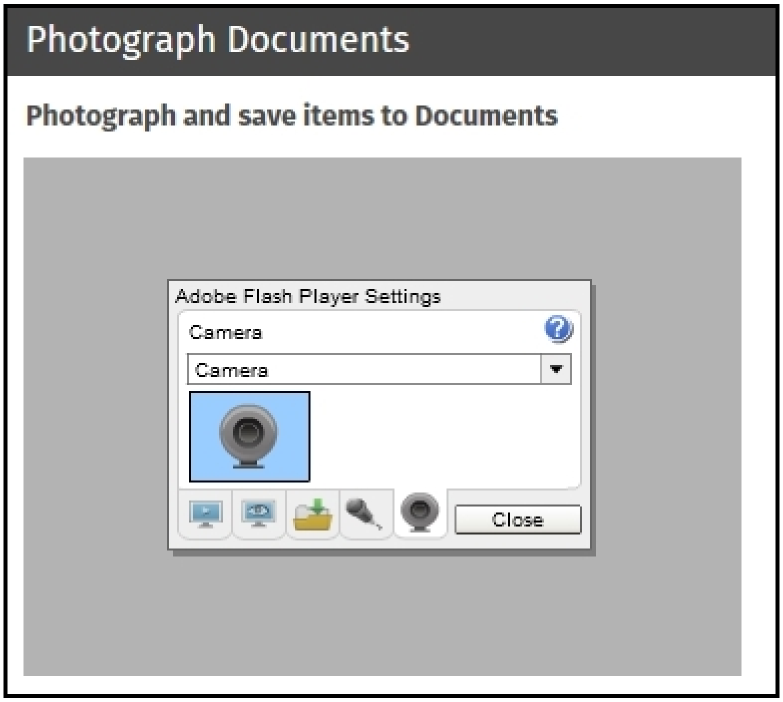
**To snap a image using an USB camera, use the following steps:**

1. Inside a return, click the **Documents** button located in the **Loaded Forms**.
2. Click **Photo**.
3. On the **Photograph Documents** dialog, you will need to click **Allow** to allow TaxWise Online access to your camera.

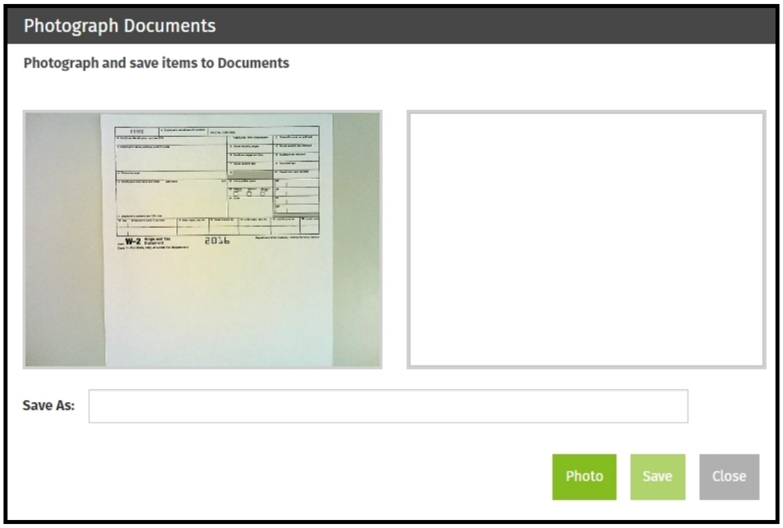

Photograph Documents
Photograph and save items to Documents
Adobe Flash Player Settings
Camera and Microphone Access
Allow
Deny
Save As:
Photo
Save
Close

qa.twonline.taxwise.com is requesting access to your camera and microphone. If you click Allow, you may be recorded.

4. If multiple cameras are detected by your computer, follow the steps below.
   - Right-click in the left panel and click **Settings**.

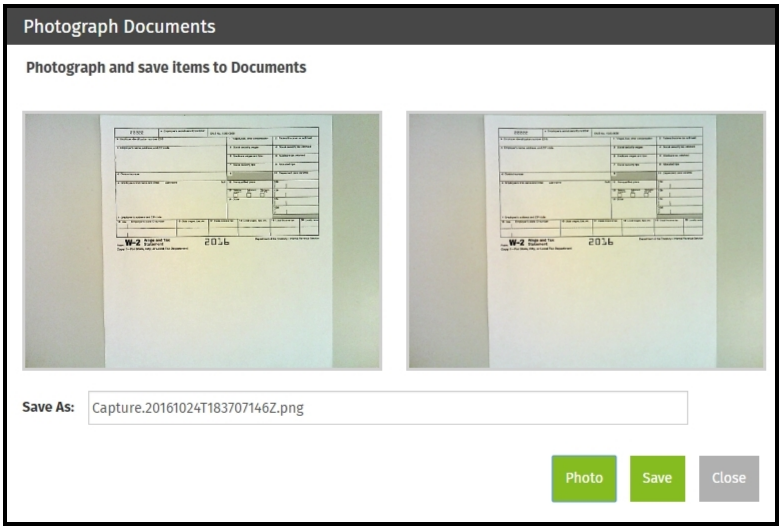

Photograph Documents
Photograph and save items to Documents
Adobe Flash Player Settings
Camera
Camera
Close

   - Click on the **Camera** button and select the camera you want to use from the list.
   - Click **Close**.
5. Make sure the document is placed so the camera can take a picture to store.


Photograph Documents
Photograph and save items to Documents
Save As:
Photo
Save
Close

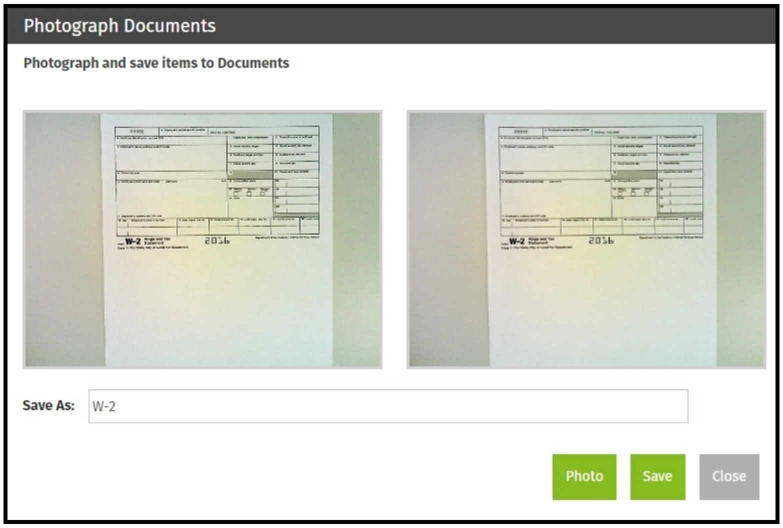
6. Click **Photo**. The live image is on the left and the photo is on the right.

If necessary, you can move the document beneath the camera around for better placement and click the **Photo** button. Don't continue to step 6 before you have an acceptable image.


Photograph Documents
Photograph and save items to Documents
Photo
Save
Close

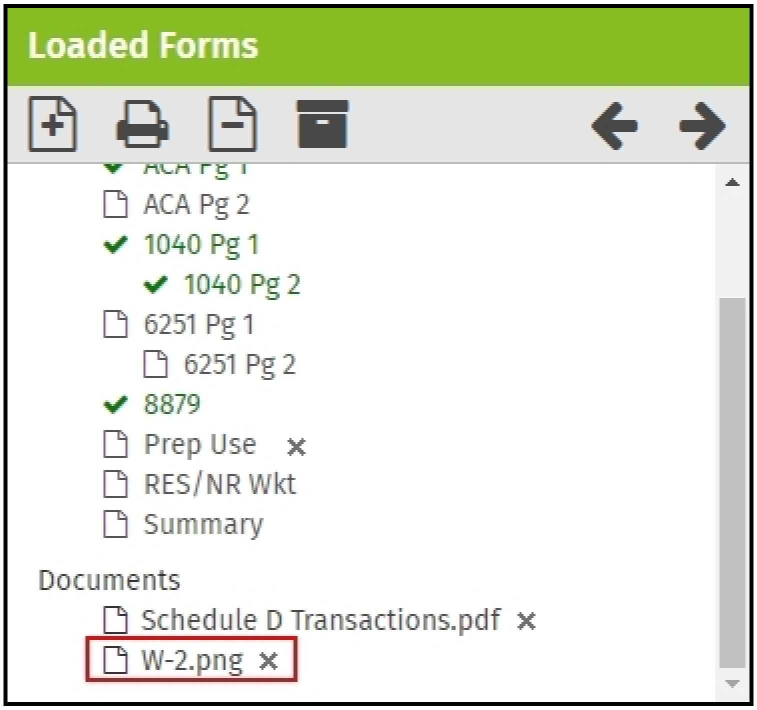
Save As: Capture.20161024T183707146Z.png

7. The file name by default will be a time and date stamp, but you can highlight the default name and enter your own file name.
8. Click **Save**.


Photograph Documents
Photograph and save items to Documents
Save As:
W-2
Photo
Save
Close

9. Click **OK** on the save confirmation.
10. Take any additional photos or click **Close** to exit the **Photograph Documents** dialog.
11. Click **Close** to exit the **Documents** dialog.

The image(s) will be displayed in the **Loaded Forms**. If you click on the file in the **Loaded Forms**, it will open in a new browser window.


Loaded Forms
ACA Pg 1
ACA Pg 2
1040 Pg 1
1040 Pg 2
6251 Pg 1
6251 Pg 2
8879
Prep Use
RES/NR Wkt
Summary
Documents
Schedule D Transactions.pdf
W-2.png

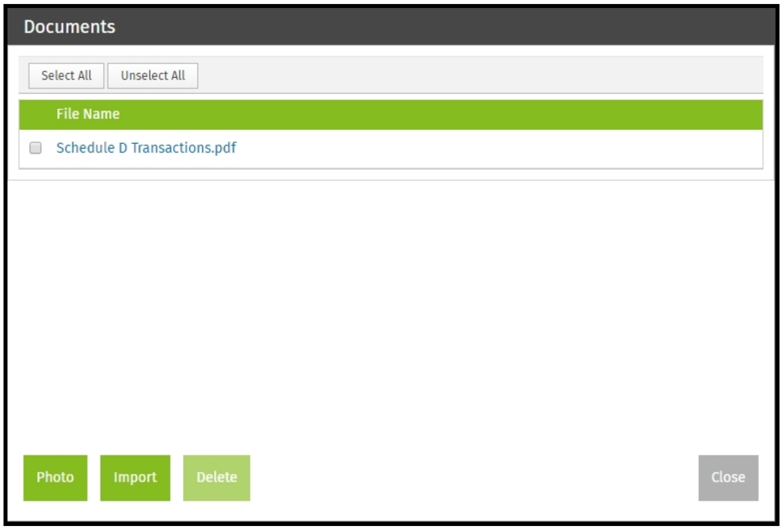
## Importing a file

**To store a document importing a file, use the following steps:**

1. Inside a return, click the **Documents** button located in the **Loaded Forms**.
2. Click **Import**.
3. Browse to the location where the file is stored on your computer, select the file and click **Open**.

To select multiple files, click on the first file, and then press and hold the **Ctrl** key. While holding down the **Ctrl** key, click each of the other files you want to select.

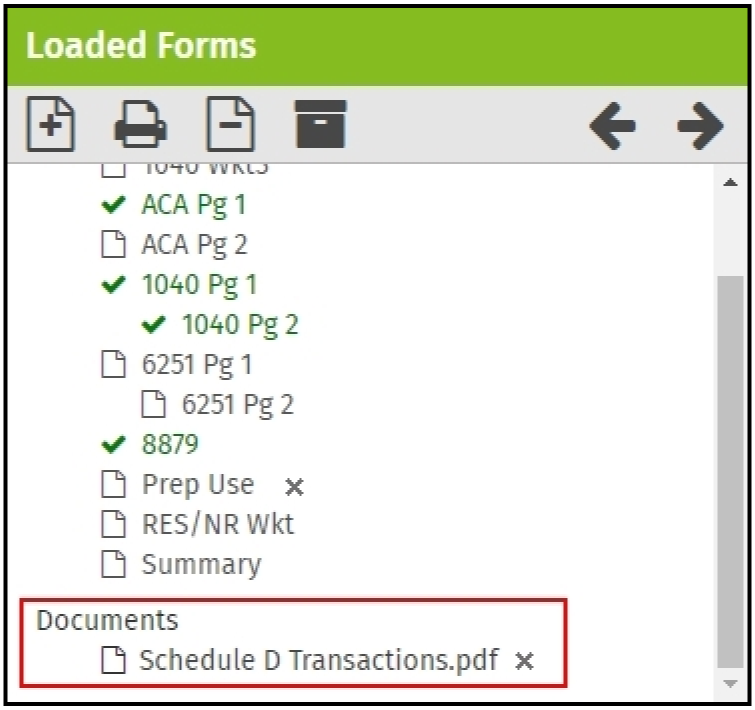
4. Click **OK** on the confirmation.


Documents
Select All
Unselect All
File Name
☐ Schedule D Transactions.pdf
Photo
Import
Delete
Close

5. Click **Close** or go through the steps again to upload additional files.

   The imported file(s) will be displayed in the **Loaded Forms**.

Depending on the type of file you attempt to open, you will either be prompted to download the file or the file will open in a new browser window.


Loaded Forms
1040 Wkts
ACA Pg 1
ACA Pg 2
1040 Pg 1
1040 Pg 2
6251 Pg 1
6251 Pg 2
8879
Prep Use
RES/NR Wkt
Summary
Documents
Schedule D Transactions.pdf

## Delete stored documents

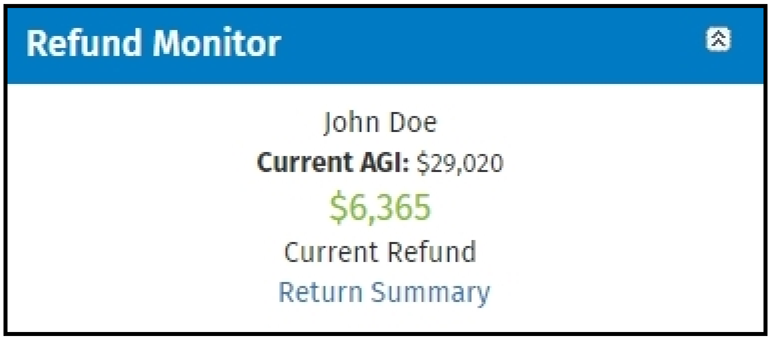
To quickly delete a file, you can click the **Delete** button ✕ located at the end of the file name in the **Loaded Forms** or you can use the following steps to delete multiple files at once.

**To delete multiple files, use the following steps:**

1. Inside a return, click the **Documents** button located in the **Loaded Forms**.
2. Select the check box before the file name on the row(s) you want to delete. To select all the files, click **Select All**.
3. Click **Delete**.
4. Click **OK** to confirm the deletion.

## Use the Refund Monitor

The **Refund Monitor**, shown to the left of the return, displays the taxpayer's name, current AGI and the refund or balance due for the active return. These figures change in real time as you update the return with data. Clicking **Return Summary** will display the Demographic Information, Federal Income Information, and e-File Status in real time.



John Doe

**Current AGI:** $29,020

$6,365

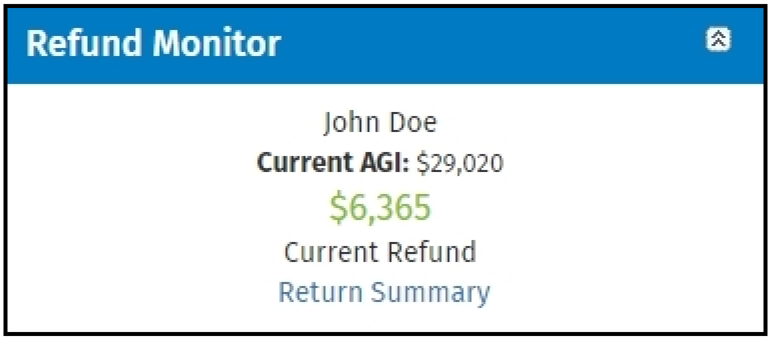
Current Refund

The **Refund Monitor** can be hidden from view by clicking the double arrow button in the top right corner.

## Check return status

**To quickly pull information about a particular return, use the following steps:**

1. Open the return.
2. Click **Return Summary** on the **Refund Monitor**.



John Doe

**Current AGI:** $29,020

$6,365

Current Refund

The **Return Summary** window displays the following information for the selected return:

- Demographic information
- Federal income information
- e-File status
- State income information

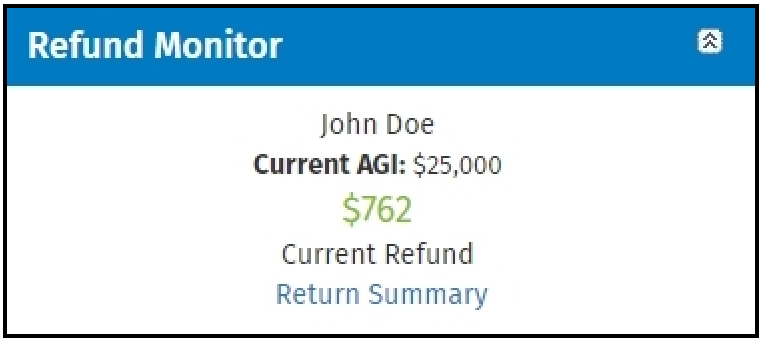
## Select the Return Stage

Once return stages are created by the **Administrator** (**Admin**), you can change the return stage while working in an active return or from the return list.

## Return stage from inside a return

**To select a return stage from inside a return, use the following steps:**

1. Open a return.
2. Click **Return Summary**.



**Refund Monitor**

John Doe

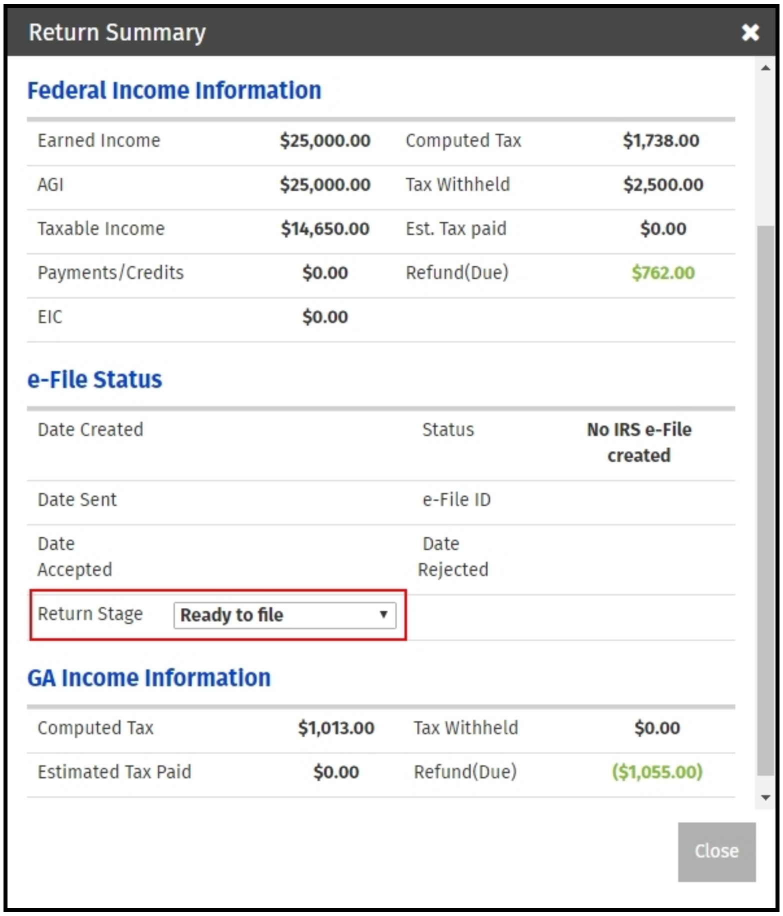
**Current AGI:** $25,000

$762

Current Refund

Return Summary

3. Select the **Return Stage** from the list.



Return Summary

**Federal Income Information**

| | | | |
|---|---|---|---|
| Earned Income | **$25,000.00** | Computed Tax | **$1,738.00** |
| AGI | **$25,000.00** | Tax Withheld | **$2,500.00** |
| Taxable Income | **$14,650.00** | Est. Tax paid | **$0.00** |
| Payments/Credits | **$0.00** | Refund(Due) | **$762.00** |
| EIC | **$0.00** | | |

**e-File Status**

| | | | |
|---|---|---|---|
| Date Created | | Status | **No IRS e-File created** |
| Date Sent | | e-File ID | |
| Date Accepted | | Date Rejected | |
| Return Stage | **Ready to file** | | |

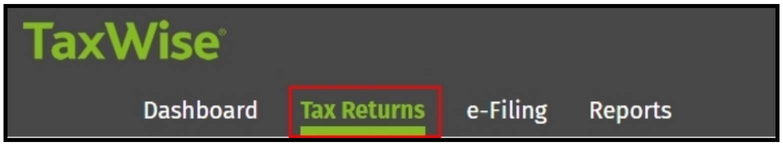
**GA Income Information**

| | | | |
|---|---|---|---|
| Computed Tax | **$1,013.00** | Tax Withheld | **$0.00** |
| Estimated Tax Paid | **$0.00** | Refund(Due) | **($1,055.00)** |

## Return stage from the return list

**To select a return stage from the return list, use the following steps:**

1. Click **Tax Returns**.


TaxWise
Dashboard
Tax Returns
e-Filing
Reports

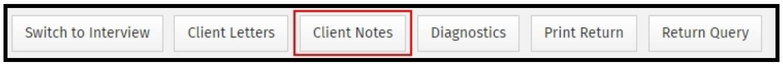
2. Select the return stage from the **Stage** list on the row of the applicable return.

## Client Notes

The Client Notes are a convenient method for recording pertinent information that would not otherwise appear in the taxpayer's return. You can add as many notes as you like to each return.

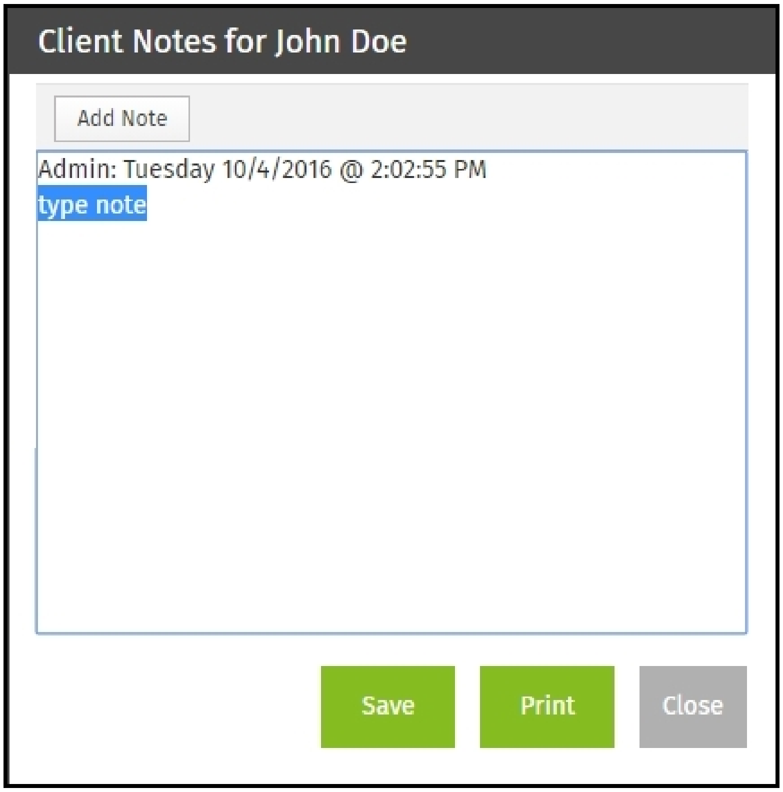
**To open the client notes while the return is open, use the following steps:**

1. Click **Client Notes**.


Switch to Interview
Client Letters
Client Notes
Diagnostics
Print Return
Return Query

2. Click **Add Note**.

TaxWise Online automatically enters the user name, date, and time.


Client Notes for John Doe
Add Note
Save
Print
Close

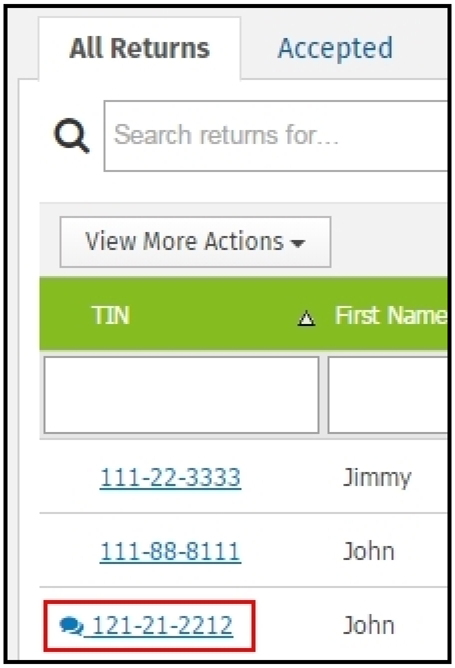
Admin: Tuesday 10/4/2016 @ 2:02:55 PM
type note

3. Enter your note and click **Save**.
4. To print the **Client Notes**, click **Print**.
5. To close the **Client Notes**, click **Close**.

## Access client notes from the Return list

If there is a note entry for an individual, the **Client Note** button 💬 will be to the left of the TIN.

1. Click the **Client Notes** button .


All Returns
Accepted
Search returns for...
View More Actions
TIN
First Name
111-22-3333
Jimmy
111-88-8111
John
121-21-2212
John

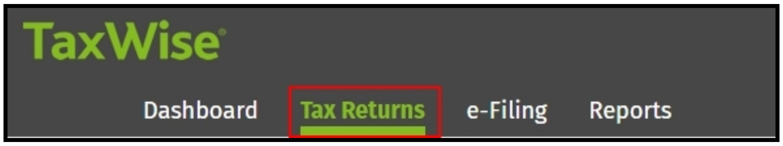
2. To view or add additional notes, click **More**.
3. To print the **Client Notes**, click **Print**.
4. To close the **Client Notes**, click **Close**.

## Move returns

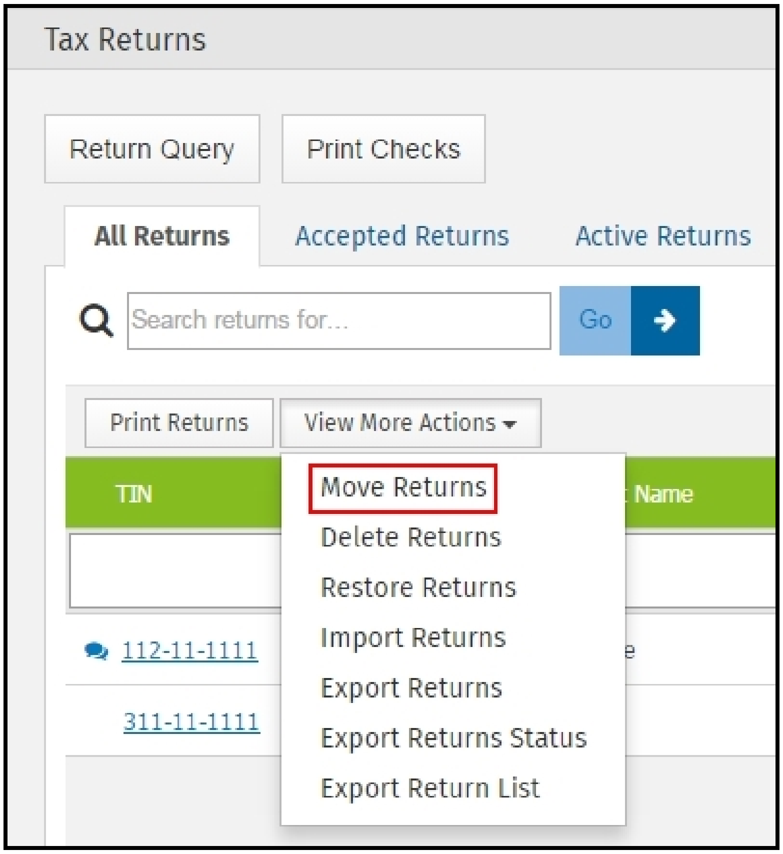
This action allows you to move tax returns from one user to another. When the tax return is moved it is no longer available to the original user.

**To move returns to another user, use the following steps:**

1. Click **Tax Returns**.


TaxWise
Dashboard
Tax Returns
e-Filing
Reports

2. In the **View More Actions** list, click **Move Returns**.


Tax Returns
Return Query
Print Checks
All Returns
Accepted Returns
Active Returns
Search returns for...
Go
Print Returns
View More Actions
TIN
Name
112-11-1111
311-11-1111
Move Returns
Delete Returns
Restore Returns
Import Returns
Export Returns
Export Returns Status
Export Return List

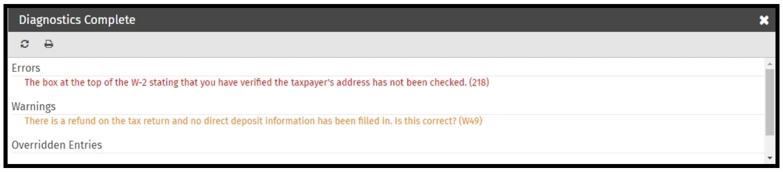
3. In the **Select a user** list, select the user where you want the return(s) moved.
4. Select the return(s) and click **Move**.

If all returns need to be moved to the same user, click **Select All**. To clear all the check boxes, click **Unselect All**.

5. Click **OK** to confirm the move.
6. Click **Close**.

## Run diagnostics

Once you have completed a return you should run diagnostics to check for errors by clicking **Diagnostics**.


Diagnostics Complete
Errors
Warnings
Overridden Entries

The box at the top of the W-2 stating that you have verified the taxpayer's address has not been checked. (218)

There is a refund on the tax return and no direct deposit information has been filled in. Is this correct? (W49)

To print the diagnostics, click the **Print diagnostics** button 🖨. TaxWise Online will display the **Print** dialog. Make any changes to the print properties if applicable and click **Print**.

The diagnostics screen is divided into four sections:

- Electronic filing errors
- Warnings
- Overridden entries
- Estimated entries

TaxWise Online may not display all sections on every diagnostics report.

## Correct electronic filing errors

Electronic filing errors are always a first priority. TaxWise Online displays them in red text on the **Diagnostics** report. The red text is a link pointing to the form and entry that needs correction. When you click the link, TaxWise Online opens the form with the error below the **Diagnostics** report so that the user has a chance to correct the entry. After you correct each error, the return is ready for another **Diagnostics** run.

You must correct all electronic filing errors prior to e-filing the return.

### Warnings

Warnings identify possible problems, inconsistencies or suspicious information in the tax's return data.

Warnings can include:

- Missing data that may not be required.
- Data that does not appear consistent with other data in the return.

If a warning is displayed, you should verify that the information in the return is correct. Warnings do not disqualify a return from electronic filing.

### Overridden Entries

TaxWise Online identifies overridden entries in the **Diagnostics** report. To go to the form to verify the overridden entry, click the listing for that entry.

As you verify the overridden entries, make sure that they are absolutely necessary. Even though overridden entries do not disqualify a return from electronic filing, they may result in calculation errors.

### Estimated Entries

TaxWise Online identifies estimated entries in the **Diagnostics** report. To go to the form to verify any missing information, click the listing for that entry.

Although estimated entries do not disqualify a return from electronic filing, they may cause you to file incorrect information.

## Client Letter

The client letter enables you to print a letter with each tax return. You can add a standard letter or customize an existing client letter for your own purposes.

You must disable all pop-up blockers to use the **Client Letter** feature.

A typical client letter provides the taxpayer with the following information:

- The tax preparer's contact information.
- The taxpayer's contact information.
- The federal and state refund, balance or amount due.
- Additional instructions about your client's federal and state tax return.

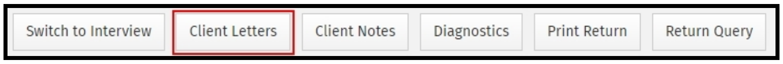
## Add a client letter to a tax return

**To add a client letter to a return, use the following steps:**

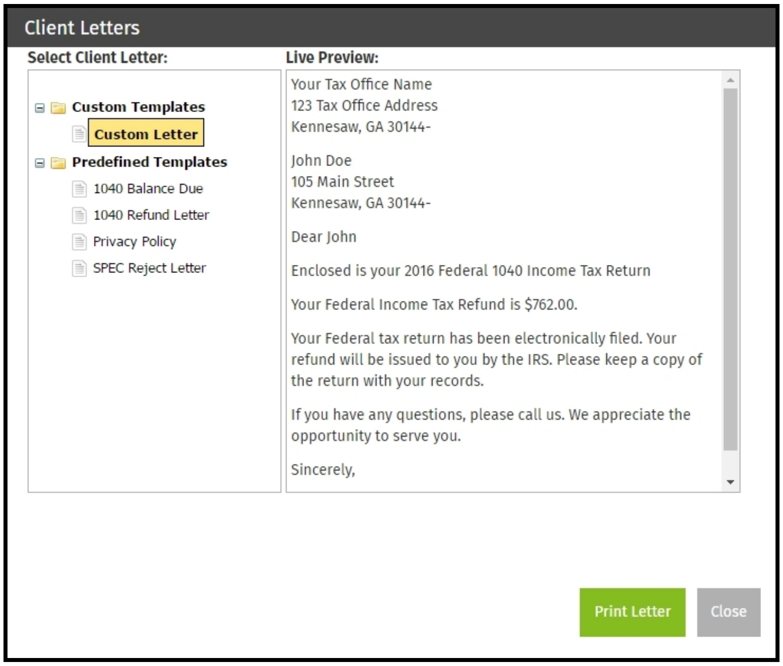
1. Log in as the appropriate user.
2. Open a tax return.

   The firm name and address calculate to the client letter from the ERO Information entered on the Form 8879.

3. Click **Client Letters** on the toolbar.



4. Select a letter from the **Custom Templates** or **Predefined Templates** in the list.
5. Click **Print Letter**.


Client Letters
Select Client Letter:
Custom Templates
Custom Letter
Predefined Templates
1040 Balance Due
1040 Refund Letter
Privacy Policy
SPEC Reject Letter
Live Preview:
Print Letter
Close

Your Tax Office Name
123 Tax Office Address
Kennesaw, GA 30144-

John Doe
105 Main Street
Kennesaw, GA 30144-

Dear John

Enclosed is your 2016 Federal 1040 Income Tax Return

Your Federal Income Tax Refund is $762.00.

Your Federal tax return has been electronically filed. Your refund will be issued to you by the IRS. Please keep a copy of the return with your records.

If you have any questions, please call us. We appreciate the opportunity to serve you.

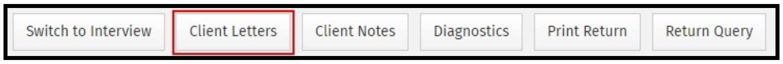
Sincerely,

6. Change any print properties if applicable, and click **Print**.

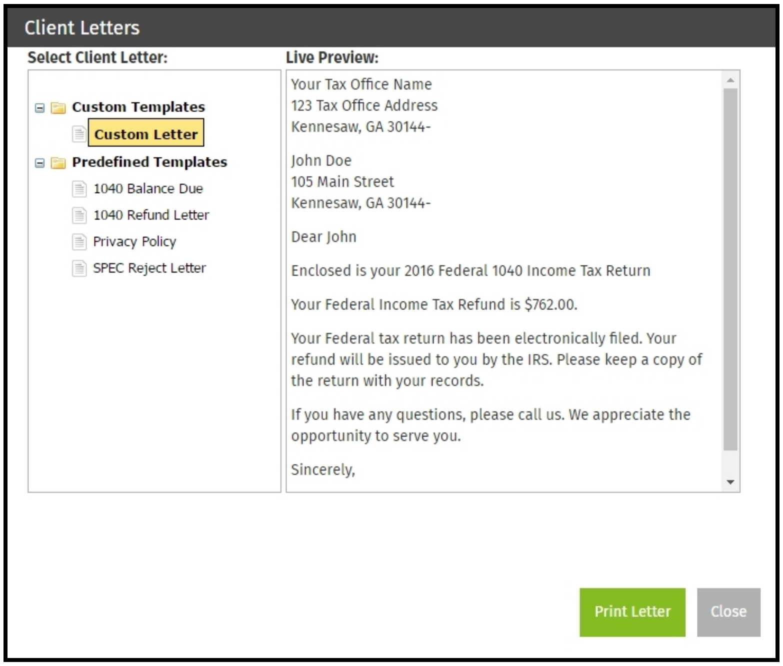
## Print a client letter for a tax return

**To add a client letter to a return, use the following steps:**

1. Open a tax return.
2. Click **Client Letters**.


Switch to Interview
Client Letters
Client Notes
Diagnostics
Print Return
Return Query

3. Select a letter from the **Custom Templates** or **Predefined Templates**.
4. Click **Print**.


Client Letters
Select Client Letter:
Custom Templates
Custom Letter
Predefined Templates
1040 Balance Due
1040 Refund Letter
Privacy Policy
SPEC Reject Letter
Live Preview:
Print Letter
Close

Your Tax Office Name
123 Tax Office Address
Kennesaw, GA 30144-

John Doe
105 Main Street
Kennesaw, GA 30144-

Dear John

Enclosed is your 2016 Federal 1040 Income Tax Return

Your Federal Income Tax Refund is $762.00.

Your Federal tax return has been electronically filed. Your refund will be issued to you by the IRS. Please keep a copy of the return with your records.

If you have any questions, please call us. We appreciate the opportunity to serve you.

Sincerely,

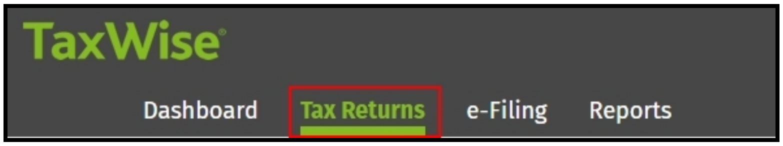
5. Make any changes to the print properties if applicable, and click **Print**.
6. Click **Close** to exit out of the Client Letters.

## Delete returns

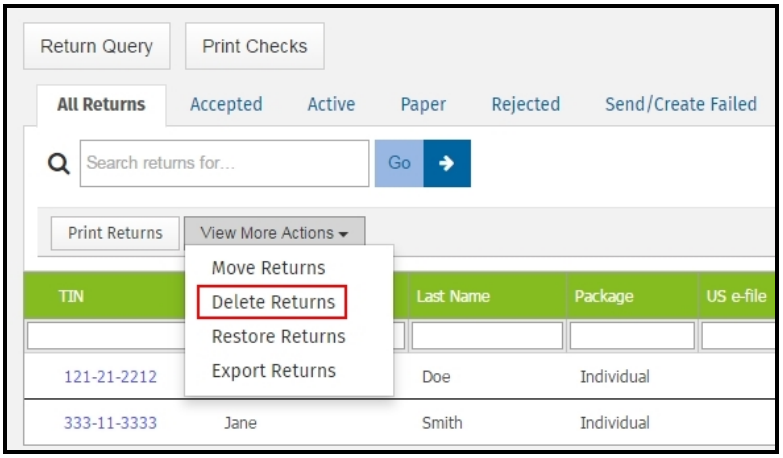
TaxWise Online allows you to delete returns and has the ability to restore returns after deletion.

**To delete returns, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click **Tax Returns**.


TaxWise
Dashboard
Tax Returns
e-Filing
Reports

3. In the **View More Actions** list, click **Delete Returns**.


Return Query
Print Checks
All Returns
Accepted
Active
Paper
Rejected
Send/Create Failed
Search returns for...
Go
Print Returns
View More Actions
Move Returns
Delete Returns
Restore Returns
Export Returns
TIN
Last Name
Package
US e-file
121-21-2212
Doe
Individual
333-11-3333
Jane
Smith
Individual

4. Select the returns and click **Delete**.

If all returns need to be deleted, click **Select All**. To clear all the check boxes, click **Unselect All**.

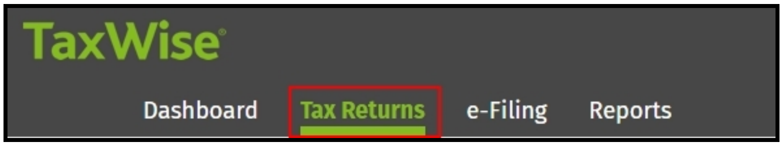
5. Click **OK** to confirm the deletion.
6. Click **Close**.

## Restore deleted returns

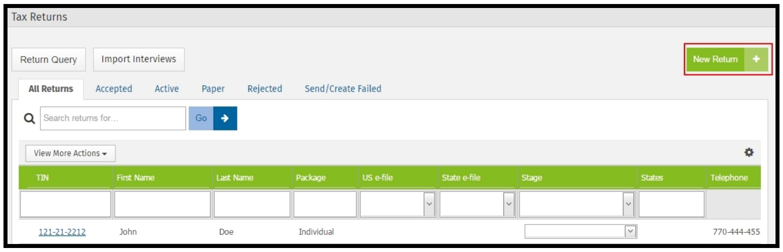
TaxWise Online gives you the option to restore returns you have previously deleted.

**To restore a deleted return, use the following steps:**

1. Click **Tax Returns**.

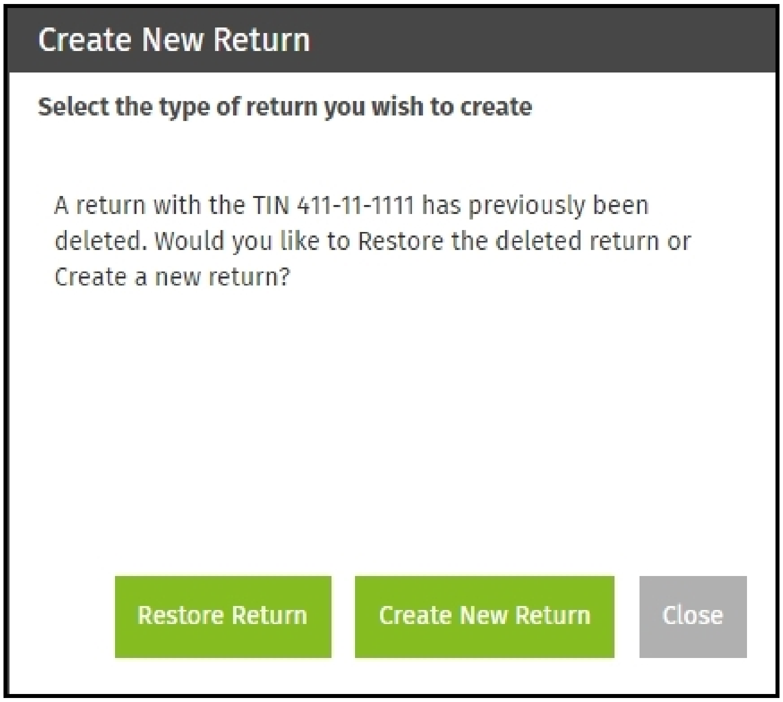

TaxWise
Dashboard
Tax Returns
e-Filing
Reports

2. Click **New Return**.


Tax Returns
Return Query
Import Interviews
New Return +
All Returns
Accepted
Active
Paper
Rejected
Send/Create Failed
Search returns for...
Go
View More Actions

| TIN | First Name | Last Name | Package | US e-file | State e-file | Stage | States | Telephone |
|---|---|---|---|---|---|---|---|---|
| 121-21-2212 | John | Doe | Individual | | | | | 770-444-455 |

3. Enter the **Social Security Number** twice for validation purposes.
4. Click **Go to Tax Forms** or **Go to Interview**.
5. Do one of the following:
   - Click **Restore Return** to bring forward the previously deleted return.
   - Click **Create New Return** to start a blank return.
   - Click **Close** to cancel the process.


Create New Return

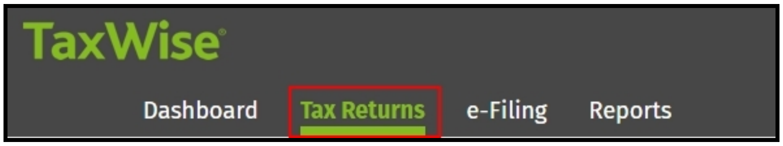
Select the type of return you wish to create

A return with the TIN 411-11-1111 has previously been deleted. Would you like to Restore the deleted return or Create a new return?
Restore Return
Create New Return
Close

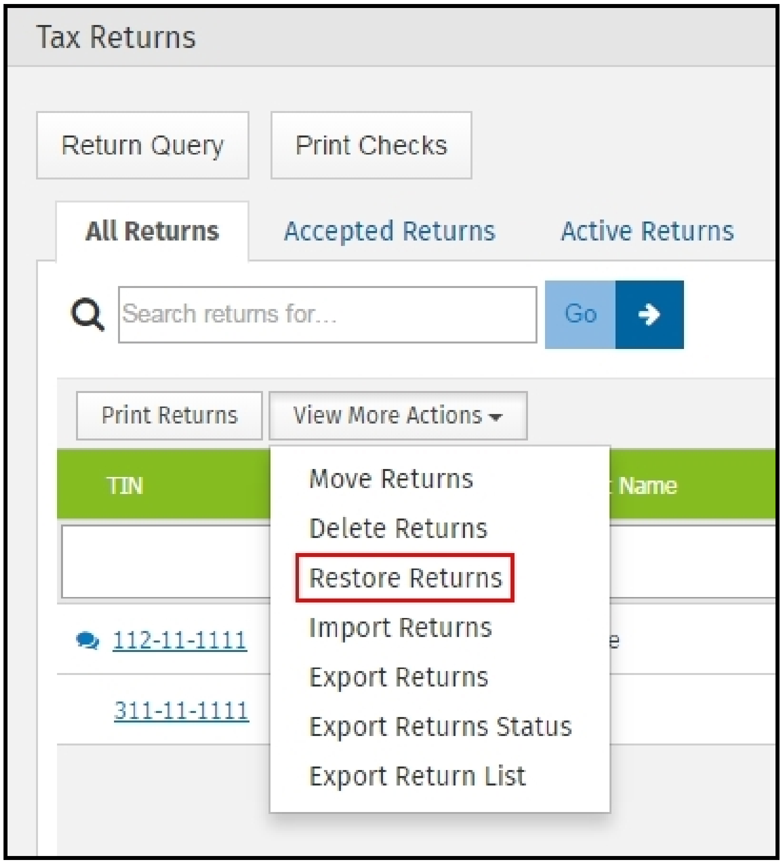
## Restore multiple deleted returns

**To restore multiple returns, use the following steps:**

1. Log in as the **Administrator** (**Admin**) or a user with the **Administrator** role.
2. Click **Tax Returns**.


TaxWise
Dashboard
Tax Returns
e-Filing
Reports

3. In the **View More Actions** list, click **Restore Returns**


Tax Returns
Return Query
Print Checks
All Returns
Accepted Returns
Active Returns
Search returns for...
Go
Print Returns
View More Actions
TIN
Name
112-11-1111
311-11-1111
Move Returns
Delete Returns
Restore Returns
Import Returns
Export Returns
Export Returns Status
Export Return List

Within the **Restore Returns** dialog, all previously deleted returns will be displayed.

4. Do one of the following:
   - Click **Select All** to select all returns shown, or
   - Select the check box next to the return(s) you want to restore.
5. Click **Restore**.
6. Click **OK** to confirm the selected returns will be restored.
7. Click **Close**.

## InterviewPLUS Interviews

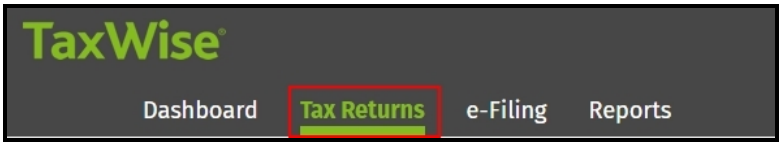
The **Import Interviews** feature allows offices with sub-offices using InterviewPLUS to process the interview and complete the return.This option is only available to the **Administrator** (**Admin**), a user with the **Administrator** role, or users assigned the **InterviewProcessor** role.

### Import Interviews

This option is only available to the **Administrator** (**Admin**), a user with the **Administrator** role, or users assigned the **InterviewProcessor** role.

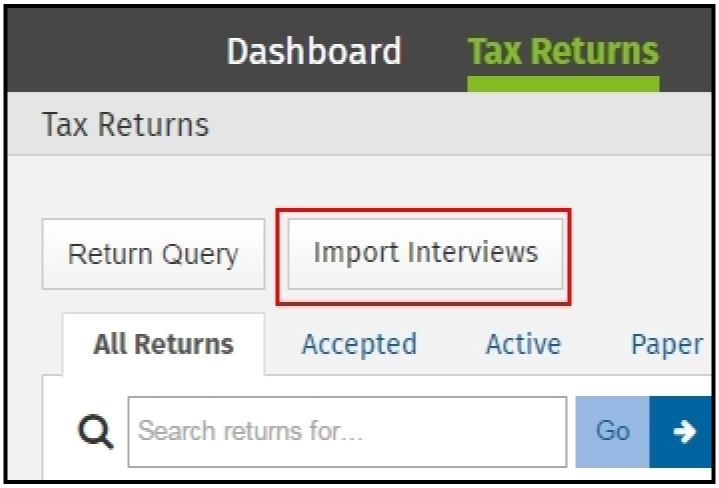
**To import interviews, use the following steps:**

1. Click **Tax Returns**.

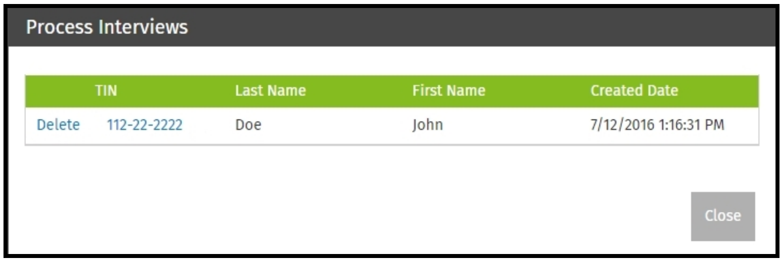

TaxWise
Dashboard
Tax Returns
e-Filing
Reports

2. Click **Import Interviews**.

The **Import Interviews** button will only be available when there are pending interviews to be imported.


Dashboard
Tax Returns
Tax Returns
Return Query
Import Interviews
All Returns
Accepted
Active
Paper
Search returns for...
Go

3. Click the TIN of the interview you wish to process. If the TIN is not available as a link and has the warning button ⚠, the return has already been created in TaxWise Online. In order to process the interview the return would have to be deleted.


Process Interviews
Close

| | TIN | Last Name | First Name | Created Date |
|---|---|---|---|---|
| Delete | 112-22-2222 | Doe | John | 7/12/2016 1:16:31 PM |

4. TaxWise Online opens a return with the information completed from the interview.
5. The preparer needs to review the return and complete any necessary information.

## Delete an unprocessed interview

**To delete an unprocessed interview, use the following steps:**

1. Click **Tax Returns**.
2. Click **Import Interviews**.
3. Click **Delete** on the row you want to delete.
4. Click **OK** to confirm the deletion.
5. Click **Close**.

If a return needs to be completed after an interview is deleted, the InterviewPLUS office has to resubmit the interview.

# Chapter

# 9

## Printing

With TaxWise Online, users can print single forms, sets of forms, or entire returns as well as checks and reports. In this chapter, the different methods that can be used in printing returns are discussed in detail and steps are given for Online Check Printing and TWO Reports.

✎ When printing returns (or forms), TaxWise Online creates a PDF that can be printed. Adobe Reader 8.1 or higher is required.

### Print Returns

The printing in TaxWise Online provides a user-friendly module to print tax returns in a PDF file. All pop-up blockers should be disabled before attempting to print returns.

⚠ Adobe 8.1 or higher is required to print returns.

**To print the tax return, use the following steps:**

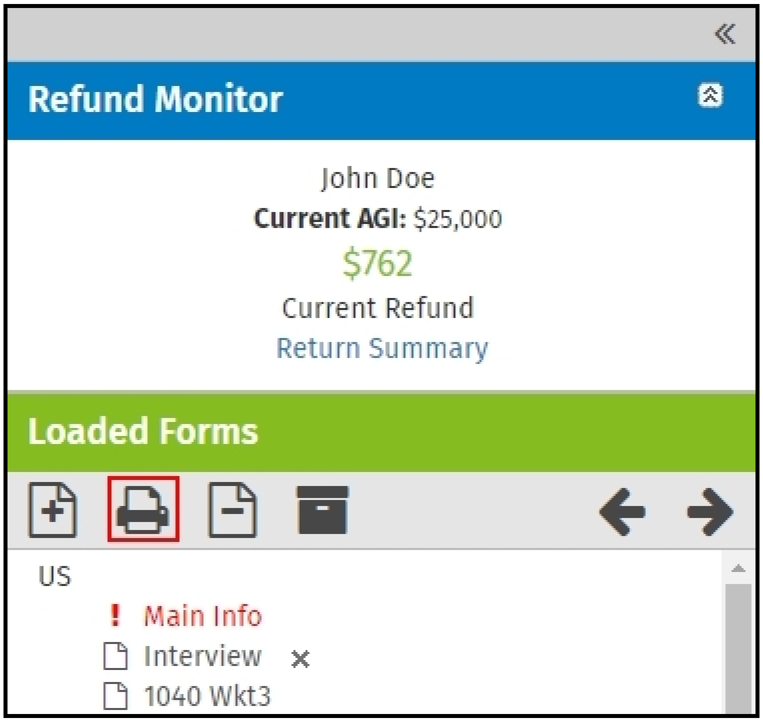
1. Open a tax return.
2. Click **Print Return**.
3. Click **OK** on the message that a pdf is being generated.
4. Click **Open PDF** to view the return in a new browser window.
5. In the new browser window, click the **Print** button.

### Print a single form

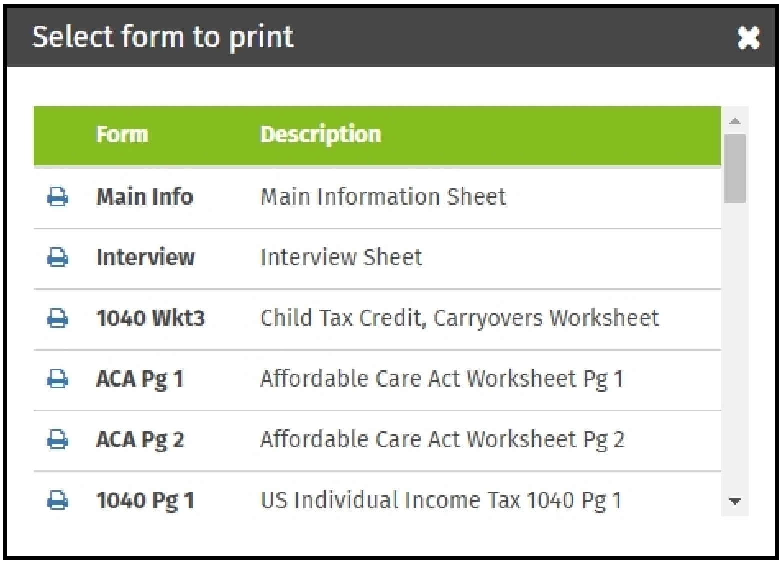
This feature allows you to print an single form while the return is open.

**To print a form inside the return, use the following steps:**

1. Open a return.
2. Click the **Print Current Form** button 🖨 in the **Loaded Forms**.

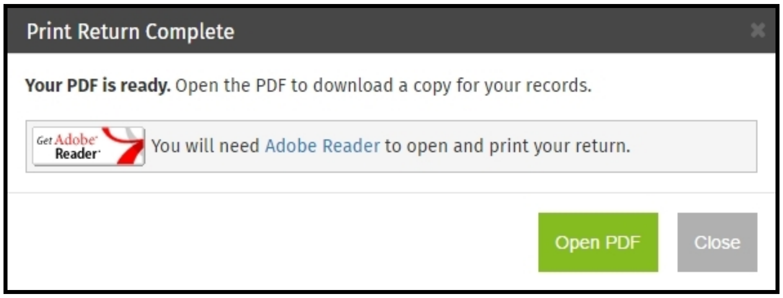

Refund Monitor
John Doe
Current AGI: $25,000
$762
Current Refund
Return Summary
Loaded Forms
US
! Main Info
Interview
1040 Wkt3

3. Click the **Printer** button 🖶 on the row of the form you want to print.


Select form to print

| | Form | Description |
|---|---|---|
| 🖶 | **Main Info** | Main Information Sheet |
| 🖶 | **Interview** | Interview Sheet |
| 🖶 | **1040 Wkt3** | Child Tax Credit, Carryovers Worksheet |
| 🖶 | **ACA Pg 1** | Affordable Care Act Worksheet Pg 1 |
| 🖶 | **ACA Pg 2** | Affordable Care Act Worksheet Pg 2 |
| 🖶 | **1040 Pg 1** | US Individual Income Tax 1040 Pg 1 |

4. Click **OK** on the message that a pdf is being generated.
5. Click **Open PDF** to view the form in your browser.


Print Return Complete

**Your PDF is ready.** Open the PDF to download a copy for your records.

Get Adobe Reader

You will need Adobe Reader to open and print your return.

Open PDF
Close

6. In your browser, click the **Print** button.

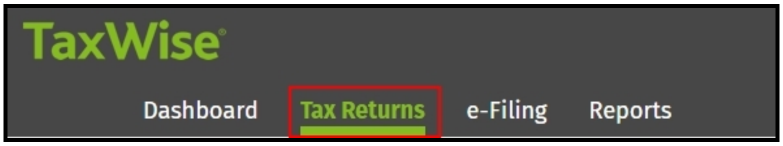
## Print returns from the return list

Printing from the return list gives you the option to print a single return or multiple returns at one time. The **Administrator** (**Admin**) or a user with the **Administrator** role can access all user's returns for printing. Other users can print only their own returns.

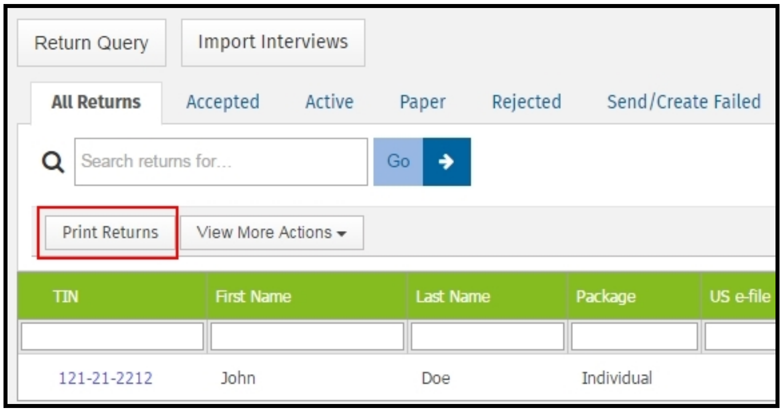
You must be logged in as the **Administrator** (**Admin**) or a user with the **Administrator**, **SuperUser**, or **ReturnPrinter** role in order to print returns from the returns list.

**To print from the return list, use the following steps:**

1. Click **Tax Returns**.


TaxWise
Dashboard
Tax Returns
e-Filing
Reports

2. Click **Print Returns**.

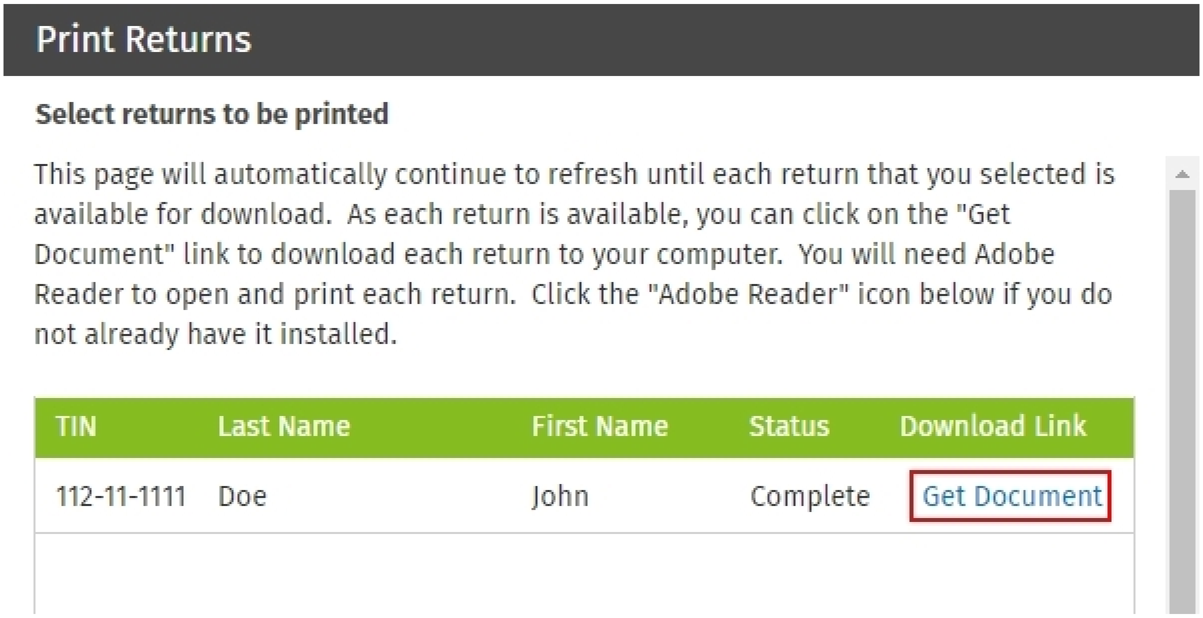

Return Query
Import Interviews
All Returns
Accepted
Active
Paper
Rejected
Send/Create Failed
Search returns for...
Go
Print Returns
View More Actions

| TIN | First Name | Last Name | Package | US e-file |
|---|---|---|---|---|
| | | | | |
| 121-21-2212 | John | Doe | Individual | |

3. Select the returns to print and click **Submit**.

   If all returns need to be printed, click **Select All**. To clear all the check boxes, click **Unselect All**.

4. Click **OK** to confirm the printing.
5. Click **Get Document**. Each return will open in a new browser window.



Print Returns

Select returns to be printed

This page will automatically continue to refresh until each return that you selected is available for download. As each return is available, you can click on the "Get Document" link to download each return to your computer. You will need Adobe Reader to open and print each return. Click the "Adobe Reader" icon below if you do not already have it installed.

| TIN | Last Name | First Name | Status | Download Link |
|---|---|---|---|---|
| 112-11-1111 | Doe | John | Complete | Get Document |

6. In your browser, click the **Print** button.
7. In the TaxWise Online browser window click **Close** to exit **Print Returns**.

## Print checks

TaxWise Online provides you with Online Check Printing. This feature allows you to print taxpayer's checks anytime at any place. All you need is a printer and check stock.

The minimum requirements for online check printing are:

- Internet connection (Broadband)
- Authorized user (CheckPrinter role)
- Check stock (Bank agreement)
- Configured laser printer

Make sure your check stock is loaded correctly in your printer.

**To print online checks, use the following steps:**

1. Log in as a user with check printing rights. The user must have the **CheckPrinter** role in order to have this option available on the **Tax Returns** page.
2. Click **Tax Returns**.
3. Click **Print Checks**.
4. The Customer Support Site displays the **Print Checks > Select Checks to Print** page, listing all the available check authorization records.
5. Select the record to print.
6. Click **Next**.
7. Set the check number and click **Next**.
8. Repeat as necessary.

# Chapter

# 10

## Working with e-Files

After you have entered all data in the tax return, reviewed all forms, and ensured that each form is complete, you are ready to run diagnostics to check the integrity of the return and create the e-File. Diagnostics also looks for electronic filing errors in both federal and state returns.

### Create and submit e-Files

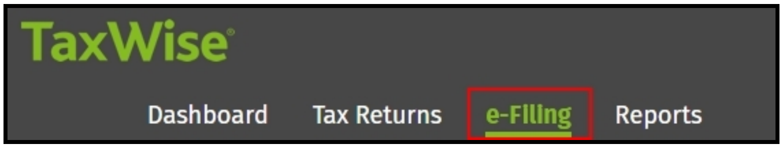
Once the tax return is finished and free of e-File and validation errors, you are ready to submit the tax return to the IRS.

**To create and send an e-File, use the following steps:**

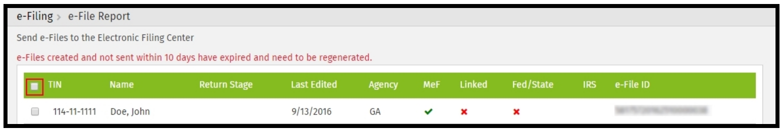
1. Click **Diagnostics**.
2. Verify that there are no electronic filing errors or validation errors.
3. Click **Create e-File(s)**. A message will display to let you know the e-File was created.

The return can be printed by clicking **Print Return**, before or after creating the e-File.

4. Click **Save and Close**.
5. Click **e-Filing**.



6. Click **Submit e-Files**.
7. Select the check box(es) next to the TIN of the tax return you want to e-File. To select all the available e-Files, select the check box in the green header (highlighted in the screenshot)


e-Filing > e-File Report

Send e-Files to the Electronic Filing Center

e-Files created and not sent within 10 days have expired and need to be regenerated.

| ☐ | TIN | Name | Return Stage | Last Edited | Agency | MeF | Linked | Fed/State | IRS | e-File ID |
|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | 114-11-1111 | Doe, John |  | 9/13/2016 | GA | ✓ | ✗ | ✗ |  | [redacted] |

8. Click **Continue**.
9. Click **Print** to print a copy of the e-File Report for your records.
10. Click **Continue**.
11. A list will be displayed showing the returns that have been queued for submission.

### Linked vs. unlinked state returns

TaxWise Online supports both linked and unlinked state e-Files.

**Linked State Returns**

Linked state returns (with a separate e-File created) cannot be submitted until the Federal return is accepted by the IRS.

The linked state e-File is displayed in the **e-File Report** dialog as locked. It cannot be selected and transmitted until the federal return is accepted. The state return becomes available in the **e-File Report** dialog when the federal return is accepted.

If the Federal return is rejected by the IRS, any associated state e-Files are deleted and are removed from the **e-File Report** dialog. Once you correct the return, be sure you recreate the state e-File in addition to the Federal e-File.

**Unlinked State Returns**

Unlinked state returns can be submitted at any time. The Federal return is not required to be accepted before the state return is submitted for processing.

An example of an unlinked state return is when no Federal return is required to be filed, but the state return is required. You would be allowed to send this unlinked state return without having to send the Federal return.

**Important Item to Remember**

The state MeF returns are defaulted to the linked condition. However, the ERO/Preparer may elect to send the state as unlinked by making a selection on the state form.

## Acknowledgements

Once an e-File has been submitted, the IRS and state will send an acknowledgement to let you know if the return was accepted or rejected and, if rejected, what you can do to correct the return. This chapter discusses acknowledgements, what they mean, and what users can do once they have been received.

## View acknowledgements

TaxWise Online allows you to view current federal, state and bank acknowledgements.

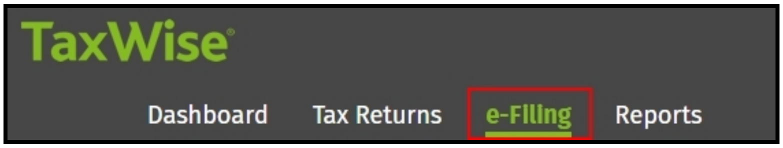
You have the option to view acknowledgements under two categories:

- Not Archived - The default view for all acknowledgements.
- Archived - Acknowledgements that you selected to archive.

Acknowledgements are available as soon as the IRS or state acknowledges the return. This could take up to 48 hours.

**To view acknowledgements, use the following steps:**

1. Click **e-Filing**.



2. Click **View Acknowledgements**.
3. Click the tab of the type of acknowledgement (IRS, State or Bank) you want to view.
4. Click the **Not Archived** tab to view acknowledgements that have not been archived. Click the **Archived** tab to view acknowledgements that have been archived.

   To learn more about archiving acknowledgements, see the section titled **Archiving acknowledgements**.

5. Notice the **Status** column indicating acceptance, rejection, or sent to the IRS for each acknowledgement.
6. Click **Print All** to print the acknowledgement.

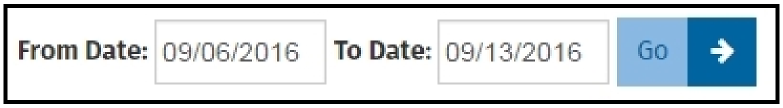
The following table displays the information contained in an acknowledgement:

| Column | Description |
|---|---|
| **Date** | Date of acknowledgement |
| **TIN** | Taxpayer's social security number (or Tax Identification Number) |
| **Name** | Taxpayer's name |
| **Ack Type** | Federal or state acknowledgement |
| **Refund** | Displays the refund or balance due |
| **Status** | Displays accepted or rejected |
| **e-File ST** | Displays the state associated with the ack type |
| **Sig Doc** | Displays PIN |
| **Debt Ind** | Displays any debt from previous year |
| **EIC Ind** | EIC Indicator; displays "Y" if the taxpayer completed Schedule EIC |
| **SVC CTR** | Displays the IRS service center that processed the return |
| **e-File ID** | e-File Identification Number assigned by TaxWise Online |

### View acknowledgements by calendar date

**To view acknowledgements using the date filter, use the following steps:**

1. Click **e-Filing**.
2. Click **View Acknowledgements**.
3. Enter the starting date in the **From Date** box.
4. Enter the ending date in the **To Date** box.



From Date: 09/06/2016 To Date: 09/13/2016

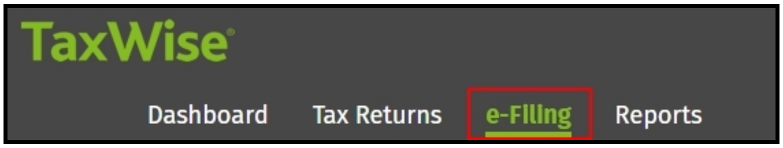
5. Click **Go**.

The acknowledgements are displayed for the date range selected.

## Archive acknowledgements

**To archive acknowledgements, use the following steps:**

1. Click **e-Filing**.



2. Click **View Acknowledgements**.
3. Click the tab of the type of acknowledgement (IRS, State or Bank) you want to archive.
4. Click the **Not Archived** tab.

5. Select the check box next to the acknowledgement(s) you want to archive.
6. Click **Archive Selected.**

Archived acknowledgements are displayed when you click the **Archived** tab.

**To unarchive acknowledgements, use the following steps:**

1. Click **e-Filing**.
2. Click **View Acknowledgements**.
3. Click the tab of the type of acknowledgement (IRS, State or Bank) you want to unarchive.
4. Click the **Archived** tab.
5. Select the check box next to the acknowledgement(s) to unarchive.
6. Click **Unarchive Selected.**

Acknowledgements that are not archived are displayed when you click the **Not Archived** tab.

## Identify rejected returns

TaxWise Online provides you with several methods of identifying rejected returns.

- The rejected returns can be viewed by, printing the acknowledgements,
- The **Return Query** located on the **Tax Returns** page can be used for a quick search for the tax return status, or
- The **Print Reject Details** can be printed to show all returns that are rejected.

**To run the Outstanding Rejects report from the Solution Center, use the following steps:**

1. Log into the **Solution Center**.
2. Click **My Information**.
3. Click **Reports**.
4. Select the **Outstanding IRS Rejects** report by clicking **Generate** to the right of the report.

After the report is generated you can download the report to be opened or saved.

## Correct and resubmit rejected returns

When a return is rejected by an agency (IRS or State), the tax preparer is notified of the rejection via an acknowledgement. An explanation or reason for the reject, or reject code is given in the acknowledgement. There are so many different reasons for a return to be rejected, it is impossible to list them all here.

The **Return Query** will show you the detail and the value rejected.

### State Rejects

Select the state website from the **State Tax Sites** panel on the **Dashboard**. Each state's Department of Revenue website has different features and functions. It is impractical to list the best method of locating rejects for every state's website. A simple search may give the desired results or it may be necessary to call the state's revenue office/department to determine the reason for the reject.

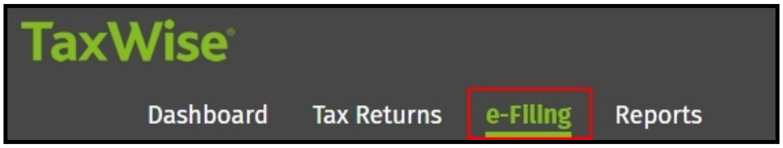
Once the errors have been identified and corrected, the return or e-File must be resubmitted.

## Clear sent e-Files

The **Administrator** (**Admin**) or a user with the **Administrator** role has the ability to clear the status of a sent e-File.

**To clear the sent e-Files, use the following instructions:**

1. Click **e-Filing**.



2. Click **Clear Sent e-Files**.
3. Select the e-Files and click **Clear e-Files**.

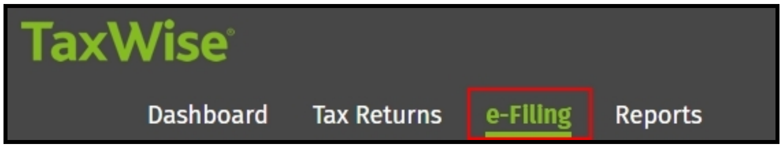
If all e-Files need to be cleared, click **Select All**. To clear all the check boxes, click **Unselect All**.

## Print Reject Details

TaxWise Online gives you the ability to print the details of rejected returns.

**To print reject details, use the following the steps:**

1. Click **e-Filing**.



2. Click **Print Reject Details**.
3. Do one of the following:
   - Select the check box(es) beside the reject(s) to be printed.
   - Click the **Select All** button to select all rejects displayed.
4. Click **Submit**.
5. Click **OK**.
6. Click **Print**.

# Chapter

# 11

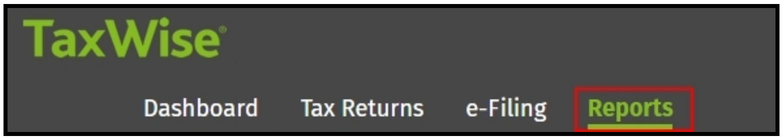
## Reports

TaxWise Online includes a variety of reports that can be generated for use in your office.

### Print Reports

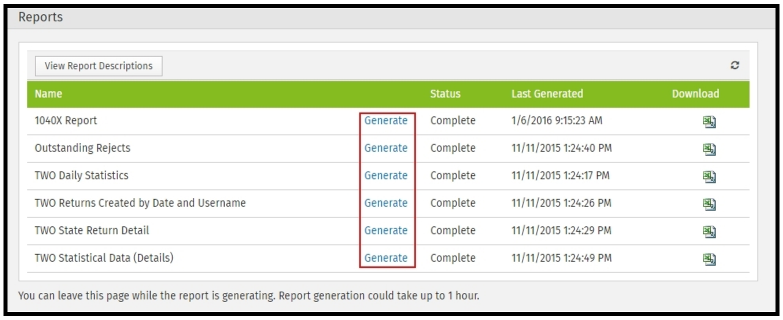
**To access reports, use the following steps:**

1. Click **Reports**.



2. Click **Generate** on the row of the report you want to view.

The status will update to Pending.

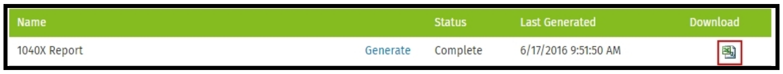

Reports

View Report Descriptions

| Name | | Status | Last Generated | Download |
|---|---|---|---|---|
| 1040X Report | Generate | Complete | 1/6/2016 9:15:23 AM | ▦ |
| Outstanding Rejects | Generate | Complete | 11/11/2015 1:24:40 PM | ▦ |
| TWO Daily Statistics | Generate | Complete | 11/11/2015 1:24:17 PM | ▦ |
| TWO Returns Created by Date and Username | Generate | Complete | 11/11/2015 1:24:26 PM | ▦ |
| TWO State Return Detail | Generate | Complete | 11/11/2015 1:24:29 PM | ▦ |
| TWO Statistical Data (Details) | Generate | Complete | 11/11/2015 1:24:49 PM | ▦ |

You can leave this page while the report is generating. Report generation could take up to 1 hour.

3. When the report is complete, the status will change to **Complete**. (This step could take up to an hour)
4. Click the **Excel** button to download the report.



| Name | | Status | Last Generated | Download |
|---|---|---|---|---|
| 1040X Report | Generate | Complete | 6/17/2016 9:51:50 AM | ▦ |

Reports are downloaded into .csv file format. These files can be opened and viewed with MS Excel. Once the file is opened, it can be printed and/or saved as an Excel file.

# Chapter

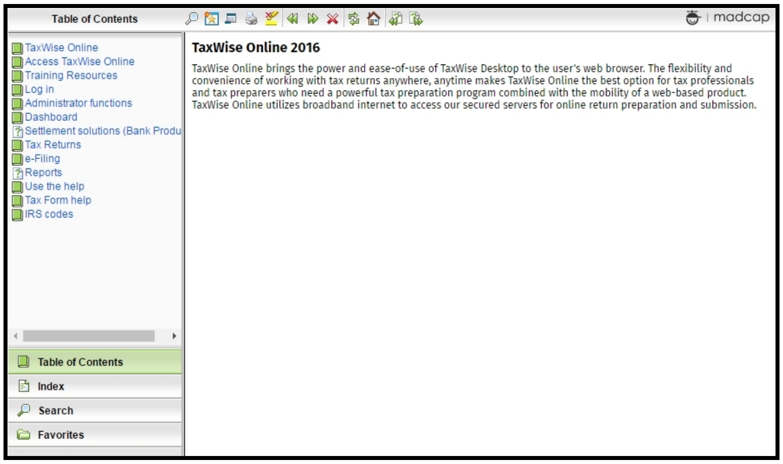
# 12

## Use the TaxWise Online help

TaxWise Online offers program help, state help, tax form help, and field level context sensitive help. This chapter discusses how to access and use help to solve many different types of issues.

### TaxWise Online help

To get help in TaxWise Online, press **F1** or select the program help or state help link from the **Help & References** panel on the **Dashboard**.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Administrator functions
Dashboard
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Tax Returns
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Tax Form help
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**TaxWise Online 2016**

TaxWise Online brings the power and ease-of-use of TaxWise Desktop to the user's web browser. The flexibility and convenience of working with tax returns anywhere, anytime makes TaxWise Online the best option for tax professionals and tax preparers who need a powerful tax preparation program combined with the mobility of a web-based product. TaxWise Online utilizes broadband internet to access our secured servers for online return preparation and submission.

The left pane of the Help window has four options:

- Table Of Contents
- Index
- Search
- Favorites

### Table of Contents tab

When help is displayed, the **Table Of Contents** is the default view.

If you've changed views and wish to return to the Table of Contents view, simply click the **Table Of Contents** tab:

Table of Contents

Click the blue text or the book icon to the left of the blue text to expand an entry. When you click on a heading for any topic, the information related to that topic is displayed in the right pane.

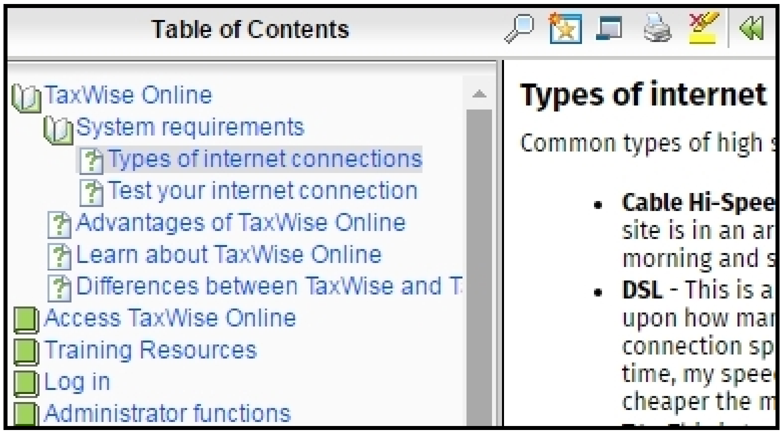
Table of Contents
TaxWise Online
System requirements
Types of internet connections
Test your internet connection
Advantages of TaxWise Online
Learn about TaxWise Online
Differences between TaxWise and T
Access TaxWise Online
Training Resources
Log in
Administrator functions
Types of internet
Common types of high s
Cable Hi-Spee
site is in an ar
morning and s
DSL - This is a
upon how mar
connection sp
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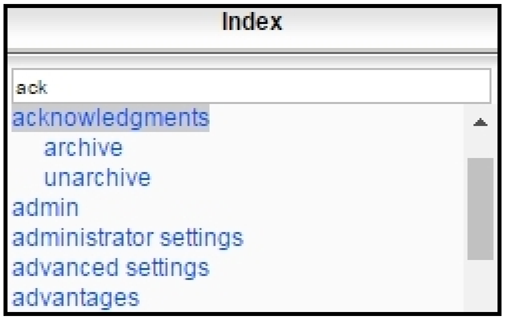
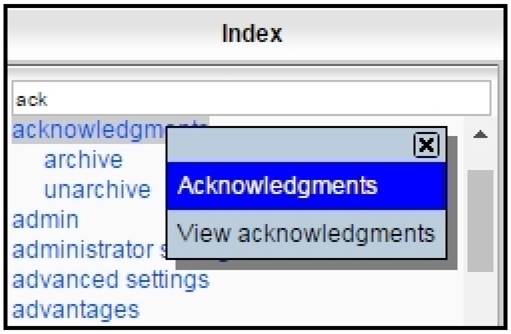
## Index tab

To search for a topic using the Help Index, click the **Index** tab. Index key words are listed in the left pane. If you type a keyword in the search box and it is listed in the left pane, that keyword will be highlighted.


Index
ack
acknowledgments
archive
unarchive
admin
administrator settings
advanced settings
advantages

Click on the desired key word in the left pane. If the selected keyword appears in multiple topics, a list of the available topics will be displayed. If there is only one topic for a keyword, that topic will immediately be displayed in the right pane.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ack
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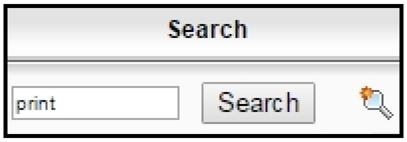
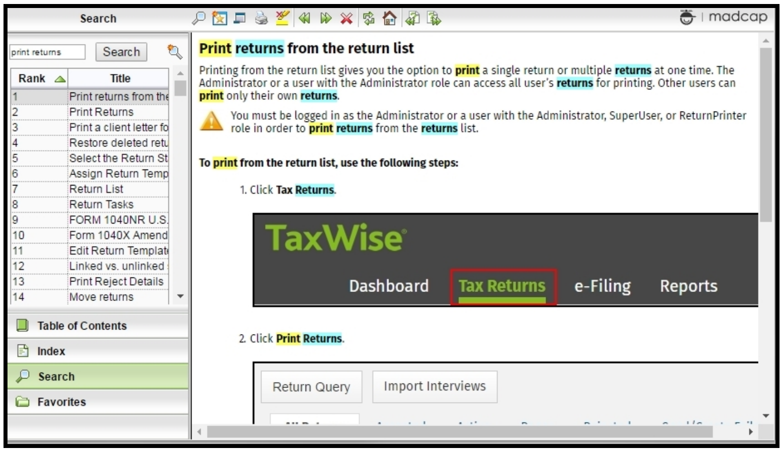
advantages
Acknowledgments
View acknowledgments

## Search tab

TaxWise Online help allows you to search text in the help files. Click the **Search** tab, then enter any keyword about the topic of interest. TaxWise Online returns a list of every possible match in the help file.


Search
print
Search

To view a topic in the list that TaxWise Online help displays, simply click that topic, and TaxWise Online help displays the information in the right pane.


Search
madcap
print returns
Search
Table of Contents
Index
Search
Favorites
TaxWise
Dashboard
Tax Returns
e-Filing
Reports
Return Query
Import Interviews

| Rank | Title |
|---|---|
| 1 | Print returns from the |
| 2 | Print Returns |
| 3 | Print a client letter fo |
| 4 | Restore deleted retu |
| 5 | Select the Return St |
| 6 | Assign Return Temp |
| 7 | Return List |
| 8 | Return Tasks |
| 9 | FORM 1040NR U.S. |
| 10 | Form 1040X Amend |
| 11 | Edit Return Template |
| 12 | Linked vs. unlinked |
| 13 | Print Reject Details |
| 14 | Move returns |

**Print returns from the return list**

Printing from the return list gives you the option to **print** a single return or multiple **returns** at one time. The Administrator or a user with the Administrator role can access all user's **returns** for printing. Other users can **print** only their own **returns**.

You must be logged in as the Administrator or a user with the Administrator, SuperUser, or ReturnPrinter role in order to **print returns** from the **returns** list.

**To print from the return list, use the following steps:**

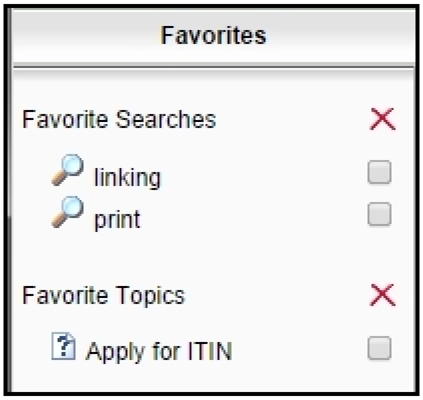
1. Click **Tax Returns**.
2. Click **Print Returns**.

All occurrences of the word(s) or phrase searched will be highlighted. To remove the highlighting, click the **Remove Search Highlighting** icon on the toolbar at the top of the screen. To add a search string to your favorites list, simply click the icon next to the **Search** button.

## Favorites tab

To add a topic to your Favorites when using the Table Of Contents or Index to navigate, open the help topic you want to save, then click the **Add Topic to Favorites** button .

The topic will then be accessible by clicking the **Favorites** tab and then selecting the topic from the **Favorite Topics** list.

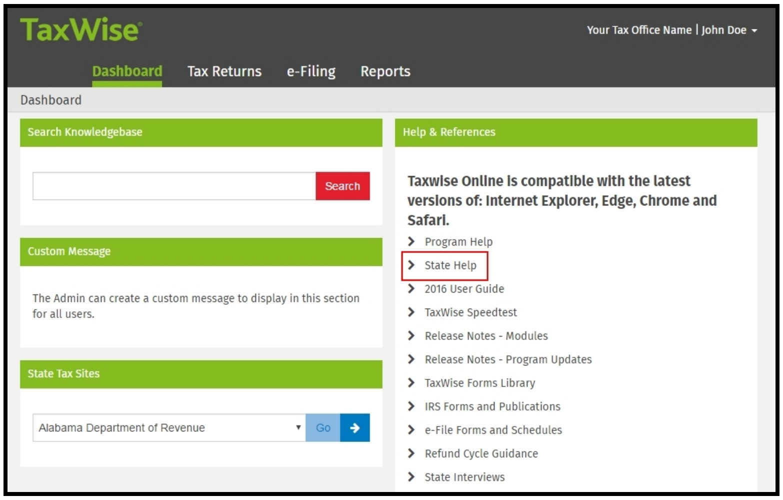

Favorites
Favorite Searches
linking
print
Favorite Topics
Apply for ITIN

To remove a topic from the **Favorite Topics** list, select the check box next to the topic, then click the red **X** at the top of the list.

# State help

**To access the state help files, use the following steps:**

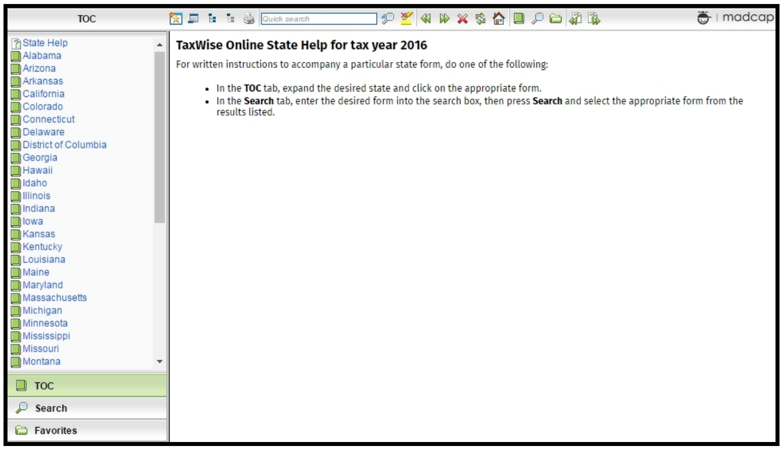
1. Click **State Help** in the **Help & References** section on the **Dashboard**.


TaxWise
Your Tax Office Name | John Doe
Dashboard
Tax Returns
e-Filing
Reports
Dashboard
Search Knowledgebase
Search
Custom Message
State Tax Sites
Alabama Department of Revenue
Go
Help & References
Program Help
State Help
2016 User Guide
TaxWise Speedtest
Release Notes - Modules
Release Notes - Program Updates
TaxWise Forms Library
IRS Forms and Publications
e-File Forms and Schedules
Refund Cycle Guidance
State Interviews

The Admin can create a custom message to display in this section for all users.

**Taxwise Online is compatible with the latest versions of: Internet Explorer, Edge, Chrome and Safari.**

2. Do one of the following:
   - On the **TOC** tab, expand the desired state and click on the appropriate form, or
   - Click the **Search** tab, type the name or abbreviation of the desired state in the **Search** box, then click **Search** to display all help references to that state. Select from the list in the left pane.
   - Click on the **Favorites** tab, click on the topic listed under the **Favorite Topics**. To add a topic to your Favorites when using Table Of Contents or Index to navigate, open the help topic you want to save, then click the **Favorites** button on the toolbar.


TOC
Quick search
madcap
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Arkansas
California
Colorado
Connecticut
Delaware
District of Columbia
Georgia
Hawaii
Idaho
Illinois
Indiana
Iowa
Kansas
Kentucky
Louisiana
Maine
Maryland
Massachusetts
Michigan
Minnesota
Mississippi
Missouri
Montana
TOC
Search
Favorites

**TaxWise Online State Help for tax year 2016**

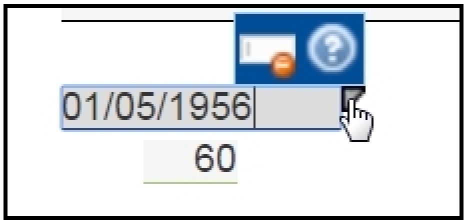
For written instructions to accompany a particular state form, do one of the following:

- In the **TOC** tab, expand the desired state and click on the appropriate form.
- In the **Search** tab, enter the desired form into the search box, then press **Search** and select the appropriate form from the results listed.

## Context sensitive help

While working in a return, when the mouse passes over a field, check box, or radio button an entry link will appear to the right for the entry. Clicking the entry link will open a smart bar that displays buttons that can be selected to either open a small window with instructions for the highlighted field or toggle the highlighted field between estimated and un-estimated.

Pictured below as an example is the birth date field found on the Main Information Sheet with the entry link and smart bar displayed:


01/05/1956
60

There are two icons on the smart bar, **Help** and **Toggle Estimated**.

Clicking the **Help** icon will open a **Context Sensitive Help** window with detailed form instructions for the highlighted field in the top, right corner of the active return.

Clicking the **Toggle Estimated** icon will toggle the highlighted field between estimated and un-estimated.

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When you have to be right