

# Suggested TaxWise Online Settings for TY 2011

December 13, 2011

**Revision History: This revision corrects the Administrator Settings, Send Settings description on page 6.**

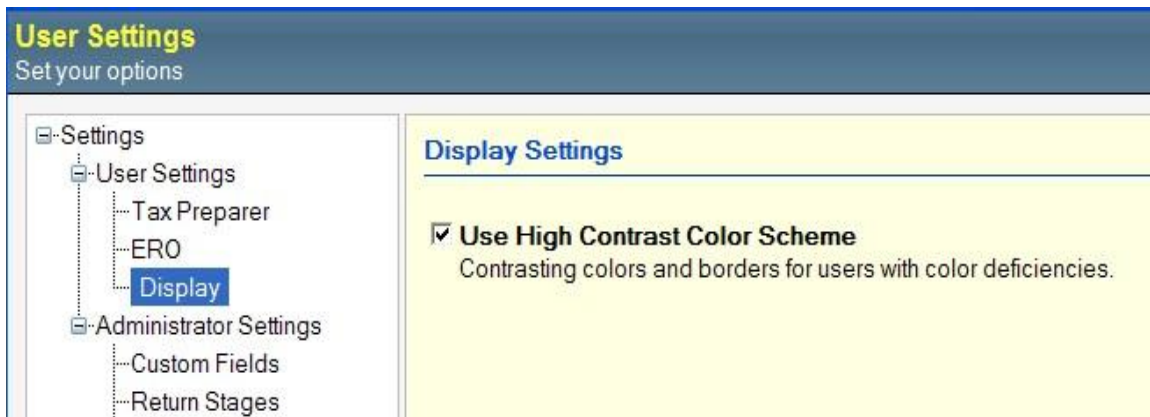
**Summary:** This document provides NTC suggested TaxWise Online (TWO) Settings and shows the procedures for setting them.

*The information that follows in this instruction is similar to that of IRS Publication 3189, but tailored for Tax-Aide use. You should also refer to the Users Guide that is available on the TWO Home Page or on your TWO DVD for additional discussion on setting up and operating TaxWise Online.*

## **Accessing the Settings**

All users have access to the Settings menu. However, the options that appear will depend on your assigned role, e.g., ReturnPreparer, Administrator, SuperUser, etc. The Admin user has access to all options in Settings. The following discussion will indicate what Settings the ReturnPreparer, Administrator, and SuperUser will have access to. For purposes of this document, to set up initial settings for all users, login as the Admin user.

The User Settings screen will appear and display a list of options. There are two subgroups: User Settings and Administrator Settings as shown in the below figure.



## **User Settings**

[The Administrator user has access to all options. The SuperUser and ReturnPreparer roles only have access to the Display option].

## **Tax Preparer**

These settings are not necessary for Tax-Aide.

## **ERO**

These settings are not necessary for Tax-Aide.

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## Display

**High Contrast Color Scheme** - You may find it desirable to change from the default color scheme to one with higher contrast. The high contrast scheme makes it easier to see the required fields. The above figure shows the High Contrast Color Scheme checked.

## Returns Shown Per Page In Return Grid

Generally, leave this set at the default of 20.

## Administrator Settings

The Administrator and SuperUser roles have access to all options. The ReturnPreparer has no access to these options.

**User Settings**  
Set your options

Settings  
User Settings  
Tax Preparer  
ERO  
Display  
Administrator Settings  
Custom Fields  
Return Stages  
Print Sets  
Advanced  
Send Settings  
Salutations

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

| Field                                      | Req Custom Question                 | Values  |
|--|-------------------------------------|---|
| <a href="#">Edit</a> Preparer Use Field 1  | <input type="checkbox"/>            |   |
| <a href="#">Edit</a> Preparer Use Field 2  | <input type="checkbox"/>            |   |
| <a href="#">Edit</a> Preparer Use Field 3  | <input type="checkbox"/>            |   |
| <a href="#">Edit</a> Preparer Use Field 4  | <input type="checkbox"/>            |   |
| <a href="#">Edit</a> Preparer Use Field 5  | <input type="checkbox"/>            |   |
| <a href="#">Edit</a> Preparer Use Field 6  | <input type="checkbox"/>            |   |
| <a href="#">Edit</a> Preparer Use Field 7  | <input type="checkbox"/>            |   |
| <a href="#">Edit</a> Preparer Use Field 8  | <input type="checkbox"/>            |   |
| <a href="#">Edit</a> Preparer Use Field 9  | <input type="checkbox"/>            |   |
| <a href="#">Edit</a> Preparer Use Field 10 | <input type="checkbox"/>            |   |
| <a href="#">Edit</a> Preparer Use Field 11 | <input checked="" type="checkbox"/> | Other than English what lang... CHINESE, FRENC... |
| <a href="#">Edit</a> Preparer Use Field 12 | <input checked="" type="checkbox"/> | Do you or any member of yo... NO, YES             |
| <a href="#">Edit</a> Preparer Use Field 13 | <input checked="" type="checkbox"/> | Enter Counselor Initials                          |
| <a href="#">Edit</a> Preparer Use Field 14 | <input checked="" type="checkbox"/> | Enter QR Initials                                 |
| <a href="#">Edit</a> Preparer Use Field 15 | <input type="checkbox"/>            | SIDN  |
| <a href="#">Edit</a> Preparer Use Field 16 | <input type="checkbox"/>            |   |
| <a href="#">Edit</a> Preparer Use Field 17 | <input type="checkbox"/>            |   |
| <a href="#">Edit</a> Preparer Use Field 18 | <input type="checkbox"/>            |   |

## Custom Fields

Entries in these fields appear in the Preparer's Use Fields that have been moved from the Main Info Form to the new Preparer's Use (Prep Use) Form this year. There are now 25 fields in this form. Prep Use form fields are made required/not required by marking the box in the appropriate field in Custom Fields. The question entered in Custom Fields will appear in the Prep Use form questions when preparing a return – it WILL NOT appear when setting up templates, which can be a source of confusion. For further instructions, if not discussed below, refer to the TaxWise Online User Guide available from the TWO Home Page or the CD that was shipped with the package.

The following changes should be made in this setting:

- Edit Preparer Use Field 11: Add "NOT ANSWERED" as the first item in the list.

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- Edit Preparer Use Field 12: Add “NOT ANSWERED” as the first item in the list.
- Edit Preparer Use Field 13: Check “Required” and enter “Enter Counselor Initials” for the question. Then click “Update.”
- Edit Preparer Use Field 14: Check “Required” and enter “Enter QR Initials” for the question. Then click “Update.”
- Edit Preparer Use Field 15: Enter “SIDN” for the question. Then click “Update.”

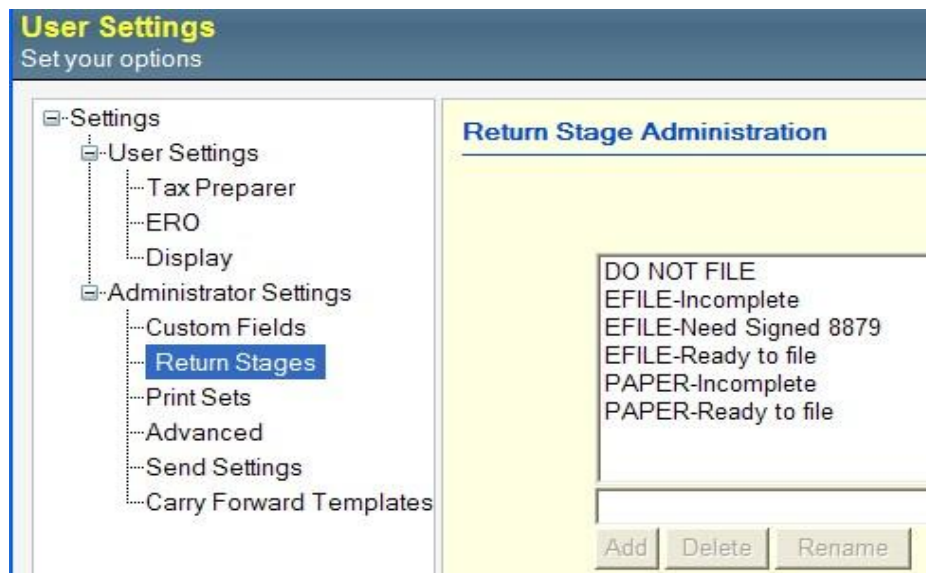
Click “Save and Close” to save your settings.

Optionally, a pick list of values can be entered in these fields that will restrict entry to only the values in the list. You may want to enter eligible counselor and QR initials in those fields.

### Return Stages

Assigning a Return Stage to each tax return is a very handy tool for quickly determining the status of the returns. Return Stages are especially useful for the ERO. It is recommended that the Administrator generate Return Stage categories and that the counselors be instructed to use them. The Return Stages option is shown in the below figure. The entries shown in the figure are suggested, not required – you can determine your own entries based on your site usage. To enter values:

- The Return Stage screen will be blank, initially.
- Decide on your desired stage descriptions and the desired order.
- Type in your first description in the bottom box.
- Click Add. This will move your text to the main box.
- Click Save and Close to save your settings.



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## Print Sets

You may find that printing the primary forms and signature forms works well for your site in which case you need only to check those two boxes. However, we also have the ability to set up our own customized print sets (Federal and State). To create your customized print sets, click “Edit My Print Set” and/or “Create my State Print Set” boxes and add the forms you wish to print, order them the way you wish them to print, and change the number of copies of each form you wish to print. The procedure for selecting forms for these print set is identical to that of the desktop version. We suggest that you create your print sets on paper, first, so you will know the order in which you wish them to print and the number of copies of each form you want. Then, add the forms in order, one-by-one according to your design until you reach the 1040 Form. At that point, you can add the balance of the forms. This procedure is recommended because it is a very laborious procedure to move a form from the bottom of the list to the top to put it in the proper order. And, you have to do it one form at a time – you can’t select multiple forms to move. Once you have created your custom print sets, “ERO Defined” and “ERO Defined State” check boxes will appear. These should be checked as shown in the below figure to print the custom sets. You will probably find this option more applicable to your use.

When finished with these settings, click “Save and Close” to save your changes.

The screenshot shows the 'User Settings' window with the 'Print Sets' option selected in the left-hand navigation menu. The main content area is titled 'Print Sets' and contains the following options:

- 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
- ERO Defined State**  
Custom State Print Set

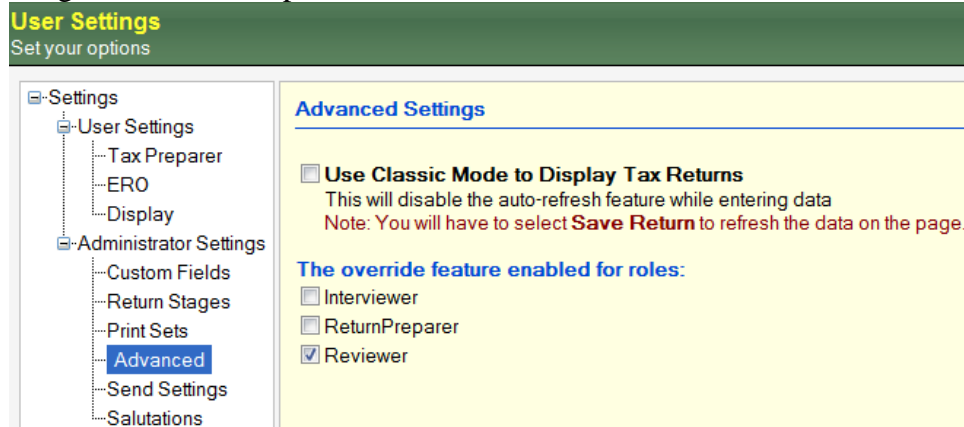
Below these options are two buttons: 'Edit My Print Set' and 'Edit My State Print Set'. At the bottom right of the window are 'Save and Close' and 'Close' buttons. Two red arrows point to the 'ERO Defined' and 'ERO Defined State' checkboxes, indicating they should be checked.

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## Advanced

Clicking the Advanced option results in the below screen.



## Use Classic Mode to Display Tax Returns

If one has a suitable high-speed Internet connection then data is written to the CCH servers as it is entered, which is the preferred mode. In this case, use of the Classic mode is not recommended. On the other hand if the page refresh is noticeably slow, you may want to switch to Classic mode which speeds up the data entry process. However, the data isn't written to the servers until a Save command is received, compared to the normal mode where fields are updated when you exit a field and the form is saved when you exit the form. Thus the following caution: **You must select the Save Return icon** to refresh the data on a page otherwise the entries will be lost. You will also not get the "Print Form" link above the Forms Tree in this mode. When using the Classic mode, caution the counselors to save the data regularly and to make saving a required procedure after finishing (or editing) a given form. The program will appear to act sluggish in this mode. It is highly recommended that you **DO NOT** use this mode except in an emergency, and then only temporarily.

## Override Feature Enabled for Roles

You can allow counselors to override by clicking the appropriate role: Interviewer, ReturnPreparer, and Reviewer. The default is to check none of these so none of these roles will be able to override a field. The NTC recommends checking Reviewer.

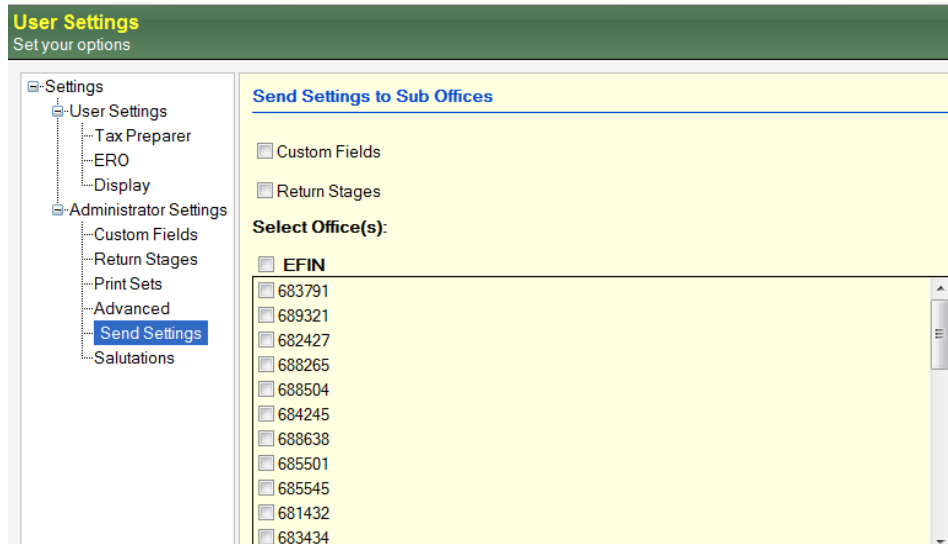
When finished, click "Save and Close" to save your changes.

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## Send Settings

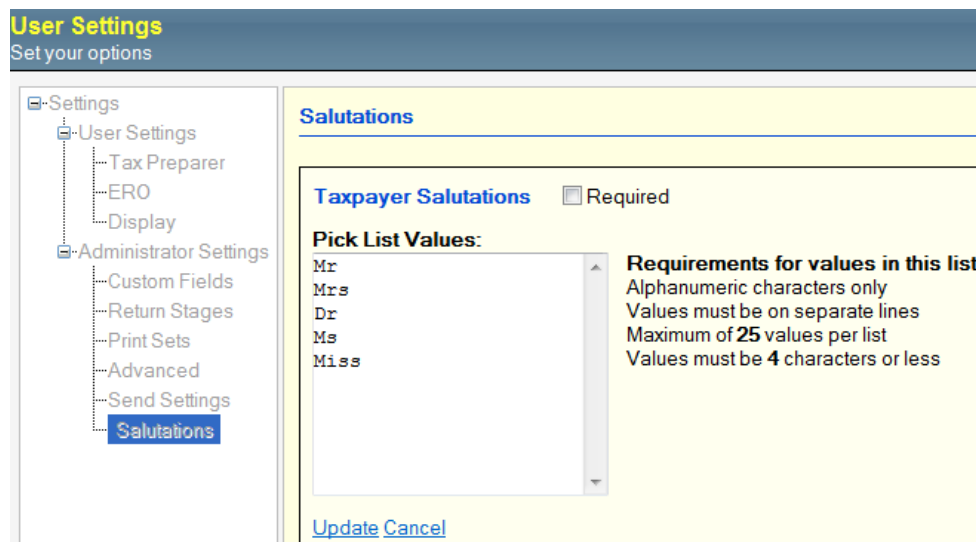
You can use this section to send the Template Publisher's Custom Fields and Return Stages settings to Template Subscriber sites. The Return Stages that are sent will be added to any Return Stages that already exist in the receiving computer.



## Salutations

This option allows you to edit the salutations for the taxpayer and spouse if the default list isn't complete for your site. The default list is shown below. You can add values if you need to, e.g., Srta, The Honorable, etc. You can also make it a requirement to use the Salutation field.

When finished, click "Save and Close" to save your settings.



Send suggestions for improving these instructions to [TaxaideTech@arp.org](mailto:TaxaideTech@arp.org).