

F.A.Q.'s for TAXWISE ONLINE

REVISED 11/02/2009

Q: With this major push toward TWO will CCH be able to handle the additional TWO volume?

A: CCH Small Firm Services is prepared to handle 3 times the current volume and can easily go beyond that by adding more servers.

Q: I am going to try out TWO at a site next season. If we don't like it can I switch back to the Desktop Version.

A: It can be done, but changes must be processed through your State IRS/SPEC Representative. Once a return is prepared and transmitted using TWO then one cannot revert to the desktop version. (Revised 11/02/2009)

Q: Will returns carry forward from last season?

A: Yes. Any returns that were e-filed under your EFIN can be carried forward. It does not matter if you used desktop or TWO last year. No specific action is required to enable this.

Q: Does the Employer database carry forward?

A: Not if you have been using the desktop version. However it will start building with TWO and will then be available in future seasons.

Q: Are prior year(s) TaxWise software available with TWO

A: Yes. TaxWise software back to 2005 is available with TWO. You just sign on for the prior year you want. (Example: <https://twonline.taxwise.com/07>)

Q Are prior year(s) returns available for viewing or amending with TWO?

A: Yes, but only for returns for your same EFIN that were prepared using TWO in the prior year. Returns aren't available on TWO for amending if they were prepared using the Desktop version. (Revised 11/02/2009)

Q: Only a wireless internet connection is available at our site. Can I use it?

A: No. Only a wired connection through a router may be used currently.

Q: I prefer to assemble the returns and do a batch e-file for better control. How do I prevent a TWO user from "sending" e-files to TaxWise?

A: You may set up the permissions for users so that specified users are restricted to preparing and printing returns only.

Q: We have a large site with two individuals that share performing the ERO functions. Can I still do this with TWO?

A: Yes. It is far easier with TWO since maintaining the database on one computer is no longer an issue. With proper authorization (permissions) set up by the site administrator others can perform most of the ERO functions.

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Q: I am concerned about controlling changes to the defaults file for our EFIN. Can I control this in TWO?

A: Yes. One can set up the permissions so that one (or more) selected users can change the return defaults (called Templates in TWO).

Q: We sometimes need to prepare returns for other states. Are any other states available on TWO?

A: Yes, all states are available; however you are cautioned that we are allowed to prepare returns only for those states for which we have received training.

Q: What happens if the TaxWise server goes down? Can we just do returns with the desktop version?

A: No, you must just wait until the server comes back up. CCH has outstanding server reliability so this doesn't often happen. Last season they suffered three sporadic outages due to patches loaded to counter the conflicker worm. These were the only outages we are aware of.

Q: If I have questions that aren't answered here, who do I contact for help?

A: You may e-mail TaxaideTech@aarp.org and a member of the National Technical Committee will contact you. During the season most questions can be handled by TaxWise support, just as in the desktop version.

Q: I would like to prepare a practice return using TWO to gain confidence. How do I do that?

A: You may log on to the TWO Training site to do this. The 2008 software will be updated to the 2009 version on or after November 23, 2009. Refer to the Technology Management Guide, Software Section, for instructions. The TCS Bulletin 2009-09, Consider TaxWise Online for 2010, also provides this information.

Q: What's the status on using I.E. 8.0 with TWO?

A: CCH has indicated that the 2009 software will be fully compatible with IE 8.0, although it is not required.

Q: Our primary site has high-speed internet available, but we also visit a few shut-ins and one day sites that may not have internet access. Can we get the desktop version for these visits?

A: No. An EFIN is permitted for either a desktop or on-line version of the software, but not both.