

To: TCS
Cc: SC, NLT, NTC
From: Bob Willis NTC Chair and the National Technology Committee
Subject: TCS Bulletin 2009-09: Consider TaxWise Online for 2010

The AARP Tax-Aide program and the National Technology Committee (NTC) strongly urge the use of the online version of TaxWise (TaxWise Online, known as “TWO”) for the upcoming tax season wherever possible. At every site, coast to coast, that used TWO last season, AARP Tax-Aide volunteers say that they will never go back to the desktop version of TaxWise. With reduced budgets for equipment purchases, TWO could make more computers available. It’s ideal for site provided computers and should make them more useable, because they do not require any additional software.

TWO has multiple advantages over the desktop version. The advantages include: reduced burden on volunteers, improved security, increased access, and ready availability of the program and other resources through the Internet. Read on to find out more about the advantages of TWO, the TWO training site, and minimum hardware requirements for your sites to use TWO this season.

Advantages to TWO :

- ☐ Reduced Burden on volunteers
 - No installation on individual computers - program maintained on CCH server
 - No updates required – updated by CCH.
 - No need to backup, restore or transmit returns – data already at CCH
 - Carry forward of prior year taxpayer data is automatic
 - No Encryption software required - the link to CCH is already encrypted
 - Computers used at multiple sites, each with its own EFIN, require no special setup. Just login to the EFIN for the site where you are volunteering today!
 - EROs who go on vacation or get sick during the tax season can hand-off their duties to a backup ERO without having to do anything to transfer the transmitting installation of TaxWise to the backup volunteer’s computer.
- ☐ Improved Security
 - No data is stored locally on individual computers - CCH stores all data
 - Intrusion detection – CCH uses software to reduce the threat of hackers
- ☐ Access from any computer with proper identification and a broadband Internet connection
 - No practical limit on the number of concurrent returns that can be prepared
 - The TaxWise Desktop maximum limit of 10 simultaneously-attached workstations for client/server networking does not apply
- ☐ Ready availability – nothing to install on computer
- ☐ Ideal use for site provided computers
- ☐ Concurrent access to all other Internet resources while preparing the taxpayer’s return, including:
 - The TaxWise support website
 - The AARP Tax-Aide ExtraNet website
 - The IRS website
 - State Department of Revenue websites
 - City and county websites for checking on what property taxes a taxpayer may have paid
 - The taxpayer’s bank’s website to look up a direct deposit routing and account number

You do need reliable broadband Internet access to use TWO and it must have a speed of at least 800 kilobits per second. Your broadband speed can be tested at <http://speedtest.taxwise.com>.

NOTE: If your site has broadband Internet access, the site may be able to provide you with a cable to access the Internet from where you do tax returns. Just ask! You may be surprised that they can hook you up; it's not that difficult. You will need a wired router to connect multiple computers and a printer for tax returns. If the facility already has a router, you can use a switch to connect additional computers and a printer to the cable from the facility's router. If your facility does not have Internet access available, your phone, cable or other broadband provider may be willing to provide the service for the tax season at no charge, if you just ask.

TRY TWO today: If you were a licensed TaxWise Desktop user last year, there is a training site available that you can log-on to and try TaxWise Online right now.

Log into <https://twonline.taxwise.com/training/> with your Client ID.

- 1) You must use Internet Explorer version 7 or later.
- 2) Use ADMIN as the Username and use the Password that you used to log into the TW Support website. This should take you to TWO as the Administrator. Note that you cannot create returns in this mode.
- 3) Select [Manage Users], create a new user (case sensitive), click "Close" on the Manage Users window and log out. This should take you back to login.
- 4) Use your client ID again and enter your new user for both the user name and password. This will prompt you to create a new password. The password cannot be any that was used previously.
- 5) Once you are logged in, enter a training SSN (this Training SSN must use the last four digits of your EFIN as its last four digits) and then select either [Go To Forms] or [Go To Interview].
- 6) Prepare a training return. Note that you can switch from Forms to Interview and vice versa.

If you are using Internet Explorer 8.0 you may need to click on the Compatibility View Button on the dropdown 'Tools' menu on the IE tool bar or add "TaxWise.com" to the list of sites to be viewed in Compatibility mode on the same 'Tools' menu, Compatibility View Settings page, to properly view Tax Forms in TaxWise. Also our experienced TWO users tell us that the actual TWO is faster than the Training website and the Practice Lab.

See Pub 4012 and Pub 3189 for additional information on TWO. There is also a TaxWise Online (TWO) 'User Guide' that is available on the training website shown above and it is on the TaxWise 2008 CD. Also be aware that our experienced TWO users have told us that the actual TWO program is faster (more responsive) than the training website.

If you do not have a current TaxWise Client ID and EFIN, your ERO can set you up as a user under their EFIN on the training website. Then you can log on starting at step 4 shown above.

You need to specify either the Online or Desktop version when your tax software is ordered this fall. So now is the time to check it out. It makes e-filing and its support much simpler and much more secure.

By early November you and your volunteers' can use the TaxWise Practice Lab, which allows training with the current year TWO software.

TaxWise Online (TWO)

Minimum Hardware Requirements

Pentium III Processor (NTC recommends 650MHz minimum speed)

Windows XP Professional or Home Edition, (with the latest Service Pack) or Microsoft Windows Vista
256 MB of RAM

Mouse

Super VGA 1024 X 768 color monitor with 16-bit color video card

Broadband Internet Access (at least 800 kilobits/sec)

Adobe Reader (version 8.1 or higher)

PCL6 compatible printer

Internet Explorer 7.0 or later (with latest service pack)

Required Browser Settings:

Security Level: Medium

JavaScript: enabled

Download Files: enabled

NOTE: The computers being used for TWO should have a firewall installed, configured, and running, as well as anti-virus software.

Please share this message with your District Coordinators (DCs) and Technical Coordinators (TCs) and other volunteers as needed.

National Technology Committee