

CONFIGURING TAXWISE FOR TRAINING and PRACTICE

It is often beneficial for new or less seasoned volunteers to have access to TaxWise on their home computer for training and practice.

This is quite feasible provided care is taken when setting up TaxWise for such a purpose.

These guidelines are written assuming TaxWise 2006 is the Prior Year software used 2006.

1. The prior year software **MUST** be used.
2. If training is started prior to the release by UTS of the "Prior Year" EFIN and Registration Code then TaxWise should be registered using a regular "live" EFIN for the District concerned.
The Prior Year EFIN is always 070743.
The Prior Year Registration Code for 070743 is not released by UTS until October when the e-filing season for the current tax year ends.
3. TaxWise is configured such that the user **cannot** transmit returns to the Electronic Filing Center.
4. The TaxWise ADMIN user is password protected and the password is not revealed.

All TaxWise usernames belong to a group of users which is defined in the TaxWise Security Manager. The default usergroups are:

Administrator
SuperUser
Training
Demo

SuperUser is the group most generally used by Tax-Aide for work during Tax Season. A user belonging to the SuperUser Group can do everything in TaxWise except some of the functions that are reserved solely for the Admin user.

The above Usergroup capabilities are locked in place and cannot be changed. However additional Usergroups can be created.

The default **Training** UserGroup has special restrictions. Specifically it forces the use of the EFIN as a part of the SSN used for a return, and it provides the capability to transmit returns to the Training Electronic Filing Center. Useful for training Transmitters (EROs) but may be confusing for general TaxWise users.

For Training and Practice work a special Usergroup should be established. The name can be whatever you choose, however TATRAN is appropriate.

TATRAN should be set up in the **TaxWise Security Manager** as follows:

1. Start TaxWise and log in as ADMIN
2. Go to the Security Manager
3. Click on Groups, then on New.
4. Enter TATRAN as the USERGROUP name.
5. Enter "Group for TaxAide Training" as a description (Optional)
6. Follow the table below and move "actions" into the right column.

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AVAILABLE ACTIONS	MOVE TO GROUP ACTION for TATRIN	CHECK DONE
Acknowledgments	YES	
Align Checks	NO	
Apply Updates from Diskette	YES	
Backup to Disk	YES	
BNA Tax Planner	NO	
Carry Forward Prior Year Data	YES	
Classic Print Defaults	YES	
Classic Print Return(s)	YES	
Classic Print This Return	YES	
Client Diary	YES	
Client Organizer	YES	
Compose/Send Message	NO	
Copy Proforma Files	YES	
Copy Updates to Diskette	YES	
Delete Pending e-files	YES	
Edit Check Range	NO	
Edit History List	NO	
Edit Payments	NO	
Edit Tax Form Defaults	MAYBE if required	
Erase e-files	MAYBE if required	
Export/Import EIN Database	MAYBE if required	
Fix Rejected Products	NO	
Get Acks Directly from State	NO	
Get Acks, Mail and Updates	NO	
Get E-Mail	NO	
Import Data	NO	
Install Federal Updates	YES	
Install Fonts	YES	
Install Soft Fonts	YES	
Install State/Bank Updates	YES	
IRS VITA Test	YES	
Mailing Labels	NO	
Make Direct State e-files	YES	
Make Extension e-files	YES	
Make IRS e-files	YES	
Make Office Files	YES	
New Return	YES	

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Non-Returning Client Log	YES	
Open Return	YES	
Override (F8)	MAYBE – up to local policy	
Print Blank Forms	YES	
Print Check Alignment Form	NO	
Print Checks	NO	
Print Return(s)	YES	
Print This Form	YES	
Print This Return	YES	
Printer Setup	YES	
Reindex Database	YES	
Reports List	YES	
Reprint Checks	NO	
Reset DCN for Returns	YES	
Restore From Disk	YES	
Search/Query for Taxpayer	YES	
Send Extension Returns To	NO	
Send Federal/State Returns To	NO	
Send TaxWise Mail	NO	
Setup Options	YES	
System Snapshot	NO	
Tax Estimator	NO	
Tax Form Defaults	YES	
TaxWise Explorer	YES	
Transfer Federal Updates	YES	
Transfer State/Bank Updates	YES	
Transmit DB Report	NO	
Uninstall State/Banks	YES	
Update RAL Applications	NO	
Utilities/Setup Options	YES	
View Authorization	YES	
View/Edit Check Ranges	NO	

7. Create a user in Security Manager (suggested name TAXAIDE) and assign that user to the new TATRAN UserGroup.

When/if the time comes for the computer concerned to be used for production work all that is needed is to change the assignment of TAXAIDE from TATRAN to SuperUser.