

MULTIPLE-EFIN SETUP

TaxWise Setup for Computers
Used At More Than One Site

Computers at Multiple Sites

- With or Without Networks, some things are the same
- Different Sites have unique SIDNs and EFINs

SIDNs and EFINs . . .

- Every site where returns are prepared has a unique **Site Identification Number** – a **SIDN**

- Every site where e-files are prepared also has a unique **Electronic Filing Identification Number** – an **EFIN**

Why Multiple-EFIN Setup?

- ❑ May be discretionary for interoperability
 - ❑ All computers in a district can be set up to work at any site in the district
- ❑ May be mandatory for computers used at multiple sites, each with its own EFIN.
 - ❑ TaxWise site-license rule
 - ❑ Exceptions for “one-day” and “ad hoc” sites
 - ❑ See TMG and Pub 3189 for details

This presentation covers the mandatory case.

If possible, Use TWO

Using TaxWise Online avoids the multiple-EFIN setup problem of TaxWise Desktop.

Just log-in to the EFIN where you are working today!

If possible, Use Networks

Using Private Networks (LANs) can solve many configuration issues:

- ❑ Allows computers to be used as workstations at different sites without actually installing TaxWise on them
- ❑ Server computer can also be used as a workstation at other sites
- ❑ Avoids complex multiple-EFIN setups
- ❑ Simplifies Printer Sharing

If possible, Use Networks

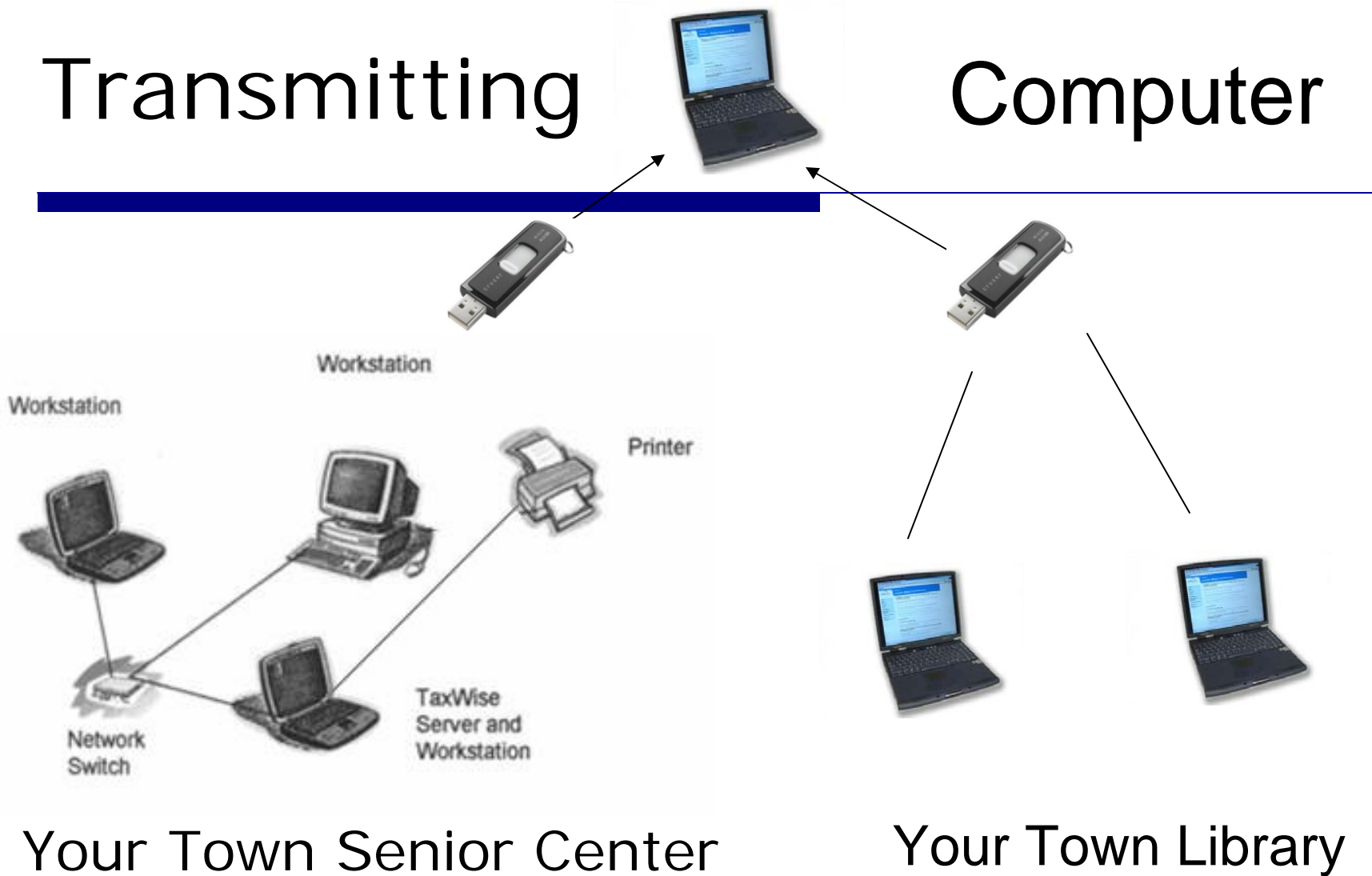
Using Private Networks (LANs) can also solve many operational issues:

- ❑ Eliminates backup from Preparing and restore to Transmitting computer
- ❑ Fewer TaxWise installations to keep Up-To-Date
- ❑ More secure because only server computers contain Taxpayer data

Networking TaxWise Procedures available on AARP ExtraNet

Transmitting

Computer



SPECIAL SITUATIONS . . .

- Sometimes a computer is used at more than one site with a different EFIN for each site
- And sometimes a computer actually transmits efiles for more than one site with different EFINs
 - A special kind of registration code makes this possible

THE 20-DIGIT ALPHA-NUMERIC TRANSMIT CODE . . .

- ❑ This code – called an XMIT code – is not the same as the standard 20 digit alpha-numeric REG code for an EFIN
- ❑ XMIT codes allow returns to be created on and transmitted from a single computer for more than one EFIN without changing TaxWise Setup Options
- ❑ XMIT codes must be requested through your SPEC Office or directly from CCH

Ordering an XMIT code

- When an XMIT code is ordered, the order must specify the two EFINs involved and the relationship between them.
- The order should be worded, "a Transmit Code that allows EFIN-A to transmit for EFIN-B" and should specify the EFINs by number.

INITIAL SETUP . . .

- Complete the setup screens as usual
 - Company – your PRIMARY EFIN
 - General – set DCN (just a counter)
 - Must be UNIQUE within the site
 - Must be DISTINCT from one site to another within the area where it will be used
 - Do not change during season
 - Printer
 - Indirect Transmitter
 - Direct Transmitter (MAKE NO ENTRIES)
 - Color – must click FINISH to save settings

REGISTER SOFTWARE . . .

- Register Software dialog box will appear, showing your Primary EFIN
- Put in your standard 20-digit alphanumeric REG code for **that** EFIN
 - Note that you'll be back at the TaxWise main page.
 - Click Tools, Utilities/Setup Options to return to the Utilities screen

REGISTER TAXWISE TO TRANSMIT FOR MULTIPLE LOCATIONS . . .

- Click Setup, Register Software
- Put in the secondary EFIN for which you will transmit or prepare returns
- Press TAB, and put in the special XMIT code for that EFIN as the Registration Code
- Repeat as needed for additional EFINs

Create the Users . . .

- There must be a separate User created for each EFIN

- Set defaults for these Users
 - Form 8879 – EFIN, SIDN, Site Address information
 - Main Info – SIDN
 - Sales Tax Deduction Worksheet defaults

TRANSMITTING COMPUTER . . .

- has EFIN **281151** but will also transmit for EFIN **281152**

TRANSMITTING COMPUTER -- GOING TO ONLY 2 SITES, TRANSMITTING FOR BOTH

Company Screen
NEVER CHANGES EFIN-RegCode Dialog Box (RegCode/XMIT Code Entries)

281151	281151	L9HJ	2223	2244	A222	6W4M	←...RegCode
	281152	6AHJ	2223	2244	A222	NG9G	←...XMITcode

NON-TRANSMITTING COMPUTERS

- Transmit Codes can also be used by computers going to multiple sites if the computer will **NOT** transmit any returns.
- Just back-up prepared returns for each site and restore them to the Transmitting Computer for that site.

NON-TRANSMITTING COMPUTERS

- Going to 4 sites

NON-TRANSMITTING COMPUTER -- GOING TO 4 SITES							
Company Screen							
Does Not Change	EFIN-RegCode Dialog Box (RegCode/XMIT Code Entries)						
281151	281151	L9HJ	2223	2244	A222	6W4M	<---RegCode
281151	281152	6AHJ	2223	2244	A222	NG9G	<---XMITcode
281151	281153	EAHJ	2223	2244	A222	NUS7	<---XMITcode
281151	281154	NAHJ	2223	2244	A222	6J7S	<---XMITcode

TRANSMITTING COMPUTERS

- Only install XMIT codes on those Transmitting Computers that will transmit **ALL** returns for the EFINs using XMIT Codes
- Must always have the Primary EFIN on the company screen when
 - sending returns
 - getting acknowledgements
 - using TaxWise e-mail

TRANSMITTING COMPUTERS

- When there are separate Transmitting Computers for the sites whose Preparing Computers use XMIT codes...
 - Each Transmitting Computer registers **only** its REG code and **not** its XMIT code.

TRANSMITTING COMPUTERS

- ❑ Separate Transmitting Computers cannot prepare returns for the sites they don't transmit for by using a single set of Setup Options.
- ❑ If they need to prepare returns for another Transmitting Computer, they will have to use a setup method using multiple separate EFINs...

MULTIPLE SEPARATE EFINS

- ❑ Multiple EFINS can also be registered separately to TaxWise one at a time using their REG codes without using XMIT codes
- ❑ This is a less preferable option because the Setup Options in TaxWise have to be reset when starting a session at a different site

MULTIPLE SEPARATE EFINS

- ❑ **Multiple-EFIN setups without XMIT codes** require that the EFIN being used be listed on the Company page of Setup Options.
- ❑ This can be done manually – OR
- ❑ **TW Make Icons**, part of the FL1 Clone Tools, can be used to automate this task by building a unique desktop icon for launching TaxWise set up for each site.
[A description of this tool is posted on the Technology page of the AARP Tax-Aide ExtraNet.](#)

TRANSMITTING COMPUTER . . .

- Going to 4 sites, transmitting for 2

TRANSMITTING COMPUTER -- GOING TO 4 SITES, TRANSMITTING FOR 2							
Company Screen							
<u>MUST BE RESET</u>	<u>EFIN-RegCode Dialog Box (RegCode/XMIT Code Entries)</u>						
281151	281151	L9HJ	2223	2244	A222	6W4M	<---RegCode
281151	281152	6AHJ	2223	2244	A222	NG9G	<---XMITcode
281153	281153	EAHJ	2223	2244	A222	NV5V	<---RegCode
281154	281154	NAHJ	2223	2244	A222	6LYA	<---RegCode

NON-TRANSMITTING COMPUTERS

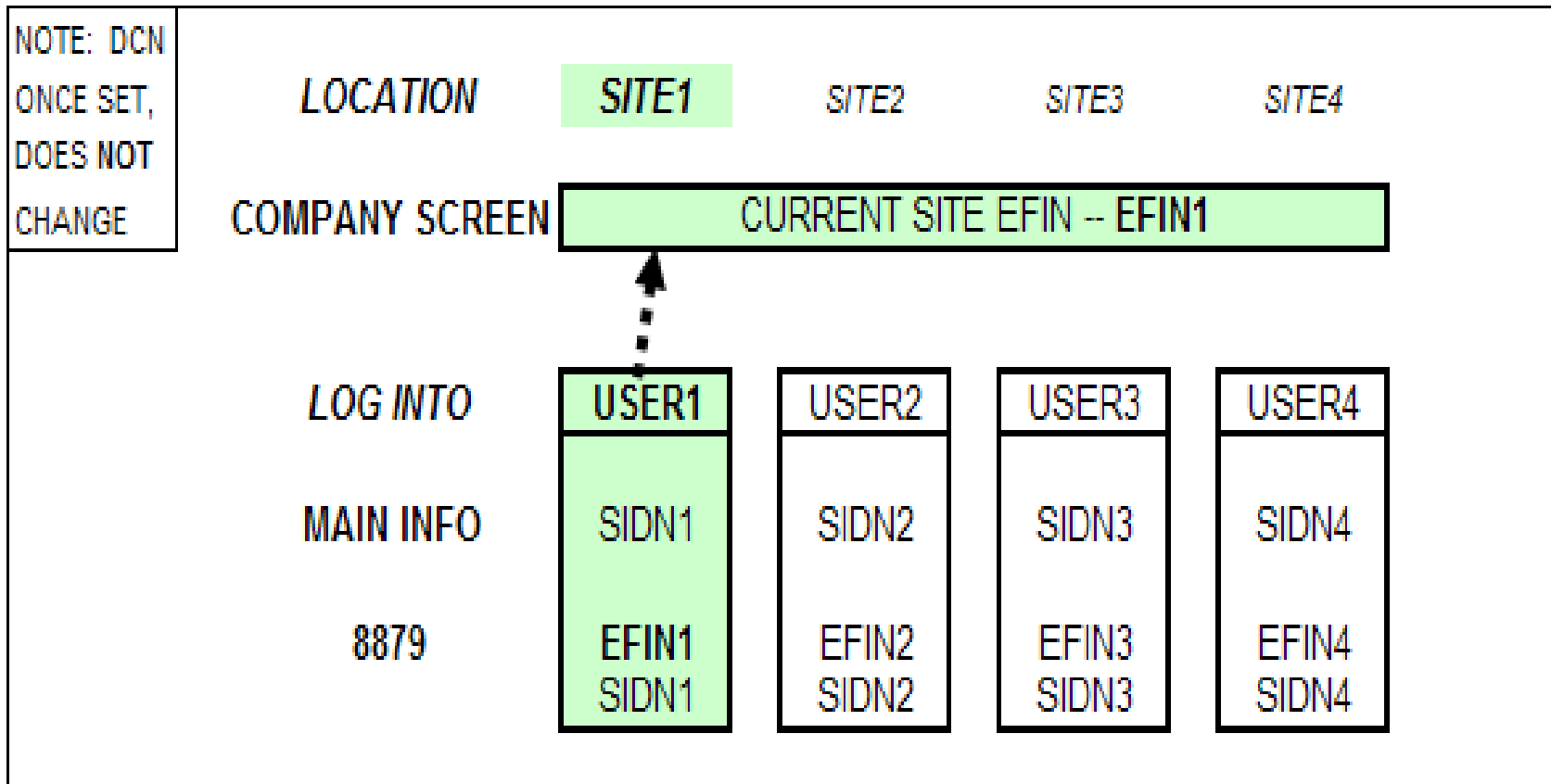
- ❑ must reset the EFIN on the Company Screen when going from site to site

COUNSELOR COMPUTERS BEING USED AT ALL 4 SITES

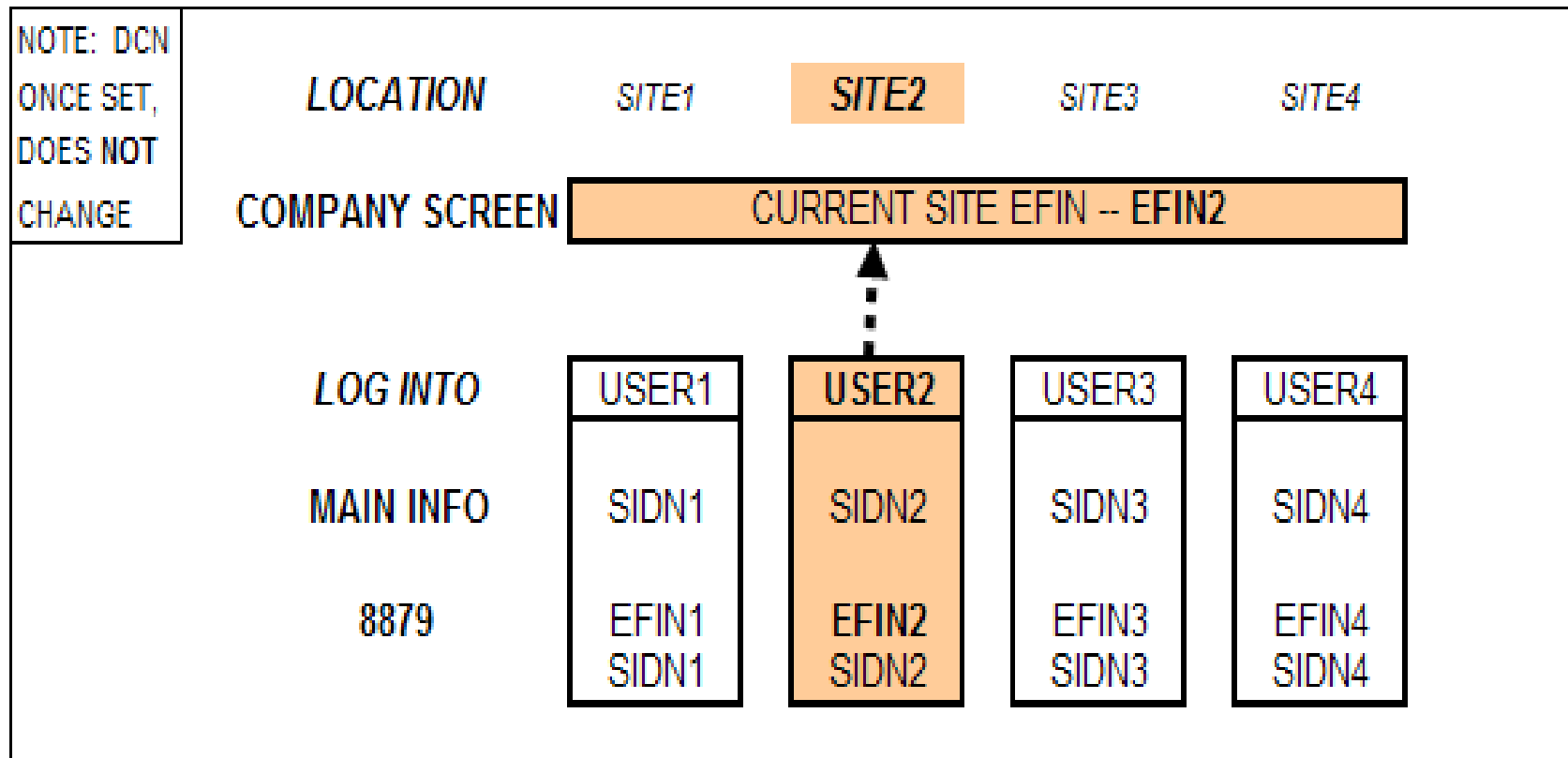
<u>Company Screen</u> <u>(Reset each time)</u>	<u>EFIN-RegCode Dialog Box (Initial RegCode Entry Only)</u>					
281151	281151	L9HJ	2223	2244	A222	6W4M
281152	281152	6AHJ	2223	2244	A222	6ZKZ
281153	281153	EAHJ	2223	2244	A222	NV5V
281154	281154	NAHJ	2223	2244	A222	6LYA

- ❑ The next 4 slides illustrate these changes

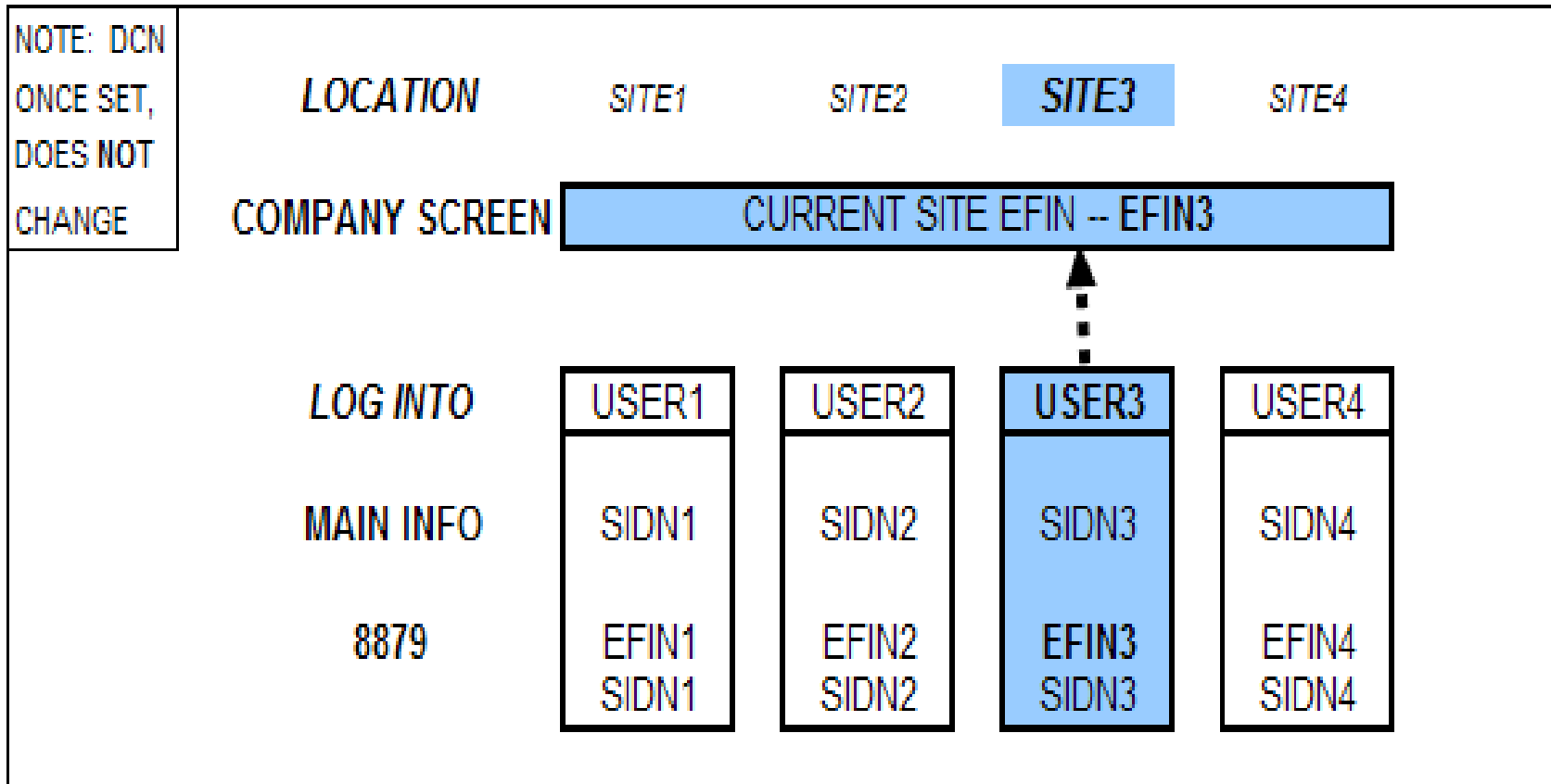
REGISTER COMPUTER FOR FIRST SITE



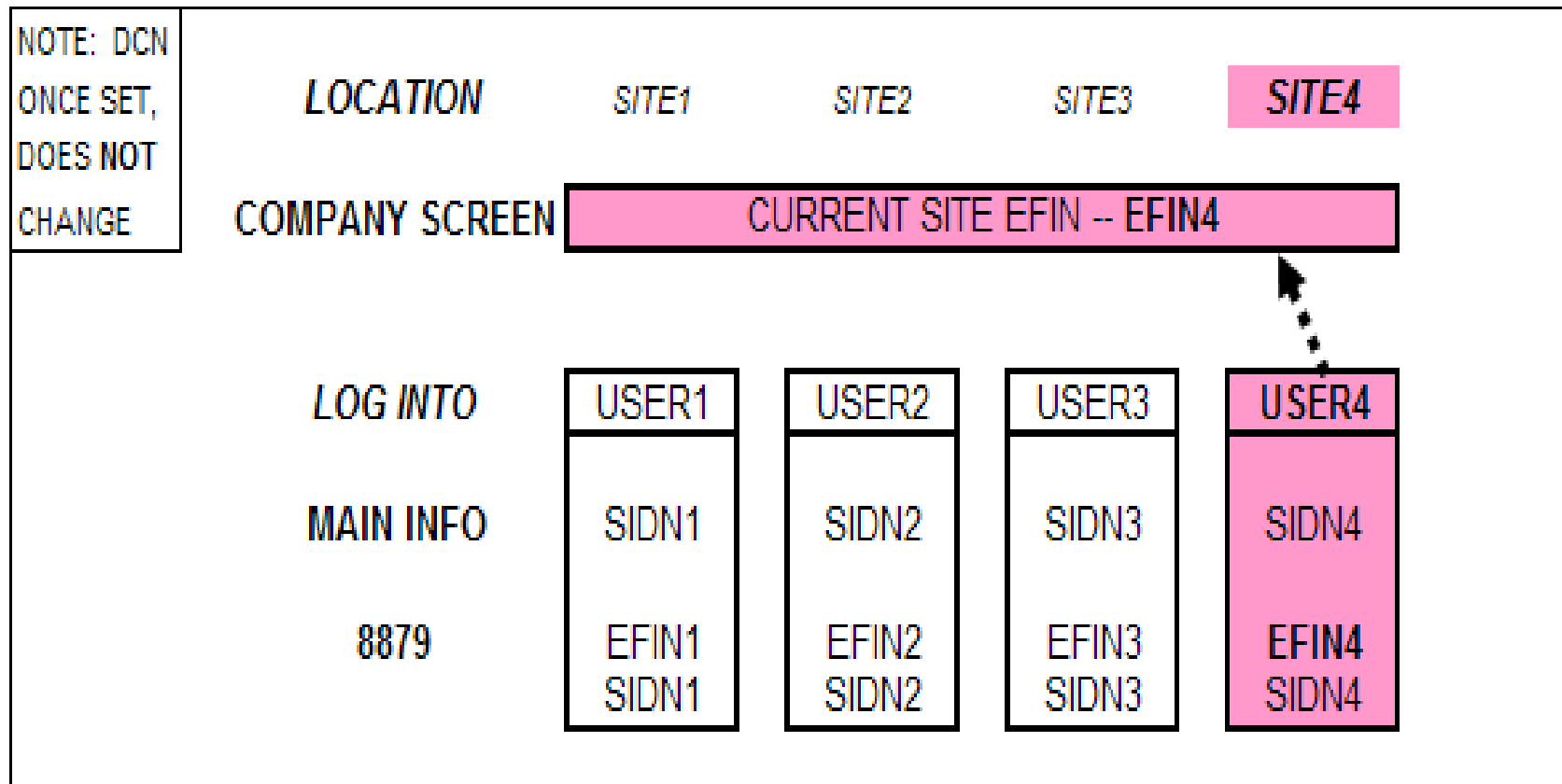
RE-REGISTER COMPUTER FOR SITE2



RE-REGISTER COMPUTER FOR SITE3



RE-REGISTER COMPUTER FOR SITE4



MULTIPLE-EFIN SETUP SUMMARY

4 OPTIONS:

1. **Use TaxWise Online** whenever possible to completely avoid this issue.
2. **Use client/server networking** whenever possible to avoid complex multiple-EFIN TaxWise setups.
3. **Use XMIT codes** to establish multiple-EFIN setups that do not have to be changed.
4. Last option is to **use changing multiple-EFIN setups** with REG codes only -
There is a tool to automate this option.

MULTIPLE-EFIN SETUP

THE LAST WORD

- There have been proposals for and experiments with installing multiple copies of the same year of TaxWise on a single computer.
- This approach is **NOT** recommended or supported!

Multiple-EFIN Setup

Questions ???