SUMMARY: This document answers some common questions encountered by users as they contemplate the switch to TaxWise Online.

Q: Some sites had difficulty in maintaining a reliable connection to the CCH servers during the past season. What can be done to improve this?
A: This issue is sometimes your local connection reliability or ISP issues, but CCH Small Firm Services had some difficulty with server availability as well. They recognize the TWO issues from the 2011 season, and have assured both the IRS and Tax-Aide that they have taken steps to upgrade reliability.

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 you cannot revert to the desktop version.

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 years TaxWise software available with TWO?
A: Yes. TaxWise software back to 2006 is available with TWO. You just sign on for the prior year you want. (Example: https://twonline.taxwise.com/10). If no one with your Client ID used TWO for that year, no defaults or print packets will have been set up – the ERO should establish these before using the site to create returns.

Q: Are prior year(s) returns available for viewing or amending with TWO?
A: Yes, but only if they were prepared in TWO using the same EFIN that you are now using. Returns aren’t available on TWO if they were prepared using the Desktop version.

Q: Only a wireless internet connection is available at our site. Can I use it?
A: Yes. See the “TWO Set-up Instructions” document on the Extranet (Technology Software tab under the TaxWise Online group).

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 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.

Q: I am concerned about controlling changes to the defaults file for our EFIN. Can I control this in TWO?
A: Yes. You can set up the permissions so that only one (or more) selected user(s) 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 wait until the server comes back up. First, make sure the problem isn’t a local computer or router issue. Refer to the “Network Troubleshooting and Checklist” document on the Extranet under the Technology Hardware tab, Networking group for possible causes of network problems.

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 practice with the 2010 software even if you had a desktop EFIN last year. Refer to the “Using TWO with a desktop EFIN” document on the Extranet under the Technology Software tab, TaxWise Online group for procedures. The TaxWise 2011 software should be available on the Training site in November 2011. A Cybertax announcement will be made when the 2011 software is available for practice returns.

Q: What’s the status on using I.E. 9.0 with TWO?
A: The 2009 and 2010 software is fully compatible with IE 9.0, although it is not required. Previous versions may require IE 8.0 or using IE 9.0 in Compatibility mode.

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 to use either a desktop or on-line version of the software, but not both. It is recommended that you keep at least one site using the Desktop version of the software in your District if you need it for shut-ins.
Q: Are any changes being made to make TWO less awkward to use?
A: Yes. CCH has indicated that the 2011 version will include several enhancements, including the addition of the F1, F3, F8, and F9 function keys which will perform the same as in the desktop version.

Q: Can a master set of Tax Form Defaults be prepared for a state or district?
A: Yes CCH provides a master Federal Tax Form Template (defaults) for all EFIN’s identified to receive it.

Q: Can I modify the master Federal Template with State defaults to create a State Master Template that can be exported to other TWO sites in my state?
A: Yes, but a Template Manager and Template Subscribers must first be identified on the TaxWise software order. Then the Template Manager can prepare a Federal and State Master Template that can be sent to all the Template Subscribers. Since the State Master Template will not have EFINs, SIDNs, or site addresses, the State Master Template is used by the subscribers to create their own unique site template with these values.

Q: If I have questions that aren’t answered here, who do I contact for help?
A: During the season most questions can be handled by TaxWise support, just as in the desktop version. If you still have questions you may e-mail TaxaideTech@aarp.org and a member of the National Technical Committee will contact you.