

# Tax Wise as a Resource for Developing Information, Using Data Resources, and Tracking the Statewide Impact of EITC Community Outreach Initiatives

# CCH Small Firm Services

- Universal Tax Systems, Inc., a CCH® business, has been a leader in the professional tax software industry for the past 24 years. We offer a full range of tax compliance, accounting and practice management software programs and services for the tax and accounting professional.
- Our award-winning TaxWise line of software products is recognized for its powerful features, ease of use and industry-leading customer and technical support.
- Our 350 full-time and 200 seasonal employees are headquartered in a modern, 80,000-square-foot facility in Rome, Georgia.
- UTS was purchased by CCH, a Wolters Kluwer business, in October 2006. CCH, a leading provider of tax and accounting law information, software and services, has been serving tax, accounting and business professionals and their clients since 1913
- CCH Small Firm Services will open a new headquarters facility in Kennesaw, Georgia, in the third quarter of 2010.

# Taxwise Online vs TaxWise Desktop

- No installation required
- No need for backup or restore options (all data is stored on the CCH SFS servers)
- **TaxWise Online** uses dynamic icons in place of function keys (The F9 key will open the link to form box)
- If the internet is down, the site is down and no returns can be prepared or transmitted
- 3 pre-set print sets, 1 Custom print set, print to PDF
- Program updates and all module updates are automatically applied to web program. (state, federal, bank)
- Prior year carry forward is available for any returns that were transmitted through the CCH SFS electronic filing center.
- Installation from CD
- Must backup for return retention or if not networked.
- Function keys available to perform actions
- Returns can be prepared but not transmitted until internet connection is restored
- Customize print packets
- Must apply program and module updates manually
- Carry forward available for any prior year returns on the system.

# TaxWise Management Reports

- In this presentation we will cover:
  - Utilizing the Prep Use Fields
    - TaxWise Desktop
    - TaxWise Online
  - Running a TaxWise report from
    - TaxWise Desktop
    - TaxWise Online
    - Customer Support Site
  - Utilizing filters to get more granular report information
  - The reports that will help you manage your sites
    - IRS Summary Report (Acceptance)
    - Preparer Field Values
  - Printing and Exporting TaxWise generated reports
  - Training Opportunities

# What are Preparer Use Fields used for in TaxWise?

- There are 12 Preparer Use Fields
  - 10 Customizable Fields
- Fields 11 & 12 are set to capture IRS Required Information
- These entries are included in the tax return database
- Use to capture information helpful to each site
- Use a history list to control answers
- Create in Tax Form Defaults or Templates for all users

# Prep Use Fields

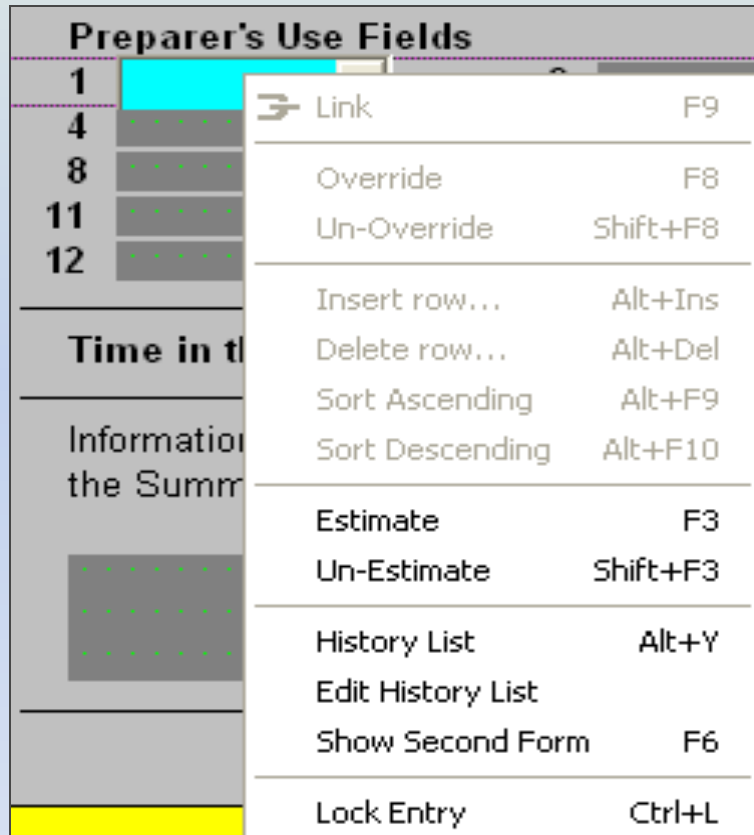
The screenshot displays the 'Prep Use Fields' section of a tax form. The form is titled 'Jackson Hewitt 2009 - 1040 Individual - Admin: Tax Form Defaults'. The 'Prep Use Fields' section is highlighted in yellow and contains the following fields:

Field	Value
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	

Below the 'Prep Use Fields' section, there are fields for 'Time in this return' (minutes), 'Tax bracket' (10.0), and 'Price' (150.00). The form also includes a section for 'Preparer Information' with fields for Preparer's ID, Name, SSN, etc., and a section for 'Preparer's Use Fields' with fields for 1-12.

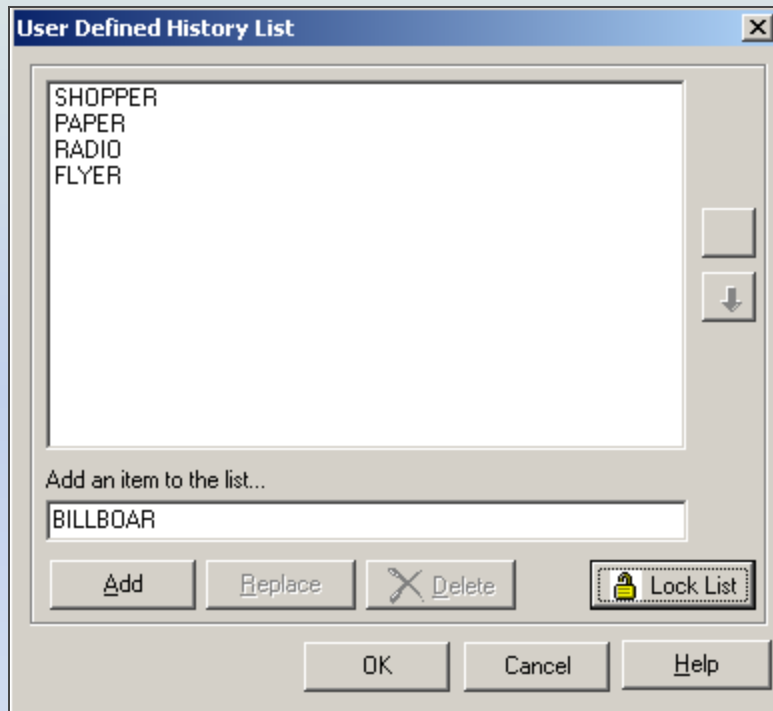
- Located on the **Main Information Sheet**
- Prep Use Fields are used to capture information **not included** elsewhere in the return
- Prep Use Fields can be setup in **Tax Form Defaults** or the **TaxWise Online Templates** to include a **history list** with an answer selection

# Steps for creating a User-Defined History list for Preparer's Use Field



- Select **Main Info** from Tax Form Defaults or Templates
- Right-click in **Preparer's Use Field**
- Click **Edit History List**
- The **User Defined History List** window will open

# Creating the History List in Prep Use Fields continued



- Enter Item in **Add an item to the list...**
- Click **Add** for each item
- Click **OK** after you have entered all of your items
- **Note:** The TaxWise Desktop report that contains this information is the **Preparer Field Values** report



# Creating Custom Questions in TaxWise Online

Custom Fields and Pick Lists for Preparer's Use

Preparer Use Field 1  Required

Custom Question:  
how did you hear about our site

Pick List Values:  
FLYER  
RADIO  
TV

Requirements for values in this list:  
Alphanumeric characters only  
Values must be on separate lines  
Maximum of 25 values per list  
Values must be 8 characters or less

Note: Other custom fields may have different requirements.

[Update](#) [Cancel](#)

- Select the **User Settings** button on the toolbar.
- Select **Custom Fields**.
- **Edit** your selected **Preparer Use Field**.
- Enter a Question that will be viewed by the preparer during the interview
- Enter pick list values
- Select **Required** to make the entry required on the Main Information Sheet.
- Click **Update**.
- Repeat the process for each **Preparer Use Field**.
- Once a User Defined History List is created the field **will be locked**.

# Using Custom Questions in the Interview

- Custom Questions page is displayed during the interview
- Select the answers from the selection box
- The answers are the designated field on the Main Info

The TaxWise Online Interview	
<a href="#">Filing Status</a>	<b>Custom Questions</b>
<a href="#">Personal Info</a>	how did you hear about our site
<a href="#">Location</a>	
<a href="#">Address</a>	Questions 2
<a href="#">Special Processing</a>	QUESTION FOR PREP USE 3
<a href="#">General Questions</a>	IRS DEFINED LANGUAGE QUESTION
<a href="#">Dependents</a>	IRS DEFINED DISABILITY QUESTION
<a href="#">Types Of Income</a>	
<a href="#">Assets</a>	
<a href="#">Adjustments</a>	
<a href="#">Deductions</a>	
<b>Custom Questions</b>	

FLYER	▼
	▼
NO	▼
SPANISH	▼
NO	▼

# Preparer Use Field on Main Info

- Information flows to the Main Information Sheet from the Interview
- Fields are available directly from the Main Information Sheet
- Required fields show up as *red*

Preparer's Use Fields			
1	FLYER	2	<u>                    </u>
4	<u>                    </u>	5	<u>                    </u>
8	<u>                    </u>	9	<u>                    </u>
11	<u>                    </u>	10	<u>                    </u>
12	<u>                    </u>		
			I 7 <u>          </u>
			SPANISH <u>                    </u> ▶
			NO <u>                    </u>

# TaxWise Desktop Reports

**Report Criteria**

**Record Filtering**

Starting date: 01/01/10  
Ending date: 12/31/10  
Date: No Date Filter  
User name:   
Preparer ID:   
State e-files only? Select state:   
Starting DCN: 000000-00000 -0  
Ending DCN: 999999-99999 -0

**Report Options**

Print summary information only  
 Include erased returns  
 Print gray bar

**Sort Order**

Sort by primary SSN  
 Sort by primary last name  
 Sort by DCN  
 Sort by ZIP

**Label Options**

Print phone number  
 Print last name first

**More Options**

Print filter information on reports  
Top Margin (inches): 0.2  
Left Margin (inches): 0.2

OK Close Help

- Located under **Reports** menu
- The **Report Criteria** screen filters based on users needs and includes
  - **Date,**
  - **User Name**
  - **Preparer ID**
- Reports can be sorted on
  - **SSN,**
  - **Taxpayers Last Name**
  - **DCN**
- Option to include **erased returns**
- Can print the **summary information** only

# TaxWise Reports Inside TaxWise Online



- There are currently **19** standard reports in **TWO**.
- **Select** the **TWO Reports** icon on the tool bar to access these reports.
- **Select** the **Generate** link for the report you wish to run.

































**(Note)** Once you have selected to **Generate** your report, you can leave the report selection page while the report is generating. **Report** generation could take up to one hour.

Name	Status	Last Generated	Download
1040X Report	<a href="#">Generate</a> None		
Awaiting IRS Ack Summary	<a href="#">Generate</a> None		
Awaiting State Ack Summary	<a href="#">Generate</a> None		
Client List w/o SSN	<a href="#">Generate</a> None		
DCN Report	<a href="#">Generate</a> None		
Daily Tax Program Statistics E-File (part 1)	<a href="#">Generate</a> None		
Daily Tax Program Statistics E-File (part 2)	<a href="#">Generate</a> None		
Daily Tax Program Statistics Paper (part 1)	<a href="#">Generate</a> None		
Daily Tax Program Statistics Paper (part 2)	<a href="#">Generate</a> None		
IRS Electronic Filing Summary	<a href="#">Generate</a> None		
IRS Summary Report (acceptance)	<a href="#">Generate</a> Complete	3/25/2010 2:56:13 PM	
Military Preparer Summary	<a href="#">Generate</a> Complete	3/25/2010 2:36:04 PM	
NTA Statistical Data	<a href="#">Generate</a> None		
Outstanding IRS Rejects Report	<a href="#">Generate</a> None		
Return Information Detail	<a href="#">Generate</a> None		

# The Customer Support site provides you with a variety of reports

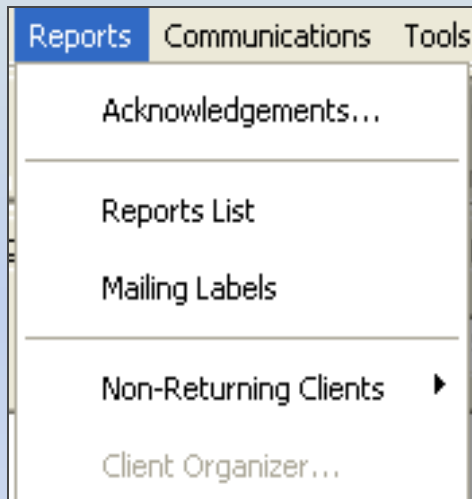
My Reports

[How do I use this feature?](#)

Reports	Subscribe
<input type="checkbox"/> Acceptance Summary Report	 
Awaiting IRS Ack Summary	 
Awaiting State Ack Summary	 
<input type="checkbox"/> Birthday Report	 
Check Print Summary Report	 
Client List	 
Client List w/o SSN	 
<input type="checkbox"/> Daily Tax Program Statistics E-File (part 1)	 
Daily Tax Program Statistics E-File (part 2)	 
Daily Tax Program Statistics Paper (part 1)	 
Daily Tax Program Statistics Paper (part 2)	 
DCN Report	 
<input type="checkbox"/> Deposited RAL/ERC Fee Summary Report	 
EFIN Acceptance Summary	 
ERC/RAL Check Counts	 
IRAL Accepted no E-file	 

- Reports include the IRS *Summary Report (Acceptance)*. This report pulls information for the dates accepted, type of return and shows the taxpayers last name
- *Prep Use Field Report* shows the ssn, last name and information from all 12 fields if populated
- Reports will include information for all *relational efin*s

# Steps for running a TaxWise Desktop report



- Login as the appropriate user
  - Users assigned to Training can also access to reports
- Open the *Reports* menu
- Select *Reports List*
- Highlight the desired report
- Press *Enter*
- Click *OK* on *Report Criteria* window

# The *Report Criteria* window allows you to customize your report

The screenshot shows the 'Report Criteria' dialog box with the following sections:

- Record Filtering:** Starting date (01/01/10), Ending date (12/31/10), Date (No Date Filter), User name, Preparer ID, State e-files only? (Select state), Starting DCN (000000-00000), Ending DCN (999999-99999).
- Report Options:** Print summary information only (unchecked), Include erased returns (unchecked), Print gray bar (checked).
- Sort Order:** Sort by primary SSN (selected), Sort by primary last name (unchecked), Sort by DCN (unchecked), Sort by ZIP (unchecked).
- Label Options:** Print phone number (unchecked), Print last name first (unchecked).
- More Options:** Print filter information on reports (unchecked), Top Margin (inches) (0.2), Left Margin (inches) (0.2).

Buttons: OK, Close, Help.

- Accept the defaults to *include all* returns
- Change the *starting or ending* date
- Choose the *type of date* you want to run your report by
  - Defaults to no date filter
  - Date created
  - Date edited
  - Printed
  - E-file created

This close-up shows the 'Record Filtering' section with the following details:

- Starting date: 01/01/2008 (with a 15-day dropdown)
- Ending date: 12/31/2008 (with a 15-day dropdown)
- Date: Created (dropdown menu open showing options: Created, Edited, Accepted, Rejected, RAL App. Accepted, Refund Deposited, Fee Deposited)
- User name: (text field)
- Preparer ID: (text field)
- State e-files or: (text field)



# Run reports for a specific EFIN if you are transmitting for multiple EFINS

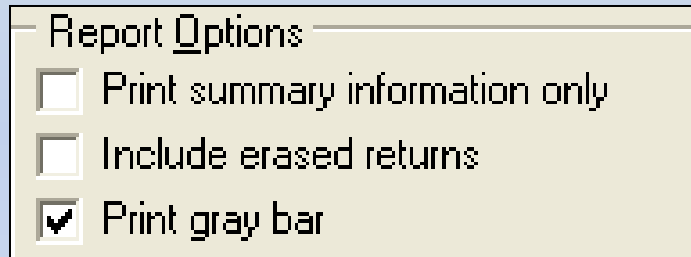
Starting DCN	<input type="text" value="000000-00000"/>	-8
Ending DCN	<input type="text" value="999999-99999"/>	-8

User name	<input type="text"/>
Preparer ID	<input type="text"/>
State e-files only? Select state	<input type="text"/>

- Enter the EFIN in the first 6 digits of the *Starting DCN* and *Ending DCN*
- *User Name*
  - Generates a report for the specific user name
- *Preparer ID*
  - Generates a report for the specific Preparer ID
- *State e-files only?*
  - Includes only the returns that have the specified state e-file

# Run a report displays totals only using

## *Report Options*

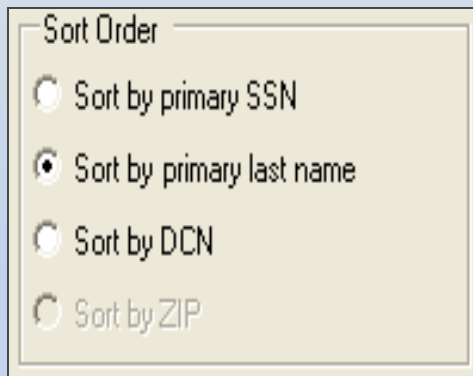


Report Options

- Print summary information only
- Include erased returns
- Print gray bar

- *Print Summary Information Only*
  - Does not show SSN details
- *Include erased returns*
  - Includes erased returns in your report totals
  - Does not indicate which returns have been erased
- *Print Gray bar*
  - Prints gray bar on alternate rows
  - Easier to review reports

# Report Criteria gives you the ability to change the order of the report



Sort Order

- Sort by primary SSN
- Sort by primary last name
- Sort by DCN
- Sort by ZIP

## ➤ *Primary SSN*

- Default option
- Returns will be listed in order by taxpayer SSN

## ➤ *Primary last name*

- Returns will be listed in order by taxpayer last name

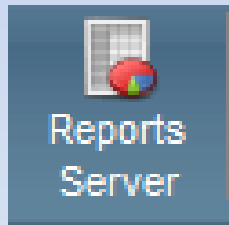
## ➤ *DCN*

- Returns will be listed in DCN order

## ➤ *ZIP*

- Returns will be listed in ZIP code order

# TaxWise Online Reports



- Taxwise Online has two options for accessing reports located on the toolbar
  - **TWO Reports**
    - Allows you to access your Reports.
    - These are TWO specific reports. They will not contain any data from desktop sites
  - **Report Server**
    - allows the user access to the Online reports on the Customer Support Site

# How to run a TWO Report

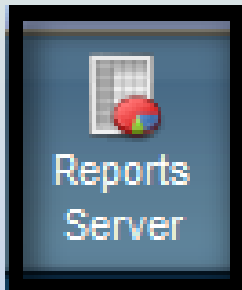


- *Select* the *TWO Reports* icon on the tool bar to access these reports.
- *Click* the *Generate* link for the report you wish to run.
- When status shows **Complete** click to download

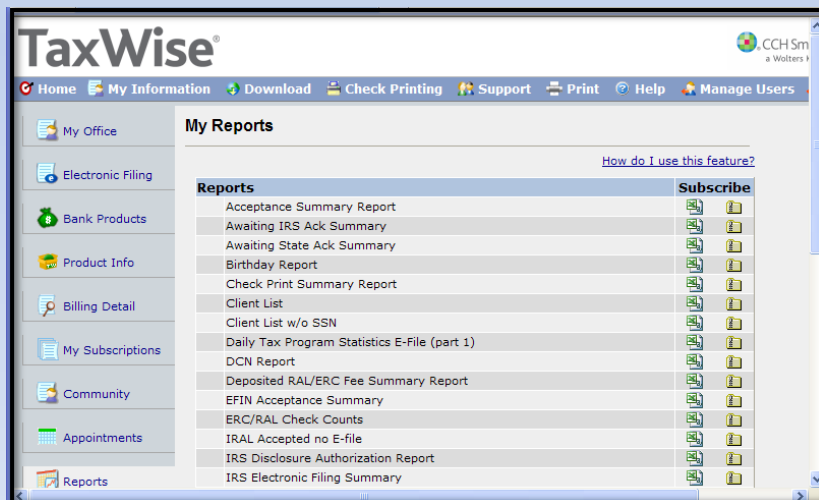
*(Note)* Once you have selected to **Generate** your report, you can leave the report selection page while the report is generating. **Report** generation could take up to one hour.

Name	Status	Last Generated	Download
1040X Report	<a href="#">Generate</a> None		
Awaiting IRS Ack Summary	<a href="#">Generate</a> None		
Awaiting State Ack Summary	<a href="#">Generate</a> None		
Client List w/o SSN	<a href="#">Generate</a> None		
DCN Report	<a href="#">Generate</a> None		
Daily Tax Program Statistics E-File (part 1)	<a href="#">Generate</a> None		
Daily Tax Program Statistics E-File (part 2)	<a href="#">Generate</a> None		
Daily Tax Program Statistics Paper (part 1)	<a href="#">Generate</a> None		
Daily Tax Program Statistics Paper (part 2)	<a href="#">Generate</a> None		
IRS Electronic Filing Summary	<a href="#">Generate</a> None		
IRS Summary Report (acceptance)	<a href="#">Generate</a> Complete	3/25/2010 2:56:13 PM	
Military Preparer Summary	<a href="#">Generate</a> Complete	3/25/2010 2:36:04 PM	
NTA Statistical Data	<a href="#">Generate</a> None		
Outstanding IRS Rejects Report	<a href="#">Generate</a> None		
Return Information Detail	<a href="#">Generate</a> None		

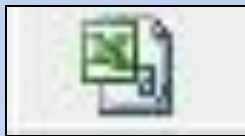
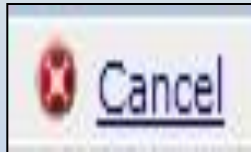
# Accessing Report Server Reports in TaxWise Online



- Select the **Reports Server** icon on the tool bar.
- **Subscribe** to the report you want. The data that the reports come from will be from a "snapshot" and the snapshot will be refreshed once a day, at 2:30AM.
- You can get assistance by clicking on the **How do I use this feature?** link.



# The **Subscribe** column allows you to manage your report downloads



































- Click the **Cancel** link to cancel a report
  - Does not delete previously generated reports
- Select the **Plain CSV** icon to download an uncompressed file
- Select the **Zipped CSV** icon to download a smaller compressed file
  - Requires a third party zip program to extract

# How do I schedule a report?

My Reports

[How do I use this feature?](#)

Reports	Subscribe
<input type="checkbox"/> Acceptance Summary Report	 
Awaiting IRS Ack Summary	 
Awaiting State Ack Summary	 
<input type="checkbox"/> Birthday Report	 
Check Print Summary Report	 
Client List	 
Client List w/o SSN	 
<input type="checkbox"/> Daily Tax Program Statistics E-File (part 1)	 
Daily Tax Program Statistics E-File (part 2)	 
Daily Tax Program Statistics Paper (part 1)	 
Daily Tax Program Statistics Paper (part 2)	 
DCN Report	 
<input type="checkbox"/> Deposited RAL/ERC Fee Summary Report	 
EFIN Acceptance Summary	 
ERC/RAL Check Counts	 
IRAL Accepted no E-file	 

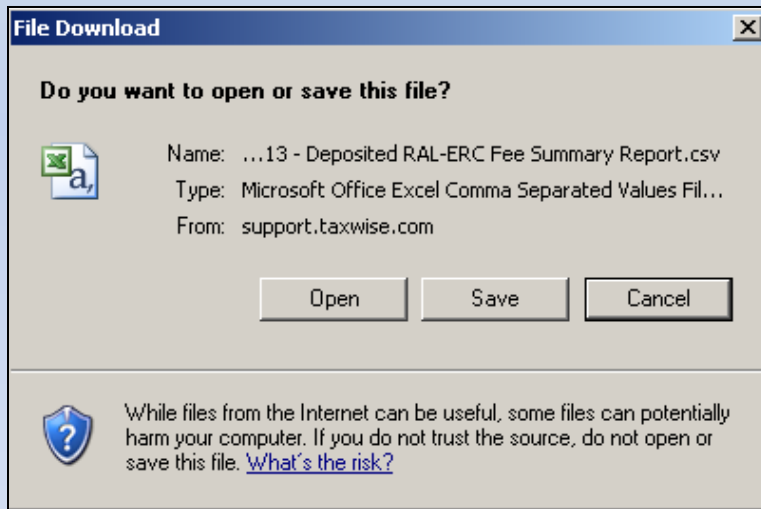
- **Subscribe** to a report by clicking on the **Excel** or **Zip file** icon.
- Once the report is available you will see a **(+) plus sign** to the right of the report name.
- Click on the **(+) plus sign** to expand the report and click on the **Download** link to open the report.
- The reports will run **daily**.
- You can save the report off and click the **Delete** link if you choose to.
- On the **Home Page** of the tax program under the **Web Resources** you can locate a document, **Report Descriptions**, that will explain what data can be found through each report.



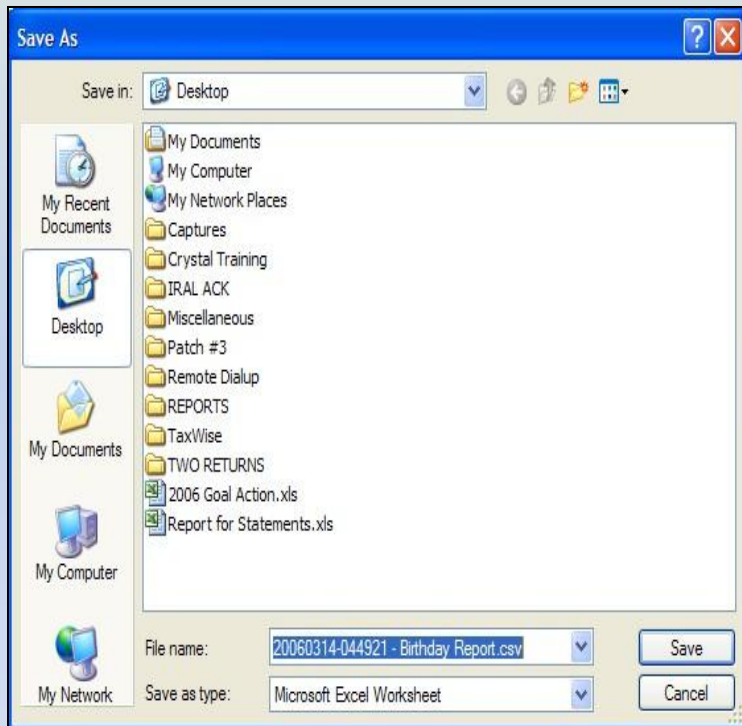
# Downloading and saving the reports to your computer is easy



- Click the **Download** link
- Select **Open** to see the report information while on the Support Site
- Select **Save** to save the file to a location on your computer





















# Saving the Report



- Select the report destination from the **Save As** window
  - We recommend you save the reports to a folder that is easily identified
- Enter your own file name or leave the default file name
- Click **Save**
- Click **Close** on the status box once the report has completed the download process

# How do I cancel a report?

Reports			Subscribe
<input type="checkbox"/>	Client List		 <a href="#">Cancel</a>
	9/24/2008 11:39:26 PM	 <a href="#">Delete</a>  <a href="#">Download</a>	
<input type="checkbox"/>	Daily Tax Program Statistics E-File (part 1)		 <a href="#">Cancel</a>
<input type="checkbox"/>	Daily Tax Program Statistics E-File (part 2)		 <a href="#">Cancel</a>
<input type="checkbox"/>	Prep Use Field Report		 <a href="#">Cancel</a>
	State returns filed		 <a href="#">Cancel</a>
	Acceptance Summary Report		 
	Awaiting IRS Ack Summary		 
	Awaiting State Ack Summary		 
	Birthday Report		 
<input type="checkbox"/>	Check Print Summary Report		 

➤ Click the **Cancel** link if you no longer need the report.

➤ Once a report is **Canceled** the options to **Subscribe** to that report will be **grayed out** until the **Report Servers** refresh.

# Managing Your Site with Reports

- Reports that will help you manage your sites include the
  - IRS Summary Report (acceptance)
  - Prep Use Field Report

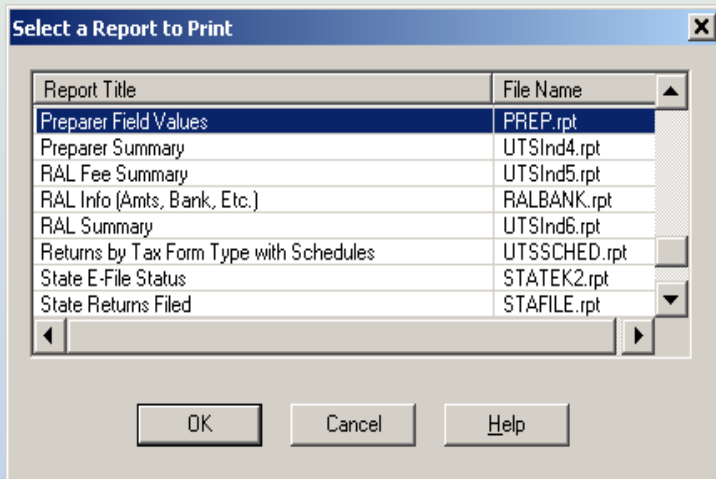
# IRS Summary Report (acceptance)

- The IRS Summary Report (acceptance) is located in
  - TW Online
  - TW Customer Support Site
- Includes information such as the
  - Type of Return
  - Filing status
  - EITC
  - Child Tax Credit
  - Education Credit
  - AGI
  - Balance Due Amount

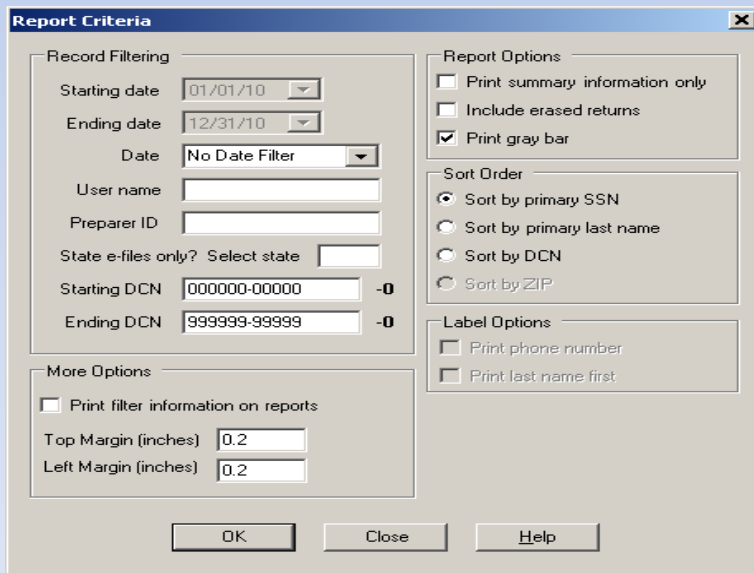
# Prep Use Field Reports

- The *Prep Use Field Report* is also named the *Preparer Field Values Report*
- Located in
  - *TaxWise Desktop*
  - *Customer Support Site*
    - Pulls information from all **Prep Use Fields**
    - Contains **site specific** information.
    - Includes information from **relational efins** when applicable
    - Reports are **generated** as needed
    - Reports can be **filtered** as desired

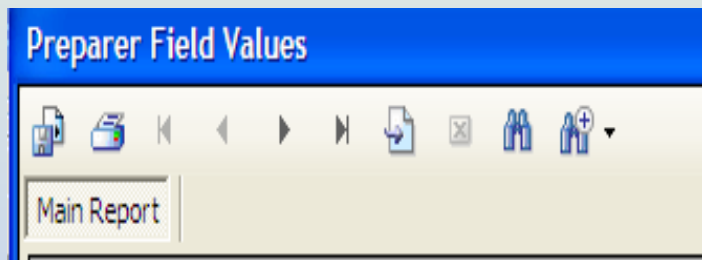
# To run a Prep Use Field Report in Desktop



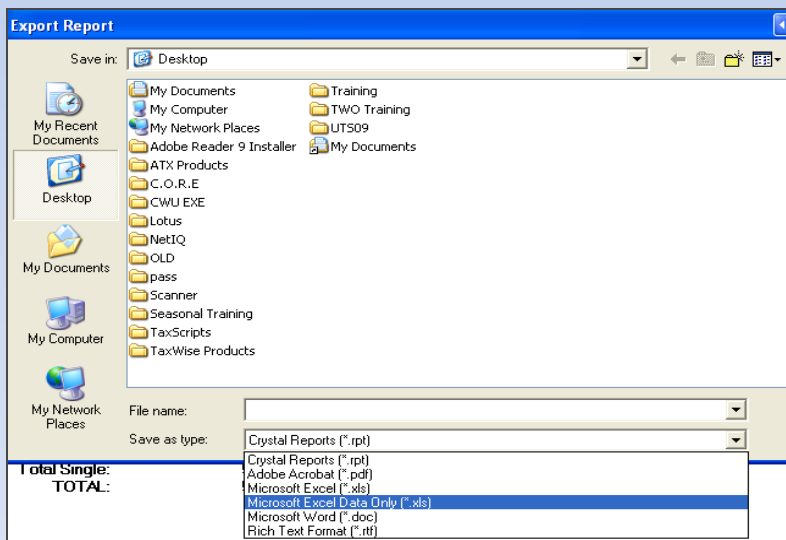
- Click on **Reports** menu option
- Select the **Preparer Field Value** report to print. Click **OK**
- Select the **Filter** option
- Click **Ok** and the report appears on screen



# Export the report information



- Click the *Export* icon
- Select the *Format* of the export file
  - PDF to store
  - Excel to edit
- Select the *Destination* of the export file
- Name the export file
- Click *Save*
- Click the *Export* icon
- Select the *Format* of the export file
  - PDF to store
  - Excel to edit
- Select the *Destination* of the export file
- Name the export file
- Click *Save*





# Preparer Field Values Report

Ver. 1

06/02/10  
4:37:30PM

**Preparer Field Values**  
TaxWise 2009

<u>SSN</u>	<u>Last Name</u>			
Prepuse 1	Prepuse 2	Prepuse 3	Prepuse 4	Prepuse 5
Prepuse 6	Prepuse 7	Prepuse 8	Prepuse 9	Prepuse 10
Prepuse 11b	Prepuse 12b			

Preparer EFIN: 009011

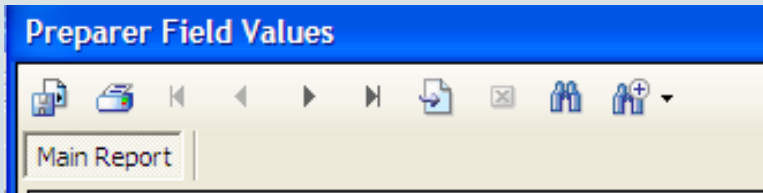
End of List

Number of Returns: 5

End of Summary for: 009011

- The **Preparer Field Values** Report lists the **Preparer Use** entries from the Main Info page for each return
- Includes the following information:
  - **SSN**
  - **Last Name**
  - **Prep Use fields 1-12**

# How to Print the Report



➤ With the **Report** open

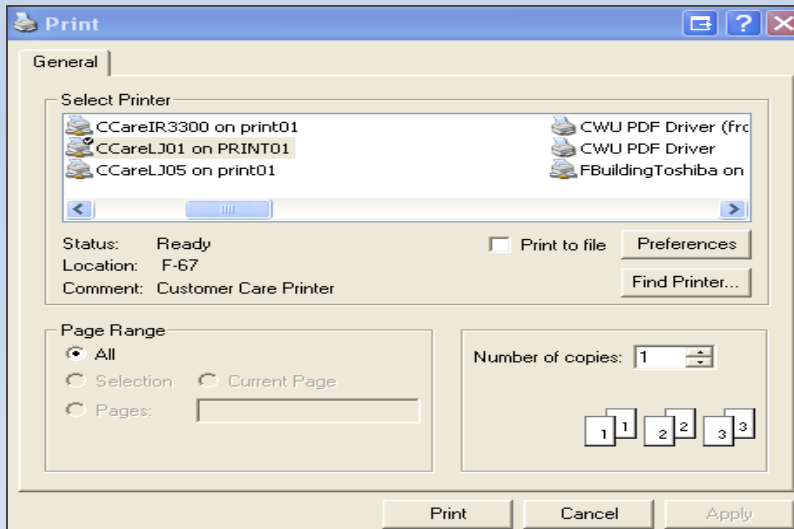
➤ Click the **Printer** icon

➤ Click **Print**

➤ Click **Cancel** to quit the printing process

➤ Close the Report window

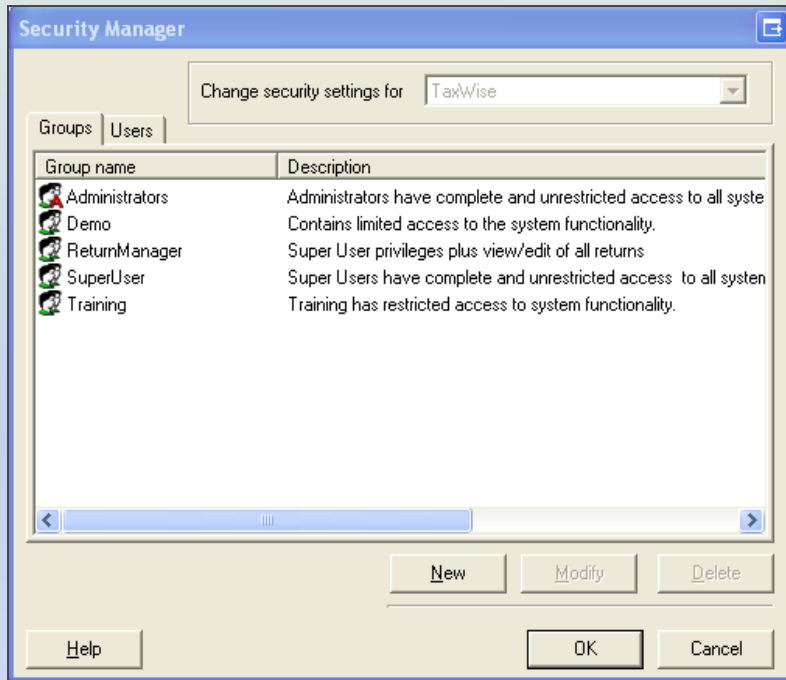
➤ Click the **X** in the upper right hand corner to close the print window



# How can I learn more about TaxWise?

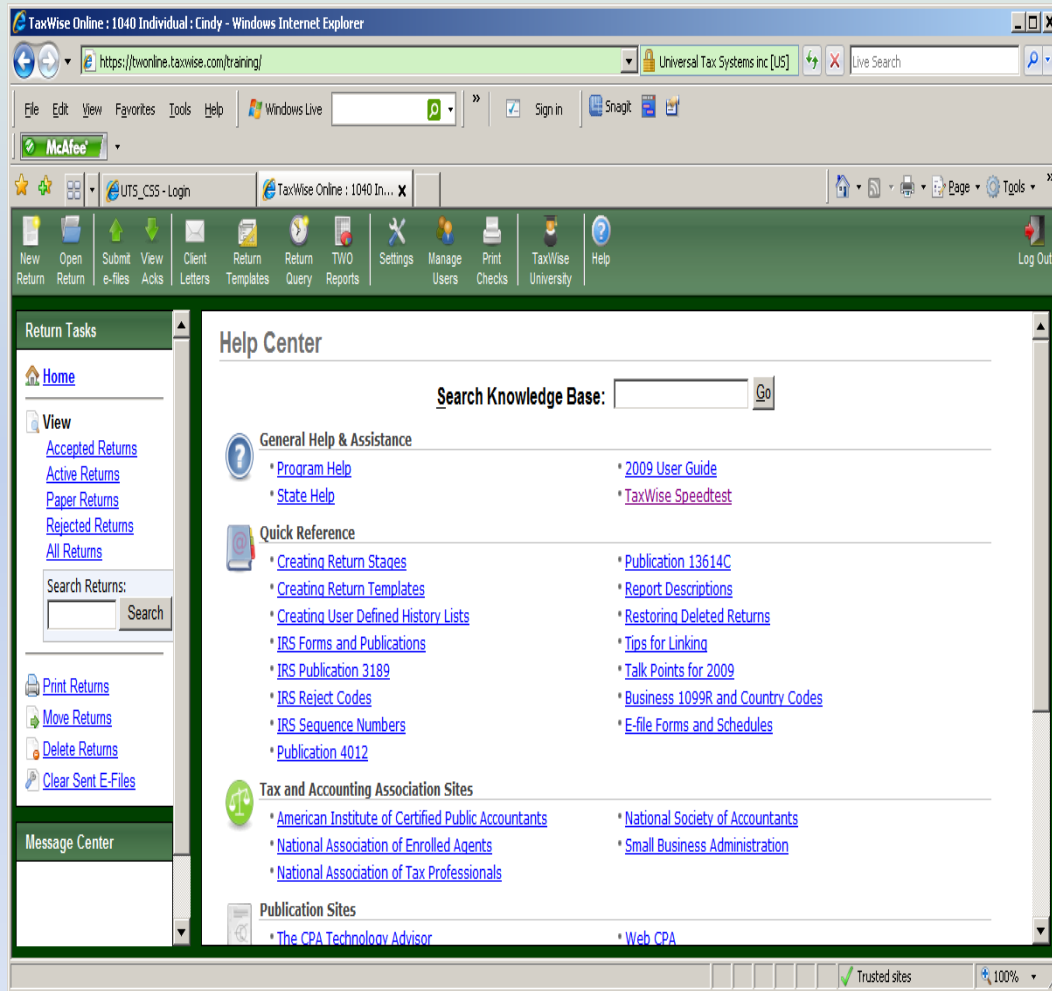
- Training options available
  - Taxwise Desktop
  - TaxWise Online
  - Link & Learn on [www.irs.gov](http://www.irs.gov) – only available to volunteers under the IRS contract such as VITA, TCE, AARP, Military

# Training in TaxWise Desktop



- In TaxWise Desktop
  - Log in to Username Training - Training returns can be created under the Training username
  - Training SSN requires use of last 4 numbers of the EFIN
  - Transmit returns to the Training EFC
  - Receive an acknowledgement
  - Reports are active in Training

# TaxWise Online Training



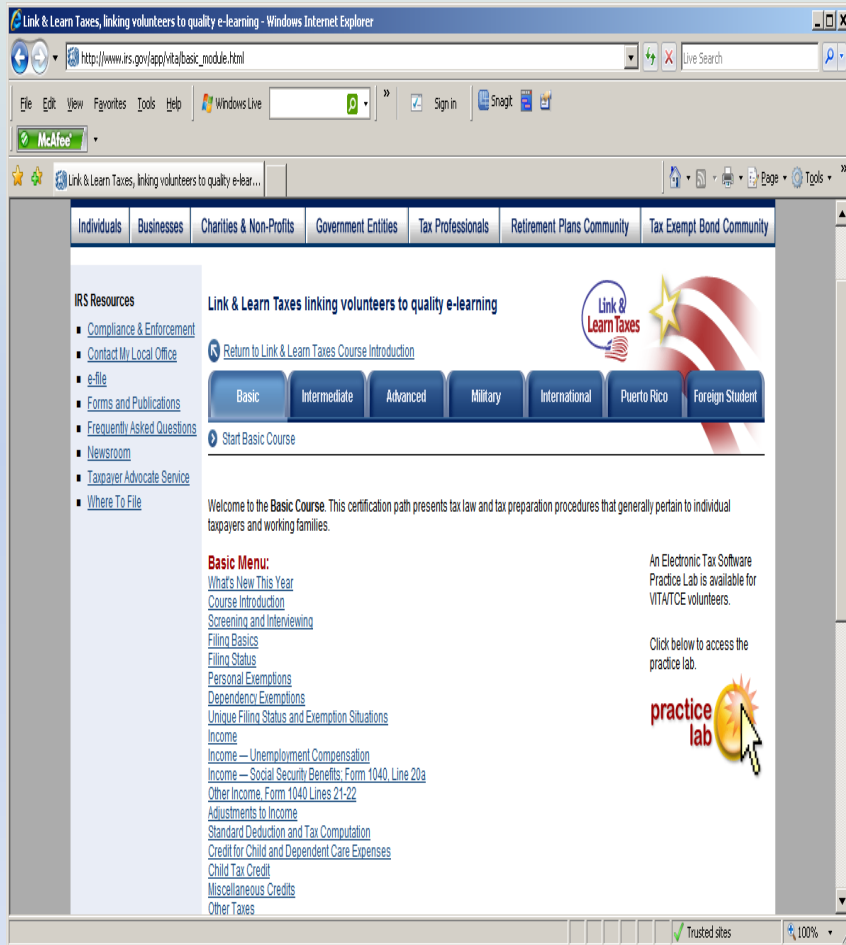
➤ Log into [www.twonline.taxwise.com/training](https://twonline.taxwise.com/training)

- Green Background regardless of year
- Create returns
- Move returns
- Print returns
- Send to Training EFC
- Receive Acknowledgements
- All users under IRS Contract have access

# What is Link & Learn?

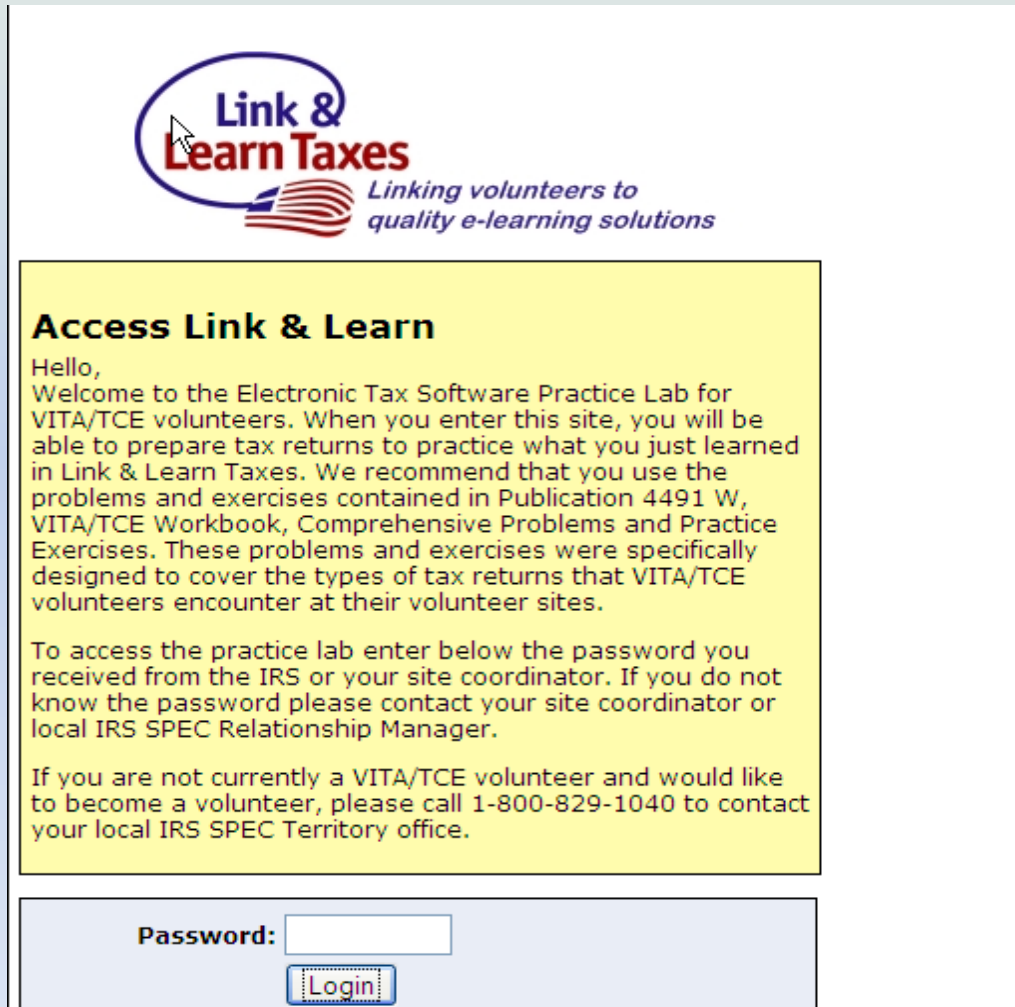
- Hosted on [www.irs.gov](http://www.irs.gov)
- The **Volunteer Income Tax Assistance** and **Tax Counseling for the Elderly** (VITA/TCE) e-learning courses!
- **Practice** the process of assisting taxpayers in preparing and filing Forms **1040EZ, 1040A, 1040, 1040NR, 1040NR-EZ, 1040PR**, and **Form 1040X** returns.
- **Seven VITA/TCE courses**—Basic, Intermediate, Advanced, Military, International, Puerto Rico and Foreign Students
- Course for **Returning Students**
- Link to **Practice Lab** from courses

# How to access Link & Learn Taxes



- Open your browser and go to [www.irs.gov](http://www.irs.gov)
- In the **Search** box type **Link & Learn Taxes**
- Click the **Link & Learn Taxes** link
- **Select** a course
- Click on **Start**
- Once you have finished the course enter the **Practice Lab** to complete returns

# Accessing the Practice Lab on Link & Learn



**Link & Learn Taxes**  
*Linking volunteers to quality e-learning solutions*

**Access Link & Learn**

Hello,  
Welcome to the Electronic Tax Software Practice Lab for VITA/TCE volunteers. When you enter this site, you will be able to prepare tax returns to practice what you just learned in Link & Learn Taxes. We recommend that you use the problems and exercises contained in Publication 4491 W, VITA/TCE Workbook, Comprehensive Problems and Practice Exercises. These problems and exercises were specifically designed to cover the types of tax returns that VITA/TCE volunteers encounter at their volunteer sites.

To access the practice lab enter below the password you received from the IRS or your site coordinator. If you do not know the password please contact your site coordinator or local IRS SPEC Relationship Manager.

If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please call 1-800-829-1040 to contact your local IRS SPEC Territory office.

Password:

- Once you have selected the **Practice Lab**
- Receive a **Password** from your Site Coordinator or SPEC Relationship Manager
- Scenarios specifically designed to cover the types of tax returns that **volunteers** encounter
- Create a new user



# Create a New User in Link & Learn

**Link & Learn Taxes**  
Linking volunteers to quality e-learning solutions

**Create Your User ID**  
Specify zip code and (optionally) an email address in order to create your user account.

Enter the first five digits of your zip code below

Zip Code:

I do not have an email address  
 I have an email address

Email Address:

Already registered? [Login](#)

- To create a **New User**
  - enter the first **5 digits** of your **zip code**
  - Enter your **email address**
  - Click on **Create User ID**
  - Click on **Next** and **Print** the **User ID** that you will log in with
  - Log in with **User ID** and **zip code**

# Classes offered on Practice Lab

- Classes offered for both Desktop and Online programs
- Classes grouped by Admin and Users such as
  - TaxWise Online Admin
    - Requirements, Settings & Prior Year
    - Login & Manage Users
    - Electronic Filing
    - Reports
  - TaxWise Desktop Admin
    - System requirements
    - Security Manager
    - Electronic Filing
    - Reports

