

# TY 2011 SUGGESTED TAXWISE DESKTOP DEFAULTS

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For possible updates to these defaults, check for newer versions of this document on the AARP Foundation Tax-Aide Extranet at [aarp.org/tavolunteers](http://aarp.org/tavolunteers)

**Summary:** This document contains NTC suggested TaxWise Desktop Setup options, Tax Form Defaults (TFDs), and User/Group setups for TY 2011.

## Changes to this document since the December 12, 2011 version:

- Entering the new default, “AARP Foundation” in the **Preparer’s Name** field of the Preparer Information Section, at the bottom of the Main Info Form, makes several other fields “Required.” The red needs to be removed (“**UndoRed**”).
- 1099-MISC form
  - **MakeRed**, Payer’s Information, Street Address
  - **MakeRed**, Payer’s Information, Zip Code
- Each Form 8949
  - **UndoRed** in Line 1a, Description of Property

**Important:** If you are making these settings in conjunction with installing TaxWise 2011, it is highly recommended that you NOT carry forward prior year settings when given the option. During the initial launch after installation of TaxWise 2011, you may see the following window:



**DO NOT ACCEPT!** TaxWise historically does not do this function correctly and by attempting to do so you may alter the “Admin” user’s TFDs that are shipped with the program. If you have already installed TaxWise and carried forward the prior year settings, you have the following options:

- Use this document to verify you have the suggested settings
- Restore the as-shipped Tax Form Defaults for the “Admin” user from the downloadable folder described below and follow these procedures.
- Uninstall TaxWise and start over

This document is organized into three parts, as follows:

**Part 1** - Setup Options

**Part 2** - Tax Form Defaults for the “Admin” user

**Part 3** - User Groups and Site-specific Users

**Appendix** – Setting Print Defaults

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## Part 1 – Setup Options

This section assumes you have just installed TaxWise and are logging in to TaxWise using the “Admin” user name for the first time. If you have already entered the setup options and given Admin a password, skip this section and go to Part 2.

The first time TaxWise starts, a “Select Package” window will appear. Select “Individual 1040” (the only package available to Tax-Aide) - check the “Do Not Auto Show” window and click “OK.” Next you will get the “Return List” window. Again, check the “Do Not Auto Show” box and click “OK.”

Next, give the “Admin” user a password. Select “Tools,” then “Utilities/Setup Options.” In the Utility program select “Setup” and then “Security Manager.” Click the “Users” tab and select “Admin.” Click “Modify” and enter a password. This password should be different from the other users to prevent accidental or overt configuration of TaxWise by others. Click “OK” twice to exit the utility.

The TaxWise Settings will now be configured. Select “Tools,” then “Utilities/Setup Options.” The Utility program will start. Select “Setup” and “Setup Options” to open the Setup Options screens.

### **COMPANY TAB**

- Fill out all the information on this page for your site, except for the last three items.
- If this is a client/server installation and you want to use these settings for the other workstations, check “Save as workstation defaults.”
- Click “Next”

### **GENERAL TAB**

- **1. Network options**
  - Check Network or No Network as applicable
- **2. E-file ID**
  - Enter your applicable starting DCN and MeF Submission ID values
- **3. Do you want TaxWise to automatically number your client invoices?**
  - Not applicable to Tax-Aide – leave default
- **4. Miscellaneous Options**
  - Uncheck “Enable Auto-Complete for entries with history lists”
  - Uncheck “Automatically display history lists”
  - Check “Display User-Defined and Auto-Populated history lists”
  - Check or uncheck “Prompt before closing TaxWise,” as you desire

### **PRINTER SETUP**

- **1. Please select a default printing method**
  - Select “Windows” – this may need to be changed to PCL if you have print problems
- **2. Select a default printer for:**
  - Returns/Reports – This is the only applicable item. The Windows default printer will appear here by default, but you can select another printer if you wish.

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- **3. Options:**
  - Check the second and third items: Print tax return in ALL CAPITAL LETTERS? And If you have more than one, print each EFIN on separate report pages?

## COLOR SETUP

Classic is the default style. Some of the other color styles may be easier on the eyes than the Classic colors, but modifications are required to make it easier to see the lines beneath the required, calculated, and overridden fields. If you choose one of these other styles, then you may wish to make the following adjustments. Select "My Custom Colors" then:

- Select the "Required Entry" item. Set the bottom borderline width to "4."
- Select the "Calculated Entry" item. Set the bottom borderline width to "4."
- Select the "Overridden Entry" item. Set the bottom borderline width to "4"; then set the background color to light grey and the foreground color to bright red.
- Then select "Finish" to exit the setup options screens.
- Exit the Utility

## **Part 2 – Federal Tax Form Defaults (TFDs) for the “Admin” user**

**Forms Tree Preferences.** Some people prefer a minimalist forms tree with few forms while others prefer a highly populated forms tree with virtually all of the forms to be used throughout the year. This document adheres to the latter philosophy. Therefore, the procedures herein create a forms tree that may contain more forms than you want to include in your tree. If you install these TFDs by copying the appropriate configuration files (discussed later), you can then quite easily trim that forms tree to suit your preferences. It's easier to remove forms from a tree than to establish them. This year TaxWise includes most of the forms we typically use in the default Forms Tree. Some additional forms and the defaults on individual forms may be desired and are described in this part.

The NTC recognizes that there is a wide range of opinions as to what constitutes the "best" TFDs. The settings described here have been popular in previous years, but you should feel free to use them or modify them based on your site's preferences.

The TFDs will be established in the following order in this document:

- TCS or representative creates the "Admin" user's TFDs to the Federal NTC-suggested defaults
- The TC, ERO, or representative creates the District- and/or Site-level customizations of the "Admin" user's TFDs
- The ERO or representative configures additional TaxWise users and groups, if needed. Setting unique defaults for specific users will be covered in Part 3 of this document.

The starting point for the following suggestions is the "Admin" user's TFDs that were shipped with Release 26.00 of TaxWise for 2011.

## **Downloadable and Installable NTC-suggested TFDs**

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The TFDs described in this part are in a Zip file on the Technology Software page of the AARP Foundation Tax-Aide Extranet. The file can be downloaded and installed on your computer(s) in lieu of performing the procedures in this part. It's a real time saver! Most of what is left after installation of those files is to insert your State and Site-specific information.

The Zip file, "NTC ADMIN TFDs.zip," contains the following: a **TFD file (1i000000.000)**, a **User History List file (1iuserlist.uhl)**, and a **Locks file (xyzyzy.elk)**. The Zip file also contains the as-shipped defaults for the "Admin" user (that you can use to return TaxWise to its initial configuration) and the as-shipped security manager configuration file.

Download the file by right-clicking on the Zip file on the Extranet Technology Software page and select "Save Target As..." Specify where you want the file saved – Desktop is a good location for ease of finding the file later. Right-click on the downloaded Zip file and select "Extract All..." In the Extraction Wizard, click "Next" to have the extracted folder saved in the same folder (Desktop) that contains the Zip file. Open the "*README before installing files.txt*" file in the extracted folder for further instructions.

**If you will be installing the files from the Zip file, you can skip to the section, "Site-level Customization of TFDs for the "Admin" user."**

## CREATING FEDERAL TAX FORM DEFAULTS FOR THE "ADMIN" USER

### To open Tax Form Defaults.

- Log in to TaxWise™ with the "Admin" user name
- Select Tools -> Edit Tax Form Defaults.
- Click on the OK button on the next screen.
- Click the Yes button on the confirm screen.

The **Main Information Sheet** will open, surrounded by a yellow border. All forms will have a yellow border in Tax Form Defaults to remind you that you are setting defaults.

### **Display and form selection conventions:**

- If both left and right panels don't appear on the screen, click on the 'Forms Tree' icon to toggle between 'Open Tree View' and 'Normal View'.
- F3 toggles a field from required (Red) to non-required. This is referred to as **MakeRed** and **UndoRed** in the text.
- To expand the size of the form in the right-hand panel, click "View" on the Menu Bar, select "Edit tax form size," and select the desired size.

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- To select other forms, click on the desired form in the left panel or select a form from the “Add Form/Display Form List” tab in the right panel of the display. You can also link to a form from any line on form 1040 or most other forms – for example, at Line 7, press F9 and select “NEW W2 Wage and Tax Statement” to enter taxpayer earnings.
- To close a form, click on the “Close this form” tab, press F10, or just open another form.

## NTC-Suggested National-level TFDs for the “Admin” user

### Main Information Sheet

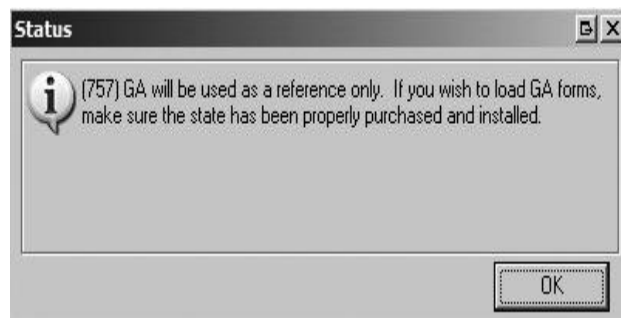
- **Mailing Address and Telephone Numbers**  
Use F3 to **MakeRed** Present Home Address; Zip code field of Zip code, city, and state; and Daytime Telephone number.

If you prepare state returns and your state program picks up the Evening Telephone Number instead of the Daytime Number, **MakeRed** the Evening Telephone Number.

- **State Information**  
If you don't prepare state returns, check the box next to “If you are not preparing a state return...”

If you prepare state returns and have installed your state software from TaxWise, enter the two letter state abbreviation in the “Full year resident” box.

**Note: If you have not installed the state software module, you will receive the following message:**



State forms will not load in the TaxWise tree until you install the state software. You will also receive a message when creating new returns indicating the state has not been installed.

- **Bank Account Information**  
**MakeRed** the Routing Transit Number. This is suggested to separate the Main Information Sheet into two parts – the first part (above this point) to be completed initially and the second part (below this point) to be completed as the final step prior to running diagnostics and finishing the return. Making this field red allows the use of Ctrl+E to easily get back to the

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second part of the Main Information Sheet.

- **Self-Select and Practitioner PIN(s)**

Enter your standard value for the Taxpayer's PIN or leave the field blank and red.

Put an "X" in the "I authorize" box for the Taxpayer.

Enter your standard value for the Spouse's PIN or leave the field blank

Put an "X" in the "I authorize" box for the Spouse.

- **Preparer Information**

Preparer's Information – Enter "AARP Foundation." That will make the following fields required. **UndoRed** each of them.

EIN

Firm Name

Phone

Zip code

Leave the PTIN field empty and **MakeRed**.

Make no other entries in this part at this point

## **Preparer Use Form (Prep Use)**

TaxWise moves the Preparer Use Fields from the Main Info Sheet to a new Preparer Use Form (Prep Use) this year. This new "Prep Use" form is found at the bottom of the forms tree. The number of fields has been increased to 25 from 15 in previous years. The information in this form will not proforma (carry over) to the next year, with the exception of the "Taxpayer Reminders."

- **Field 13**

- Question: Enter, "Enter Counselor Initials." Ctrl-L to lock the entry.
- Answer: **MakeRed**.

- **Field 14**

- Question: Enter, "Enter QR Initials." Ctrl-L to lock the entry.
- Answer: **MakeRed**.

- **Field 15**

- Question: Enter, "SIDN." Ctrl-L to lock the entry.

## **8879 Declaration for Electronic Filing**

- Print Signature – Check and Ctrl-L to lock.
- Select the next worksheet.

## **Social Security.**

- Open "1040 Wkt1 – Social Security Other Income Worksheet."
- In the "Taxpayer" column **MakeRed** the field for "Medicare Parts B, C, and D to Schedule A"
- In the "Taxpayer" column, **MakeRed** the field for "Federal tax withheld."
- Select the next schedule.

## **Schedule A**

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- Under “Taxes You Paid”
  - **MakeRed** Line 6, “Real estate taxes on your principal residence, not listed above.”
  - *(Optional, use if applicable in your state)* Line 8, “Other taxes,” type “VEHICLE LICENSE FEE,” “PERSONAL PROPERTY,” etc., as appropriate. This will turn the amount field red when saved.
- Under “Interest You Paid”
  - **MakeRed** Line 10, “Home mortgage interest and points from form 1098, not listed above”
- Select the next worksheet.

## Sales Tax Worksheet *(Optional, use if applicable in your state)*

- Link to the “Sales Tax Worksheet” from line 5b of the Schedule A
- Enter your state abbreviation on line 1
- Answer the remaining questions as they apply to the preponderance of taxpayers in your state or district. **MakeRed** those fields that will need to be verified or entered for each return based on the taxpayer’s residence
- **MakeRed** Line 8 to encourage counselors to ask the taxpayer about any additional big ticket items purchased.

## Schedule B

- Seller Financed Mortgage – **UndoRed**.
- Go to next statement

## Schedule C, Pg 1

- Open Schedule C Pg1.
- On line F, check the box for “Cash Method.”
- On line G, check the box “YES” for “Did you materially participate in the business.”
- On line I, check the box “NO” for “Did you make any payments in 2011...”
- Ctrl-L in Line 1a, “Gross Merchant card and ...” to prevent entries in this field

## 1099 MISC form that is linked to the Schedule C

- **UndoRed** in Box 1, Rent
- **MakeRed**, Payer’s Information, Street Address
- **MakeRed**, Payer’s Information, Zip Code
- **MakeRed** Box 7, Nonemployee compensation.
- Line 17, Enter your state abbreviation if your state has an income tax

## Schedule C, Pg 2

- Check the box on line 44 to calculate business miles at the standard mileage rate
- Select the next schedule

## Schedule D

This form has been redesigned this year. There are no defaults for the form.

## 8949 Page 1



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- In Part I, check the “A” box
- **UndoRed** in Line 1a, Description of Property
- Select the next forms.

## Additional 8949 Forms

- Add two more 8949, Page 1 forms to the tree by pressing Shift-F10 twice
  - On the first, in Part I, check the “B” box
  - **UndoRed** in Line 1a, Description of Property
  - On the second, in Part I, check the “C” box
  - **UndoRed** in Line 1a, Description of Property
- Add Form 8949, Page 2, by clicking “Add Form/Display Form List,” entering 8949, and selecting “8949 Pg 2.” Add two more 8949, Page 2 forms to the tree by pressing Shift-F10 twice
  - On the first, in Part II, check the “A” box
  - **UndoRed** in Line 1a, Description of Property
  - On the second, in Part II, check the “B” box
  - **UndoRed** in Line 1a, Description of Property
  - On the third, in Part II, check the “C” box
  - **UndoRed** in Line 1a, Description of Property
- Select the next schedule.

## Schedule EIC

- Open the Add Forms list and add Schedule EIC to the tree.
- Use F3 to remove the red from the first child’s name.
- Go to the next form.

## W-2 Wages

- **UndoRed** the “Name code” in block b.
- **MakeRed**, Line 2, “Federal tax withheld”.
- Block 15, State: If your state has an income tax enter your state code
- Block 17, State Tax: **MakeRed** if your state has an income tax
- Select the next worksheet.

## 1099G Wkt – Unemployment Benefits Received Worksheet

- Add the 1099G Worksheet to the Forms Tree
- Enter the EIN and name of your state’s payer of unemployment compensation.
- **MakeRed** lines 2 and 5 – line 6 if your state withholds taxes
- If applicable, create additional Form 1099G worksheets for additional states that may pay unemployment benefits to taxpayers who visit AARP Foundation Tax-Aide sites in your state
- Select the next form.



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## **982 Reduction of Tax Attributes Due to Discharge of Indebtedness**

- Add the Form 982 to the Forms Tree
- **MakeRed** line 2.
- Select the next form.

## **1099-R Distributions from Profit Sharing, Retirement Plans, IRAs, etc.**

- Press F3 on the Name code to remove the red.
- Press F3 on Box 1, “Gross (RRB line 7)” to turn it red.
- Press F3 on Box 4, “Federal tax withheld” to turn it red.
- **MakeRed** Payer’s Name, address and zip.
- Block 12, “State Tax,” **MakeRed** if your state has a tax.
- Block 13, State/State ID: Enter your state code if your state has a tax.
- State-use boxes (to the left of Block 15): If certain pensions are not taxed in your state place a check mark in Box 1
- Select the next form.

## **1116 Foreign Tax Credit.**

- Go to form “1040 PG2.” Select line 47 (Foreign Tax Credit). Right click, and then select “Link.” Select “NEW 1116 Pg1 – Foreign Tax Credit.” Click “OK.”
- **MakeRed** the “Simplified Limitation Election”
- Select the next form.

## **F/S Tax Pd Federal/State Taxes Paid**

- Add the form to the Forms Tree by clicking the “Add Forms/Display Forms List” tab and entering “Tax”
- In the “Date of Payment” column, **MakeRed** due dates 1 through 4 so they have to be validated if used.
- Proceed to the next item.

**Return Stage (optional but recommended).** The Return Stage can only be edited by the “Admin” User. The Return Stage entries are available to all users.

- Click on the “Return Stage” icon on the Menu Bar, and select “Edit Return Stage Options.”
- Add the following items to the list (your preferences may be different):
  - EFILE-Ready to file
  - EFILE-Needs Signed 8879
  - EFILE-Incomplete
  - PAPER-Ready to file
  - PAPER-Incomplete
  - DO NOT FILE
- Select “OK”

## **Client Letter (optional but recommended).**

- Click the “Add form/display form list” tab and enter “letter” in the “Look for” field.

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- Click “Open”
- Select the “1040 Letter.CL” file (or your site’s standard letter) and click “Open.”
- Edit the letter as desired.
- To save your changes, select the “Save Letter” icon on the letter Tool Bar.
- You will be notified that this is a reserved filename and to choose another
- In the NTC-suggested TFDs, we have named it “Standard 1040 Letter.”
- This will add the letter to the forms tree so that it will be printed with each return.
- Click the “X” above the letter to close the letter or open another form.

## **Code Section 7216 Compliance Forms:**

- Right-click the “Gen Use” form in the forms tree, select “Remove Form,” then click “OK” in the Delete Forms box.
- Select and remove the “Gen Disclosure” form in a similar manner.
- Select the next form.

**Private forms (list)** (*optional*) The TaxWise program provides a feature called “private forms” that can be set as part of the defaults. When all forms for a return are closed, the panel on the right side of the screen displays a list of all forms. You can create a smaller, private, forms list that only includes the forms your site is authorized to complete.

To create a private forms list:

- Press F10 to close the open form. The panel on the right side will display the “Find a form” window, listing all forms.
- Click on the item that reads “Can’t find it? Try form filter list.”
- Click on the “Private Forms” button. This will show a screen with two columns—a list of all forms (on the left) and a list of your selected forms (on the right).
- To add a form to your list, click on the desired form in the left column, then click on the “>” button. When you are finished, click “OK” to close this screen
- Click “OK” to close the Form Filter window
- Now click on “Use Private Forms” at the top right-hand corner of the “Find a form” window. Your selected forms will be listed as the default when a new return is opened for this user name. (A counselor can still click on “Show All Forms” if a desired form is not in the private forms list.)
- Select “File,” “Close Return” to close the "Find a form" window and save your changes.

The Federal Tax Form Defaults for the “Admin” user have now been configured to the State-level settings suggested by the NTC.

**State Tax Form Defaults:** As TCS for a state, you will need to determine appropriate TFDs for your state tax module. The state TFDs are created in the same manner as the Federal TFDs, above. When finished with the State TFDs, the TCS may want to capture and publish them to be used for the district/site final customization.

## **District-level Customization of TFDs for the “Admin” user**

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District-level customization of the TFDs is up to the district. The District Training Coordinator/Lead Instructor should coordinate with the Technology Coordinator to assure the defaults created for the sites are used during training.

## **Site-level Customization of TFDs for the “Admin” user**

This section assumes that all counselors at a site will use the same TFDs. If the TFDs will be different for various counselors, skip this section and proceed to Part 3 below.

Also, if you have multiple standalone computers at a site, or computers that are used at multiple sites, you will have to make adjustments to the starting DCNs and MeF Submission ID values in the Setup Options. These settings should be made to assure that the DCNs or MeF Submission IDs don't overlap, as they must be unique for each return.

Make the following site-level changes to the previously developed TFDs.

## **Main Information Sheet**

- **Preparer Information**
  - Enter your site's unique eight-digit SIDN in the PTIN field.
  - **UndoRed** in the Preparer's Name field

## **8879 Declaration for Electronic Filing**

- **Enter the EFIN** assigned to this site at the top of the form. It must be one of the EFINs registered with a REG code or a Transmit (XMIT) code.
  
- **Electronic Return Originator (ERO) Information** (*At the bottom of the form*)
  - Click in the “PTIN” field. Enter your site's unique eight-digit SIDN.
  - Press Ctrl-L in the ERO Signature field to unlock that field
  - Enter “AARP TCE [your SIDN] [abbreviated site name]” in ERO Signature, e.g., AARP TCE S38345556 Bos Civ Ctr, then press Ctrl-L
  - Check “Print Signature” and press Ctrl-L to lock that block
  - Enter the site name as shown on Form 8633 in the “Firm's Name” field
  - Enter the “Firm's Address”
  - **UndoRed** in the EIN field
  - Enter the Zip Code in the “Zip Code” field.

## **Prep Use Form**

- **Field 15.** To default your site's SIDN in this field, enter the SIDN in the answer field and press Ctrl-L to lock the field. The SIDN includes the “S” prefix plus the number.

## **Sales Tax Worksheet** (*Optional, use if applicable in your state*)

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- If the tax rate varies from site to site, you may want to further customize the Sales Tax Worksheet for each specific TaxWise site.

Select “File,” “Close Return” to close the defaults and save your changes.

This completes the Tax Forms Defaults to the site-level.

## **Part 3 – User Groups and Site-specific Users**

Tax Form Defaults (TFDs) created in the “Admin” user will be available to all other users – it is not necessary to copy these defaults to those users. If the individual users need to have their own defaults, different from the Admin defaults, the Admin defaults file (1I00000.000) should be copied to the other users and modified accordingly. Users assigned to the “SuperUser” or “ReturnManager” groups are not allowed to edit their own TFDs. Therefore, if you need unique TFDs for each counselor at a site, you will need to establish at least one new group with TFD editing privileges and assign those users to that group. You may also want to establish a group to be used by EROs that will include permissions to communicate with the TaxWise Electronic Filing Center; or a group could be created to allow Counselors to prepare, QR, and print returns but not have permissions to do things that could potentially interfere with the work of the ERO. You will need a new group if using either Transmit Codes or Exception 3 that requires users to have unique defaults at their separate sites.

### **To establish user names to be used by the EROs only:**

1. Open TaxWise and select the “Admin” user.
2. Select “Tools,” then “Utilities/Setup Options.”
3. In the Utility Program, select “Setup,” then “Security Manager.”
4. Select the “Groups” tab.
5. Select “New.”
6. Name the new group “EROs”
7. For description use “User names for use by EROs only.”
8. Select all actions for this user group.  
(Note: You can highlight the first item by clicking on it, then scroll down to the last action and hold the Shift key while clicking on the last item. This selects all items on the list.)
9. Click on “Add” to transfer all these actions to the new user group.
10. Click “OK.”

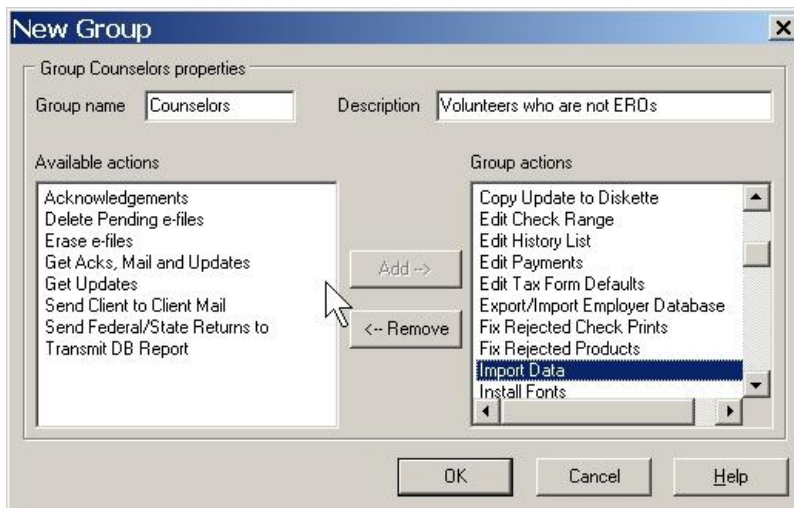
### **For user names to be used by counselors who are not EROs.** Open TaxWise 2011 and select the “Admin” user.

1. Select “Tools,” then “Utilities/Setup Options.”
2. In the Utility Program, select “Setup,” then “Security Manager.”
3. Select the “Groups” tab.
4. Select “New.”
5. Name the new group “Counselors.”

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6. For description use “User names for counselors.”
7. Select all actions for this user group. (Note: You can highlight the first item by clicking on it then scroll down to the last action and hold the Shift key while clicking on the last item. This selects all items on the list.)
8. Click on “Add” to transfer all these actions to the new group.
9. Then, in the right panel, select the following items:  
(Note: Hold down the CTRL key while selecting each item.)
  - a. Acknowledgements
  - b. Delete Pending e-files
  - c. Erase e-files
  - d. Get Acks, Mail and Updates
  - e. Get Updates
  - f. Send Client to Client Mail
  - g. Send Federal/State Returns to
  - h. Transmit DB Report



10. Click on “Remove” to remove these permissions from the “Counselors” group
11. Click “OK.”

Use the same procedure to create a group for User names for Sites or counselors using Transmit Codes or Exception 3, but this group needs to include the Edit Defaults authority. It is suggested you call this group “Unique Defaults.” Using the above approach, Users (such as site names) assigned to the “Counselors” group will be able to Edit Tax Form Defaults, but will not be able to communicate with the Electronic Filing Center.

Users (such as Transmit, etc.) assigned to the “EROs” group will be able to carry out all functions in TaxWise, including communicating with the Electronic Filing Center. They will not be able to access Security Manager, which is reserved for the “Admin” user.

**NOTE:** While normally a user can be assigned to two or more groups and will then have all of the permissions contained in any of those groups, this rule does not apply if one of the groups is

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“Training,” “SuperUser,” or “ReturnManager.” If “SuperUser” or “ReturnManager” is included in the groups to which a user is assigned, its lack of permission to Edit Tax Form Defaults will override the permission granted by other groups for that capability.

After creating these new groups, use Security Manager to create a new TaxWise user, assigned to the particular group, for each Tax-Aide site or counselor that will use this Tax-Wise set-up.

The following describes the process for users that will be allowed to create and edit their own defaults. When every user is first created, the user uses the Tax Form Defaults located in the default file (1I00000.000) created in the “Admin” user (D:\UTS11\USERS\ADMIN\1I00000.000). So, when TaxWise is started, the program first looks to the logged-in user folder to see if a default file exists. If so, the program uses that file. If not, the program uses the defaults that exist in the “Admin” user default file.

For simplicity, we’ll refer to the user that is allowed to create/edit their defaults as, “TFDUSER.” When “TFDUSER” creates its own Tax Form Defaults, a new default file will be created in the “TFDUSER” folder (D:\UTS11\USERS\TFDUSER\1I00000.000). Now, when TaxWise is started the program will find the default file in the “TFDUSER” folder and use it for the Tax Form Defaults. One ramification of this is that while other users will still get their defaults from “Admin,” “TFDUSER” will now get its defaults from its own folder, meaning that any future changes to the “Admin” TFDs will manually have to be made in “TFDUSER,” if desired. The other ramification is that if no default file exists in “TFDUSER,” when “TFDUSER” starts to create its TFDs it will start from a virtually empty forms tree and will have to create the “Admin” defaults all over again. To prevent this, you can use TaxWise Explorer to copy the modified defaults from the “Admin” user to “TFDUSER.” Then, when “TFDUSER” starts to create its defaults, a copy of the “Admin” default file will be located in the “TFDUSER” folder and this file will be edited rather than starting from scratch. So, to repeat, from now on, when you modify the defaults in the “Admin” user, they will automatically be used by all of your users **except** the “TFDUSER.” The “TFDUSER” will have to make those changes manually, as appropriate to their situation.

Use the procedure below to customize the TFDs for each site-specific user.

## **Site-specific Customization of TFDs for different sites**

If you did not enter Site-level Customization of TFDs for the “Admin” user, above, use the following steps to tailor the TFDs for each TaxWise user for a specific Tax-Aide site.

- Log in to TaxWise with the user name for a site.
- Select “Tools” and then “Edit Tax Form Defaults.”
- Click on the OK button on the next screen.
- Click the “Yes” button on the confirm screen.
- Use the steps of the *Site-level Customization of TFDs for the “Admin” user* procedure starting with the **Main Information Sheet** to set the site-specific defaults for the site.
- Repeat this procedure for each additional site.

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This ends the procedures for setting Tax Form Defaults.

## APPENDIX - SETTING PRINT DEFAULTS

Earlier versions of this document quoted verbatim the section from Pub 3189 on Setting Print Packet Defaults. We have removed that redundant section from this document.

We offer the following cautionary note on this subject that is not contained in Pub 3189.

NOTE on Print Packets: The Print Packets are in the “Admin” user folder with the file names “\*.PFL”. They can also exist in each username folder.

If there are no print packets in a user other than “Admin,” the packets in the “Admin” user will be used whenever the Print Return dialog is invoked from any logged-in user. When a non-“Admin” user is logged-in and invokes the Print Return dialog, the packets from the logged-in user will be used instead of those from the “Admin” user.

**WARNING:** There is a **TaxWise bug** (that has been around for several years) **that deletes all print packets from the “Admin” user** if the Print Return dialog is invoked from the “Admin” user when there are no print packets in the TaxWise user where the return that is being printed is located.

There are two ways to avoid the disappearance of the print packets as a result of this bug. The first is to make sure that you never print a return when logged in as the “Admin” user. The second is to copy all of the print packets from the “Admin” user to all of the other TaxWise users. If you do that, you will not be exposed to this bug.