

AARP Tax-Aide ERO Training

• **Objectives** (Be able to):

- Use TaxWise to transmit tax returns
- Receive and respond to acknowledgements and rejects
- Update TaxWise on ERO and EFC computers
- Manage tax return e-files and paperwork
- Maintain security of taxpayer data



Assumptions

- You have been a TaxWise EFC
- You will not be running TaxWise on a network
- You will transmit all returns prepared with your EFIN
- You will transmit and receive Acknowledgements from home
- You have a broadband internet connection (or access to one)



There is no single right way!

- Discuss preferred or recommended ways
- Describe good practices
- Provide references for options



What EROs Get

From IRS Andover – EFIN letter

- New EFIN: 4 to 6 weeks after applying
- Changed/Renewed EFIN: December

• From CCH – December

- TaxWise CD
- Registration Code
- TaxWise User Manual
- Access to web site downloads, knowledge base, etc.



Taxwise Software Package

CD
EFIN
Registration Code
Client ID number

 Make copy of letter and save separately



Customer Support Tab

Links to TW support
Need client id
Password ADMIN
You create password



What EFC's Need

 TrueCrypt TaxWise 2010 Unique DCN New Jersey Periodic updates Printer drivers Wireless printer network setup (optional) Passwords



Agenda

Site operations
Transmit returns
Acks, Rejects and ERO paperwork
TaxWise Updates
Reports, Utilities, Tech Tips and Good Practices
Post-season



Start your computers!

computers

- Login:
- Password:

All computers – Caps Lock recommended





O ADMIN

- o Training
- o Guest
- o Site name(s)
- Password first 3 to prevent EFC errors



Let's see what we can find

- 1. find EFIN on your machine2. find DCN
- 3.printer default

TOOLS-UTILITY/SETUP-SETUP OPTIONS



LOG INTO any USER

• NOW WE CAN PLAY

2009 Tax season

ERO TRAINING - MODULE 0



ERO Module 1 – Site Operations

In the Tax-Aide Program ...training is the brains ...counseling is the heart & soul ...transmitting is the voice

SITE PROCEDURES



Assure SIDN is setup on all computers Assure DCN has a different start number for each computer

• Quality review each return



Data Retention – What & Why

- One electronic copy of the return <u>may</u> be retained for an additional year
- Returns prepared with retained data should have fewer errors and take less time



Data Retention

- IRS now allows us to keep data for year
- Do not need permission of Taxpayer



Quality Review

Do your clients a favor: send them out the door with a return without errors!

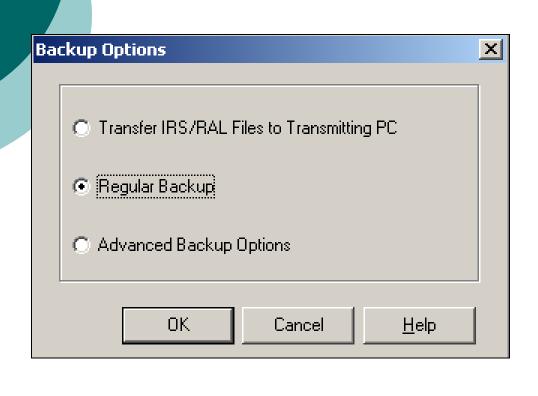
- Tax return review required by IRS
- E-file review prudent to minimize rejects
- Review on computer –reviewer should have TaxWise training
- Review data on paper –W-2, 1099s and other statements



Backing up returns

- Backup can be done to a Flash Drive
- A folder on the backup media for each EFC is recommended

TaxWise offers three methods of Backup



- Transfer IRS/RAL files to transmitting PC
 - This method is not recommended
- Regular backup
 - Recommended method
- Advanced backup options

Tax-Aide



Backing up returns

Stop and play with back ups

One flash drive, multiple EFCs



My thumbdrive folders

- o Carla
- o Maria
- o Steve

Complete (ACCEPTED RETURNS I NO LONGER NEED TO LOOK AT)



LETS MAKE FOLDERS

O INSERT THUMBDRIVE O SCREEN WILL APPEAR SHOWING WHAT'S ON DRIVE O RIGHT CLICK ON SCREEN O NEW **o** FOLDER O NAME IT O MAKE 3 FOLDERS

Regular Backup backs up tax returns and all related files (Recommended)



		74
elect User		×
Admin		
Guest Contract Contra		
Jim		
Prep1		
🚞 Training		
express		
istory		
marcus		
peter		
	OK Cancel <u>H</u> el	

- Log in as the appropriate user
- Open the *Tools* menu
- Select **Backup to Disk**
- Select *Regular Backup*
- o Click OK
- Select the user name(s) whose returns you want to backup
- Press *Enter* or Click *OK*



The next step is selecting the returns

☑ 446991146
✓ 448991146
✓ 449991146
✓ 456991146
✓ 550991146

Select a directory where the current backup will be saved.	×
Location:	
D:\backup	
Drives:	
See D-Drive (D:)	-
Directories:	
D-Drive (D:)	

- Select the returns from each user name
 - Click the Select All button to backup all returns
- Press enter or click OK
- Select the drive and/or directory for backup
 - If you are using floppy disk, remember to number the disks
- Press *enter* or click *OK*
- Click **OK** on the Backup Complete confirmation box



Security of Backup files

2 files, encrypted
Files always have the same names: will erase previous backups
May be emailed (not recommended)
Delete at the end of the season



RESTORE

• From flash to your computer

Restore from Full Backup restores returns to the active user name



Restore Options		×
 Restore From Full B Advanced Restore 		
ОК	Cancel	Help

- Login with the appropriate user name
 - Returns will not restore to Admin
- Open the **Tools** menu
- Select Restore from Disk
- Select *Restore from Full Backup*
- o Click **OK**



Selecting the returns to Restore from Full Backup

Select User Name(s)						
	ÍHIS	TOR	Ŷ		 	_
	<					

Restoring to: C:\UTS04\USERS\GUEST\ - 1/1
▼ 551991146

- Select the drive that contains your backup
- Select the user name(s) to restore returns from
 - The user name must be on the computer you are restoring to
- Click OK
- Select the returns to restore
 - Restores to active user

O Click OK ERO TRAINING - MODULE 0

Erase Returns when Appropriate

- Delete returns from EFC computer when no longer needed.
- Don't erase returns until they exist in a second place.
- Transmitted returns can be deleted from backup disk.
- Accepted returns can be deleted from preparing computer if saved elsewhere.



Deleting Returns from EFC Computer

Tools/Utility Setup/File/erase efiles

 Another way: for you!
 Tools/Utility Setup/File/Taxwise Explorer/user

Highlight returns/action/delete



Security Note

- Deleting a return does <u>not</u> remove all taxpayer data.
- A summary of the tax return remains in the TaxWise database even after the return is deleted.



Questions

comments



ERO (Transmitter) Training Module 2

Getting Ready to Transmit

2009 Tax Season

ERO TRAINING - MODULE 0



Transmitting Computer

- Set DCN to unique starting number
- Use the same computer to transmit returns and receive ACKs all season
 - Required for complete TaxWise database
 - Contact UTS if computer fails



Before you transmit

• Verify desired returns restored

- match Site Sign-In Sheet
- match signature documents
- Verify signature documents (DCN, SIDN & site name) and backup forms (W-2's, 1099's etc.)



Make IRS e-files

- Recommended before each transmitting session
- Runs diagnostics without opening returns
- Ensures current e-file before transmitting
- o Tools/Make IRS e-files
- Select the returns individually or with Select All

TaxWise runs diagnostics on all returns selected



Status
(618) Could not create EFile for 6 return(s). See the diagnostic window for more details.
ОК

Diagnostic Results	
IRS Electronic filing errors detected.	
Forms to be filed to MA are as follows: MA Resident Income Tax Pg 1 MA Resident Income Tax Pg 2 MA Interest, Dividends, Gain, Loss Pg 1 MA Sch B Other Excluded Interest	
MA Electronic Filing Summary Report	
FORGIONE Total Tax: 1223.00 Withheld: 1247.00 Refund: 24.00 RTN: Account:	
Errors found. Could not create IRS electronic return.	
Next incorrect return Apply for [RAL Close Print	<u>H</u> elp

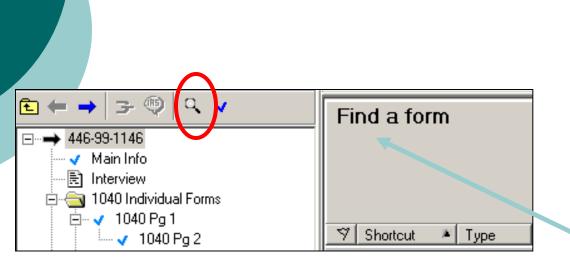
- Status message will
 appear if returns have e-file errors
- Click OK
- Review the errors in the *Diagnostics Results* window
 - Errors found. Could not create IRS electronic return
 - IRS Electronic return is created and stored on disk

Make IRS e-files does not allow the user to correct e-file errors

E ← → → ∅ □ ✓ □ → 446-99-1146 □ ✓ Main Info	Electronic Filing Errors: The Electronic Return Originator information is not filled in o
	The EFIN has been omitted on Form 8453. (172)
⊡ -	The question "Do you wish to electronically file?" on the Cor
	IRS Electronic filing errors detected.
🛄 🔂 6251 Pg 2	Forms to be filed via U.S. MAIL to CT are as follows:
····· 📍 8453	CT Resident Income Tax Pg 1
🛱 😋 Misc. Forms	CT Resident Income Tax Pg 2
	CT Resident Income Tax Pg 3
🔤 🗸 Summary	CT Resident Income Tax Pg 4
🖻 🔄 CT State	CT Underpayment of Estimated Tax Pg 1
	CT Undernayment of Estimated Tax Po 2
📍 CT 1040 Pg 2	Next Entry E-File Apply for IRAL Run Close Print
	Next Entry E-File Apply for [RAL Run Close Print

Must open the return to correct any efile errors

Creating the e-file from Inside the Tax Return (Generally done by QR)



- Log in as the appropriate user
- Open the completed return
- Run Diagnostics
 - Press *F10* from the Forms list
 - Click on the diagnostics icon
 - Press Ctrl-D
 - Will be covered in a later session

Click the *E-file* button

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Ready to Transmit

Questions

Comments



ERO (Transmitter) Training Module 3

Transmitting



THE PROCESS

Fed/St to CCH
CCH to IRS
Fed ok? Then State sent on
Fed -bad- both held back
Acknowledgement sent to ERO
Fix bad and resend both



IRS Federal/State e-file program

- State return is sent with the Federal return to the IRS
- Federal return is accepted
 - IRS makes the state e-file available for the state
- Federal return is rejected
 - State e-file is not available for the state
 - Must file the state again when the Federal is re-sent



Federal Accepted, NJ Rejected

- The New Jersey return can be corrected and retransmitted electronically
- Alternatively, the New Jersey return can be mailed



Things to do before you transmit e-files to CCH

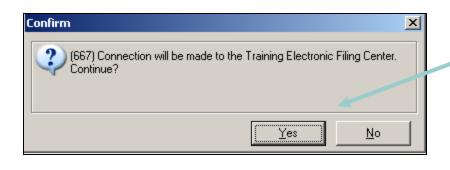


- Create the e-file for one or more returns
- Internet connection must be active if transmitting via the Internet
- Printer must be turned on and ready to print the Declaration Control Report (DCR)!

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Transmitting your Federal and State returns to the TaxWise Electronic Filing Center

Communications	Tools	Help	
Send Federal, Send Extensio			Ctrl+S
膏 Get Acks, Mai Get Acks Dire	-		Ctrl+G
Send TaxWise	- Mail		



- Login with the appropriate user name
 - Users assigned to the Training Group will transmit to the Training Electronic Filing Center
- Open the Communications menu
 - Will display a warning box if the user is
 assigned to the Training group
- Select Send Federal/State Returns to...
 - Shortcut *Ctrl-S*

Selecting returns to send to the Electronic Filing Center



Select Returns to File: - 5/13		_		_		X
Send Federal/JELF or Direct States to					[Send
Send Returns to the Electronic Filing Cer						<u>P</u> roperties
C Send Returns Direct to IRS Service Cent	ier (Send State Return	ns Direct to			<u>F</u> ilter
Andover C Memphis		C California	C Massach	usetts	-	Cancel
C Austin C Philadelphia C Kansas City		C Maine	C Minnesot	a	-	
					_	Help
Select All Search By: File Name						
SSN File Name 🔻	Туре	Return Stage	Status	Edit	Fed	State
▼ 573 E4573943590IUSFS.EFL	EFile		IRS Rejected		Y	_
✓ 573 E4573943590ICASA.EFL	EFile		IRS Rejected	03/25	N	CA
471 E4471742374IMNSA.EFL	EFile		IRS Accep		N	MN

- Transmission destination defaults to Send Returns to the Electronic Filing Center
- Select the returns to send
 - Only displays eligible e-files

Select Returns to file window opens

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Caution

- It is possible to have a file ready to transmit
- But you are missing <u>completed</u> paperwork

O DO NOT EFILE

Review the Declaration Control Report before transmitting



Ver.3 EFIN: 9		4ANUEL 705-232-8423		ation Cor TaxWite 2 MS 2001 SO	004		t				27/2001 8 38AM
TIN	Name	Refund	Prep Fest	Bak/Prd	ST	PIN	Form 8453	Audit Shield	SVC CTR	DCN	Food
471-74-23		\$1,388.00	- Constanting		MN		×	5		00-991146-00001-5	
	ave return was profiled	EFIN m 1040: EFIN m su		8			85				1.27
178-26-31		(\$151.00) (\$4,167.00)	\$0.00 \$0.00			×	×		PHI PHI	00-991146-02002-5 00-991146-02052-5	- C.
131-60-83		(\$851.00)	\$0.00			· ·	SQ		PHI	00-991146-04034-5	÷.
173-94-35		(\$174.00)	\$0.00				×		PHI	00-991146-09081-5	XXXX
Grand Te	tals:										
Total nur	nber of returns includes	d in this transmission:		4							
Rotuma	ubmitted for Philadelpi	hia Service Center:		4							
1 PIN re	turn(s) submitted										

• Things to look for:

- Refund/Balance due amount is correct
 - Number of returns correct
 - Returns on DCR match those ready to send
 - Returns omitted due to batching errors (Error 189)
- State return indication correct
- Verify signed signature documents for each return

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Print the Declaration Control Report (DCR)

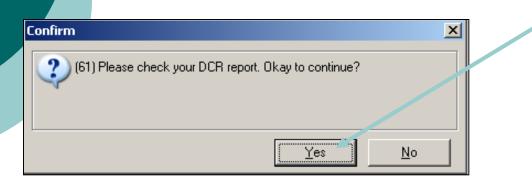


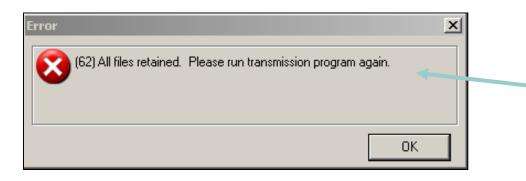
Declaration Control Report	 Click the <i>Printer</i> icor Click <i>OK</i> to print
× 🛃 ⅔ 100% ▼	 Click Cancel to quit the printing process
Printer: System Printer (\\print01\NA)	OK OK Cancel OK OK Printed
Print Range O All O Pages	Copies: 13 O Close the DCR window
From: 1 To:	 Collate Copies Click the X in the upper right corner

of the window

Answer Yes or No to send the transmission







- Click Yes if the information on the DCR is correct
 - The transmission process will begin
- Click No if the information on the DCR is not correct
 - Cancels the transmission
 - E-files remain on your system to correct and resend

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LETS TRY IT

- 1. COMMUNICATIONS
- o 2.SEND FED/ST
- O PICK ONES WANT/SELECT ALL
- o 3.SEND
- o 4.UP COMES DCR REPORT
- o 5.REVIEW IT
- o 6.ARE YOU CONNECTED TO PRINTER?
- 7.IF SO PRINT DCR otherwise STOP

The communication process begins after clicking Yes to verify your DCR information

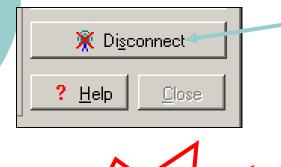


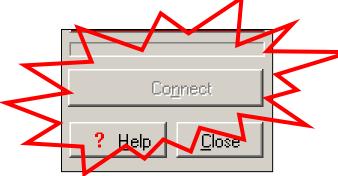
CELECTRONIC FILING CENTER			
Tasks Connect Login Receive login message Receive acknowledgements Send tax return Hangup			
Details	Print Information	? <u>H</u> elp	<u>C</u> lose
Session information			
Connected		0 CP5 0	2

- Automatically initiates the communication session
- Communication progress will be displayed
 - Blue progress bar
- Communication results will be ero TRAINING - MODULE displayed



Cancel the Transmission at any time





- Click the *Disconnect* button at any time to stop the transmission
- Disconnect button will change to Connect when the transmission is finished
 - Connect button will be disabled
- Click *Close* if session was successful
- Note: TaxWise erases the electronic file once the transmission is successful.

Review the Session Information for transmission messages

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55



Session information

Incoming mail file MAILINAA contains the following: IRS acknowledgment Database updates

Mail Tossed

The session was successful. Press 'Close' to exit.

- Displays transmission messages
- Identifies the files you are picking up
- Indicates if you do not pick up any files
 - No Mail to Toss

Indicates if your communication session was

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Troubleshooting Tip: What should I
do if my communications session is not
successful?

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	 Click Connect to try again TaxWise will try to
	resend the transmission
(42) Transmittal file already exists. Transmit	• Click Close to try again that file first. • at a later time
<u>R</u> etransmit Batch <u>U</u> nbatch	 TaxWise stores the transmittal file
	 Will be prompted to send the transmittal file the next time you click Send Federal/State Returns to.
	 Click Retransmit Batch to send the transmittal file
2009 Tax season	ERO TRAINING - MODUCIICK Unbatch to remove the transmittal file

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Troubleshooting Tip: Can CCH stop a return that I filed by mistake?



- CCH cannot stop returns that have been electronically filed
- E-files are automatically placed into a transmittal file to send to the IRS
- Correct mistakes if the IRS rejects the return
- File a 1040X if the IRS accepts the return



3189 Guidelines: Transmitting Returns

The ERO must submit returns to CCH as soon as possible

- > Must be submitted within 3 calendar days from completion of return
- Return is not complete until both taxpayers have signed and should not be transmitted till have both signatures
- > Review the DCR for any errors
- > Print the DCR

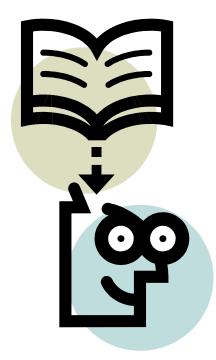


Form 8879

2 copies
Top line
Both copies signed

What is the *Training Electronic Filing*<u>Center?</u>



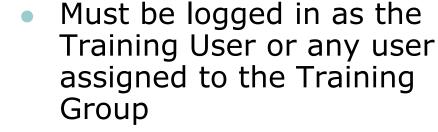


- Year round training tool
- Gives preparers the opportunity to experience tax season all year
 - Simulates IRS acknowledgements
 - Accepted returns
 - Rejected returns

Training Electronic Filing Center Requirements



• Requirements:



- Must have internet access
- Must use TaxWise 2009 prior to December 10th
- Must use TaxWise 2010 after December 10th
- *Recommendations:*
 - Access to a printer to print out DCR and Acknowledgement reports



Experience both Accepted and Rejected returns



Accepted 0,2,4,6,8



- IRS Accepted acknowledgement for returns in which the primary SSN starts with an even number (0, 2, 4, 6, 8)
- **IRS Rejected** acknowledgement for returns in which the primary SSN starts with an odd number (1, 3, 5, 7, 9)
 - » Rejects codes are random and not related to the return information
 - » Rejected returns will never be accepted because the primary SSN is an odd number



Transmitting to the Training Electronic Filing Center

Confirm	×
(667) Connection will be made to the Training Electro Continue?	nic Filing Center.
Yes	<u>N</u> o

- Login as the Training User or any user assigned to the Training Group
- Create a return
- Create an e-file
- Open the
 Communications menu
- Select Send
 Federal/State Returns
- Click **Yes** on the confirmation box



Lesson Summary: Transmitting

- > In this lesson we have covered:
 - > The life cycle of an e-file
 - > Electronic filing of New Jersey returns
 - > Checks to make before transmitting
 - Sending returns to UTS
 - > The Training Electronic Filing Center
- > What questions do you have?



ERO (Transmitter) Training Module 4

Acknowledgements & Email

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Communications from TaxWise



 Acknowledgements are posted to your UTS Electronic Mailbox

• *IRS*

• IRS Acknowledgment

• **ST**

• Fed/State e-file Ack

o **EMAIL**

• TaxWise Mail



Availability of Acknowledgements

- Federal: 6 to 48 hours after returns transmitted
- NJ: 1 to 7 days after Federal ACK
- Have printer ready
- Request from Communications menu
- Email will download at same time
- Available acknowledgements (ACK) and email will automatically download when transmitting e-files

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GETTING ACKNOWLEDGEMENTS

- Communications/Get Acknowledgements/ Get
- Connects to site
- **o** Up comes list
- False/True
- One or more than one can be checked
- Gives summary then ask for "details"
- o Print Fed Acks
- Attach 8879s to Ack and save
- State Acks no need to print, still IMPORTANT

Database acknowledgements will automatically process

se with information received



4	opacing bacabase
	TaXWise is updating the database with information receive
	·
	from the Electronic Filing Center. This process may take a
	few minutes

All database update files

Indating Databa

File: D4U52713.48A

Last error: None

 Automatically process when the communications window is closed

o Receive database updates frequently

Select acknowledgement window lists the available acknowledgement files



	Processed	File Name	File Date 🛛 🗸	File Time	File Type
	False	A4U52710.58A	05/27/05	10:58	IRS
) 🖹	False	A4U52713.48A	05/27/05	13:48	IRS
) 🖹	False	A4U11316.07A	01/13/05	16:07	IRS

- Defaults to Wide
 Format
- Defaults to show only unprocessed acknowledgements
- Select the files you want to process
- Click OK
- Note: You should process and print all acknowledgements.

FORGOT TO PRINT ACKNOWLEDGEMENT



Go to "REPORTS" ACKNOWLEDGEMENTS this list all, just pick by date and print

summary of each acknowledgement file appears on your screen



low processing IRS :	file A4I52713.48A			-
	IRS Acknowledgment Summa	ry (Memphis)		
	Total Return Count:	l		
	Returns Accepted:	0		
	Returns Rejected:	1		
	Duplicate Returns:	0		
	Unresolved Returns:	0		
Now processing IRS :	file A4I52710.58A			
Now processing IRS :	file A4I52710.58A IRS Acknowledgment Summa	ry (Memphis)		
Now processing IRS :		ry (Memphis) 1		
Now processing IRS :	IRS Acknowledgment Summa 			
Now processing IRS :	IRS Acknowledgment Summa Total Return Count: Returns Accepted: Returns Rejected:	1		
Now processing IRS :	IRS Acknowledgment Summa Total Return Count: Returns Accepted: Returns Rejected: Duplicate Returns:	1 0		
Now processing IRS :	IRS Acknowledgment Summa Total Return Count: Returns Accepted: Returns Rejected:	1 0 1		-

- List a brief summary of what each acknowledgement files contains
 - Total returns in file
 - Total returns accepted
 - Total returns Rejected
- Click the *Details* button to display the full acknowledgement
 - Allows you to print your
 acknowledgement

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Show and tell

View one report
Summary then need detail
Print
Or choose several reports, details, and print

Email from CCH



REJECT REPORT

 FROM ACK SCREEN, CLICK THE "REJECT" BUTTON TO DISPLAY THE REASONS FOR ANY REJECTED RETURNS
 CLICK THE PRINT BUTTON TO PRINT THE REJECT REPORT



Print your Acknowledgements

Acknowledgeme	nts										
< 🖨 🏝 🔗 🏾	00% 💌	[] •		1 of 3		· · ·		 M			
Ver. 1							A	cknowl	edge	ments	;
								т. А.	r - 201	14	
								Taxw	/ise 200	J4	
							IR	S Ackn			ents
TIN	Name			Refu	Ind	Туре					sig Doc
<u>tin</u> IRS 334991146	Name	Filename:	A41527			EFIN:	· !	S Ackni		lgeme e-file	Sig

- Click the *Printer* icon
- Click OK to print
 - Click Cancel to quit the printing process
- Close the Acknowledgement window
 - Click the X in the upper right corner of the window
- Click OK on the View Processed Acknowledgements window



3189 Guidelines: Acknowledgements

Print **all** Acknowledgement Reports

- > This will print the reject details
- Save the Acknowledgement report for end of season reporting

> Verify acceptance of Federal and New Jersey returns

- Compare to DCR report
- > The DCR report can be shredded once all returns have been accepted
- Retain Forms 8879 with W-2's and 1099's for year end submittal to IRS

Detailed Reject information prints with the IRS acknowledgement



TIN: 321-99-1146 Form reference: 10401040 Error code: 504

DCN: 991146-00009 Copy number: 1

Sequence number: 175

Dependent's SSN (SEQ 0175, 0185, 0195, 0205, 0215) of Form 1040/1040A and corresponding Dependent Name Control (SEQ 0172, 0182, 0192, 0202, 0212) must match data from the IRS Master File.

TAXWISE CORRECTION SUGGESTION:

Verify the Dependent's Last Name and Social Security Number information, HIGHLIGHTED IN RED on the MAIN INFO, with the actual Social Security Card. If the actual card matches your TaxWise entry exactly, have Taxpayer contact the Social Security Administration at 1-800-772-1213 to correct the Social Security Administration records. It takes approximately two weeks for this information to be updated in the IRS's files as well. You can then re-transmit the return electronically.

- Detailed reject information contains:
 - TIN (Social Security Number)
 - DCN
 - Form Reference
 - Copy Number
 - Sequence Number
 - Error Code
 - IRS description from the 1345A
 - TaxWise Correction

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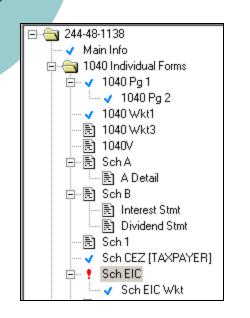


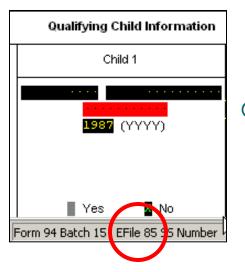
MAJOR REASONS FOR REJECTS

OINCORRECT SOCIAL SECURITY NUMBERS **OMISSPELLED NAMES** O LAST NAME USED ON **RETURN DOES NOT MATCH** SOCIAL SECURITY RECORDS **OINCORRECT EINS OINCORRECT EMPLOYER OR PAYER NAMES**



Fixing the Rejected Return in TaxWise





- Open the rejected return
- Form containing the error will have a red exclamation point (!)
- The rejected entry is typically in red

FIXING REJECTS Continued



- ERROR CODE INDEX & FIELD NUMBERS FOUND IN PUB 1345A
- CONTACT TAXPAYER BY PHONE OR BY LETTER TO GET CORRECT INFORMATION
- FIX THE ERROR
- RUN DIAGNOSTICS AND CREATE AN E-FILE RETURN
- IF THE RETURN DOES NOT INVOLVE MAJOR CHANGES, RETRANSMIT THE RETURN



REJECTS REQUIRING NEW SIGNATURES &/OR PINS

• CHANGES THAT ARE MORE THAN

• \$50 TO "TOTAL INCOME" OR "AGI"

• \$14 TO "TOTAL TAX," "FEDERAL INCOME TAX WITHHELD," REFUND," OR "AMOUNT YOU OWE."



SUGGESTED METHOD

- O 1. CALL TAXPAYER
- 2.FIX ERROR (ones that involve \$ changes)
- 3.create efile and resubmit
- 4.print out new return for taxpayer to replace old one, new 8879s to be signed MUST DO!!!

5. meet at site for quick signing

REJECTS THAT MUST BE PAPER FILED

CHANGE IN NAME CHANGE IN SSN ANOTHER TAXPAYER HAS CLAIMED THE SAME DEPENDENT

Tax-Aide

Resend the return after reject corrections are complete





- Fix the reject
- Run
 Diagnostics
- Create a new e-file
- Transmit the return

STATE RETURN REJECT



- Fix the error
- State e-file help if needed
- o Resend efile
- Will be a state stand alone
- FYI cannot do a NJ stand alone without Federal return except when correcting error



IRS Record Keeping Guidelines

- The following should be kept confidential and in a secured location until the end of tax season.
 - > One signed Form 8879 for each return transmitted with one copy of Forms W-2/1099
 - Master backup disk with all electronically transmitted returns
 - Copy of IRS Acknowledgement Report for transmitted federal returns



Questions

comments



ERO (Transmitter) Training Module 5

Reports

2009 Tax Season

ERO TRAINING - MODULE 0



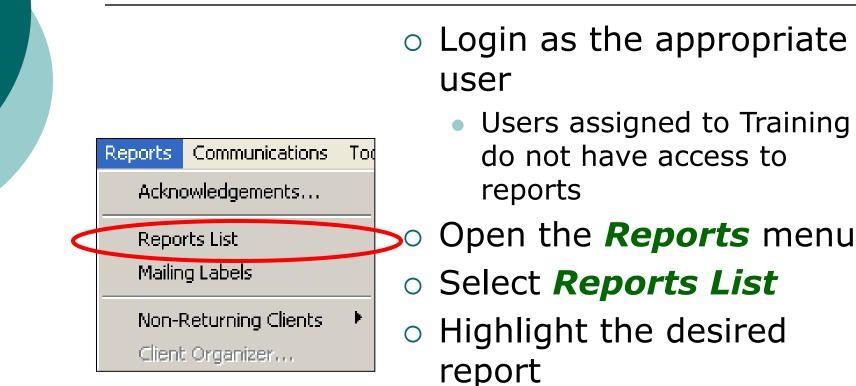
Lesson Overview: TaxWise Management Reports

In this lesson we will:

- Learn how to run a TaxWise report
- > Learn how to filter and sort the report
- > Discuss typical reports
 - > IRS Electronic Filing Summary
 - > Preparer Field Values
- > Learn how to print reports



Steps for running a TaxWise report



- o Press *Enter*
- Click OK on Report
 Criteria window

Use Help to determine which reports to use at your site

Select A Report To Print	×
Report Name	🖌 File Name 🔺
Acceptance Summary	UTSInd1.rpt
Audit Shield Totals	AUDITSHIELDTOTALS
Awaiting IRS Acks Summary	UTSInd14.rpt
Awaiting State Acks Summary	UTSInd15.rpt
CashWise Card Mgmt Report	UTSCW1.rpt
Check Print Summary	UTSInd8.rpt
Client List	UTSInd2.rpt
Deposited RAL/ERC Fee Summary	UTSInd9.rpt
Depreciation Forms	UTSInd16.rpt
Individual - IPS Return Mailer - #UT100/200	UTSIND99.rpt
IRS Deposits Report	IRSDEP.rpt
IRS Electronic Filing Summary	UTSInd3.rpt
IRS Extension Summary	UTSInd12.rpt
IRS Rejected Returns	UTSInd11.rpt
Military Preparer Summary	UTSInd13.rpt
∩(C l., (C	
<u> </u>	
οκ	Cancel Help

Click the *Help* button on *Select a Report to Print*

Click the **1040 Report Descriptions** link

See Also

1040 Report Descriptions

Tax-Aide



TYPICAL REPORTS REQUIRED

IRS Electronic Filing Summary Print and send to IRS Newark at end of season



Specify the Report Criteria

Report Criteria	×
Record Filtering	
Starting date 01/01/2007 II	Starting DCN 000000-00000 -7
Ending date 12/31/2007 1	Ending DCN 999999-99999 -7
Date No Date Filter 👻	T
User name	Print Options
Preparer ID	C Printer
State e-files only? Select state	C Disk
Report Options	<u>S</u> ort Order
Print summary information only	Sort by primary SSN
Include erased returns	C Sort by primary last name
🔽 Print gray bar	◯ Sort by DCN ◯ Sort by ZIP
Label Options Print phone number Print last name first	More Options Print filter information on reports Top Margin 0.25 inches Left Margin 0.25 inches
	IK Cancel <u>H</u> elp

- Normally use defaults
- Filter by DCN if multiple EFINs or to isolate computers
- Can change sort field



IRS Electronic Filing Summary

Ver. 1	I	RS Electronic Filing	•	,	9/5/2007 4:57:03PM
Filename	Name	TaxWise 2006 E-File Status	Date Sent	Date Acked	DCN
Preparer EFIN:	227923				
61021888.888	WILSON	NOT TRANS			227923-50000
61028888.888	BROWN	NOT TRANS			227923-50003
6 111111.111	JONES	NOT TRANS			227923-00001
Total e-files:			3		
Total e-files Total e-files Total e-files Total e-files	Resent or Awaiting Ack: Accepted:		3 0 0		

Print and send to IRS Newark with 8879s, taxpayer forms and e-file backups

Lesson Summary: TaxWise Management Reports

In this lesson we have covered:

- Running a TaxWise report
- Report criteria
- > Examples of reports
- > Printing a report

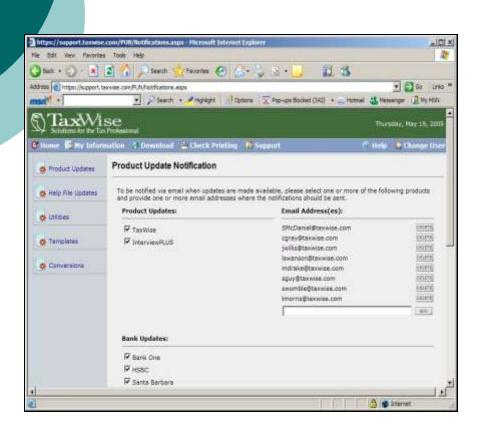
Tax-Aide



ERO (Transmitter) Training Module 6

TaxWise Updates

Receive an email notification when a Federal or State update has been released



- Each email address submitted with IRS orders are automatically signed up for the following notifications
 - TaxWise
 - Resident State

 Click the Notify me by e-mail when my products are updated link

'Tax-Aide

Select the States for which you want to receive initial release and update notifications



https://supp	ort, taxivise.com,PUN,NotFcations.aspx			* 🔁 Go 🛛
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	P Liberty Bank			
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	California 🖓 : 🖗 B	Lauluiana 🖓 5 🖗 8	New Massica P 1 P a	Texas P 1 P a
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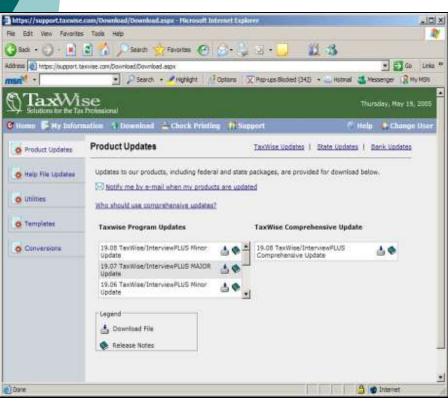
- Click to place check mark next to New Jersey
- Scroll to the bottom of the page and click
 Save



Update Files

- Federal updates are usually several MB
- Downloading from the TaxAide web site with a broadband internet connection is recommended
- Libraries usually have high speed internet access that can be used to download to a flash drive
- If using a dial-up connection, download during the night

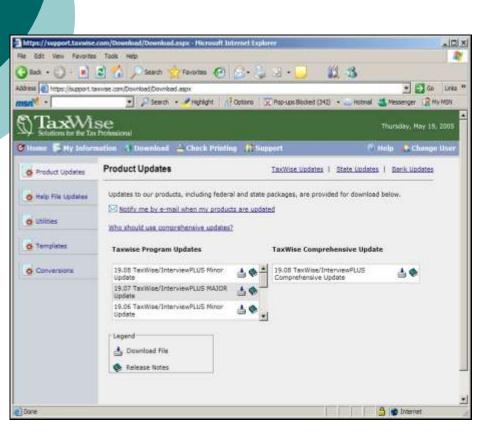
Get the latest versions of TaxWise Customer Support tab



 Click *Download* from the *Home* page Tax-Aide

- TaxWise Program
 Updates gives the ability to update one version at a time
- TaxWise
 Comprehensive
 Updates include all
 updates in one
 download
- View readme files prior ERO TRAINING - MO**to**e downloading 102

Select the appropriate Federal Update to download



 Click the *download* icon to begin downloading Tax-Aide

 Each time the federal program is updated, it will be listed on the *TaxWise Updates*

screen

Note: Clicking the release notes icon will allow viewing of what is included and/or fix@d.

The File Download dialog box will display after selecting the update

)o you	want to ru	in or save this fil	le?		
	Name:	TWUPD08.EXE			
	Type:	Application, 2.36	MB		
	From:	download.taxwise	.com		
		Run	Save	Cancel]

Open Option:

 Allows the installation of the module without saving the installation file to the hard drive

Save Option

 Requires the installation file to be saved to the hard drive/flash before the module can be installed

RP Tax-Aide

If the option to save was selected, a **Save As** dialogue box will be displayed



- Select the destination for the installation file
 - Remember where the file is being saved so it will be easy to locate once the state module is ready to be installed
- Double-click on the installation file to install the module
- *Note*: The desktop is the most common location to save a file. **Do not save to the UTS09 folder.**

The installation has easy to follow on-screen instructions



Setup	A DESCRIPTION OF A DESC	×
	UTS Tax Software Update	
	The InstallShield® Wizard will deliver the UTS Tax Software update to your computer. To continue, click Next.	
	< Back Next > Car	icel

Simply click *Next* to continue.

The installation will give a list of drives available to install the module

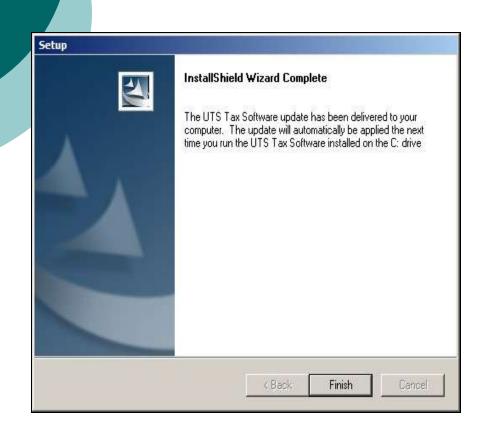
١	A
Ľ	AR
1	PTa
	IX-Ai
	de

tup				
Drive Se	lection			22
Select th	ne drive below where your software is In:	stalled.		
C E I I S T U	2147 Meg free 2147 Meg free 2147 Meg free (\\netapp03\i-drive 2147 Meg free (\\netapp03\shar 2147 Meg free (\\Netapp03\TW/ 2147 Meg free	ed)		
allShield -		< Back	Next >	Cancel

- Select the drive where TaxWise is installed
- If the drive is encrypted, it must be mounted

Finishing Up

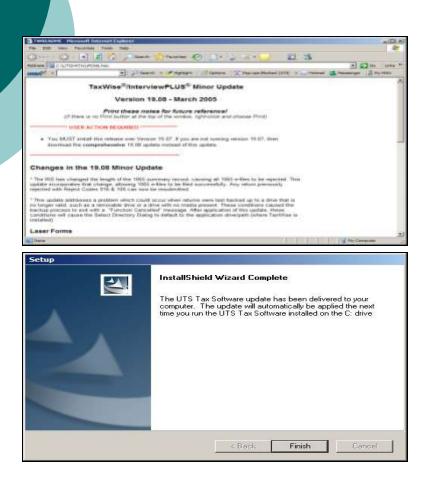




- The Update has been installed
- The update will automatically apply the next time TaxWise is opened
- Click *Finish* to continue



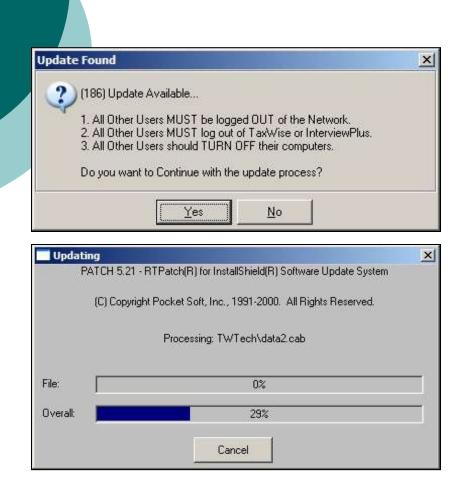
Viewing the Readme notes



 Once the Federal update has been installed, the associated readme notes will automatically open

- Program changes
- Laser forms
- New tools and options
- Close Readme and click *Finish* to close the update wizard.

Open TaxWise to apply the Federal update



- Click **Yes** to continue with the update process
- View the update's progress

Tax-Aide



The TaxWise update is now complete



 Once the update is complete, a pop up will list both the previous version and the newly updated version Click OK and TaxWise will automatically open

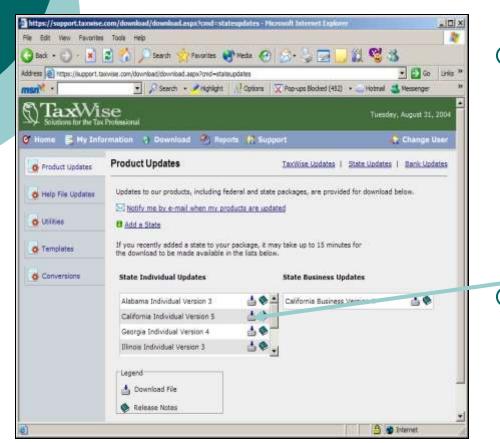
Download state files for initial installation and state updates



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A Product Updates	Product Updates		TaxWise Updates	State Updates	Bank Updates
🔆 Help File Updates	Updates to our products, including t			ed for download bei	o#.
o utilities	Add a State	roducts are update	đ		
G Templetes	If you recently added a state to yo the download to be made available	ur package, ≷ may in the lists below.	take up to 15 minub	es for	
Conversione	State Individual Updates		State Business Up	dates	
	Alabama Individual 2.0	404	Alabama Business 3	3.0	40-
	Arizona Individual 2.0	46	Alaska Business 2.0	1	44
	Arkenses Individual 3.0	40	Arizona Business 4.	0	40
	California Individual 6.0	±♥	Arkanses Business	4.0	-
	Legend				
	📥 Download Nie				
	Release Notes				
Dore			15		Diternet

- Click the State
 Updates link to
 access state
 downloads
- The latest version of the state is always available
 - All state versions are combined in the update

Select the appropriate state module to download from the *State Updates* sub-page



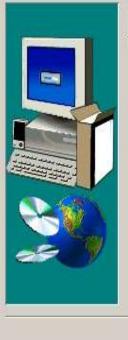
 Click the *Release* **Notes** icon to view important information about the state update O Click the **Download** icon to begin the download process

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The State Installation has easy to follow on-screen instructions

Welcome



Welcome to the TaxWise State Setup program. This program will install a TaxWise state package on your computer.

It is strongly recommended that you exit TaxWise before running this setup program.

WARNING: This program is protected by copyright law and international treaties.

Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.

Next >

Simply click **Next** to continue

2009 Tax season

Cancel

There are two options given during the installation of the state module



• Make a state flash

 Allows the user to put the state module on a disk which can be used to install the state on non-networked and/or non-connected computers

Install XX Individual to this computer

 Installs straight to the computer Tax-Aide



Select a target drive for the state

Target Drive	C E I O P S T	Please select Individual.	a target drive fo	r Georgia
	Target C:\UTS			
		< <u>B</u> ack	<u>N</u> ext >	Cancel

- Select the drive where TaxWise is installed
- If the drive is encrypted, it must be mounted
- Only one drive can be selected at a time

A confirmation box will appear once the installation has been completed







- The location where the state module was installed will be listed in the confirmation box
- Click **OK** in the confirmation box
 - Continue for other setup options
 - Exit the installation
- Continuing will allow creation of an installation diskette/flash

Release notes can be viewed after the installation has been completed



×			Confirm
?	ile for Georgia Individ	View readme file	2
			~
	No	Yes	
	<u>N</u> o	Yes	

 An option to view additional information about the state module will be available via a readme file



Updating EFC Computers

 Federal updates and state modules can be installed by saving the update to a flash drive and opening the update file on the EFC computer

 Alternately, updates can be transferred between computers using the **Tools** menu

Troubleshooting Tip: How can I tell if TaxWise updated to the correct version?

About TaxWise for Windows	×
TAXWISE® for WINDOWS® Tax Software for Professionals Version 19.09 (0005) Workstation : 0 Universal Tax Systems Jrc. Copyright © 1996 - 2004 All Rights Reserved	
	OK System Snapshot

Open TaxWise

- You do not have to log in
- Open the *Help* menu

Select About TaxWise

- Verify the version number
- o Click **OK**

Note: You must complete this process on all stand alone computers.

Tax-Aide

Troubleshooting Tip: How can I tell if the State installed or updated completely?



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	0																

- Open the TaxWise Utility Program
- Open the *Setup* menu
- Select View
 Authorization
 - Packages and Options
 - Individual States (Version)
 - Pay Per Return Authorization



Other Updates

- TaxWise Help, Federal Help and Utility updates are sometimes posted on the TaxWise web site.
- These updates can be downloaded and installed like the Federal and state updates

Quick Recap: Federal and State Installation Transfer and Updates

Quick look at what we have covered:

- Receive email notification of updates
- ✓ Download Federal Update
- ✓ Download State Files
- ✓ Install Federal Updates from flash
- ✓ Install State(s) and State updates from flash

> What questions do you have before continue?

Tax-Aide



ERO (Transmitter) Training Module 7

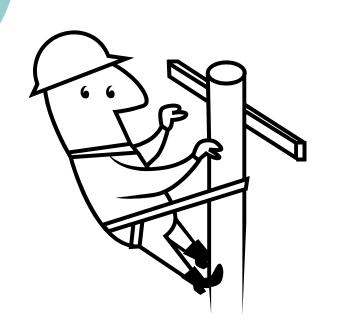
Utility Program

Module 7 Overview: TaxWise Utility Program

In this lesson we will cover:

- > Learn how to use TaxWise Explorer to manage your TaxWise files
- > Learn how to copy Tax Form Defaults to disk
- > Learn how to use Utility File Menu
- > Learn how to send TaxWise customer support a tax return using Compose/Send message

TaxWise Utility handles setup, file maintenance, software updates, and e-mail



Steps to opening the TaxWise Utility Program

- 1. Login as Admin
- 2. Open the *Tools* menu
- 3. Select Utilities/Setup Options

TaxWise Utility has the following menus

- » File
- » Communication
- » Tools
- » Setup
- » Help

Tax-Aide

The Site Administrator can use TaxWise Explorer to manage files



- The Admin user has access to files in all user directories
- All other users can only access files belonging to the active user
- Locating TaxWise
 Explorer from the
 Utility Program
 - Open the *File* menu
 - Select TaxWise Explorer

Tax-Aide

Actions that are available for file management in TaxWise Explorer



Copy Files to Another User -- Use this action to copy Tax Form Defaults, Form Print Defaults, and History lists from one user to another.

- You cannot copy tax returns to another user.
- > **Delete Files** -- Use this action to delete tax returns and other files.
 - The file cannot be restored.
- Move Files to Another User -- Use this action to move tax returns and other files from one user to another.

Use the *Look in* box to find the file or files you want to select



- Expand the folder or drive to show subdirectories
 - Click the plus sign (+)
- Admin user can select files in any folder or drive
- Other user names can only select files from their own user name

Tax-Aide

Statistical information displays for the highlighted return



File name	Package
41446991.146	1040 Individual
41448991.146	1040 Individual
41449991.146	1040 Individual

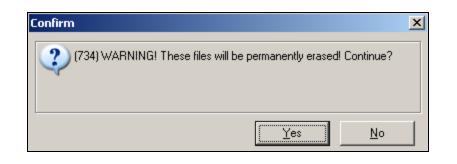
Statistics
SSN/ EIN:
446991146
Taxpayer Name:
test one
Return Type:
E-File
Created:
05/18/2005
Last Edited:
05/20/2005
Last Printed:
Preparer ID:

- SSN/EIN
- Taxpayer Name
- Return type
- Date created
- Date last edited
- Date last printed
- Preparer ID



se TaxWise Explorer to delete returns

Restrict file list	to: 1040 Individual 💌	
Action:	Delete Files	
File name:	41168448.125	
Copy to:	TWO	
Rename to:	·	
<u>Play Movie</u>		<u>D</u> elete



- Select user name
- Select file name
- Select Action Delete files
- Click the *Delete* button
- Click Yes on
 Confirmation box

Note: You cannot recover deleted files or returns. Make sure you have a backup before deleting returns.

Move returns from one user name to another user name



TaxWise Explorer			
Look in:		File name	Package
□ - C USERS - C ADMIN - C GUEST - C ONE - C TRAININ - C THREE - C TWO 	Ξ	41168448.125 41465675.957	1040 Individual 1040 Individual
Restrict file list to:	1040 Individual	_	
Action:	Move Files to Anoth	her Location	
File name:	41168448.125		
Move to:	TWO		•
Rename to:	·		
<u>Play Movie</u>			Move

- Select user name
- Select file name
- Select Action Move files to Another User
- Select a user name
- Click the *Move* button



Quick Recap: TaxWise Explorer

Quick look at what we have covered:

- Copy files to another user
- Delete returns and files
- Move returns to another user

> What questions do you have before we continue?



REMINDER

- A good EFC can help you maintain their own computer
- Teach then how to update using desktop icon
- Teach then to delete files after they are accepted.
- Keep them out of ADMIN

AARP Tax-Aide

Remove tax return e-files that were created by mistake

e Name SSN/EIN	Taxpayer Name	Туре	Status 🛆	Edit	States
043227991 043-22-799	1	EFile	EFile Batc	04/15	
115664248 115-66-424	3	EFile	EFile Batc	03/21	PA
286245444 286-24-544	4	EFile	EFile Batc	04/12	OH
328307803 328-30-780	3	EFile	EFile Batc	03/08	IL
406561131 406-56-113	1	EFile	EFile Batc	03/08	
179400276 179-40-027	6	EFile	EFile Created	03/25	PA
033480311 033-48-031	1	EFile	IRS Accep	04/05	MA
) 471742374 471-74-237	4	EFile	IRS Accep	03/08	MN
082263265 082-26-326	5	EFile	IRS Rejected	04/16	NY
) 573943590 573-94-359)	EFile	IRS Rejected	03/25	CA

- Open the *File* menu
- Select Erase efiles...
- Select the e-files to erase
- Click OK
- Re-create an efile by opening the return and running Diagnostics or by using Make



Quick Recap: Utility Program

Quick look at what we have covered:

- > Learned how to use TaxWise Explorer to manage your TaxWise files
- > Learned how to use some of the Utility File Menu
- What questions do you have before we continue?



TC Module 8: Technical Tips and Good Practices

In this lesson we will cover: • Passwords TrueCrypt Auto start Managing E-files Restricting EFC access Display Resolution How to be prepared when you call TaxWise Customer Support



Security Vulnerabilities

Equipment possession

- Unattended during site setup, operation or end of day pack up
- In sight in vehicles
- Password compromise
 - Access restriction depends on password
 - Providing the password removes the barrier
 - Why bother to encrypt if the password is provided?



Passwords

Required for

- computer operating system (all users)
- Encryption software
- Taxwise

 Can be remembered by computer users (should not be written down)



Security Note

 If passwords are written, they should not be on the computer, in the computer case or on anything that goes into the computer case (like the volunteer's name tag)

 Good idea for **you** to keep passwords of all EFCs if they differ

Backing up returns should be part of your daily routine



- Backup returns
 on a daily basis
- If something happens to your computer, this is your only way to recover your tax returns



Managing E-files

 Tracking returns from preparation to delivery to IRS (Cradle to grave)

- EFC to ERO
- CCH/IRS/NJ accept/reject
- Mail if cannot be e-filed

Goal: Don't misplace any returns!



Managing E-files – Considerations

- Electronic copy of return and associated paper
- Extra paper avoid if possible
- Self-checking (Audit) needed
- EFC burden minimize



Managing E-files – Options

TaxWise reports

- Track & audit
- No additional data entry or paper

TaxWise Users

- Add Users for "Complete"
- Move returns accepted by IRS <u>and</u> NJ from site user to Complete user



Managing E-file Paper – Options

- 8879 plus withholding documents for each return
- File folders for
 - Ready to transmit
 - Awaiting ACK
 - Accepted (Federal and NJ) holding until sent to IRS



User Names & Passwords

Recommendations: User for each e-file site User(s) for completed returns Same password for Admin, Training & Guest (consider deleting the Guest user) on all district computers, known to EROs only Passwords in CAPS



Tips for getting the most efficient Customer Service



• Know your EFIN

- Must enter prior to being transferred to a Customer Service Representative
- Be at your computer
- Write down the exact error message
- Describe the exact function you were performing when you received the error
- Know the SSN when checking the status of a return

Module 8 Summary: Technical Tips and Good Practices

AARP Tax-Aide

In this lesson we have covered:

- TaxWise Use
- Passwords

- Managing E-files
- Being prepared when you call TaxWise Customer Support

What questions do you have ?



ERO (Transmitter) Training Module 9

Post-Filing Season Procedures

2009 Tax Season

ERO TRAINING - MODULE 0



Lesson Overview: Post-Filing Season Procedures

In this lesson we will cover:

- > Transferring data for storage
- > Destroying data records
- Completing a backup of electronically filed returns
- > Deleting Taxpayer data



Records Transfer

To IRS Newark by April 30

- Acknowledgements
- Signature and withholding documents
- Backup with all e-files
- You will never see these records again!
- Note: some EROs send this data monthly
- If retaining taxpayer data, to TCS by April 30 (Gary Broughton)
 - Backup of returns authorized for retention
 - Data will be returned to TC by end of year



Packaging for shipment

- Package securely to prevent damage or loss
 - CD mailer
 - <u>Padded</u> mailer for flash drives
 - Durable envelope
- Return address on flash drive



Data disposal

- All records (paper and electronic) with taxpayer data not transferred should be destroyed by April 30
- Shred DCNs, tracking sheets, logs
- Cut CDs and floppy disks
- Delete files on flash drives
- Remove data from computers per IRS and AARP directions



Post-Filing Season Backups

Ba	ckup Options	×
	Transfer IRS/RAL Files to Transmitting PC	
	Regular Backup	
	Advanced Backup Options	
	OK Cancel <u>H</u> elp	

- For IRS: Complete backup of all returns electronically filed
- For TCS: backup of returns authorized for retention
- Use Regular Backup
- Test the backup prior to removing your TaxWise software

DELETE ALL RETURN DATA FROM COMPUTERS

- Run a disk wipe program for all IRS computers.
- Follow TCS directions to delete all taxpayer data from personal and/or AARP computers.

 Optional for AARP and personal computers: Download TPClear from <u>http://www.aarp.org/tavolunteers/</u> Tax-Aide



Lesson Summary: Post-Filing Season Procedures

In this lesson we have covered:

- > Transferring data for storage
- > Destroying data records
- Completing a backup of electronically filed returns
- > Deleting Taxpayer data

> What questions do you have?



References

- IRS Pub 3189 Volunteer e-file
 Administrator Guide
- TaxWise (year) User Manual
- AARP Tax-Aide Technology Management Guide
- IRS Pub 1345 Electronic Filing Handbook



Multiple EFINs

- When you are transmitting for more than one site
- You must use a transmit efin so that your database can sort the data properly
- Acquired through Taxwise
- Set up with your TC