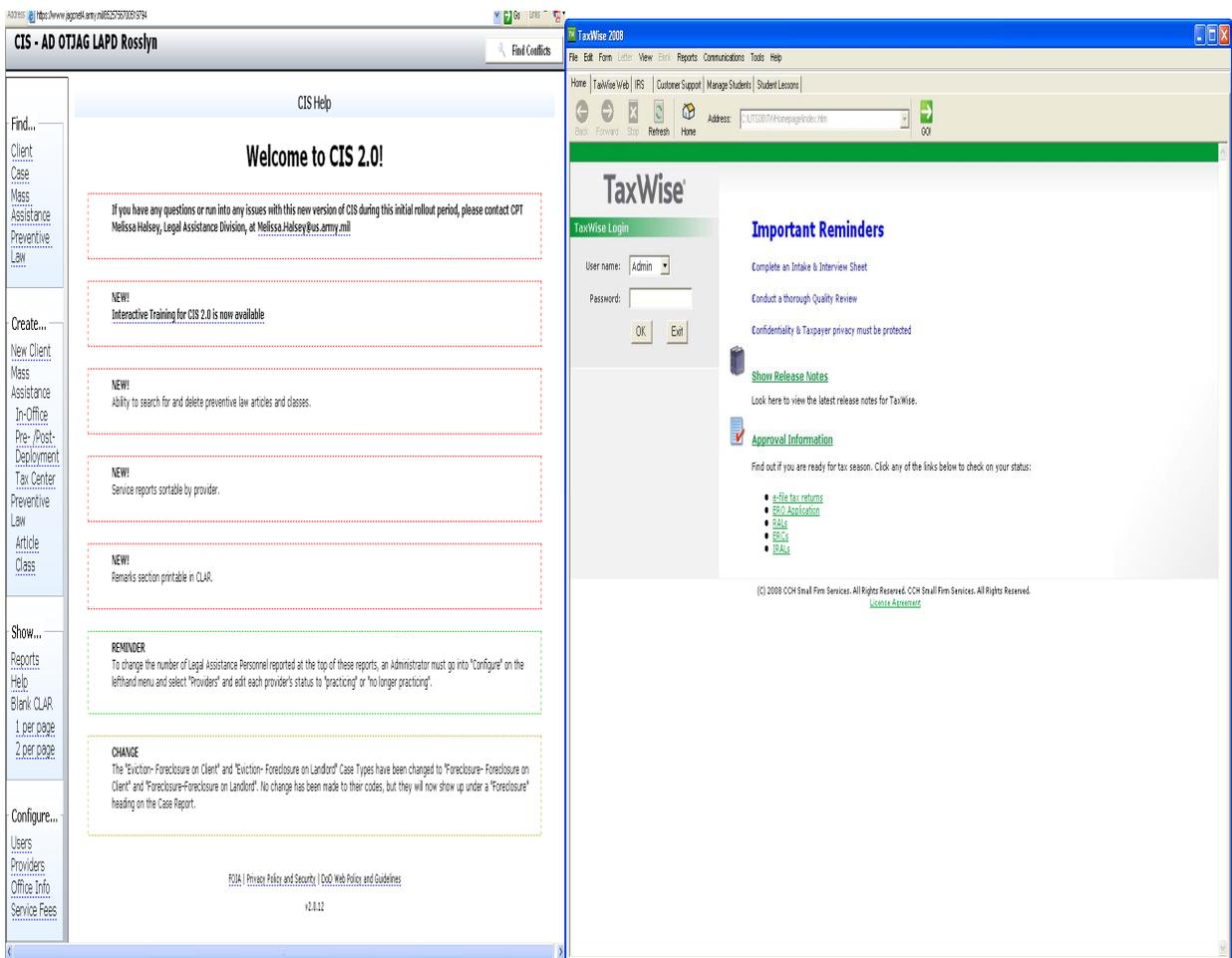


Tax Office Statistics

TaxWise Desktop

Purpose: To assist legal assistance offices in setting up TaxWise Software to gather statistical information for input into the Tax After Action Report (TAAR). The TAAR will be generated by the Client Information System (CIS).



I. Tax After Action Report

On 31 March 2008, The Deputy Judge Advocate General designated the Client Information System (CIS) software program as the sole Legal Assistance data collection source. The Tax After Action Report (TAAR) consists of entries made into the Mass Assistance Tax Center portion of your installation's CIS program. The TAAR is due 1 June of every year for CONUS Tax Offices and 1 July of every year for OCONUS Tax Offices. Every tax site that receives the TaxWise Software **must** submit a report.

II. TaxWise Online Setup

CCH, the vendor of TaxWise Online, will mail you a CD-Rom, a User Manual, and a Confirmation Slip.

The **Confirmation Slip** will contain valuable information that is essential in the operation of the software and **will need to be maintained**. The essential information contained on the Confirmation Slip will be:

- Your Electronic Filing Identification Number (EFIN).
- Your Client Identification Number, which will be a six digit number that you will need to enter each time you use the system and each time you communicate telephonically with TaxWise representatives.
- Your Registration Code (**Reg Code**), which is a 20 digit alpha-numeric code you will need to enter after you have completed the Setup Options.

III. Admin Duties

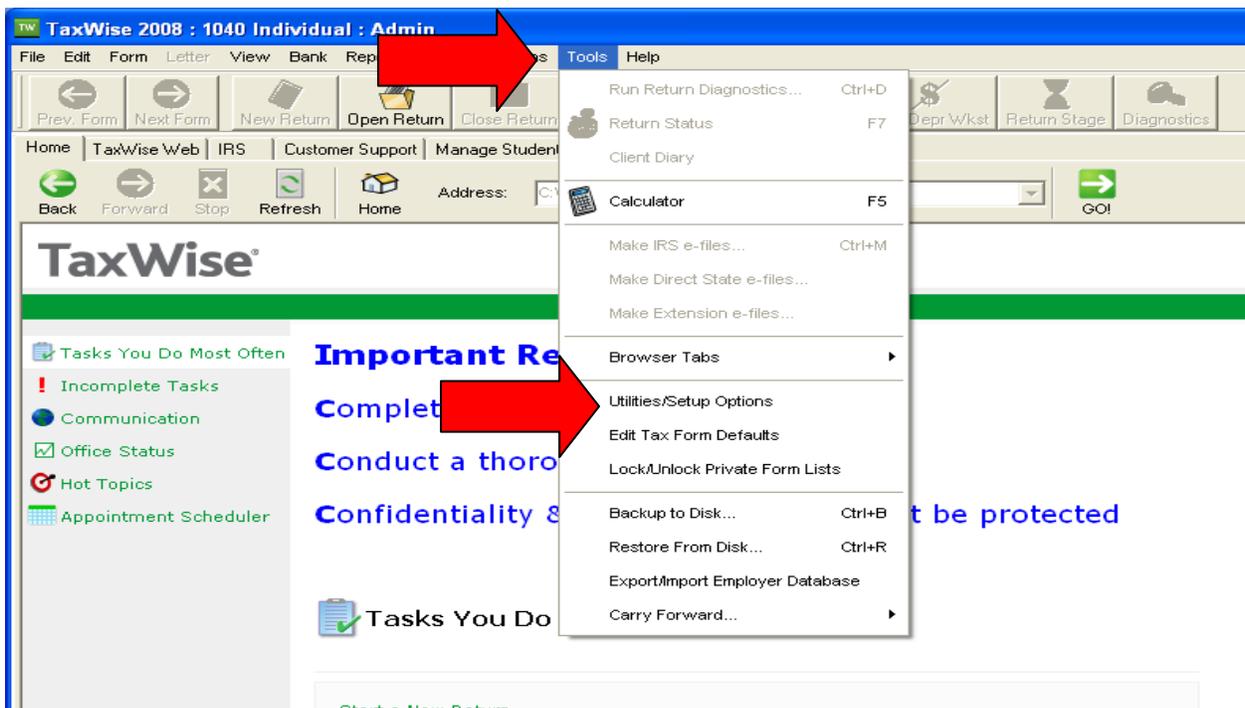
Upon receipt of the TaxWise Software, the Tax Center Manager needs to appoint an Administrator on the TaxWise system. The Administrator, known on the system as **Admin**, can perform tasks that no other user can. These tasks include:

- Using Security Manager to create and add user's names and groups to TaxWise. **It is the Admin that assign names and initial passwords too all users of TaxWise.**

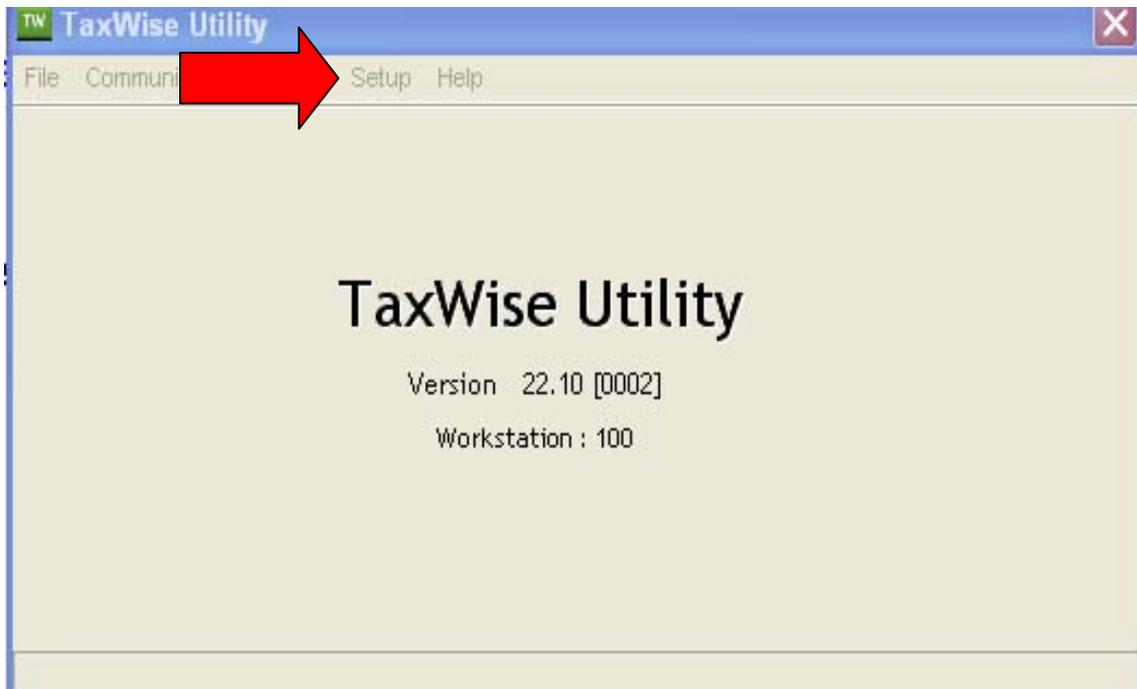
- Creating and Editing Tax Form Defaults that will generate the CIS input information.
- Set up tax form and print defaults that will be used by all users.
- Open, edit, print, create and submit e-files under any user name.
- Delete or move tax returns under any user name.
- Restrict access to tasks in TaxWise for other users (*i.e. restrict who can transmit e-files*).
- Create a **Price List** for all forms prepared. The Price List will generate CIS input information.

IV: TaxWise Desktop - Setup Options

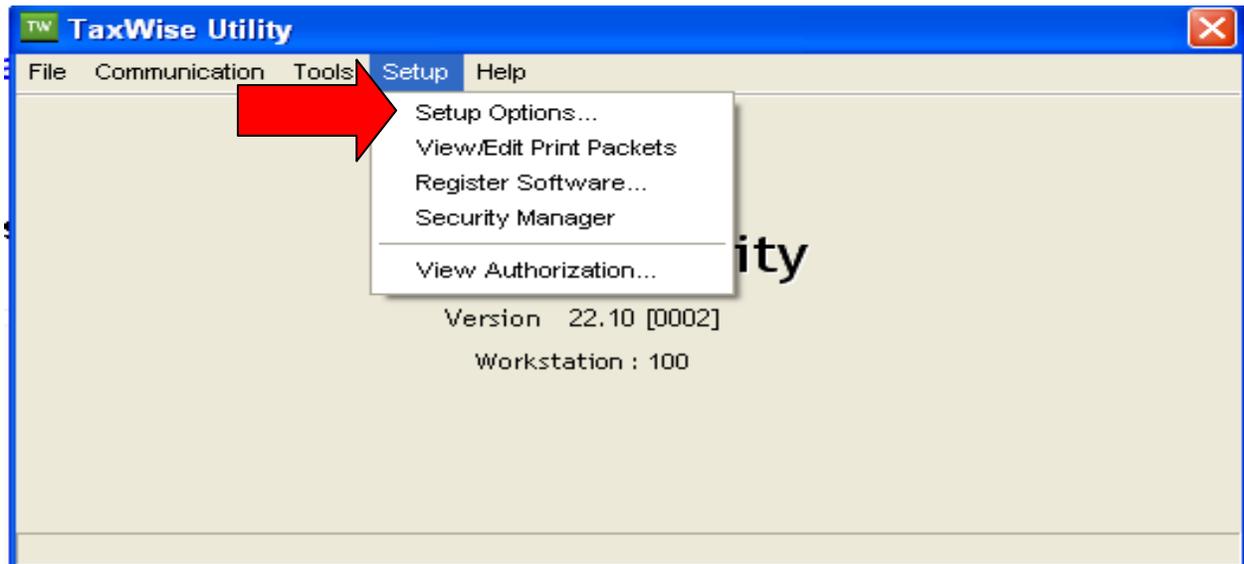
In TaxWise Desktop, this process begins when you first install the software. Upon software installation, the Admin must register the software, and then go through the Setup Options process. This is done by clicking **Tools** and then clicking the **Utilities/Setup Options**.



This will bring you to the **TaxWise Utility** screen show below. While at the TaxWise Utility screen, click on **Setup**.



TaxWise will then display the below screen. Click on **Setup Options**.



You will see the Setup Options screen shown below.

Setup Options

Company | General | Printer Setup | Indirect Transmitter | Direct Transmitter | Color Setup

Company Information

Look for your EFIN (or Customer ID) and Reg Code in the starburst on your Fulfillment Confirmation Slip

EFIN (Electronic Filing Identification Number) or Customer ID 070743

Your company's contact name Danny Fentress

Your company's name LAPD

Your company's street address 1777 North Kent Street

Your company's city, state, zip code Arlington VA 22209

Your company's telephone number 703-588-6722

Your company's Federal Employer's Identification Number (EIN), if you have one 27-0670836

Name of your company's Service Bureau, if applicable.....

Save as Workstation Defaults

<< Back Next >> Cancel Help

The Setup Options function is a five step process for military tax centers that requires the Admin to set up the tax center.list:

- The first Setup Options Tab is called **Company**. This section requires the tax centers electronic filing identification number (EFIN), the center's name, point of contact, address and telephone number.

- The second Setup Options Tab is called **General**. In this section you identify;
 - a. Block 1 to determine if TaxWise is operating on a stand alone computer or on a Network.
 - b. Block 2 is to start the count for the Declaration Control Numbers for all taxes prepared.
 - c. Block 3 of this tab is used by TaxWise to automatically print an invoice with each return. This is a must and works in conjunction with loading the Price Sheet (which will be discussed later in the manual); and
 - d. Block 4 is for Miscellaneous options. It is in this portion of the setup that we inform the software to use and limit the Preparer's Use Fields.

To enable and restrict entries in the Preparer's Use Fields, all selections in Miscellaneous options must be checked.

Other choices in the Setup Options features are **Printer Setup**, where you name your printer.

Setup Options

Company | General | **Printer Setup** | Indirect Transmitter | Direct Transmitter | Color Setup

1. Please select a default printing method.

Windows: Standard for the most common printers.

PCL: Use this method if you are experiencing printer problems.

2. Select a default printer for:

Tax returns, reports..... Xerox Phaser 4510DT PS

Check printing..... Xerox Phaser 4510DT PS

Label printing..... Xerox Phaser 4510DT PS

3. Options: (Check each option that you would like activated.)

Print blank page after EACH tax return?

Print tax returns in ALL CAPITAL LETTERS?

If you have more than one, print each EFIN on separate report pages?

Auto load soft fonts each time a tax return is sent to the printer?
(Note: If you are NOT using PCL, this should not be necessary.)

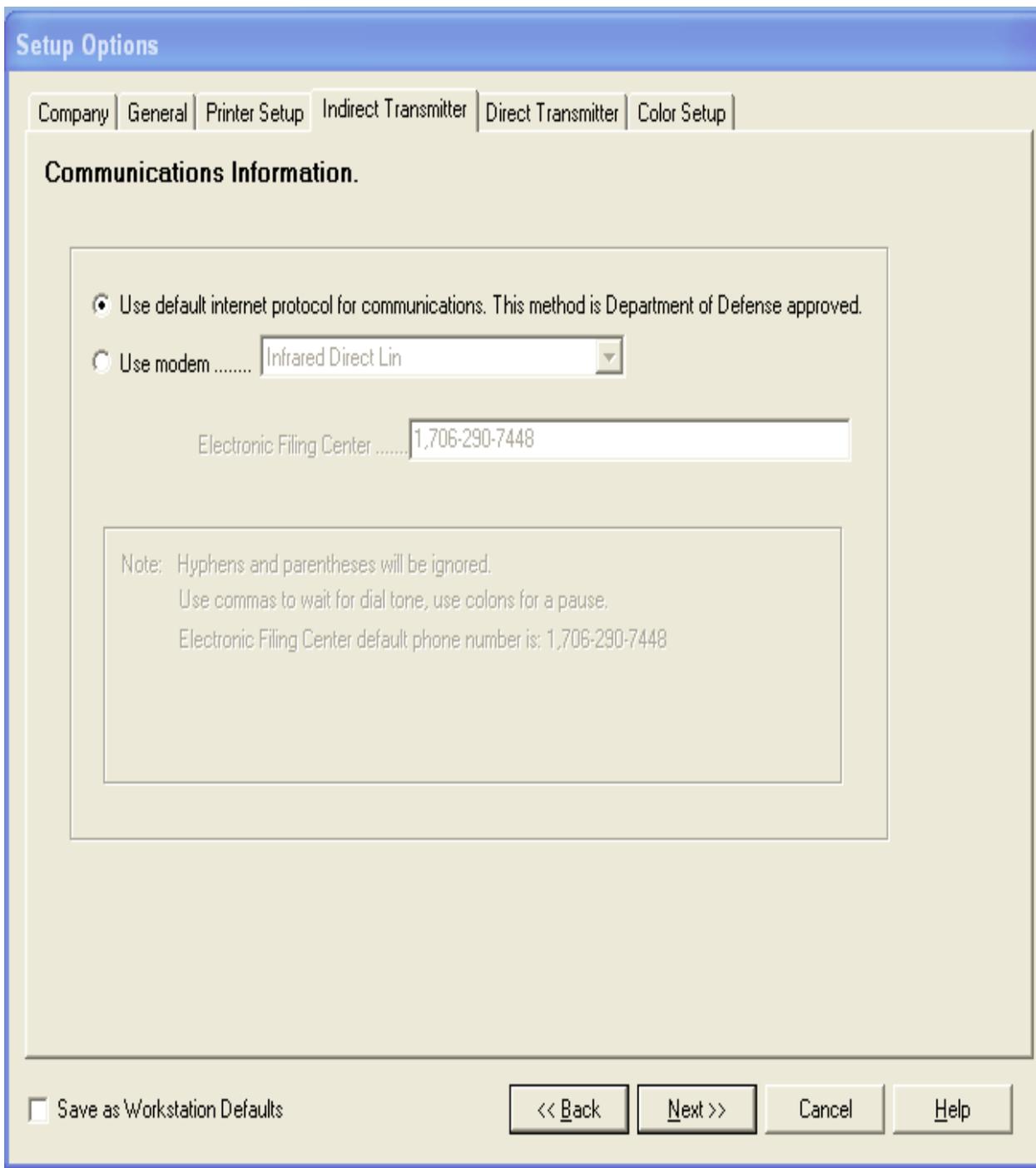
Print EACH rejected SSN on separate pages

Automatically print form 9325 as each IRS tax return is acknowledged?

Save as Workstation Defaults

<< Back Next >> Cancel Help

All Army Tax Centers are **Indirect Transmitters**. That means, Army Tax Centers transmit returns to TaxWise, who then sends the return to the Internal Revenue Service Center. In the tab named Indirect Transmitter, TaxWise has a choice specifically designed for Army and other Department of Defense Tax Centers. **Disregard the Direct Transmitter Tab.**



The last Setup Option Tab is the Color Setup. Simply choose the desired color and click on the Finish button.

Setup Options

Company | General | Printer Setup | Indirect Transmitter | Direct Transmitter | **Color Setup**

Color Settings

- Default
- Default without Color Coding
- Classic**
- DOS Classic
- Soothing
- My Custom Colors

Form Properties | **Text Properties**

Color Style

- Page Background**
- Label
- Heading 1
- Heading 2
- Highlight 1
- Highlight 2
- Filled Entry
- Empty Entry
- Required Entry
- Calculated Entry
- Scratchpad Entry
- Overridden Entry

Color | Line Width

Background

US 1234

Earnings summary

Heading 2

Your Name: **John Doe** SS number: **123-45-6789** XYZ: **123**

From Date: **01/01/2000** Full Year: **X** Period:

Employer Name: **[REDACTED]**

Employer Address: **1 Street, Rome, 30165**

Business type: **Accounting**

Press F1 for Help

Earned Income: **85000**

Fed Tax With: **25000**

Tips: **1500**

Dep. care: **3500**

Press F9 to see details...

Save as Workstation Defaults

<< Back

Finish

Cancel

Help

This will bring you back to the TaxWise Utility page. Close out by clicking on the **Red X**.



TaxWise will then return to the initial page, where you will have to **register** your software using the **Reg Code** provided at receipt of the software. To register the software, click on **Tools**.

TaxWise 2007: 1040 Individual: A Main

File Edit Form Letter Reports Tools Help

Prev. Form Next Form New Return Open Return Close Return Forms Tree Print Return Print Form Link Depr Wkst Return Stage Diagnostics TaxWise U

TaxWise Home TaxWise Web IRS Customer Support

Back Forward Stop Refresh Home Address: C:\UTS07\TW\HomePage\homepage.htm GO!

TaxWise

Log Out

Tasks You Do Most Often

! Incomplete Tasks

Communication

Office Status

Hot Topics

Appointment Scheduler

Important Reminders

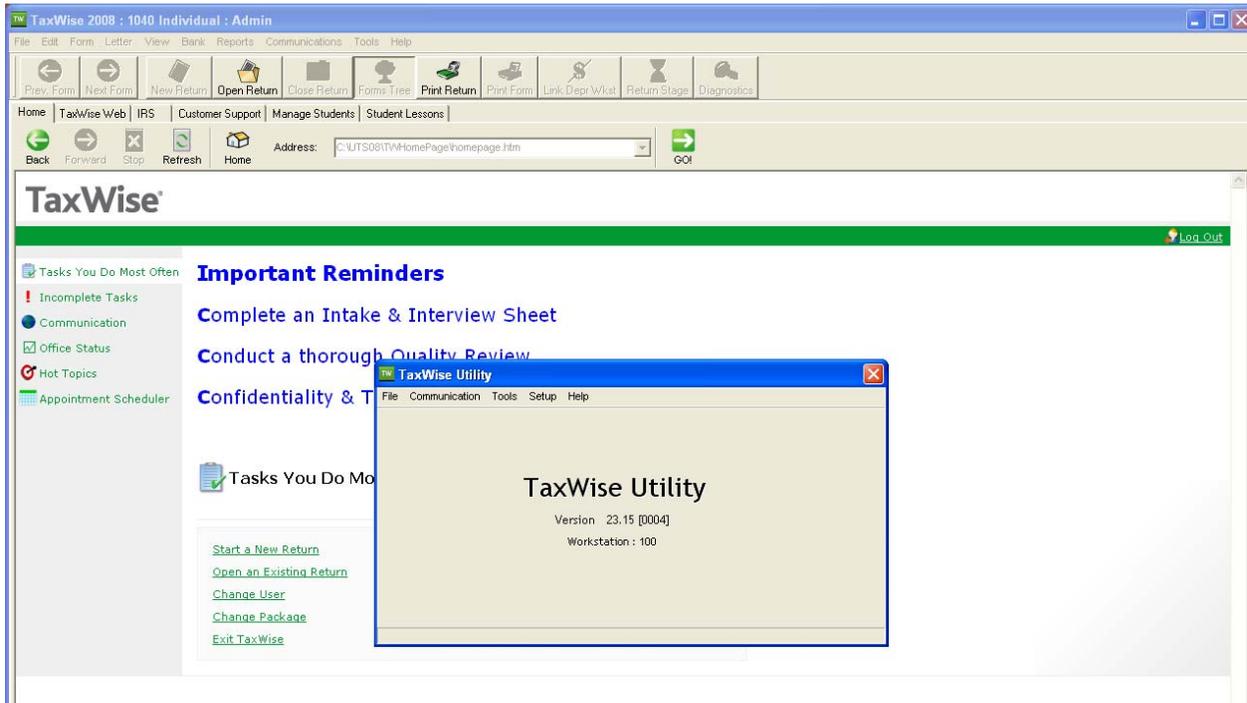
- Complete an Intake & Interview Sheet
- Conduct a thorough Quality Review
- Confidentiality & Taxpayer privacy must be protected

Tasks You Do Most Often

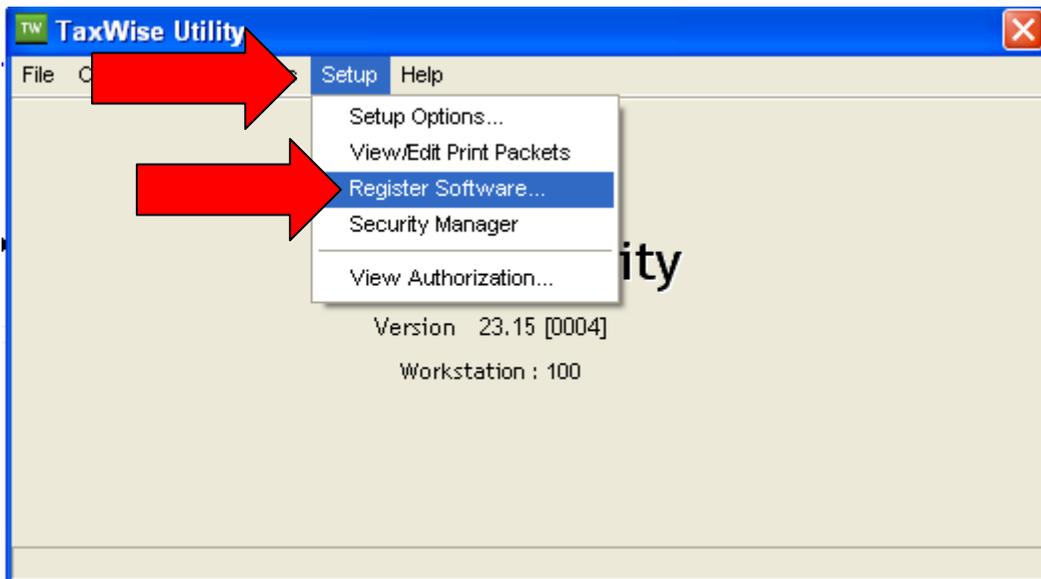
- [Start a New Return](#)
- [Open an Existing Return](#)
- [Change User](#)
- [Change Package](#)
- [Exit TaxWise](#)

9/23/2009 12:38 PM

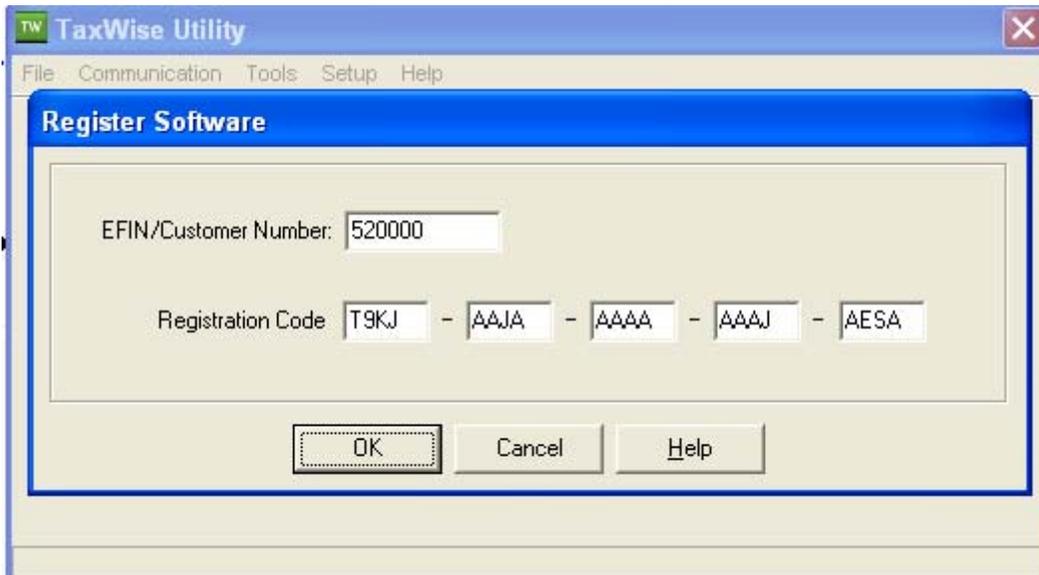
This will bring you back to the TaxWise Utility screen shown below.



Click on **Setup**, then click on **Register Software**.



The below screen will appear. Enter in the **Reg Code** provided by TaxWise and then click **OK**..



This will complete the installation and setup of TaxWise Desktop. Close all features and return to the main page.

V. Data Collection Setup - TaxWise Desktop

To capture data needed for CIS, the **Admin** creates settings in the **Preparer's Use Fields**, located at the bottom of the **Main Information Sheet** (shown below). The Main Information Sheet is the first form shown when creating a return. By creating these settings, the Admin can mandate that these fields be used to obtain information desired for the TAAR.

Preparer's Use Fields

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

Time in this return: ___ minutes Tax bracket: 10.0 Price: 125.00

Information below is for the preparer. It will print and proform a. Notes to the client should be listed on the SummarySheet.

VI. Creating Settings in Preparer's Use Field 1

- **Preparer Use Field 1 - Set up this Preparer Use Field to capture the status of the tax client.**
- **Mandatory Information required** for entry into Preparer Use Field 1 is **limited** to the **below choices only**. The abbreviations shown below will be used.

ESM = Enlisted Service Member

EFM = Enlisted Family Member

WOSM = Warrant Service Member

WOFM = Warrant Family Member

COSM = Commissioned Service Member

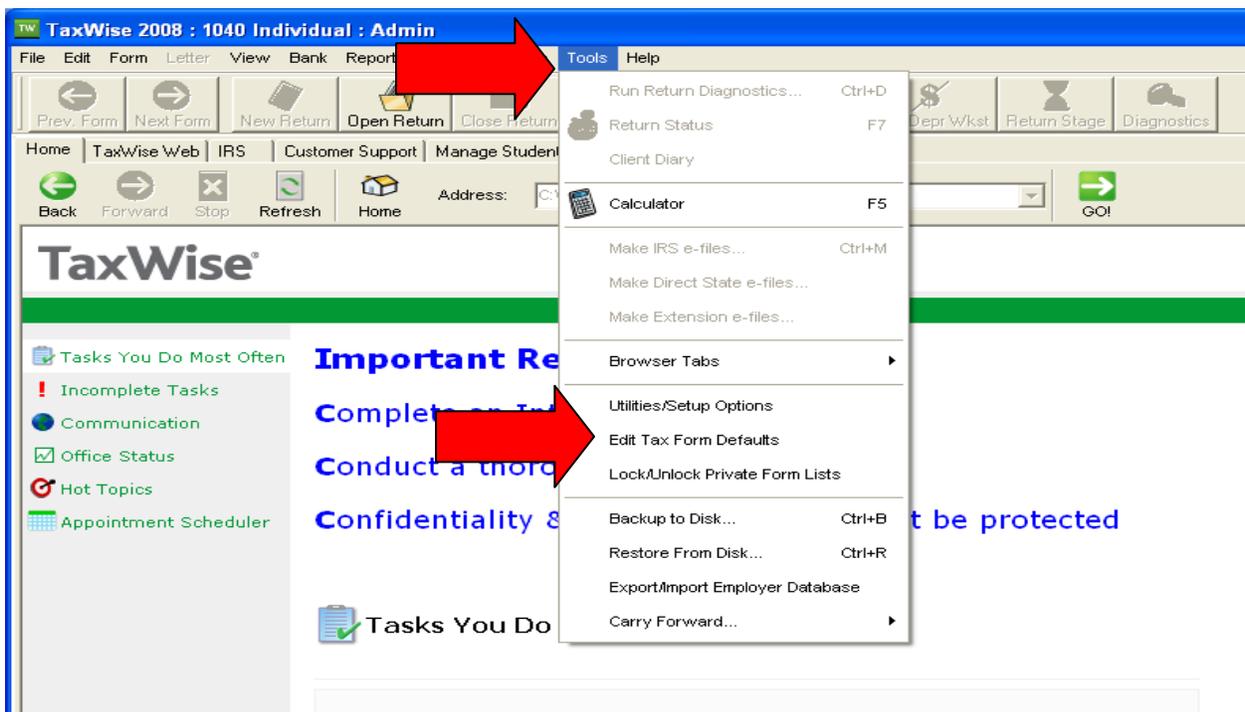
COFM = Commissioned Family Member

Retiree

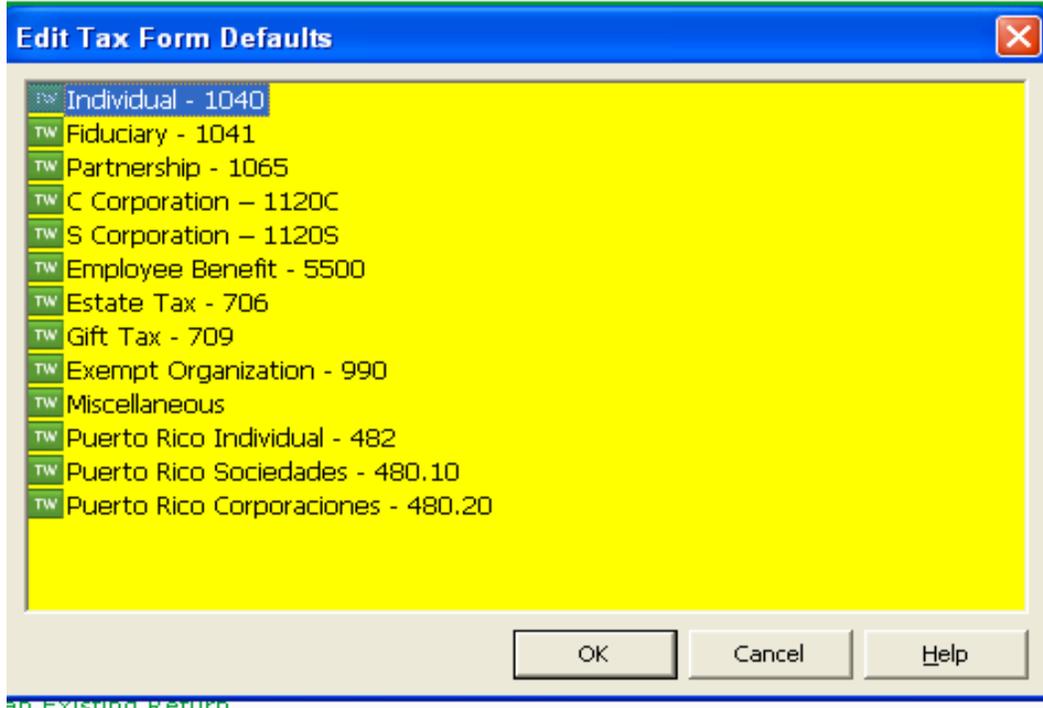
Other

To capture data needed for CIS, the Admin has to create settings for use in the Preparer's Use Fields (located at the bottom of the Main Information Sheet) and input information from the Price List.

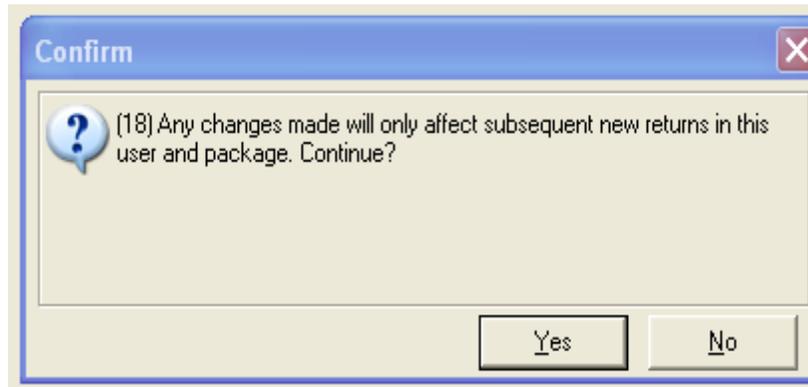
- To create and enter the required data above in Preparer Use Field 1, open TaxWise Desktop as the Admin, and from the Toolbar, click on the **Tools** Menu and then click **Edit Tax Form Defaults** (shown below).



Double-click on the Individual 1040 Tax Package or highlight and then click **OK**.



TaxWise Desktop will display a confirm message box, informing the user that all changes will affect subsequent returns. Click **yes**.



TaxWise Desktop will then display the Main Information Page.

This return can be filed on Form 1040

Check form you are using: [x] 1040 [] 1040A [] 1040EZ [] 1040PR [] 1040NR [] 1040NREZ

Check one: [] Spanish forms on the screen and printed. [] Spanish forms printed only.

Your first name [redacted] Initial [] Last name [] Suffix [] Your SSN []

If filing a JOINT return, enter your spouse's First name [] Initial [] Last name, if different from yours [] Spouse's SSN []

Mailing address

Name line 2. Use % for care of [] Present home address [] Zip code, city, and state [] Email address []

Telephone numbers

Daytime [] Evening [] Cell phone or fax [] Foreign phone [] Taxpayer Spouse

Birth date [redacted] Age for Federal tax purposes [] 0 [] 0

Taxpayer's occupation [redacted] Spouse's occupation []

Foreign Address Foreign street address [] Foreign city, state, province, Zip code [] Foreign country. Do not abbreviate []

Taxpayer Information

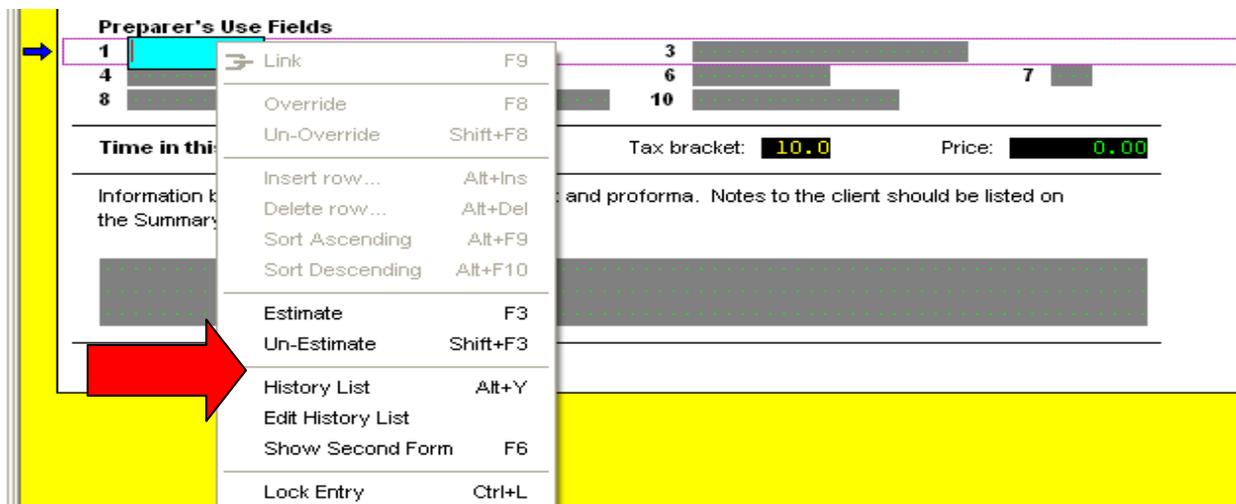
Disaster designation - IRS e-filing field 98 [] Special processing []

Are you excluding Puerto Rico income from this tax return? [] Yes [x] No If "Yes", enter the amount of income excluded [] 0.

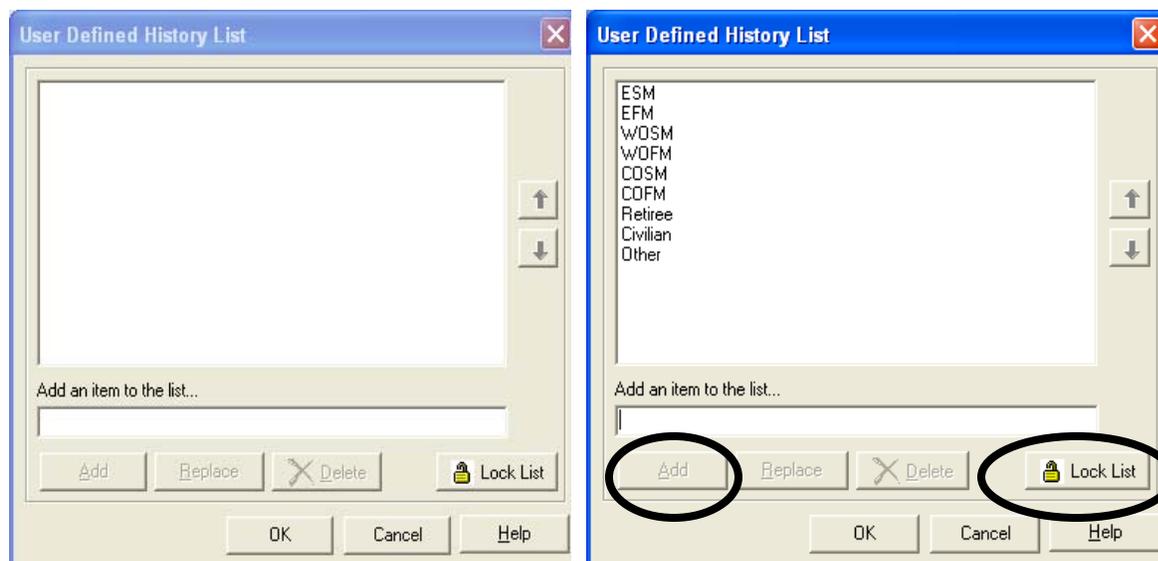
Check if blind [] Yes [] Yes Taxpayer Spouse Check if totally and permanently disabled [] Yes [] Yes Date of death. ONLY if in 2008 or 2009 [] []

Scroll down the Main Information Page until you get to the Preparer's Use Fields.

Place your cursor in Preparer's Use Fields Box 1 and **right click**. TaxWise Desktop will display a pull down menu. Place the cursor on **Edit History List** and click.



TaxWise Desktop will display a blank User Defined History List Box as shown below. Insert each **mandatory member status** as required by CIS and defined in Section IV. Click **Add** after each entry, and when the list is complete, click on the lock list button.



Once the entries are made and the list is locked, the tax preparer can only select those entries. A pull down menu with those entries will appear, limiting the tax preparer choices. once the cursor is placed in the box.

The screenshot shows a form titled "Preparer's Use Fields" with a table of 10 numbered fields. A dropdown menu is open over field 1, listing options: ESM, EFM, WOSM, WOPM, COSM, COFM, and Retiree. Below the table, there are fields for "Time" (minutes), "Tax bracket" (10.0), and "Price" (0.00). A text area below contains the instruction: "Info for the preparer. It will print and proforma. Notes to the client should be listed on the" followed by a large greyed-out text box.

Once the entries are entered and locked, go back to Preparer's Use Field selected, and use the **F3** key to turn the field's color to Red and shows that this is a mandatory field that requires an entry.

This screenshot is similar to the previous one, but field 1 in the table is now highlighted in red. A blue arrow points to the red field 1. The dropdown menu is still open, showing the same list of options. The rest of the form, including the "Time", "Tax bracket", "Price" fields and the instruction text, remains the same.

VII. Creating Settings in Preparer's Use Field 2

- **Preparer Use Field 2 - Set up this Preparer Use Field to capture the status of the tax client.**

Mandatory Information required for entry into Preparer Use Field 2 is **limited** to the **below choices only**.

Army

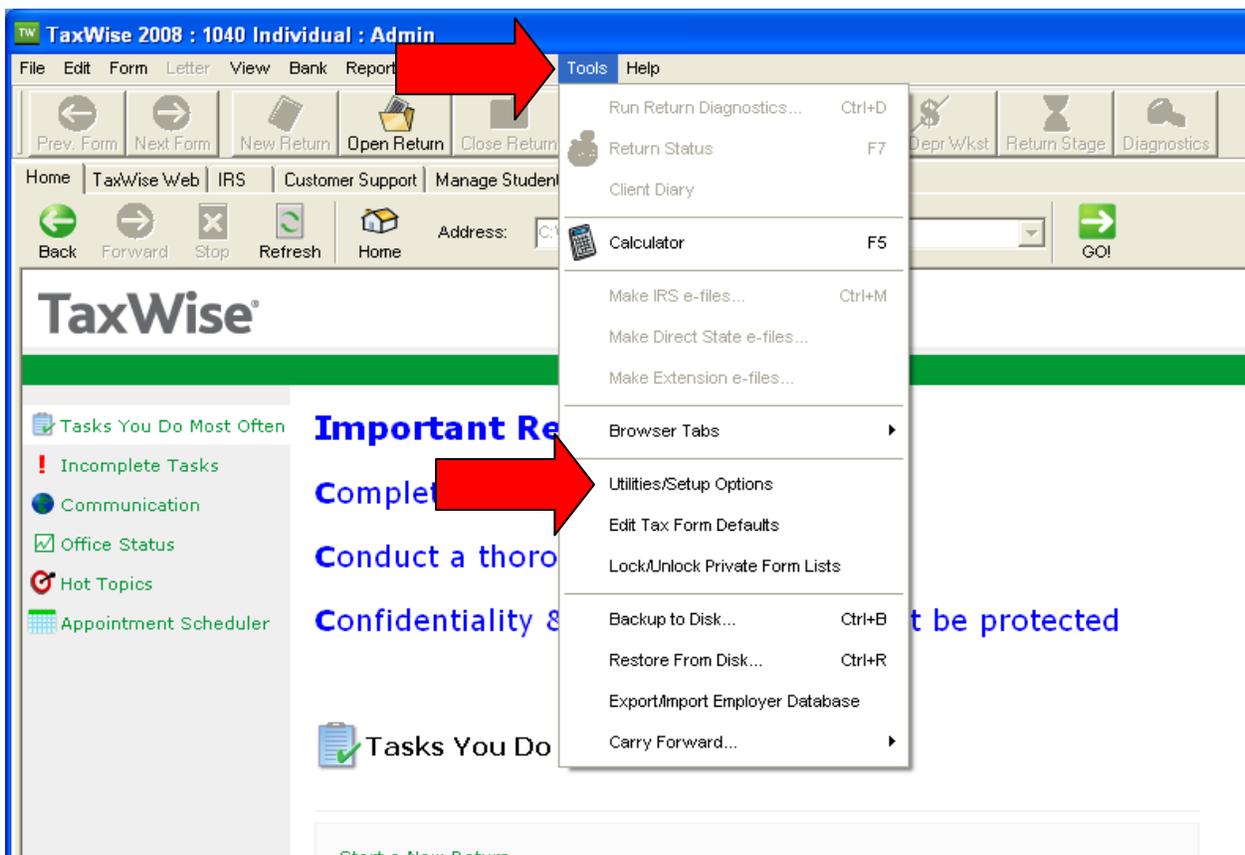
Navy

USAF

USMC

USCG

To create and enter the required branch of service shown above in Preparer's Use Field 2, open TaxWise Desktop as the Admin, and from the Toolbar, click on the **Tools** Menu and then click **Edit Tax Form Defaults** (shown below).



Double-click on the Individual 1040 Tax Package or highlight and then click **OK**

Scroll down the Main Information Page until you get to the Preparer's Use Fields.

Preparer's Use Fields			
1	2	3	7
4	5	6	
8	9	10	
11			
12			

Time in this return: _____ minutes Tax bracket: 10.0 Price: 125.00

Information below is for the preparer. It will print and proforma. Notes to the client should be listed on the Summary Sheet.

Place your cursor in Preparer's Use Fields Box 2 and right click. TaxWise Desktop will display the following screen. Place the cursor on **Edit History List** and click

The screenshot shows the 'Preparer's Use Fields' section with a right-click context menu open over box 2. The menu items and their shortcuts are:

- Link (F9)
- Override (F8)
- Un-Override (Shift+F8)
- Insert row... (Alt+Ins)
- Delete row... (Alt+Del)
- Sort Ascending (Alt+F9)
- Sort Descending (Alt+F10)
- Estimate (F3)
- Un-Estimate (Shift+F3)
- History List (Alt+Y)
- Edit History List**
- Show Second Form (F6)
- Lock Entry (Ctrl+L)

A red arrow points to the 'Edit History List' option in the menu.

TaxWise Desktop will display a blank User Defined History List Box as shown below. Insert each **mandatory member status** as required by CIS and defined in Section IV. Click **Add** after each entry, and when the list is complete, click on the lock list button and then click OK.

User Defined History List

Add an item to the list...

Add
Replace
Delete
Lock List

OK
Cancel
Help

Help

Tree Print Return Print Form Link Depr Wkst Return Stage Diagnostics

Copy This Form (Shift+F10) Remove Form (Shift+F9) Close This Form (F10)

Enter 5 numbers, other than all zeroes. Date: [REDACTED]

Authorize [REDACTED] to enter this PIN as my [REDACTED]

electronically filed income tax return.

person to discuss this return with the IRS? Yes No

Designee's telephone [REDACTED] Designee's PIN (cannot be 00000) [REDACTED]

Check to bill as a self-prepared return:

Date: [REDACTED] Print as signature:

EIN: [REDACTED] Check if also ERO:

Check if self-employed: Phone: [REDACTED] Fax: [REDACTED]

IRS only:

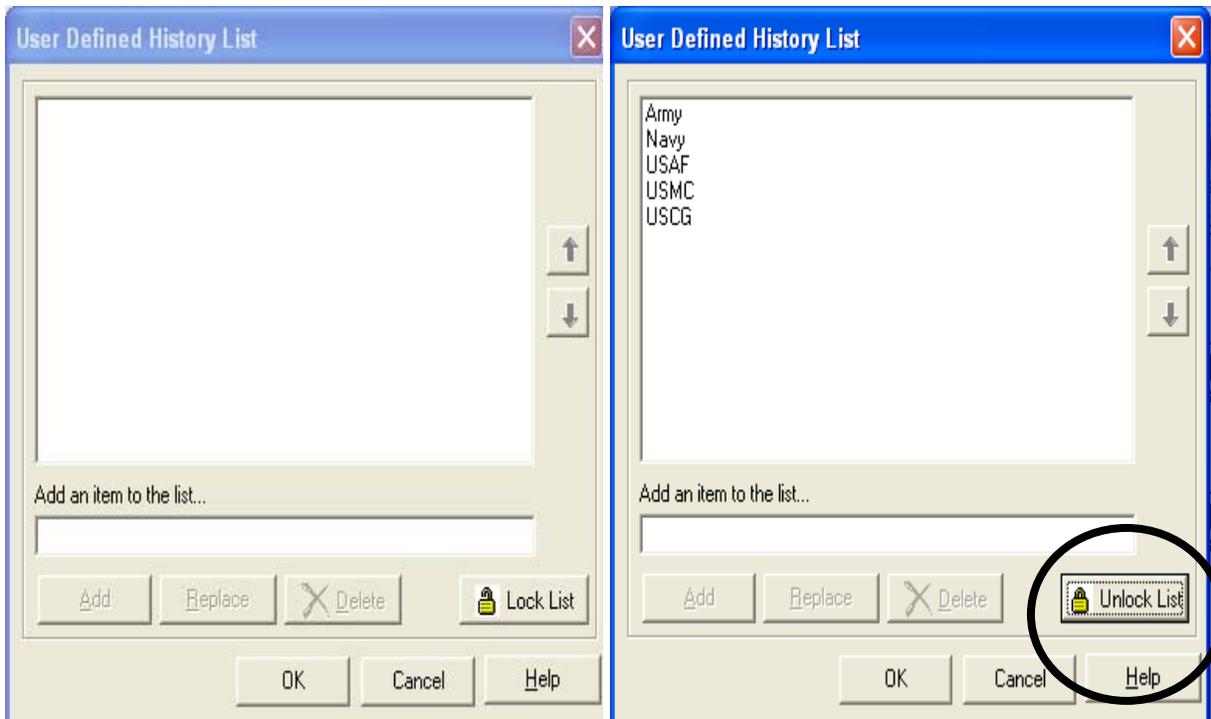
Preparer's Use Fields

1 [REDACTED]	2 [REDACTED]	3 [REDACTED]	
4 [REDACTED]	5 [REDACTED]	6 [REDACTED]	7 [REDACTED]
8 [REDACTED]	9 [REDACTED]	10 [REDACTED]	
11 Other than English what language is spoken in your home			[REDACTED]
12 Are you or a member of your household considered disabled			[REDACTED]

Time in this return: [REDACTED] minutes **Tax bracket:** 10.0 **Price:** 0.00

Information below is for the preparer. It will print and proforma. Notes to the client should be listed on the Summary Sheet.

{ 22 }



Once the entries are entered and locked, go back to Preparer's Use Field 2 and use the **F3** key to turn the field's color to Red and shows that this is a mandatory field that requires an entry. The tax preparer can only select from a pull down menu with that contains those entries only.

Preparer's Use Fields

1	.....	2	.....	3	.....
4	.....	5	.....	6	.....
8	.....	9	.....	10	.....

Time in this return: Tax bracket: 10.0 Price: 125.00

Information below is for the preparer. It will print and proforma. Notes to the client should be listed on the Summary Sheet.

VIII: Recommended uses of other Preparer Use Fields.

Preparer's Use Fields

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

Time in this return: minutes Tax bracket: Price:

Information below is for the preparer. It will print and perform a. Notes to the client should be listed on the Summary Sheet.

Although only the first two Preparer Use Fields have a mandated use, it is highly recommended that the Admin set up and use the other fields to collect other useful data as determined by the Tax OIC.

For instance;

- **Preparer Use Field 3:** Use to capture the name of the tax preparers in your tax center.
- **Preparer Use Field 4:** Use to capture the unit of the tax client. This data can be used to report to the Staff Judge Advocate where the clients are coming from. It can also be used as a management tool to solicit personnel from units that have a high tax preparation volume but did not provide any support to the tax center.

IX: Setting Up Price List

The last element in Tax Center Statistics is including the Price List into the TaxWise program. Every year before the start of tax season, members of the Armed Forces Tax Council agree on

a Price List. This Price List shows the value of each tax formed prepared (see below). **The Price List can be changed to conform to prices in local areas.**

Sample Tax Season Price List

FORMS	PRICE	FORMS	PRICE	FORMS	PRICE
1040	125.00	2555	45.00	8609A	15.00
1040A	100.00	2555 EZ	30.00	8611	15.00
1040ES	30.00	3468	15.00	8615	20.00
1040EZ	85.00	3800	20.00	8689	10.00
1040NR	45.00	3903	15.00	8697	10.00
1040NR-EZ	35.00	4136	15.00	8801	20.00
1040V	40.00	4137	15.00	8812	30.00
1040X	65.00	4255	15.00	8814	15.00
1045	40.00	4562	25.00	8815	15.00
SCH-A*	45.00	4563	15.00	8820	20.00
by line	0	4797	40.00	8826	20.00

The Price Sheet allows TaxWise to calculate the tax preparation fee for each return prepared and print an individual invoice for each tax returned prepared. These numbers are also stored in the TaxWise Database and are produced when doing the **Military Summary Report** and the **Preparer Field Report**.

It was shown earlier in the TaxWise Desktop Setup Options that under the **General** tab, the program can be used to generate invoices for each tax return prepared.

Setup Options

Company | **General** | Printer Setup | Indirect Transmitter | Direct Transmitter | Color Setup

1. Network options:

No Network - My computer is a single user machine NOT attached to others.

Network - My computer is a single or multi-user machine ATTACHED to others.

2. Current Declaration Control Number (DCN)..... 1

3. Do you want TaxWise to automatically number your client invoices?

Do NOT auto number.

Auto number each invoice ONLY on MY LOCAL COMPUTER even if I am attached to a network.

Start my local invoice number with..... 1

Auto number ALL invoices, making each UNIQUE across the entire network.

4. Miscellaneous options:

Enable Auto-Complete for entries with history lists

Display User-Defined and Auto-Populated history lists

Automatically display history lists

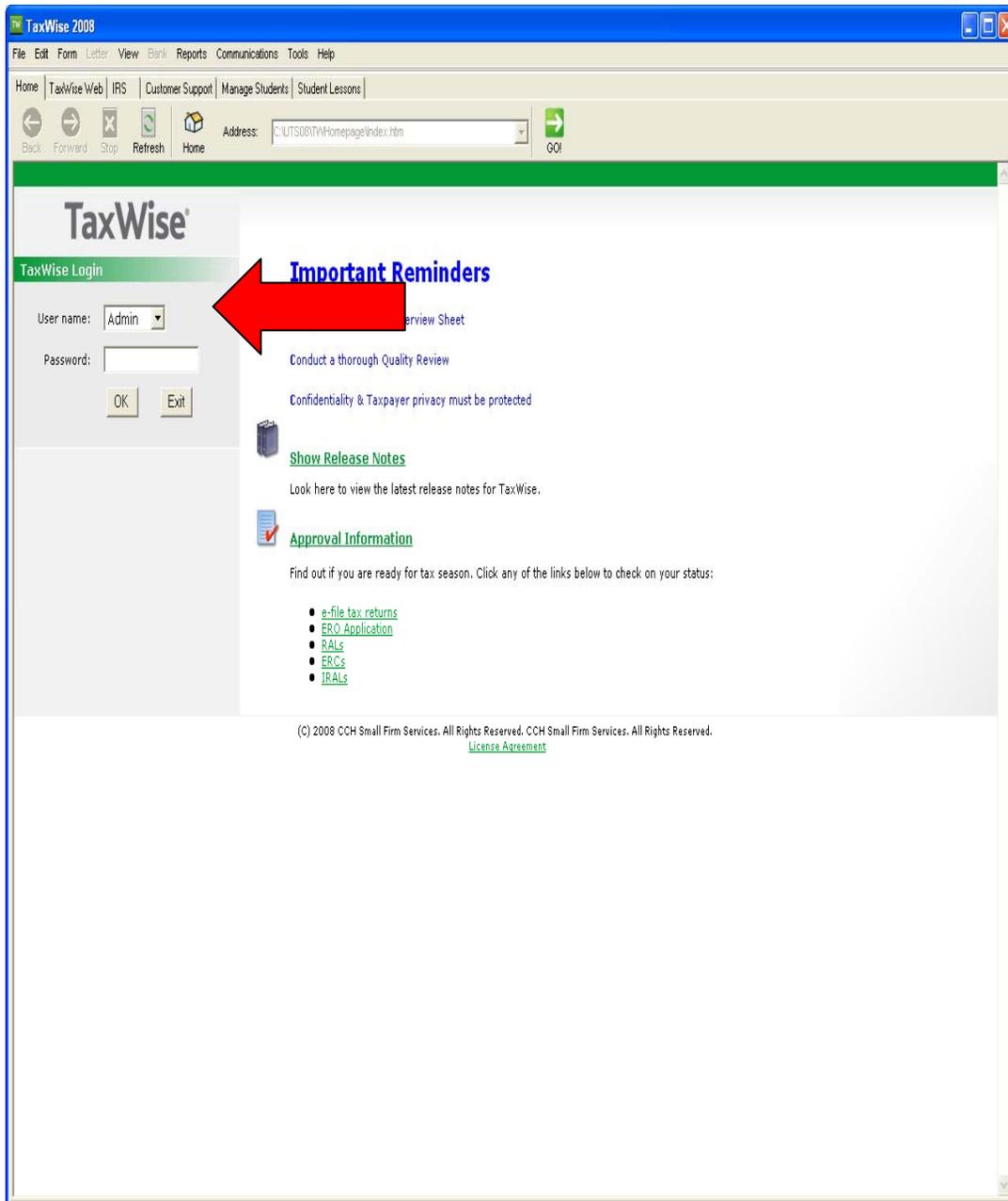
Save as Workstation Defaults

<< Back | Next >> | Cancel | Help

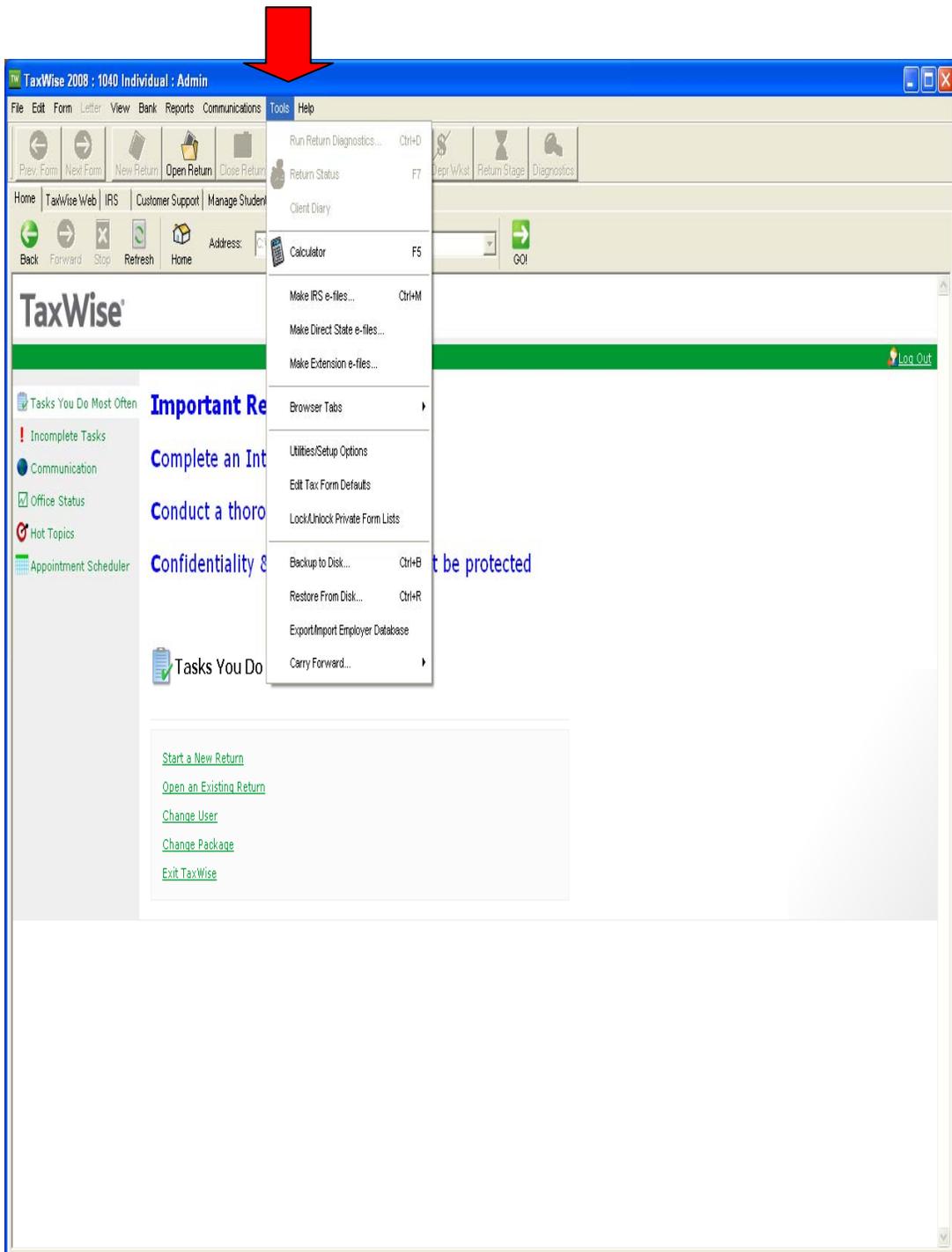
In order for TaxWise Desktop to print invoices for each and every return, you must enter numbers from the Price List onto the Price Sheet located in **Tax Form Defaults**.

The Price Sheet allows TaxWise to calculate the tax preparation fee for each return based and print individual invoices for each tax returned prepared. These numbers are then stored in the TaxWise Database and are produced when doing the **Military Summary Report** and the **Preparer Field Reports**.

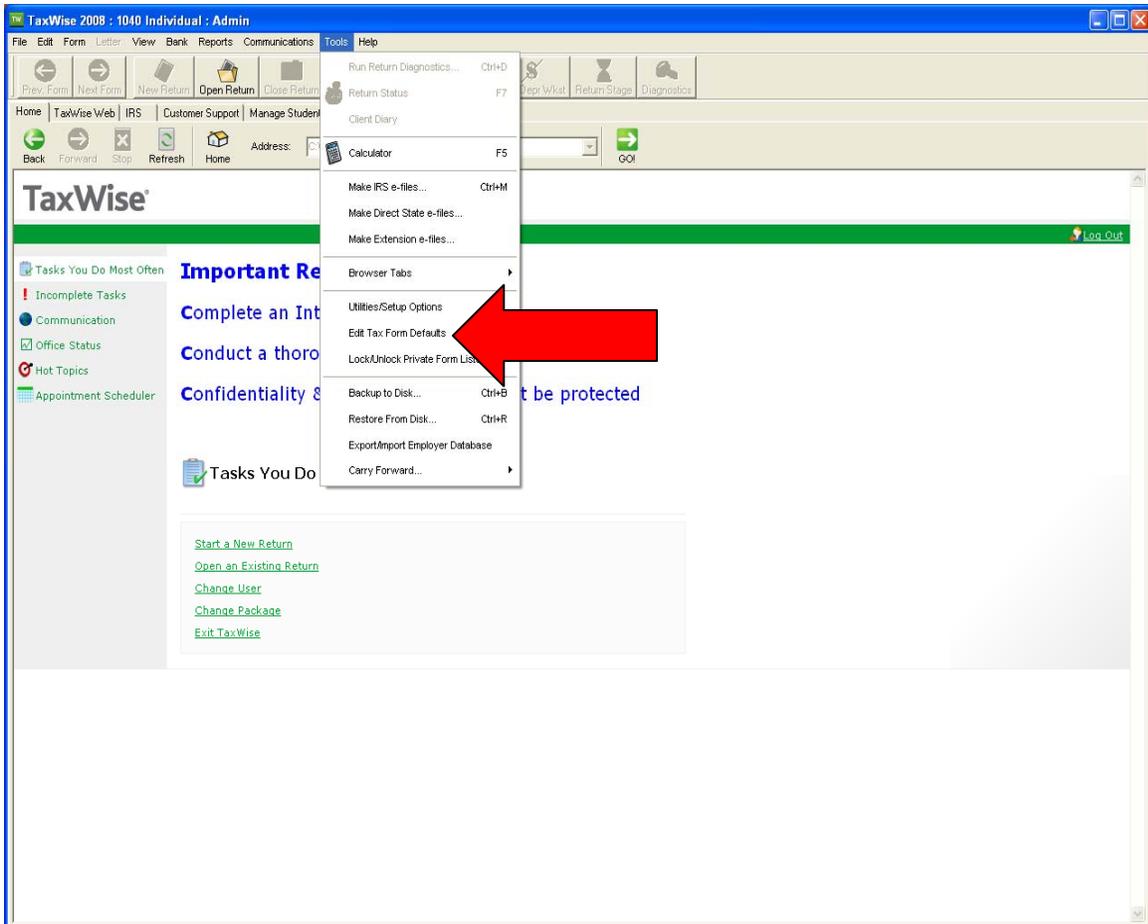
To enter the **Price List** into TaxWise, do the following: Enter TaxWise Desktop as the Admin.



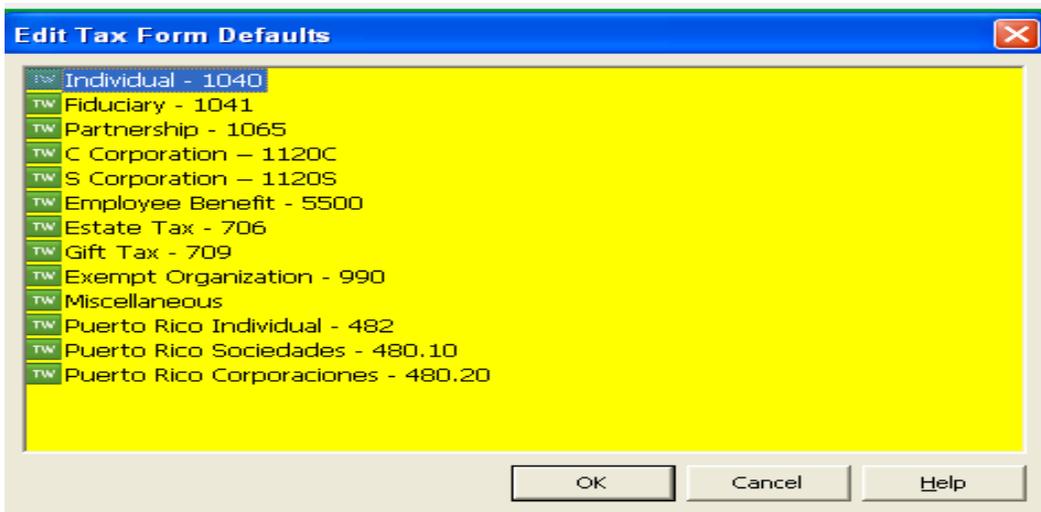
Click on **Tools**, which will give the below pull down menus.



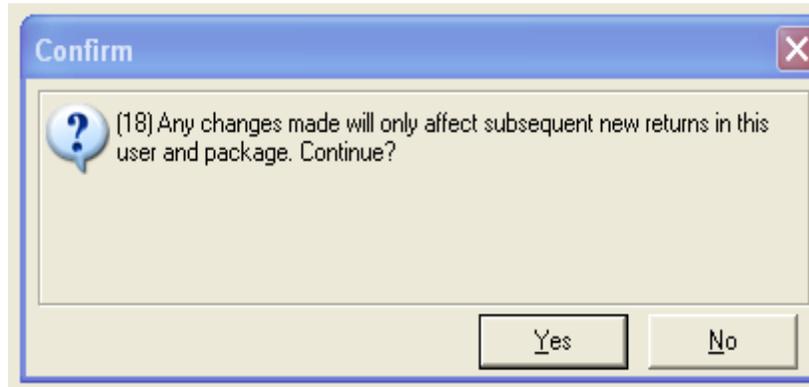
Then click on **Edit Tax Form Defaults**.



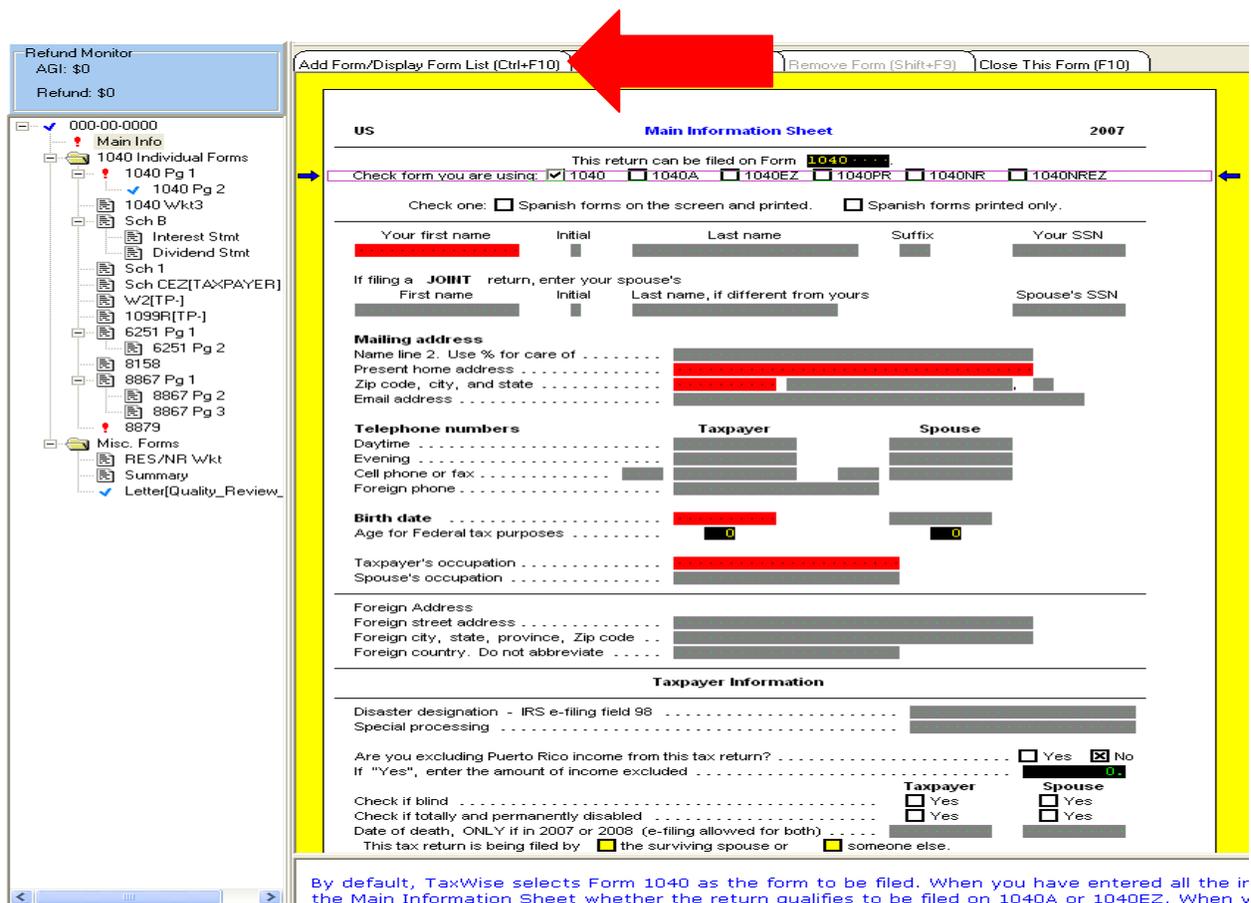
Double-click on the Individual 1040 Tax Package or highlight and then click OK.



TaxWise Desktop will display a confirm message box, informing the user that all changes will affect subsequent returns. Click **yes**.



TaxWise Desktop will display the Main Information Sheet. Click on Add Form/Display Form List.



A list of all tax forms contained on TaxWise will be displayed. Scroll down (near the bottom of the page) until you find the **Price Sheet**, highlight, and then click.

The screenshot shows the TaxWise Desktop interface. The 'Find a form' window is open, displaying a list of tax forms. The search criteria are set to '1040ES Pg 2'. The list is sorted by 'Shortcut'. A red arrow points to the 'Price Sheet' form, which is highlighted in yellow. The 'Price Sheet' form is listed as 'Price Sheet' with a shortcut of 'Price'.

Shortcut	Type	Description
8889 Pg 2	Federal	Health Savings Accounts Pg 2
8901	Federal	CTC Qualifying Children Not Dependent
8903	Federal	Domestic Production Activities Deduction
8907	Federal	Nonconventional Source Fuel Credit
8908	Federal	Energy Efficient Home Credit
8910	Federal	Alternative Motor Vehicle Credit
8915	Federal	Hurricane Retirement Distribution
8917	Federal	Tuition and Fees Deduction
8919 TP	Federal	Uncollected Social Security Tax Taxpayer
8919 SP	Federal	Uncollected Social Security Tax Spouse
9465	Federal	Installment Agreement Request
ACH 1040/ES	Federal	Ach Debit of Balance Due/Estimate E-file
ACH EXT	Federal	Ach Debit for Forms 2350 and 4868 E-file
Comm Prop	Federal	Community Property Allocation Wkt
Amort Sch	Federal	Amortization Schedule
Blank	Federal	Blank Form
Dependents	Federal	Dependent Worksheet
Refund Auth	Federal	Fee Collect Authorization
Hd of Hshld	Federal	Unmarried Head of Household Worksheet
IPLUS	Federal	InterviewPLUS Information
Letter	Federal	Client Letter
MFJ-MFS Pg 1	Federal	Married Joint Separate Comparison Pg 1
MFJ-MFS Pg 2	Federal	Married Joint Separate Comparison Pg 2
8879	Federal	1040 e-file Signature Authorization
8879 Att	Federal	E-file 1310 Claimant Verification
8878	Federal	Extension e-file Signature Authorization
POA Pg 1	Federal	Power of Attorney Pg 1
POA Pg 2	Federal	Power of Attorney Pg 2
Prep Notes	Federal	Preparer Notes
Reg Expl	Federal	Regulation Explanations
Price	Federal	Price Sheet
PY Res Wkt	Federal	Part Year Resident Allocation Wkt
RES/NR Wkt	Federal	Resident and Nonresident Allocation Wkt
Add NR Wkt	Federal	Additional Nonresident Allocation Wkt
Summary	Federal	Three Year Tax Summary
W4	Federal	Employee Withholding Planner
W7	Federal	Application for Taxpayer ID Number

By default, TaxWise selects Form 1040 as the form to be filed. When you have entered all the information for this return, TaxWise shows you at the top of the Main Information Sheet whether the return qualifies to be filed on 1040A or 1040EZ. When you select 1040A or 1040EZ, TaxWise automatically

The Price Sheet in TaxWise Desktop will then appear. To complete the Price Sheet, do the following:

- Enable the **Check to print detailed pricing Invoice** by clicking in the box next to it.
- Enter the name and address of your tax center.
- Enter the value of each form in the both boxes marked Prepared by You and Not You.
- Click on the Close This Form Tab when all tax form values have been entered.

US List of Charges for Tax Return Processing 2008

Check to print detailed pricing on invoice:

Legal Assistance Policy Division
4777 North Kent Street Suite 9004
Rosslyn VA 22209

INVOICE NO.: 0
INVOICE DATE: 09/25/2009
SS NUMBER:
TELEPHONE:

Note: There is a check box on Schedules A and B below. If you check the box next to Schedule A, the fee will be charged only if itemized deductions are used in the return. If you check the box next to Schedule B, the fee will be charged if the schedule is required to be filed with the return.

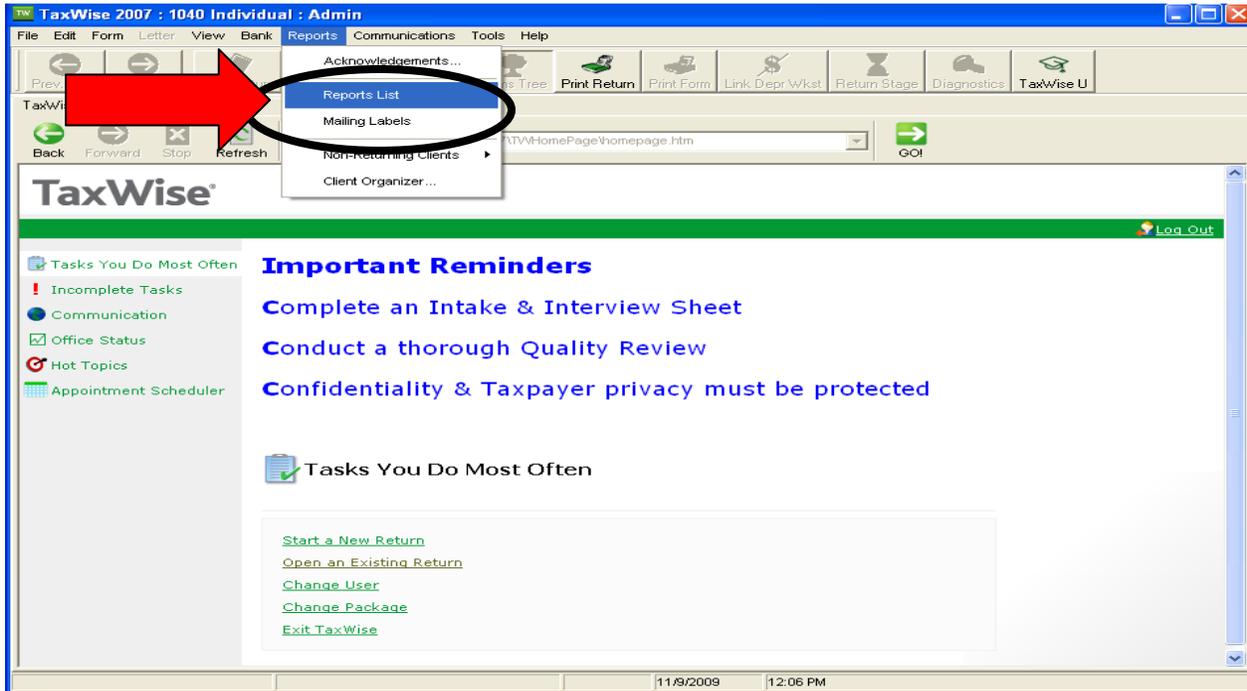
No.	Form	\$ - Prepared by		No.	Form	\$ - Prepared by	
		You	Not You			You	Not You
1	1040	125.00	125.00	0	8881	0.00	0.00
0	1040A	100.00	100.00	0	8882	0.00	0.00
0	1040ES	65.00	65.00	0	8885	0.00	0.00
0	1040EZ	85.00	85.00	0	8889	0.00	0.00
0	1040NR	85.00	85.00	0	8901	0.00	0.00
0	1040NR-EZ	80.00	80.00	0	8903	0.00	0.00
0	1040PR	125.00	125.00	0	8907	0.00	0.00
0	1040V	3.00	3.00	0	8908	0.00	0.00
0	1040X	85.00	85.00	0	8910	0.00	0.00
0	1045	50.00	50.00	0	8915	0.00	0.00
0	Schedule A	50.00	50.00	0	8917	0.00	0.00
0	Schedule B or 1	50.00	50.00	0	8919	0.00	0.00
0	by line	0.00	0.00	0	9465	0.00	0.00
0	Schedule C	65.00	65.00	0	W7	0.00	0.00
0	Schedule CEZ	90.00	90.00				
0	Schedule D	70.00	70.00				
0	by line	0.00	0.00				
0	Schedule E by						
0	property	60.00	60.00				
0	page 2	0.00	0.00				
0	Schedule EIC	50.00	50.00				
0	Schedule F	0.00	0.00				
0	Schedule H	0.00	0.00				
0	Schedule J	0.00	0.00				
0	Schedule R or 3	0.00	0.00				
0	Schedule SE	0.00	0.00				
0	W-2 / W-2PR	0.00	0.00				
0	W2G	0.00	0.00				
					Statements charged by line		
				0	Main Info dependents	0.00	0.00
				0	Additional dependents	0.00	0.00
				0	Overseas explanation	0.00	0.00
				0	1040 other income	0.00	0.00
				0	1040(A) IRA rollover	0.00	0.00
				0	Alimony paid	0.00	0.00
				0	2555 list on 1040	0.00	0.00
				0	Schedule A lists	0.00	0.00
				0	Schedule B dividends	0.00	0.00
				0	Schedule B interest	0.00	0.00
				0	Schedule B mortgage	0.00	0.00

By default, TaxWise selects Form 1040 as the form to be filed. When you have entered all the inform the Main Information Sheet whether the return qualifies to be filed on 1040A or 1040EZ. When you s

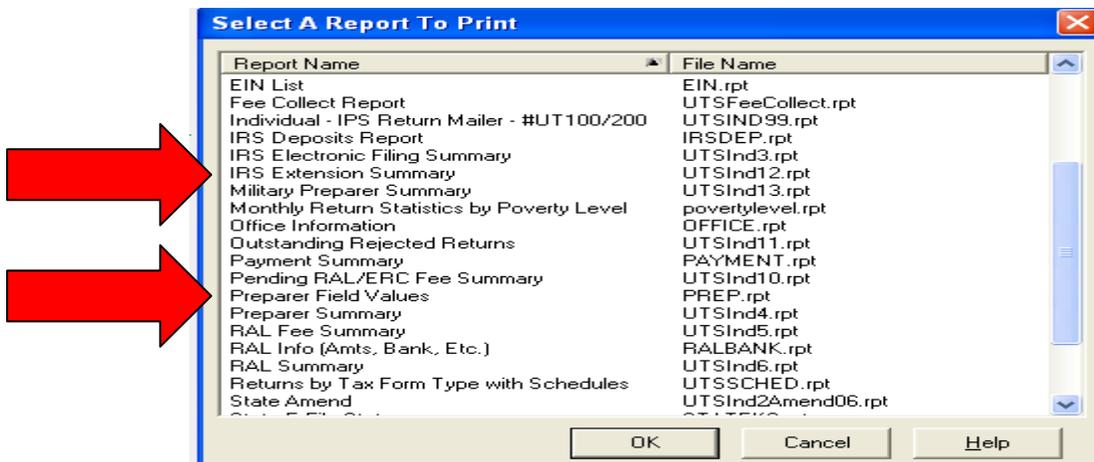
Form 90 Batch 656 Seq # 0 "X" or Delete 9/25/2009 2:40 PM In Return:

X. Generating Reports

TaxWise Desktop contains its own database, so data entered into the system, including the entered into the Preparer Use's Fields, are able to be computed and printed instantly. To access all reports in TaxWise Desktop, from Admin, click on the **Report** Toolbar and then click on the **Reports List**.



The list of all the reports in TaxWise Desktop will appear as shown below. Scroll down the list to find the **Military Preparer Summary** and the **Preparer Field Values** report(s)



Click on the report desired, and TaxWise Desktop will prompt you for the **Report Criteria**, as shown below (The **Report Criteria screen will appear for each requested report**). Go to the **Date** and click on **Edited**. This field will give you an year to date report.

Report Criteria

Record Filtering

Starting date: 1/ 1/2009

Ending date: 12/31/2009

Date: Edited

User name: []

Preparer ID: []

State e-files only? Select state: []

Starting DCN: 000000-00000 -9

Ending DCN: 999999-99999 -9

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): 0.21

Left Margin (inches): 0.21

OK Close Help

Then click **OK**. TaxWise Desktop will calculate and produce the report. In the examples below, you will see the criteria for both, the Military Preparer Summary Report and the Preparer Field Values Report.

TaxWise's
 Military
 Preparer
 Summary
 Reports
 provides
 most of the
 data needed
 for the TAAR

Sample Military Preparer Summary Report

Military Preparer Summary

1:09:53PM

TaxWise 2008

Filename	Last Name	E-File Created	Ret Type	Form Type	Filing Status	Prep Fees	Refund	1040X
----------	-----------	----------------	----------	-----------	---------------	-----------	--------	-------

Preparer EFIN:

End of List for:

Group Totals:

Total Returns:

Total Refund Amount:

Total E-Files:

0

Total Paper Returns:

0

E-Files Ratio:

0.00%

Total Schedule E:

0

Total Schedule EIC:

0

Total Form 2441:

0

Total Form 8606:

0

Total Schedule C:

0

Total Schedule D:

0

1040X Returns:

0

Pay Grade

Value of Services Provided :

Grand Totals:

Total Returns:

Total Refund Amount:

Total E-Files:

0

Total Paper Returns:

0

E-Files Ratio:

0.00%

Total Schedule E:

0

Total Schedule EIC:

0

Total Form 2441:

0

Total Form 8606:

0

Total Schedule C:

0

Total Schedule D:

0

1040X Returns:

0

Sample Preparer Field Values Report

Preparer Field Values

11:23:01AM

TaxWise 2008

Filename Last Name

Prepuse 1

Prepuse 2

Prepuse 3

Prepuse 4

Prepuse 5

Prepuse 6

Prepuse 7

Prepuse 8

Prepuse 9

Prepuse 10

Prepuse 11b

Prepuse 12b

filename

Preparer EFIN:

End of List

Number of Returns:

End of Summary for:

Grand Totals:

Number of Returns:

TaxWise will calculate all entries made in each Preparer Use Field. After calculation, enter the number in the CIS Mass Assistance Tax Center screen.

Mass Assistance - Tax Center

Tax Center Info

 Save Tax Center

Highlighted fields are required

Date

Provided To

Tax Preparation and Electronic Fees Saved \$

Tax Refunds \$

Memo

		Federal		State/Local Returns	
		Prepared	E-Filed	Prepared	E-Filed
Enlisted	Service Mbr.	<input style="width: 40px;" type="text" value="0"/>			
	Family Mbr.	<input style="width: 40px;" type="text" value="0"/>			
Warrant	Service Mbr.	<input style="width: 40px;" type="text" value="0"/>			
	Family Mbr.	<input style="width: 40px;" type="text" value="0"/>			
Common Off.	Service Mbr.	<input style="width: 40px;" type="text" value="0"/>			
	Family Mbr.	<input style="width: 40px;" type="text" value="0"/>			
Retiree		<input style="width: 40px;" type="text" value="0"/>			
Civilian		<input style="width: 40px;" type="text" value="0"/>			
Other		<input style="width: 40px;" type="text" value="0"/>			
Tax Clients Turned Away		<input style="width: 40px;" type="text" value="0"/>			

Prepared by Danny Fentress,

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