

TaxWise Online: Create & Manage Users



SFS Learning



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Table of Contents

CREATE & MANAGE USERS OBJECTIVES:-----	4
ADD NEW USERS-----	5
Assign Roles-----	6
Password Requirements for All Users -----	8
RESET USER PASSWORDS-----	8
DEACTIVATING A USER-----	9
Show Active/Inactive Users-----	10
ADD/CHANGE ADMIN MESSAGE -----	11
ENABLE REMOTE ASSISTANCE-----	12
RESTRICT IP ADDRESSES -----	15
SUMMARY-----	16
APPENDIX-----	17
The Admin User -----	17
The SuperUser-----	18
The Reviewer-----	19
The ReturnPreparer -----	20
The Interviewer -----	21
The TemplateManager-----	22
The E-file Manager-----	23

CREATE & MANAGE USERS OBJECTIVES:

During this lesson, you will learn how to...

- Add New Users
- Assign Roles
- Reset User Passwords
- Deactivate a User
- Create a Custom Message
- Enable Remote Assistance
- Restrict IP Addresses

Add New Users

To add a new user to TaxWise Online, use the following steps:

1. Log in as the Admin User, or a user with the Administrator role.
2. Click the **Manage Users** button located on the toolbar.

TaxWise Online displays the **User Manager** window:

Reset Password	Edit	UserName	FirstName	M.I.	Last Name	Assigned Roles
Reset	Edit	Admin	Administrator			Administrator

3. Click the **Create a New User** link.

TaxWise Online displays the **Create User** page:

Create User

User Name:

Real Name:

Email Address:

Is Active User:

Assign Roles

Possible Roles: Interviewer, SuperUser, TemplateManager, Administrator

Assigned Roles: ReturnPreparer

>> <<

Save Cancel

4. Type a new user name in the **User Name** field and press the **Tab** key.

All preparers should have their own unique user name.

5. Type the user's first name in the first box of the **Real Name** fields and press the **Tab** key.
6. Type the user's middle initial, if applicable, and press the **Tab** key.
7. Type the user's last name, and press the **Tab** key
8. Type the user's e-mail address.

If the user does not have an e-mail address, enter the e-mail address of the Administrator. An e-mail address is required to reset a created user's password.

By default, the **Is Active User** check box is selected, and the assigned role is Return Preparer.

Assign Roles

To assign a different role to the new user, select the role in the **Possible Roles** list, and then click the right double-arrow button (>>) to move the role into the **Assigned Roles** list.

To assign more than one role to the new user, select the first role, hold down the **Ctrl** key and select each additional role. Click the double-arrow button to move all selected roles to the **Assigned Roles** list.

To remove a role, click the role in the **Assigned Roles** list, and then click the left double-arrow button (<<) to move the role to the **Possible Roles** list.

9. Click the **Save** button.

The following table describes the roles that you can assign to a user:

Role	Description
Administrator	The ADMIN user or any user that has the Administrator role assigned has access to all commands and actions except Start a New Return .
SuperUser	Has access to management tools such as Move Returns, Submit E-files, View Acks, TWO Reports, & Report Server , and all functions related to creating and editing a tax return. Any user assigned the SuperUser role has the ability to edit returns created by all users. This role does not have access to Advanced Settings, Delete Returns or Manage Users.
Reviewer	Allows access to all SuperUser role functions except Submit e-files. By default, any user assigned the Reviewer role does not have the ability to override entries.
ReturnPreparer	Allows access to all functions associated with creating and editing a tax return. Any user assigned this role can mark the return Ready to File from Diagnostics but they cannot submit the e-file. They cannot delete or move returns, access acknowledgements or reports. By default, any user assigned the Return Preparer role does not have the ability to override entries.
Interviewer	Allows access to all ReturnPreparer role functions, but is <i>required</i> to start new returns by selecting Go to Interview . By default, any user assigned the Interviewer role does not have the ability to override entries.
Template Manager	Can create new return templates, edit existing templates, assign, and unassign users to templates.
E-file Manager	Allows the user to submit e-files. This role is designed to be used with other roles, such as reviewer, to allow more flexibility in assigning roles.
All Roles	All users have access to User Settings and TaxWise University .

If a user assigned the Administrator role needs to create tax returns, you **MUST** assign the ReturnPreparer role in addition to the Administrator role.

Password Requirements for All Users

Passwords assigned to created users must meet the following requirements:

- Must be a minimum of 8 alpha-numeric characters.
- You will be prompted to change the password every 90 days.

Reset User Passwords

If a created user account has been locked out and the User Account Reset is not available, TaxWise Online displays the following message: “Your account has been locked. To regain access, your account administrator must reset your account.” (Or the custom message created by the site administrator that gives the user instructions on who to contact to have their password reset.)

Created users should contact the ADMIN user or a user with administrator rights in order to reset their accounts.

To reset this account, use the following steps:

1. Login as ADMIN or any user with permissions to the Manage Users feature.
2. Click the **Manage Users** icon.
3. Click the **reset** link next to the locked user.

Once the account has been reset, the new password is the User Name.

TaxWise Online sends an email reporting the change of password to the email address setup for the user.

Deactivating a User

The Administrator should deactivate a user name if the volunteer is no longer at the site. An inactive user no longer has access to any TaxWise Online application. The ADMIN user or any user assigned the Administrator or SuperUser role can still access the returns created by the inactive user.

To deactivate a user in TaxWise Online, use the following steps:

1. Click the **Manage Users** button.

TaxWise Online displays the **User Manager** window:

Reset Password	Edit	UserName	FirstName	M.I.	Last Name	Assigned Roles
Reset	Edit	Admin	Administrator			Administrator
Reset	Edit	sbrown	Samantha		Brown	Administrator, SuperUser

2. Click the **Edit** link located next to the appropriate user name.

TaxWise Online displays the **Edit User** page:

Edit User

User Name: sbrown

Real Name: Samantha Brown

Email Address: s.brown@uga.edu

Is Active User:

Assign Roles

Possible Roles: Interviewer, ReturnPreparer, TemplateManager

Assigned Roles: Administrator, SuperUser

>> <<

Save Cancel

3. Clear the **Is Active User** checkbox.
4. Click **Save**.

Show Active/Inactive Users

To view inactive users, click on the **Show Inactive Users** link.

User Manager

User Manager

[Create a New User](#)
 [Add/Change Admin Message](#)
 [Show Inactive Users](#)
 [Enable Remote Assistance](#)
 [Restrict IP Addresses](#)

Reset Password	Edit	UserName	FirstName	M.I.	Last Name	Assigned Roles
Reset	Edit	Admin	Administrator			Administrator

[Close](#)

TaxWise Online displays all inactive users:

User Manager

User Manager

[Create a New User](#)
 [Add/Change Admin Message](#)
 [Show Active Users](#)
 [Enable Remote Assistance](#)
 [Restrict IP Addresses](#)

Reset Password	Edit	UserName	FirstName	M.I.	Last Name	Assigned Roles
Reset	Edit	sbrown	Samantha	Brown		Administrator, SuperUser

[Close](#)

To return to the active users, click the **Show Active Users** link.

Add/Change Admin Message

TaxWise Online allows the Administrator to create a message the users will see if they lock their password account and require it to be reset.

To create the message, use the following steps:

1. Click the **Manage Users** button.

TaxWise Online displays the **User Manager** window:

Reset Password	Edit	UserName	FirstName	M.I.	Last Name	Assigned Roles
Reset	Edit	Admin	Administrator			Administrator

2. Click the **Add/Change Admin Message** link located next to the appropriate user name.

TaxWise Online displays the **Message** Dialogue page:

Create a message your users will see if they become locked out and require Administrator intervention.
HTML/javascript is not allowed and will be disabled.

Please contact Site Administrator Joe Smith at ext. 2274 to reset your account.

Save

3. Type in the message you want your users to see and click **Save**.

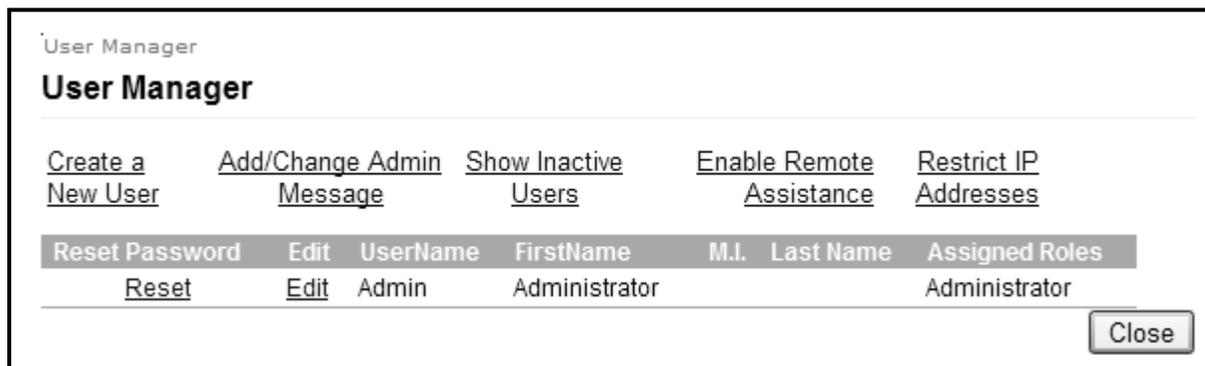
Enable Remote Assistance

There are times when a TaxWise Support representative will ask your site to **Enable Remote Assistance** if they need access to the return.

To **Enable Remote Assistance**, use the following steps:

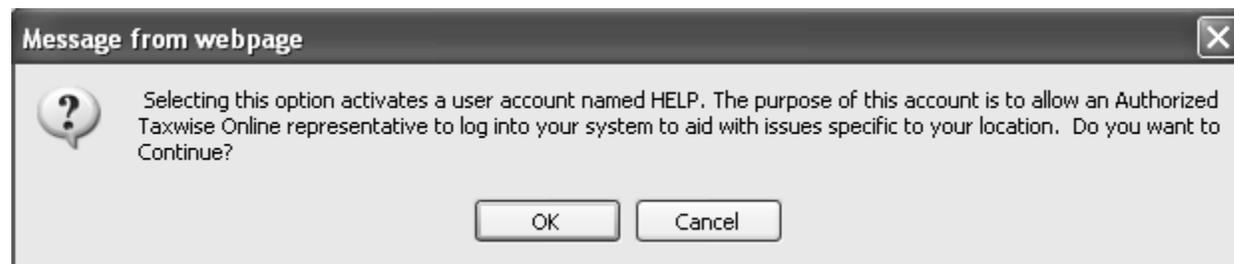
1. Click the **Manage Users** button.

TaxWise Online displays the **User Manager** window:



2. Click the **Enable Remote Assistance** link.

TaxWise Online displays a confirmation message:



3. Click the **OK** button to confirm.

TaxWise Online Displays the **User Manager** with the **Help** UserName:

The screenshot shows the 'User Manager' interface with the following elements:

- Navigation links: [Create a New User](#), [Add/Change Admin Message](#), [Show Inactive Users](#), [Disable Remote Assistance](#), [Restrict IP Addresses](#)
- Table of users:

Reset Password	Edit	UserName	FirstName	M.I.	Last Name	Assigned Roles
Reset	Edit	Admin	Administrator			Administrator
Reset	Edit	GUEST	GUEST		GUEST	ReturnPreparer, SuperUser, Administrator
Reset	Edit	HELP	Remote		Assistance	

A 'Close' button is located at the bottom right of the window.

If you are a first time TaxWise Online user, the application will create the HELP username and automatically assign the Administrator and ReturnPreparer roles to it.

If you are a returning TaxWise Online user and the HELP user already exists, the **ReturnPreparer** and **Administrator** roles will need to be added to the HELP user.

4. Click **Edit** and add **ReturnPreparer** and **Administrator** roles to the HELP user.

This is to assure the HELP user can assist with any issues.

The screenshot shows the 'Edit User' interface for the user 'HELP'. The fields are as follows:

- User Name:** HELP
- Real Name:** Remote Assistance
- Email Address:** two@taxwise.com
- Is Active User:**

The 'Assign Roles' section contains two lists:

- Possible Roles:** Interviewer, SuperUser, TemplateManager
- Assigned Roles:** ReturnPreparer, Administrator

Navigation buttons '>>' and '<<' are located between the two lists. 'Save' and 'Cancel' buttons are at the bottom right.

5. Click **Save** to apply the roles.

The User Manager should now display the Assigned Roles for the HELP user:

User Manager

User Manager

[Create a New User](#) [Add/Change Admin Message](#) [Show Inactive Users](#) [Disable Remote Assistance](#) [Restrict IP Addresses](#)

Reset Password	Edit	UserName	FirstName	M.I.	Last Name	Assigned Roles
Reset	Edit	Admin	Administrator			Administrator
Reset	Edit	GUEST	GUEST		GUEST	ReturnPreparer, SuperUser, Administrator
Reset	Edit	HELP	Remote		Assistance	ReturnPreparer, Administrator

You may Disable Remote Assistance at any time.

Restrict IP Addresses

With TaxWise Online, you have the ability to access the application from anywhere that has a high speed internet connection. The **Restrict IP Addresses** feature gives you the flexibility of restricting application access to your site and to selected users (such as the site administrators).

Your site must have a static IP address to utilize this feature. This means that your IP address does not change each time you access the internet.

To restrict the IP Addresses, use the following steps:

1. Click the **Manage Users** button.

TaxWise Online displays the **User Manager** window:

Reset Password	Edit	UserName	FirstName	M.I.	Last Name	Assigned Roles
Reset	Edit	Admin	Administrator			Administrator

2. Click the **Restrict IP Addresses** link.

TaxWise Online displays the **Restrict IP Addresses** window:

Allow users at this office to access this website from the following IP addresses only.
If any IP addresses are in this list ONLY these IP Addresses will be allowed to login to this application.

Add IP Address to list

IP Address to Add:

Enter the IP address used to access the internet in the **IP Address to Add** field and select **Add**. Repeat this process for each IP address that you want to have the ability to access the application.

Select the Close Window button when complete.

Summary

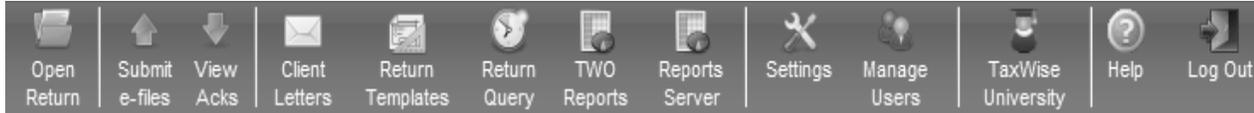
In this course you learned how to: Add New Users, Assign Roles, Reset User Passwords, Deactivate a User, Create a Custom Message, Enable Remote Assistance, and Restrict IP Addresses.

Appendix

The Admin User

The Admin user has access to all commands and actions except **Start a New Return**.

The following graphic and table describe the buttons on the Home page while logged in as the ADMIN user:

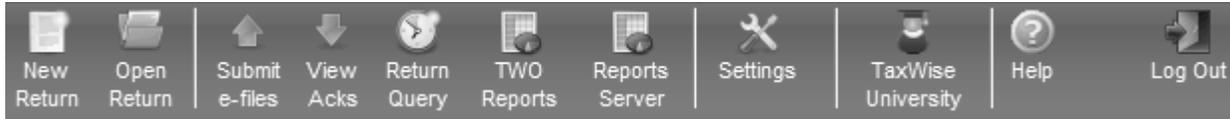


Option	Description
Open Return	Allows you to open a return by SSN.
Submit e-files	Allows you to submit e-files to the CCH SFS Electronic Filing Center.
View Acks	Allows you to view and print IRS and state acknowledgements.
Client Letters	Allows you to create and print client letters.
Return Templates	Allows you to create/modify Return Templates.
Return Query	Allows you to check the status of any tax return.
TWO Reports	Allows you to schedule and run site specific reports
Reports Server	Opens the CS site for available online reports. You will use this feature if you are the relational EFIN and run reports for multiple sites using TaxWise Online.
Settings	Allows you to create site specific settings that is accessed by all users such as: Return Stages, Print Sets, and Custom Questions
Manage Users	Allows you to create and modify users.
TaxWise University	Opens a separate browser window and allows you to access TaxWise University.
Help	Opens the help file for TaxWise Online.
Log Out	Logs out of TaxWise Online.

The SuperUser

The SuperUser has access to all actions in TaxWise Online except for Manage Users and Return Templates

The following graphic and table describe the buttons on the Home page while logged in as a new user that has been assigned the SuperUser role:



Option	Description
New Return	Allows to create a new tax return.
Open Return	Allows you to open a return by SSN.
Submit e-files	Allows you to submit e-files to the CCH SFS Electronic Filing Center.
View Acks	Allows you to view and print IRS and bank acknowledgements.
Return Query	Allows you to check the status of any tax return.
TWO Reports	Allows you to schedule and run site specific reports
Reports Server	Opens the CS site for available online reports. You will use this feature if you are the relational EFIN and run reports for multiple sites using TaxWise Online
Settings	Allows the user to color preferences and the number of returns displayed in the return list.
TaxWise University	Opens a separate browser window and allows you to access TaxWise University.
Help	Opens the help file for TaxWise Online.
Log Out	Logs out of TaxWise Online.

The Reviewer

The Reviewer has access to all SuperUser role functions except Submit e-files. By default, any user assigned the Reviewer role does not have the ability to override entries. The following graphic and table describe the buttons on the Home page while logged in as a new user that has been assigned the SuperUser role:

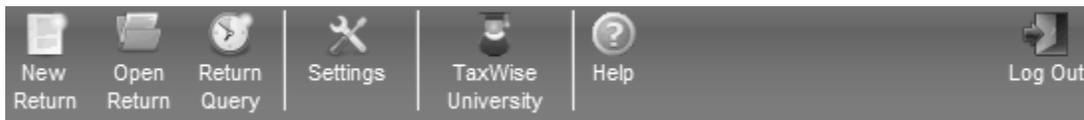


Option	Description
New Return	Allows to create a new tax return.
Open Return	Allows you to open a return by SSN.
View Acks	Allows you to view and print IRS and state acknowledgements.
Return Query	Allows you to check the status of any tax return.
Settings	Allows the user to color preferences and the number of returns displayed in the return list.
TaxWise University	Opens a separate browser window and allows you to access TaxWise University.
Help	Opens the help file for TaxWise Online.
Log Out	Logs out of TaxWise Online.

The ReturnPreparer

The ReturnPreparer can access all functions associated with creating and editing a tax return. Any user assigned this role can mark the return **Ready to File** from Diagnostics but they cannot submit the e-file. They cannot delete or move returns, access acknowledgements or reports. By default, any user assigned the Return Preparer role does not have the ability to override entries.

The following graphic and table describe the buttons on the Home page while logged in as a new user that has been assigned the ReturnPreparer role:



Option	Description
New Return	Allows to create a new tax return.
Open Return	Allows you to open a return by SSN.
Return Query	Allows you to check the status of any tax return.
Settings	Allows the user to color preferences and the number of returns displayed in the return list.
TaxWise University	Opens a separate browser window and allows you to access TaxWise University.
Help	Opens the help file for TaxWise Online.
Log Out	Logs out of TaxWise Online.

The Interviewer

The Interviewer can access all functions associated with creating and editing a tax return. The Interviewer cannot submit e-files or review and print acknowledgement reports. Additionally, the Interviewer **MUST** Go to Interview upon creation of a new return. The Go to Tax Forms option is not available. By default, any user assigned the Interviewer role does not have the ability to override entries.

The following graphic and table describe the buttons on the Home page while logged in as a new user that has been assigned the Interviewer role:



Option	Description
New Return	Allows to create a new tax return.
Open Return	Allows you to open a return by SSN.
Return Query	Allows you to check the status of any tax return.
Settings	Allows the user to color preferences and the number of returns displayed in the return list.
TaxWise University	Opens a separate browser window and allows you to access TaxWise University.
Help	Opens the help file for TaxWise Online.
Log Out	Logs out of TaxWise Online.

The TemplateManager

The Template Manager can create new return templates, edit existing templates, assign and un-assign templates to users.

The following graphic and table describe the buttons on the Home page while logged in as a new user that has been assigned the TemplateManager role:



Option	Description
Return Templates	Allows you to create/modify Return Templates.
Settings	Allows the user to color preferences and the number of returns displayed in the return list.
TaxWise University	Opens a separate browser window and allows you to access TaxWise University.
Help	Opens the help file for TaxWise Online.
Log Out	Logs out of TaxWise Online.

The E-file Manager

This role will allow the user to submit e-files. This role is designed to be used with other roles, such as reviewer, to allow more flexibility in assigning roles.

The following graphic and table describe the buttons on the Home page while logged in as a new user that has been assigned the E-file Manager role:



Option	Description
Submit e-files	Allows you to submit e-files to the CCH SFS Electronic Filing Center.
Settings	Allows the user to color preferences and the number of returns displayed in the return list.
TaxWise University	Opens a separate browser window and allows you to access TaxWise University.
Help	Opens the help file for TaxWise Online.
Log Out	Logs out of TaxWise Online.