

TaxWise Online: Delete & Restore Returns



2010 IRS Training

© 2010 CCH Small Firm Services. All rights reserved.
225 Chastain Meadows Court NW
Suite 200
Kennesaw, GA 30144

Information in this manuscript is subject to change without notice. Any software described in this manuscript is furnished under a license agreement and may be used or copied only in accordance with the terms of the agreement.

CCH Small Firm Services is not engaged in rendering legal, technical, or other professional services. Use of this manuscript or the information in this publication does not relieve the user of complete responsibility for the operation and functionality of its computers and/or network, for the maintenance and backup of all user data, or for the preparation, content, accuracy, and review of all forms.

THERE ARE NO WARRANTIES, EXPRESSED OR IMPLIED, INCLUDING WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, MADE WITH RESPECT TO THESE MATERIALS OR ANY OTHER INFORMATION PROVIDED TO THE STUDENT.

All trademarks are the property of their respective owners.

Table of Contents

COURSE OBJECTIVES:7

Delete Returns8

Restoring Deleted Returns10

DELETE AND RESTORE RETURNS OBJECTIVES:

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

- Delete Returns
- Restore Deleted Returns

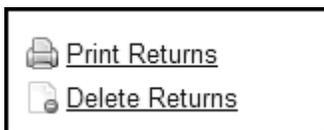
Delete Returns

To delete returns in TaxWise Online, use the following steps:

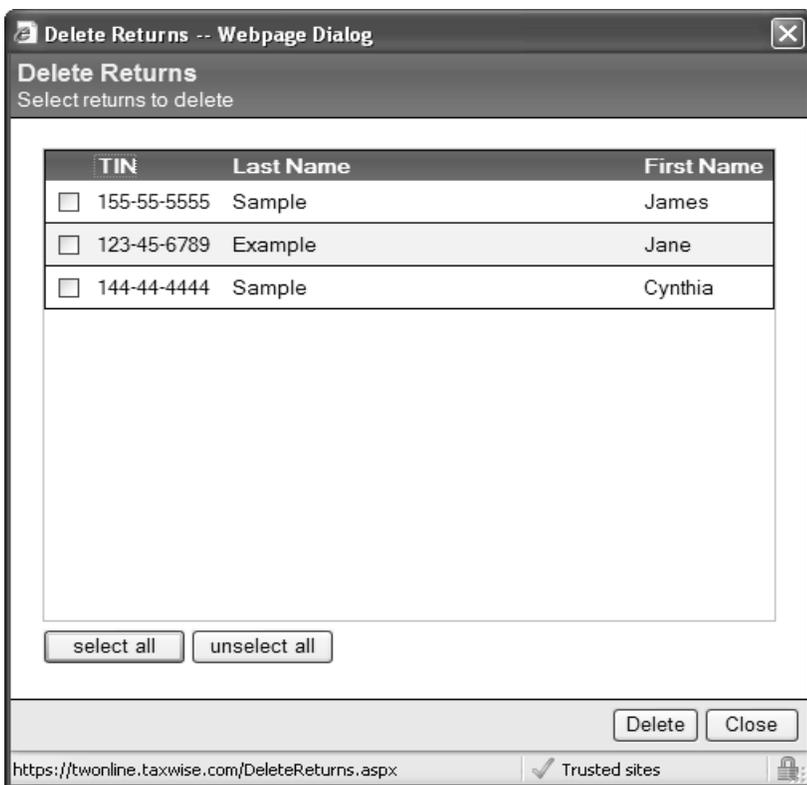
1. Log in with a user that is assigned Administrator role.

Note: Only the **Admin** User or **user assigned the Administrator role** has rights to delete returns

2. Click the **Delete Returns** link under **Return Tasks**.



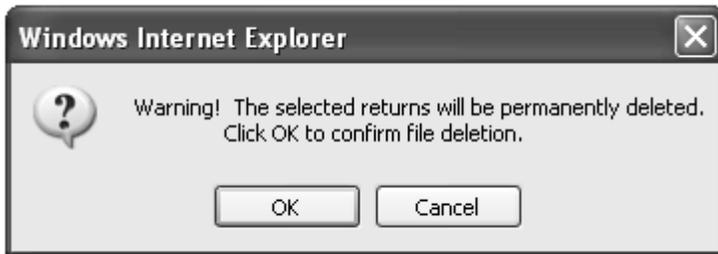
3. TaxWise Online displays the **Delete Returns** dialog box:



4. Select the return(s) to delete and click the **Delete** button.

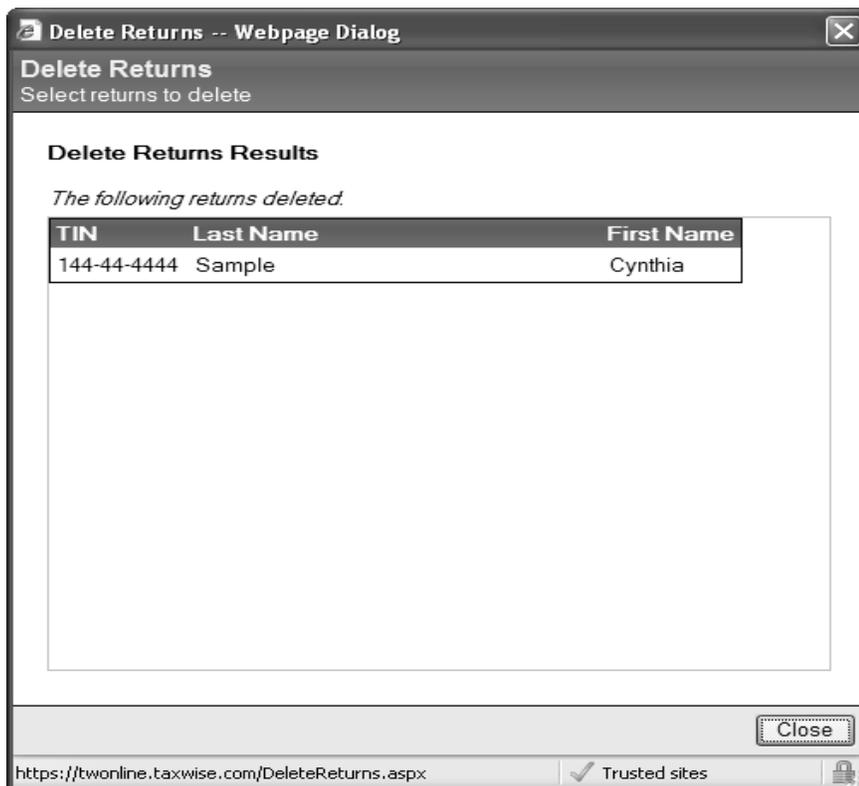
NOTE: Click **select all** to select all returns for deletion. Click **unselect all** to remove all selections.

TaxWise Online displays the following confirmation message:



Click the **OK** button to confirm the **deletion**

5. Once you click **OK**, TaxWise Online displays the Delete Returns Results box



6. Click **Close**

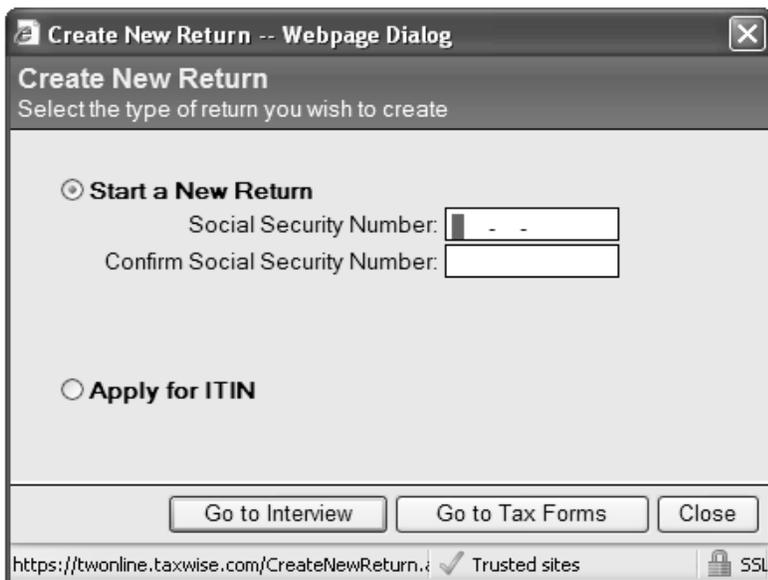
Restoring Deleted Returns

To restore a deleted return, use the following steps.

Note: Only users with the rights to **Start a New Return** can restore a Return.

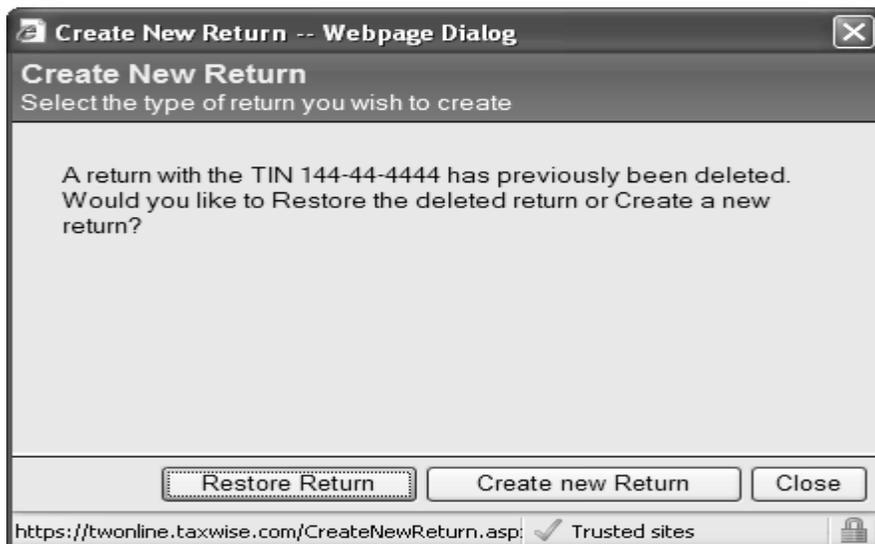
1. Click the **New Return** button.

TaxWise Online displays the **Create New Return** dialog box.



2. Enter the Social Security Number twice for validation purposes.
3. Select the **Go to Interview** or **Go to Tax Forms** button.

You are prompted to restore the deleted return, as illustrated below



Do one of the following:

- Select **Restore Return** to bring forward the previously deleted return.
- Select **Create new Return** to start a blank return.
- Select **Close** to cancel the process.

NOTE: TaxWise Online does not completely delete a return unless you choose **Create new Return** when prompted to restore a deleted return.

If you choose to restore the return, you are given the option to go to the “Interview or the Tax Forms”

US
Main Information Sheet
This return can be filed on Form 1040EZ
Check form you are using: 1040 1040A 1040EZ 1040PR 1040NR 1040NREZ
Check one: Spanish forms on the screen and printed. Spanish forms printed only.
Your first name: Cynthia Initial: Sample Last name: Sample Suffix: Your SSN: 144-44-4444
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: 789 First Ave Zip code, city, and state: 30165-RCME, GA Email address:
Telephone numbers: Taxpayer Spouse Daytime Evening Cell phone or fax Foreign phone
Birth date: 10/16/1964 Age for Federal tax purposes: 42 0
Taxpayer's occupation: Teacher Spouse's occupation:
Foreign Address: Foreign street address Foreign city, state, province, Zip code Foreign country. Do not abbreviate

If you choose the Interview, you can also choose to “Click on Switch to Tax Forms to view the forms in the return.”

The TaxWise Online Interview
Please choose your client's filing status:
 Single
 Married Filing Separately
 Married Filing Jointly
 Head of Household
 Qualifying Widow(er) with Dependent Child
Help Me
Next