

TaxWise Online: Delete & Restore Returns



2010 IRS Training

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DELETE AND RESTORE RETURNS OBJECTIVES:

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

- Delete Returns
- Restore Deleted Returns

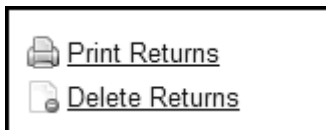
Delete Returns

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

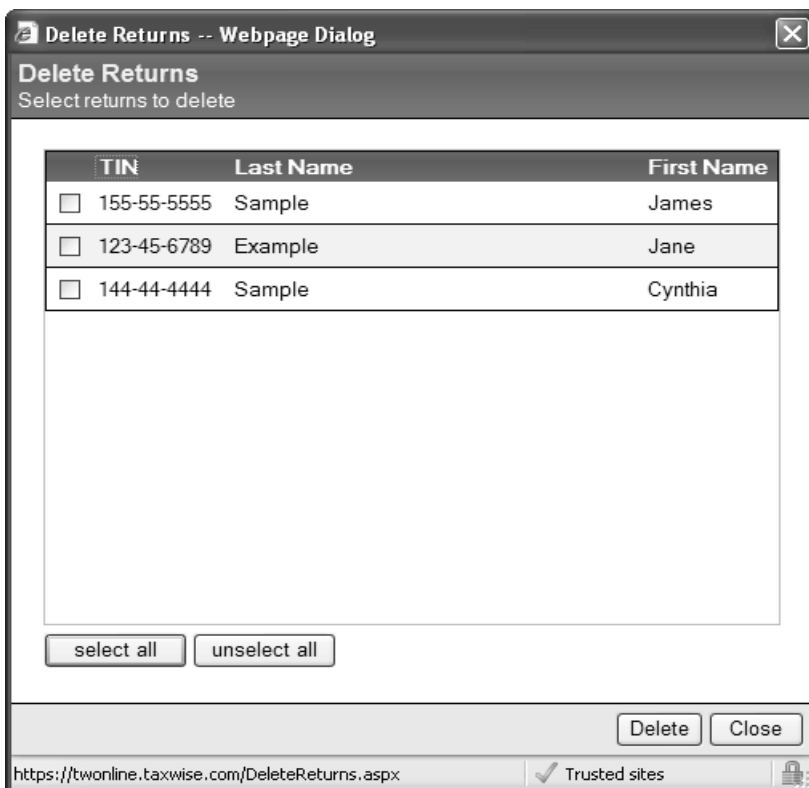
1. Log in with a user that is assigned Administrator role.

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**.



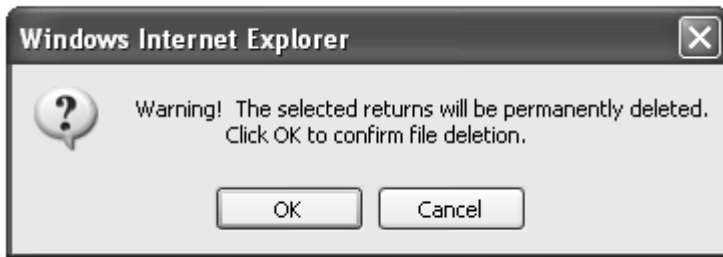
3. TaxWise Online displays the **Delete Returns** dialog box:



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

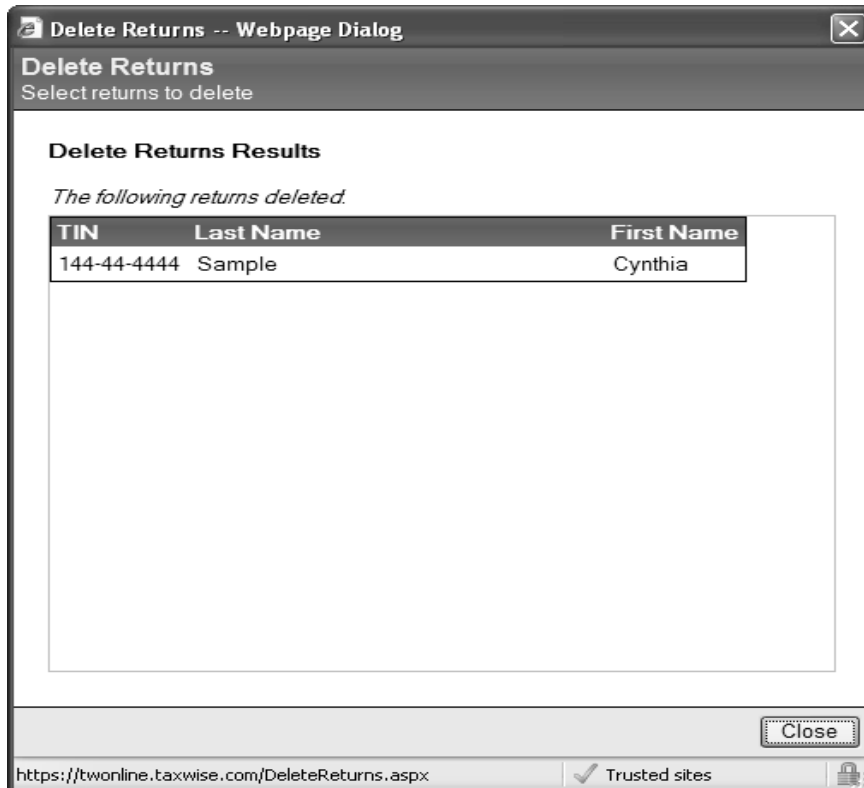
NOTE: Click **select all** to select all returns for deletion. Click **unselect all** to remove all selections.

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**

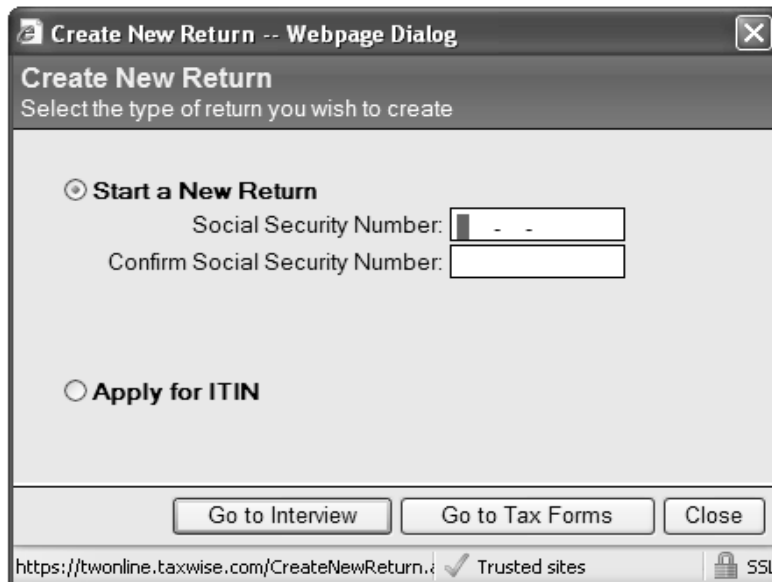
Restoring Deleted Returns

To restore a deleted return, use the following steps.

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

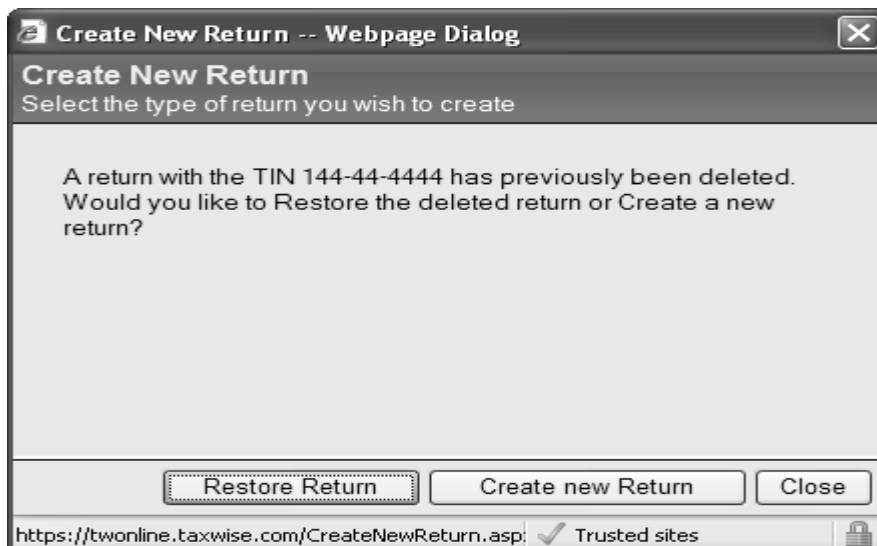
1. Click the **New Return** button.

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”

The screenshot shows the 'Main Information Sheet' for a US return. The top toolbar includes buttons for Previous Form, Next Form, Save Return, Close Return, Print Return, Client Letters, Switch To Interview, Run Diagnostics, Return Summary, Return Query, Forms List, Calculator, Help, and Log Out. On the left, a 'Refund Monitor' shows 'Current AGI: \$0' and 'Current Refund: \$0'. Below it, 'Loaded Forms' lists various forms like 1040 Wkt3, 1040 Pg 1, 1040 Pg 2, Sch B, Sch M, W2, 6251 Pg 1, 6251 Pg 2, 8879, Price, RES/NR Wkt, Summary, GA 500 Pg 1, and GA 500 Pg 2. The main area is titled 'Main Information Sheet' and contains fields for:

- US (checked)
- This return can be filed on Form: 1040EZ (selected), 1040, 1040A, 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: Sample, 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, Zip code, city, and state, Email address (789 First Ave, 30165-ROME, GA)
- Telephone numbers: Daytime, Evening, Cell phone or fax, Foreign phone (Taxpayer and Spouse fields)
- Birth date: 10/16/1964, Age for Federal tax purposes: 42
- 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 screenshot shows 'The TaxWise Online Interview' screen. The top toolbar has Save Return, Close Return, Switch To Tax Forms, and Help. On the left, a 'Filing Status' sidebar lists: Personal Info, Location, Address, Special Processing, General Questions, Dependents, Types Of Income, Assets, Adjustments, Deductions, Extra Questions, State Return, Select States, and Finish. The main area is titled 'Please choose your client's filing status:' and includes radio buttons for:

- ☒ Single
- ☐ Married Filing Separately
- ☐ Married Filing Jointly
- ☐ Head of Household
- ☐ Qualifying Widow(er) with Dependent Child

 There is a 'Help Me' button and a 'Next' button at the bottom right.