A young woman with long dark hair, wearing a dark blue blazer, is smiling and looking down at a tablet computer she is holding. The background is a blurred office setting with glass partitions.

TaxWise® Online Admin Role and Functions

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This course book reviews the administrative functions of in TaxWise®Online™.

Admin Password

The first time you log in, your password is your software registration code. You are then prompted to create your own password. You can find your software registration code in your Welcome email.

The requirements for the Admin password and any other user password using TaxWise Online are as follows:

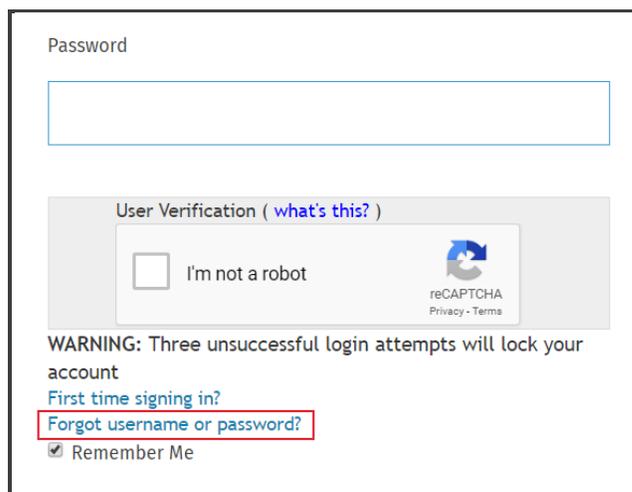
- 8-100 characters
- At least 1 upper case letter
- At least 1 lower case letter
- At least 1 number
- At least 1 special character/punctuation

i Passwords expire every 90 days.

Resetting Admin Password

If the admin user forgets his/her password prior to failed login attempts:

1. Click the **Forgot username or password?** link provided on the login screen.



The screenshot shows a login interface. At the top is a text input field labeled "Password". Below it is a "User Verification (what's this?)" section containing a reCAPTCHA "I'm not a robot" checkbox and a reCAPTCHA logo with "reCAPTCHA Privacy - Terms" text. Below the verification is a "WARNING: Three unsuccessful login attempts will lock your account" message. Underneath the warning are two links: "First time signing in?" and "Forgot username or password?". The "Forgot username or password?" link is highlighted with a red rectangular box. At the bottom left is a "Remember Me" checkbox with a checked mark.

2. On the Reset Password screen, enter your **Client ID** and **Username**, and click **Next**.

Reset Password

Client ID

Username

[Next](#)

[Cancel](#)

3. TaxWise Online displays message to check your email.

Reset Password

[Check your email](#)

[Back to login](#)

4. The admin user will receive an email with a temporary password. Highlight and copy the password.

Password Reset

 dontreply@wolterskluwer.com
To  Rangel, Maria

Caution, this email may be from a sender outside Wolters Kluwer. Verify the sender and know the content is safe.

The password for 800284\Admin has been set to dfPg35VgF3uuFtcjYzbQH

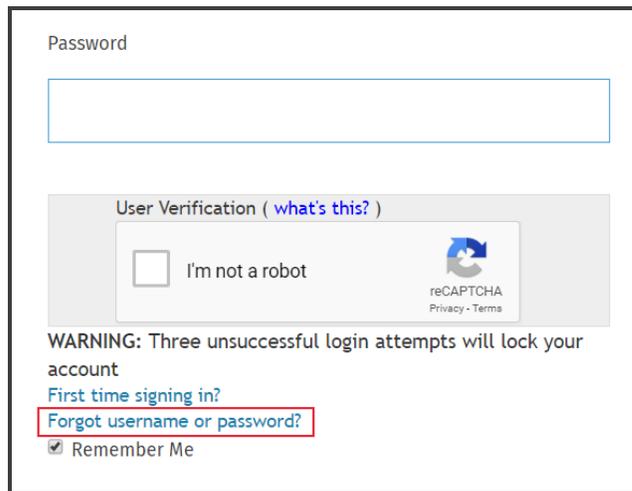
Once you login with your temporary password, you will be required to change your password.

- Return to the login page of TaxWise Online, and use the temporary password to log in to TaxWise Online. You will be prompted to change the password.

Resetting User Passwords

If a user forgets his/her password prior to failed login attempts:

- Click the **Forgot username or password?** link provided on the login screen.



Password

User Verification ([what's this?](#))

I'm not a robot  reCAPTCHA
Privacy - Terms

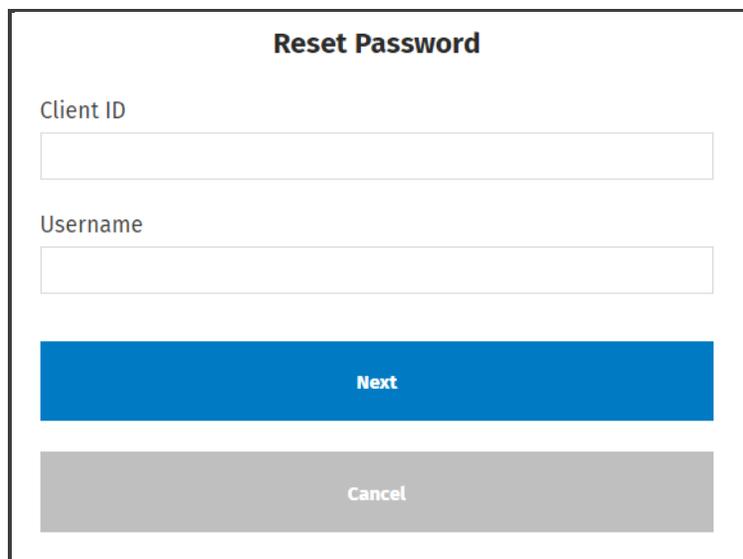
WARNING: Three unsuccessful login attempts will lock your account

[First time signing in?](#)

[Forgot username or password?](#)

Remember Me

- On the Reset Password screen, enter your **Client ID** and **Username**, and click **Next**.



Reset Password

Client ID

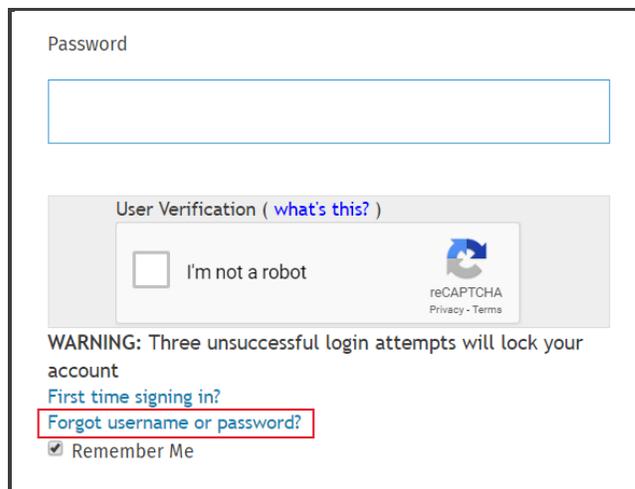
Username

Next

Cancel

- TaxWise Online displays message to check your email.

4. Click the **Forgot username or password?** link provided on the login screen.



Password

User Verification ([what's this?](#))

I'm not a robot  reCAPTCHA
Privacy - Terms

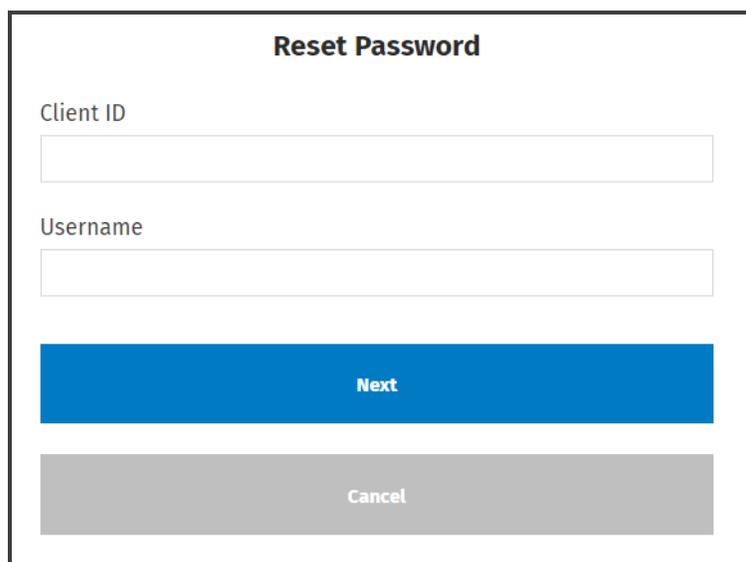
WARNING: Three unsuccessful login attempts will lock your account

[First time signing in?](#)

Forgot username or password?

Remember Me

5. On the Reset Password screen, enter your **Client ID** and **Username**, and click **Next**.



Reset Password

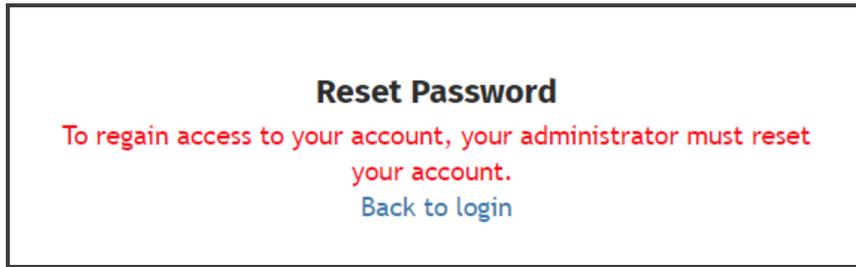
Client ID

Username

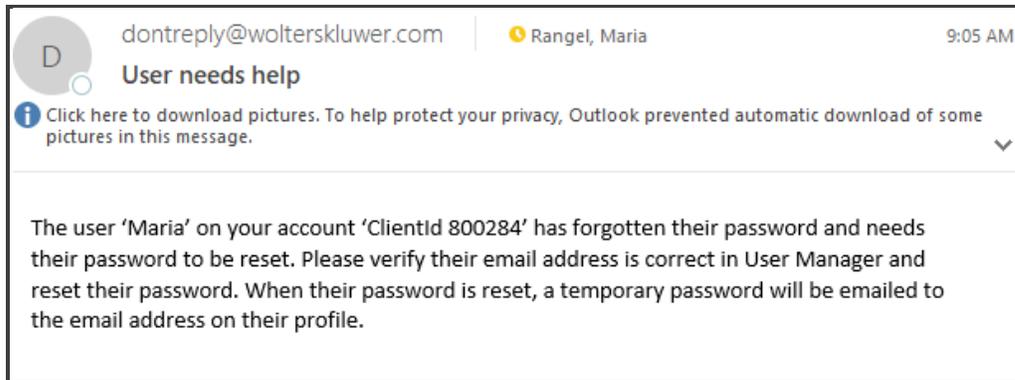
Next

Cancel

6. TaxWise Online displays message to check your email.

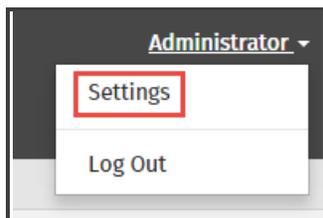


- The admin user receives an email letting them know that a user needs help. The admin user will need to log in to the User Manager to reset that user's password.

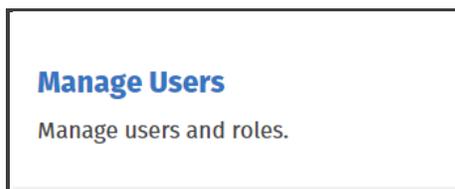


To access these options:

- As the Admin user, from the Administrator menu, click **Settings**.



- From the Settings page, click **Manage Users**.



- On the User Manager page, the admin user can reset the password for any other user by clicking the **Reset** link.

User Manager

[Create a New User](#) [Add/Change Admin Message](#) [Show Inactive Users](#)
[Enable Remote Assistance](#) [Restrict IP Addresses](#) [Logged In Users](#)
[Mark all users active](#) [Mark all users inactive](#) [Manage 2-Step Verification](#) NEW
[Help](#)

Reset Password	Edit	UserName	FirstName	M.I.	Last Name	Assigned Roles
Reset	Edit	Admin	Administrator			ReturnPrinter, Administrator
Reset	Edit	Chaos	Nathan	Plant		ReturnPreparer
Reset	Edit	Maria	Maria	Rangel		SuperUser, LicensedUser
Reset	Edit	mrangel	Maria	Rangel		

- TaxWise Online displays a confirmation message asking if we are sure we want to reset selected user, click **OK**.

twonline-19.taxwise.com says

Reset selected user?

A temporary password will be emailed to
 maria.rangel@wolterskluwer.com.

The user must have access to this email account.

- The users will receive an email, with a temporary password.

Password Reset

dontreply@wolterskluwer.com

Caution, this email may be from a sender outside Wolters Kluwer. Verify the sender and know the content is safe.

The password for 800284\Maria has been set to mHk3MCveM3bKPrb4LU9f2

Once you login with your temporary password, you will be required to change your password.

- Return to the login page of TaxWise Online, and use the temporary password to log in to TaxWise Online. You will be prompted to change the password.

Admin User Functions

Now there are some roles designed specifically for the Admin user, or users with the Admin role assigned to them. Any features that can only be performed by the Admin user, will be noted.

The table below outlines the administrator functions available to any user who is assigned the Administrator Role.

Function/Lesson	Description
General Settings	Set general settings. This includes user and administrator settings, custom fields, returns stages, print sets, and the carryforward of print sets. Also included in general settings is the Advance setting that allows you to enable override function for user role.
Return Templates	Create return templates for all user names in the system. Carryforward Return Templates.
Manage Users	Create user names and assign user roles. Here you can assign or restrict user privileges. The only exception is that you cannot assign the LicensedUser role, as only the Admin user can.
Client Letters	Allows you to create custom client letter templates.
Print Sets	Create federal and state print sets for sub-offices
Send Settings	Send settings to designated offices.
Audit log	Allows you to view audit log for selected return(s).
Return Manager	Open, edit, print, and if applicable, delete or move tax returns under any username.
E-File Manager	Create and submit e-files for returns under any username. Clear sent e-file status.

- i** For additional information on general settings, return templates, managing users, creating custom client letter templates, establishing federal and state print sets, and sending settings to sub-offices, review the respective lessons in the Registration and Setup course.

Managing Returns

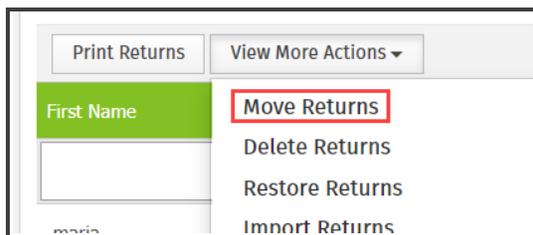
The Admin user, or any user assigned the administrator role can create a new return, open, edit, print, delete or move tax returns under any username.

Move Returns

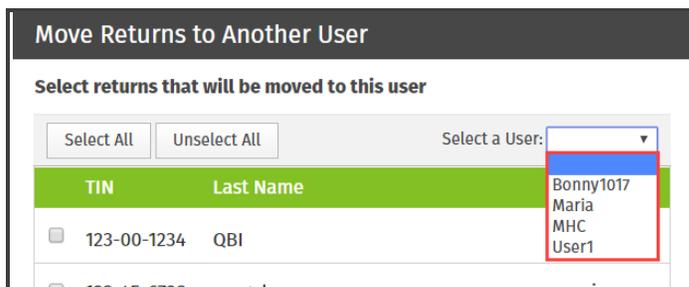
This action allows you to move tax returns from one user to another. When the tax return is moved it is no longer available to the original user. The ability to move returns is only available to the Admin user or a user with one of the following security roles: Administrator, SuperUser, or Reviewer.

To move returns:

1. Log in as the admin user or a user with an appropriate security role.
2. Click **Tax Returns**.
3. From the **View More Actions** list, click **Move Returns**.



4. TaxWise Online displays the Move Returns to Another User dialog box. From the Select a User list, select the users where you want the return(s) moved to.



5. Select the return(s), and click **Move**.

Move Returns to Another User

Select returns that will be moved to this user

Select All Unselect All Select a User: Maria ▼

TIN	Last Name	First Name	
<input type="checkbox"/>	██████████	QBI	TaxPayer
<input type="checkbox"/>	██████████	rangel	maria
<input checked="" type="checkbox"/>	██████████	Duncan	Robert
<input type="checkbox"/>	██████████		
<input type="checkbox"/>	██████████	Smith	Robert
<input checked="" type="checkbox"/>	██████████	Kindyak	Maryna

Move Close

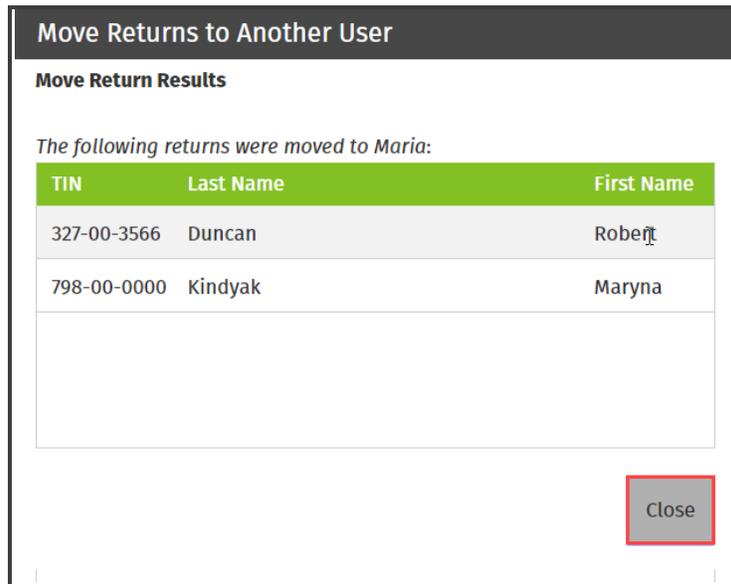
6. TaxWise Online displays the Move Return(s) confirmation page, click **OK** to proceed.

Move Return(s) ✕

The selected returns will be moved to user, Maria. Select OK to continue.

Cancel **OK**

7. TaxWise Online displays the Move Return Results. Here we see listed the returns moved and to what user. Click **Close**.



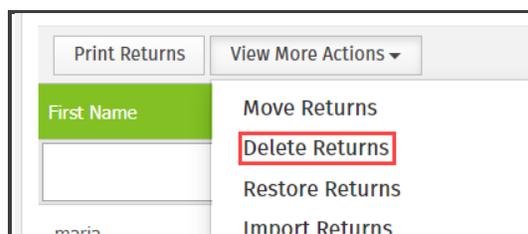
That user can now access those returns, but the original user can no longer access the returns moved.

Delete Returns

TaxWise Online allows you to delete returns and has the ability to restore returns after deletion.

To delete returns:

1. Log in as the admin user or a user appropriate security role.
2. Click **Tax Returns**.
3. From the **View More Actions** list, click **Delete Returns**.



4. TaxWise Online displays the Delete Returns dialog box. Select the return(s) and click **Delete**.

Delete Returns

Some returns have documents associated with them. All associated documents will be deleted when the return is deleted.

Select returns to delete

Select All Unselect All

TIN	Last Name	First Name
<input checked="" type="checkbox"/>	QBI	TaxPayer
<input type="checkbox"/>	rangel	maria
<input type="checkbox"/>	Duncan	Robert
<input type="checkbox"/>		
<input type="checkbox"/>	Smith	Robert
<input type="checkbox"/>	Kindyak	Maryna

Delete Close

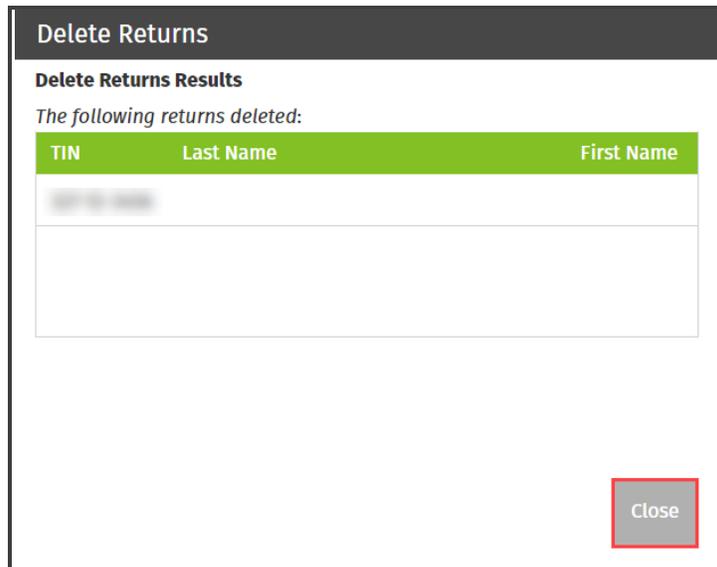
5. TaxWise Online displays the Delete Return(s) confirmation page. If there are documents associated with this return, they will be permanently deleted. Click **OK** to proceed.

Delete Return(s)

The selected return(s) and all associated documents will be permanently deleted. Select OK to confirm deletion.

Cancel OK

6. TaxWise Online displays the Delete Returns dialog box. Listed here are the returns that were deleted. Click **Close** to exit.

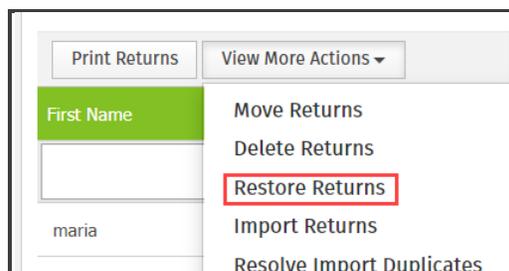


Restore Returns

TaxWise Online gives you the option to restore returns you have previously deleted.

To restore returns:

1. Log in as the admin user or a user appropriate security role.
2. Click **Tax Returns**.
3. From the **View More Actions** list, click **Restore Returns**.



4. TaxWise Online displays the Restore Returns dialog box. Select the return(s) and click **Restore**.

TIN	Last Name	First Name
<input type="checkbox"/>		
<input type="checkbox"/>	Rangel	Maria
<input type="checkbox"/>		
<input type="checkbox"/>		

Restore Close

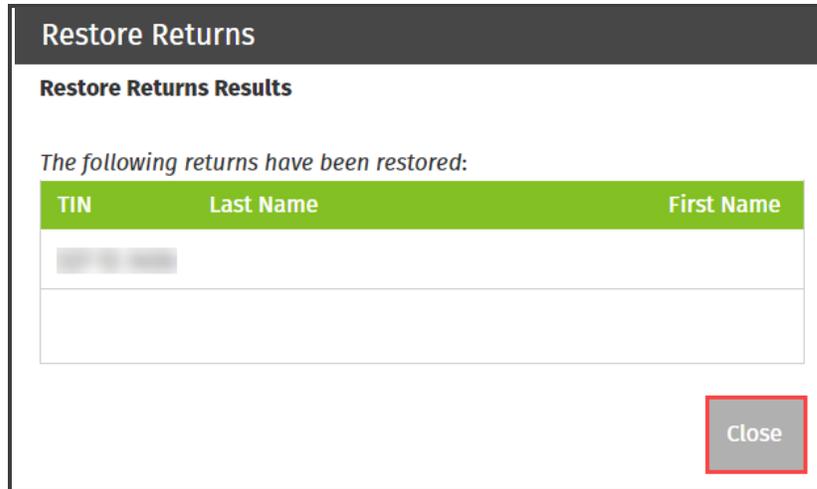
5. TaxWise Online displays the Restore Return(s) confirmation page. Click **OK** to proceed.

Restore Return(s)

The selected returns will be restored. Select OK to continue.

Cancel **OK**

6. TaxWise Online displays the Restore Returns dialog box. Listed here are the returns that were restored. Click **Close** to exit.



Import Returns

You can import returns to TaxWise Online for a number of reasons. These can include:

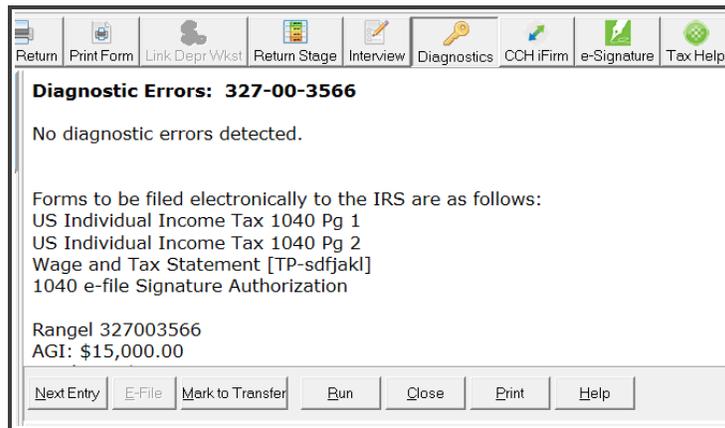
- Returns prepared in TaxWise Desktop Alternative Preparation Solution (APS)
- Returns were converted from another tax program

Import Returns from TaxWise Desktop

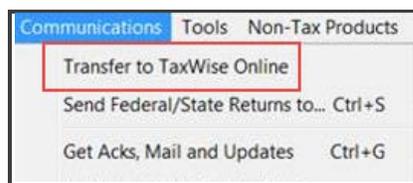
TaxWise Online allows you to import returns from TaxWise Desktop. If you use TaxWise Online, you also have access to TaxWise desktop software, referred to as the Alternative Preparation Solution or APS. This ensures that even if you have a disruption in your internet connection, you can continue preparing returns. Prepare returns in the desktop software, and then transfer them to your TaxWise Online account to transmit.

To do this:

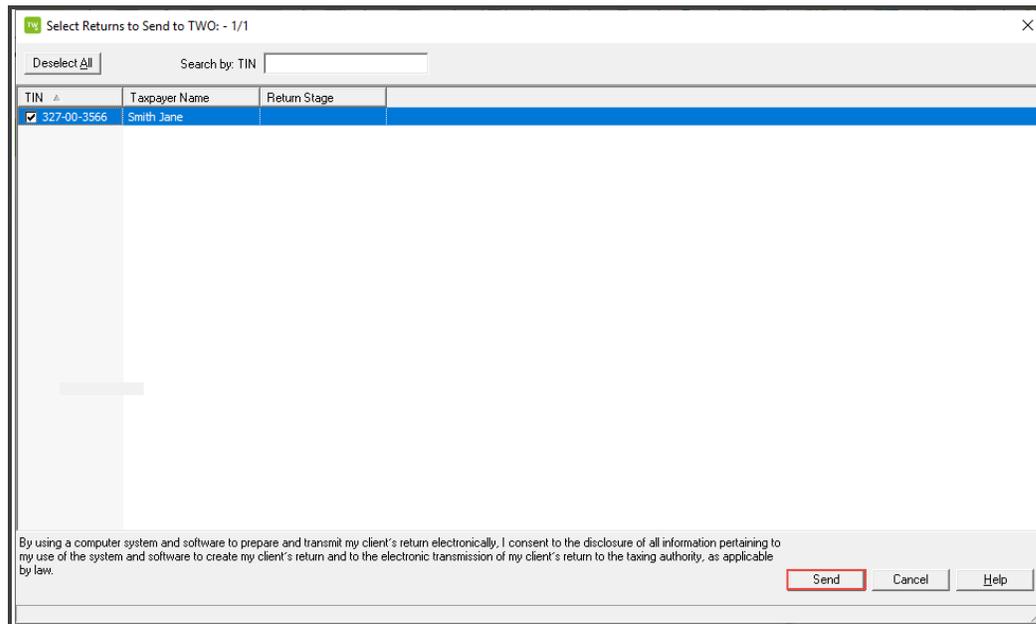
1. From within the return in TaxWise Desktop, click **Diagnostics**.
2. From the Diagnostic dialog box, click **Mark to Transfer**.



3. TaxWise displays confirmation that the return has been marked. Click **OK**.
4. Close the return and change the user to Admin.
5. Go to **Communications** and click **Transfer to TaxWise Online**.



6. Select the return(s) you want to send to TaxWise Online, and click **Send**.

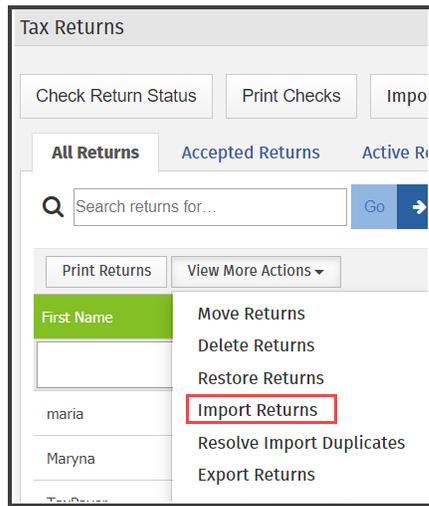


7. TaxWise displays the Electronic Filing Center box. In the session Information section, you will see confirmation stating that the return package has been successfully uploaded and is ready for retrieval in TaxWise Online.
8. Click **Close**.

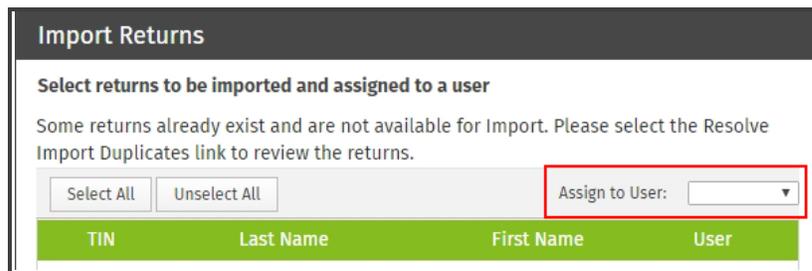
TaxWise Online allows you to import returns that were created and uploaded by TaxWise Desktop to a username under your Client ID. TaxWise Desktop and TaxWise Online must be registered with the same EFIN.

To do this:

1. Log in as the admin user or a user with the administrator role.
2. Click **Tax Returns**.
3. From the **View More Actions** list, click **Import Returns**.



4. From the **Assign to User** drop-down list, select the user where you want the returns(s) imported.



5. Select the check box(es) besides the return(s) to be imported.
6. Click **Import**.

Import Returns

Select returns to be imported and assigned to a user

Some returns already exist and are not available for import. Please select the Resolve Import Duplicates link to review the returns.

Select All Unselect All Assign to User:

TIN	Last Name	First Name	User
[REDACTED]	twentyfourtwo	safetynetmb	GUEST
<input type="checkbox"/>	[REDACTED] twentyfourthree	safetynetmb	GUEST
<input type="checkbox"/>	[REDACTED] twentyfourthree	safetynetmb	GUEST
<input type="checkbox"/>	[REDACTED] twentyfourfour	safetynetmb	GUEST
[REDACTED]	twentyfiveone	safetynetmb	GUEST

Import Close

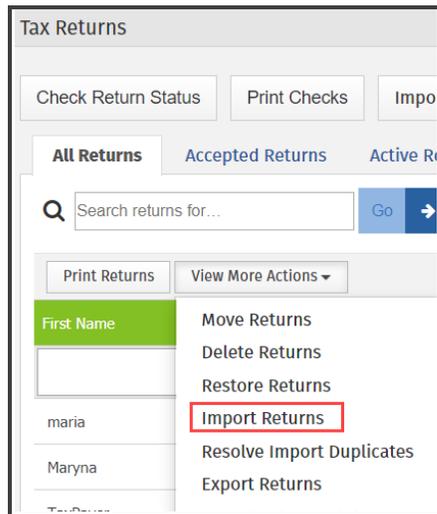
7. Click **OK** to confirm the import, and click **Close** on the dialog box displaying the status of the import.

Import Converted Returns

New users can download the tax conversion utility from the Solution Center to convert your prior year returns to use in TaxWise Online. Once the returns are converted and upload to the Solution Center, you will need to import the returns into TaxWise online.

To do this:

8. Log in as the admin user or a user with the administrator role.
9. Click **Tax Returns**.
10. From the **View More Actions** list, click **Import Returns**.



The import process is the same as described in the previous section.

i For additional information on the conversion process, review the *Conversion* lessons in the *Registration and Set up* course.

Resolve Import Duplicates

If a return already exists in TaxWise Online, you will not be able to import a return with the same Social Security number, this results in what we call an import duplicate. You will need to resolve the import duplicates.

To do this:

1. From the **View More Actions** list, click **Resolve Import Duplicates**.
2. Click one of the following:
 - **Existing:** This allows you to keep the existing return in TaxWise Online, but deletes the attempted import from TaxWise Desktop
 - **Imported:** This deletes the existing return in TaxWise Online and imports the return from TaxWise Desktop.
3. Click **Close**.

Resolve Import Duplicates

Returns with the following TINs already exist.

Do you want to use the existing return or replace it with the imported file?

TIN	Name	Username	Select which Return to Use	
[REDACTED]	twentyfourtwo, safetynetmb	karen	Existing	Imported
[REDACTED]	twentyfiveone, safetynetmb	karen	Existing	Imported

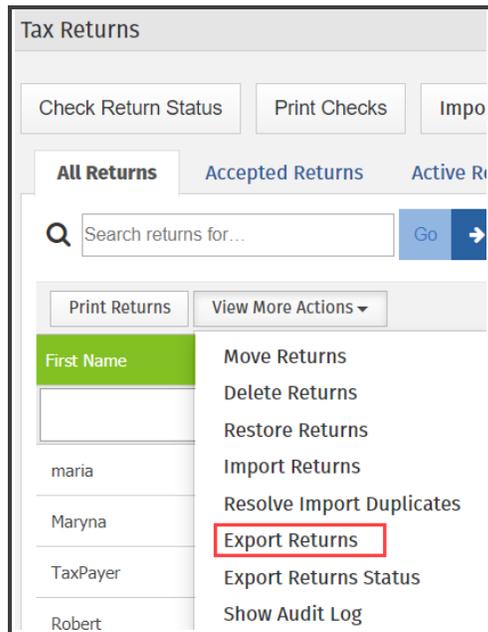
Close

Export Returns

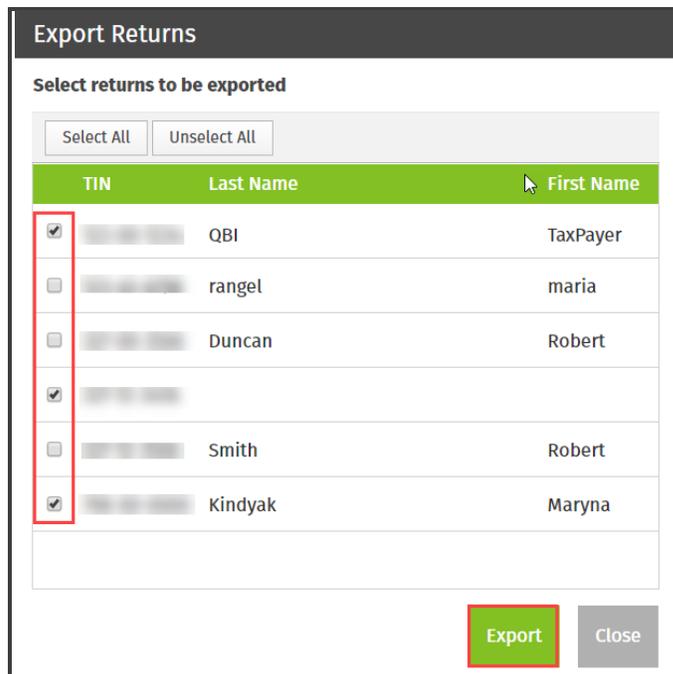
TaxWise online gives you the ability to export your return data and those files can be used in TaxWise Desktop. The export file will be password protected and encrypted. An email containing the password will be sent to the email address on file for the Admin user.

To export returns:

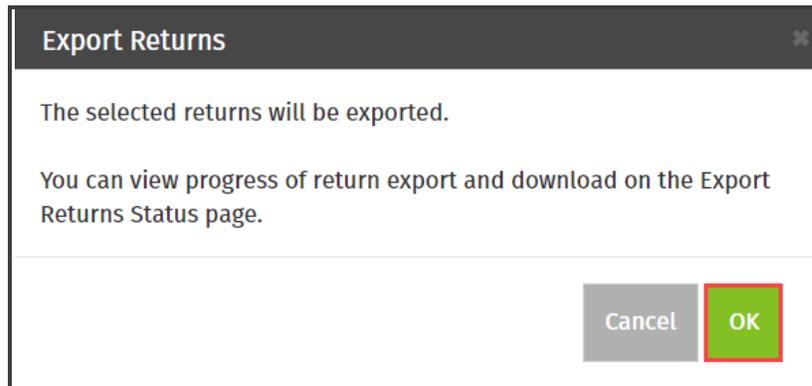
1. Log in as the admin user or a user with the administrator role.
2. Click **Tax Returns**.
3. From the **View More Actions** list, click **Export Returns**.



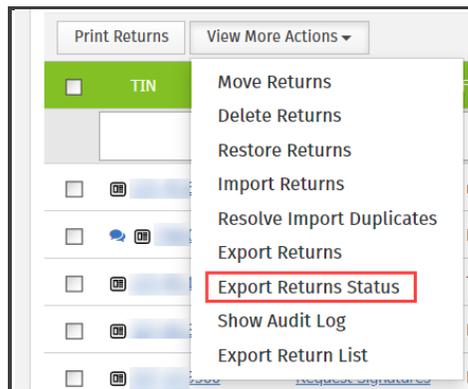
4. Select the return(s) to be exported, and click **Export**.



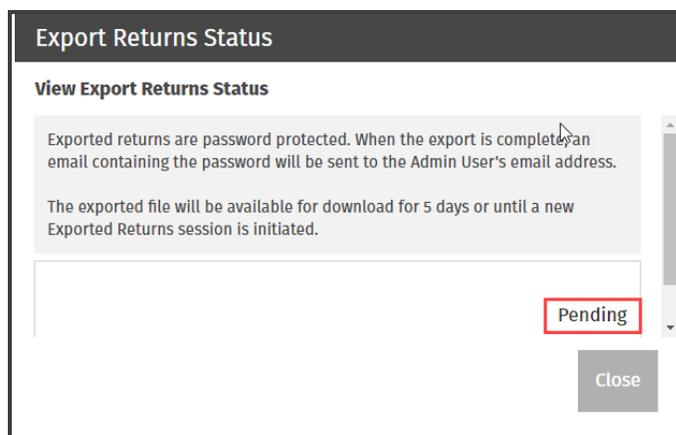
5. TaxWise Online displays confirmation message stating that the selected returns will be exported, and that you can view the progress of the return export, on the Export Returns Status page. To proceed to the Export Returns Status page, click **OK**.



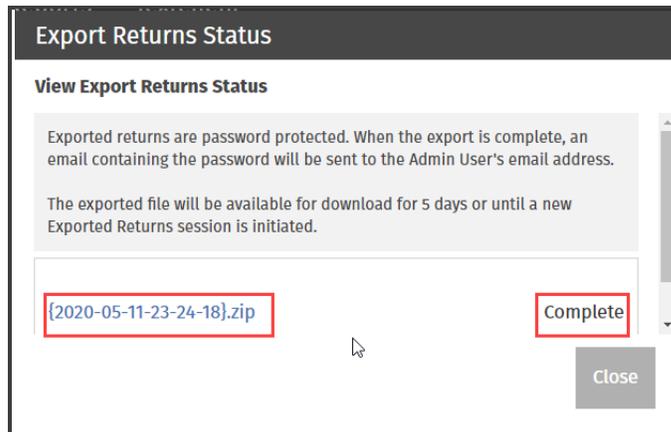
- i** You can access the Export Return Status page from the View More Actions menu.



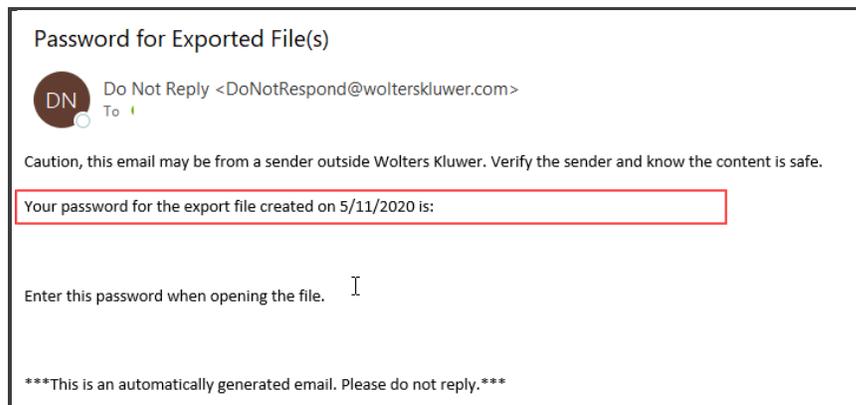
- 6.** TaxWise Online displays the Export Returns Status page, where we see that the progress on the Export is still Pending.



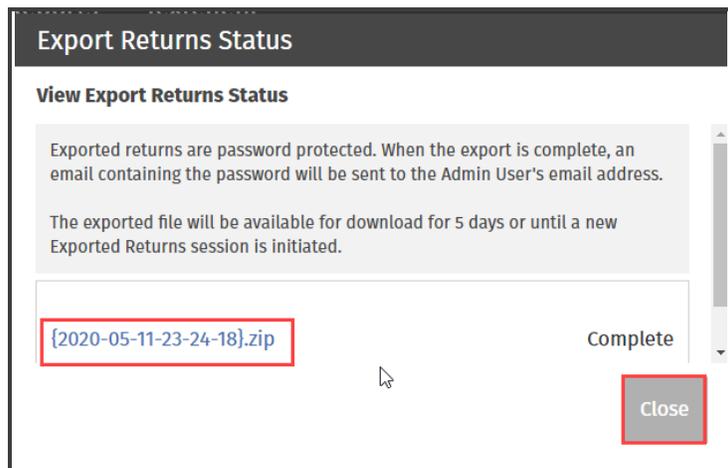
- Once the process is complete, you will see the ZIP file of the exported returns, and the status reflects Complete.



- Remember that the exported returns are password protected. When the export is complete, an email containing the password will be sent to the Admin User's email.



- From the Export Return Status page, do one of the following:
 - Click the file name to download the file.
 - Click **Close** to exit.



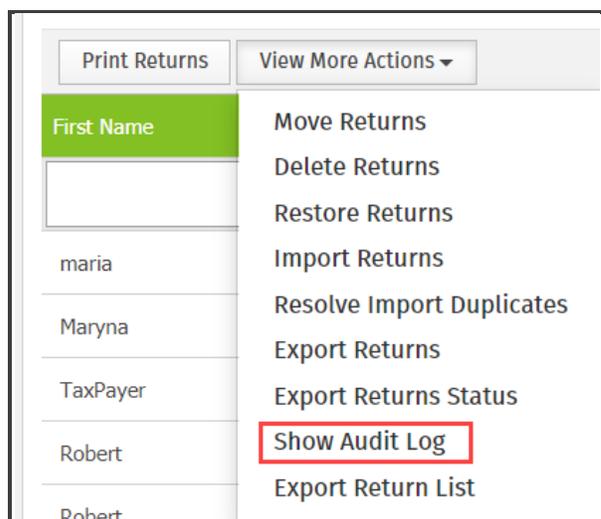
- i** The exported file will be available for download for 5 days or until a new Exported Returns session is initiated.

Audit Log

TaxWise Online allows you to track certain changes within the return.

To access the Audit log:

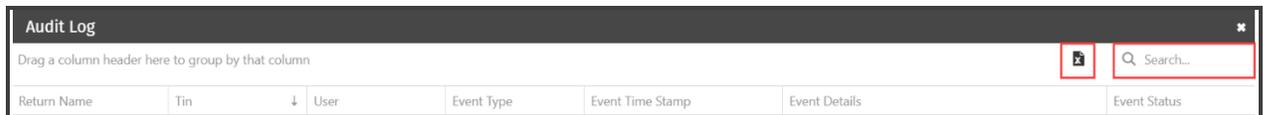
1. Log in as the admin user, and click on the **Tax Returns** tab.
2. From the return list, select the return(s) for which you want to see the audit log.
3. From the **View More Actions** list, click **Show Audit Log**.



4. TaxWise Online displays the Audit log page. Here you will see the audit changes made for the selected return(s).

Return Name	Tin	User	Event Type	Event Time Stamp	Event Details	Event Status
maria.rangel	*****6798	Admin	Open Return	1/17/2020, 12:28 PM	Create New Return from wktraining	Successful
maria.rangel	*****6798	Admin	Open Return	1/17/2020, 12:28 PM	Open Existing Return	Successful
maria.rangel	*****6798	Admin	Return Close	1/17/2020, 12:29 PM	Editing duration in seconds = 53	Successful
maria.rangel	*****6798	Admin	Return Close	1/17/2020, 12:31 PM	Editing duration in seconds = 28	Successful
maria.rangel	*****6798	Admin	Return Close	1/17/2020, 12:31 PM	Editing duration in seconds = 28	Successful
maria.rangel	*****6798	Admin	Open Return	1/22/2020, 12:02 PM	Open Existing Return	Successful
maria.rangel	*****6798	Admin	Return Close	1/22/2020, 12:03 PM	Editing duration in seconds = 13	Successful
maria.rangel	*****6798	Admin	Return Close	1/23/2020, 12:17 PM	Editing duration in seconds = 16	Successful
maria.rangel	*****6798	Admin	Open Return	1/23/2020, 12:12 PM	Open Existing Return	Successful
maria.rangel	*****6798	Admin	Return Close	1/27/2020, 3:44 PM	Editing duration in seconds = 40	Successful

5. From the Audit log dialog box, at the top right, you can do:
 - Export the content to Excel
 - Search



i Audit log feature enhancements are coming for the 2020 Filing season. Please look out for the *Enhancements* course that will be available in December 2020.

Export Return List

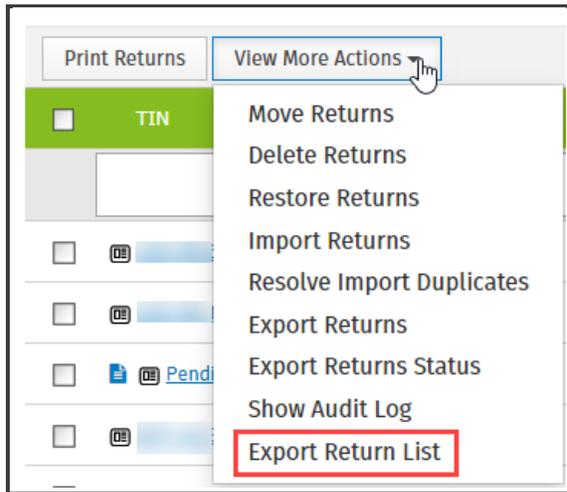
The return list on the Tax Returns tab can be exported as a .csv or .xls file.

To export the return list:

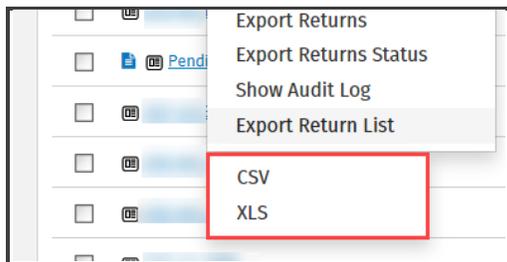
1. Log in as the Admin or a user with the Administrator role or ExportGrid role, and click on the **Tax Returns** tab.
2. Select the tab representing the view you want to export.



- From the **View More Actions** list, click **Export Return List**.



- Select if you want the return list exported in CSV or XLS format. For this lesson select XLS.



- TaxWise Online displays in the lower left hand corner, the file that is being generated as part of this export.



The tax preparer can now open this return list in excel and review it.

Reports

TaxWise Online contains some reports to assist you in monitoring your business and managing your clients. To view these reports:

1. Click the **Reports** tab.
2. Click the **Generate** link for the report you want to run.

Reports		
View Report Descriptions		
Name		Status
1040X Report	Generate	None
Outstanding Rejects	Generate	None
TWO Daily Statistics	Generate	None
TWO Returns Created by Date and Username	Generate	None
TWO State Return Detail	Generate	None
TWO Statistical Data (Details)	Generate	None

3. TaxWise Online indicates the report is now pending.

Reports		
View Report Descriptions		
Name		Status
1040X Report		Pending

4. When the report is ready to view, click the **Download** icon to open the Excel file.

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- i** The Administrator can access additional reports from the Solution Center. For additional information see the respective lesson that is part of the Working with Wolters Kluwer course.