# TaxWise® Learning Portal

## Print Packets

TaxWise allows you to print returns, reports, and labels, either to paper or to PDF. Before you print returns, set your printing preferences in Setup Assistant, and create print packets to save time when printing returns.

ℹ️ For more information about setting printing preferences, review the lesson in the *Product Registration and Setup* module.

Print packets are sets of forms you can edit to include only the forms you want to print with certain copies of the return. The default setting prints one copy of each completed form in the return, including IRS forms, schedules, worksheets, and statements.

Each return type includes multiple print packets. Review the chart below for the available packets:

| Print Packet | Contains | Use |
|---|---|---|
| **Signature Pages** | Main tax forms, disclosure forms, e-file authorization forms | Prints the pages the taxpayer needs to sign |
| **File Copy** | All forms in the return | Prints a copy of the return for your records |
| **Taxpayer Federal Copy** | All federal forms and schedules | Prints a copy of the federal return for the taxpayer's records |
| **Taxpayer State Copy** | All state forms and schedules | Prints a copy of the state return for the taxpayer's records |
| **Federal Copy to be Mailed** | All federal forms and schedules the IRS requires to be filed with the return | Prints a copy of the federal return for the taxpayer to mail |
| **State Copy to be Mailed** | All state forms and schedules the state requires to be filed with the return | Prints a copy of the state return for the taxpayer to mail |
| **Organizer Packet** | All completed forms in the return | Prints a copy of all forms for the taxpayer to use to organize next year's tax information |

To edit the default print packets:

1. On the **Tools** menu, click **Utilities/Setup Assistant**.

2. On the **Setup** menu, click **View/Edit Print Packets**.
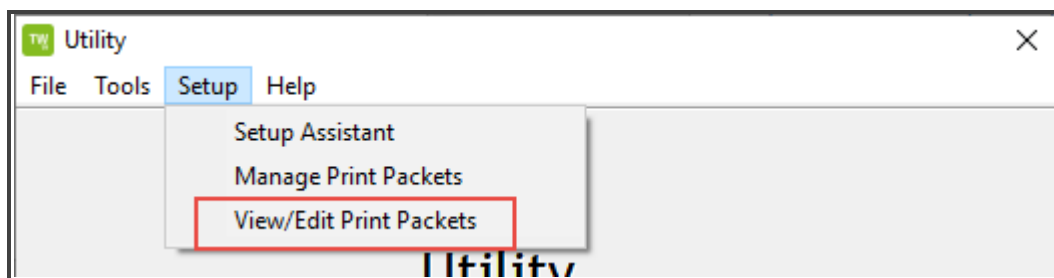


3. In the View/Edit Print Packets window, you can add or remove forms from your Selected Forms list, increase the number of copies of specific forms, and use the arrows to the right to rearrange the order in which the forms print.
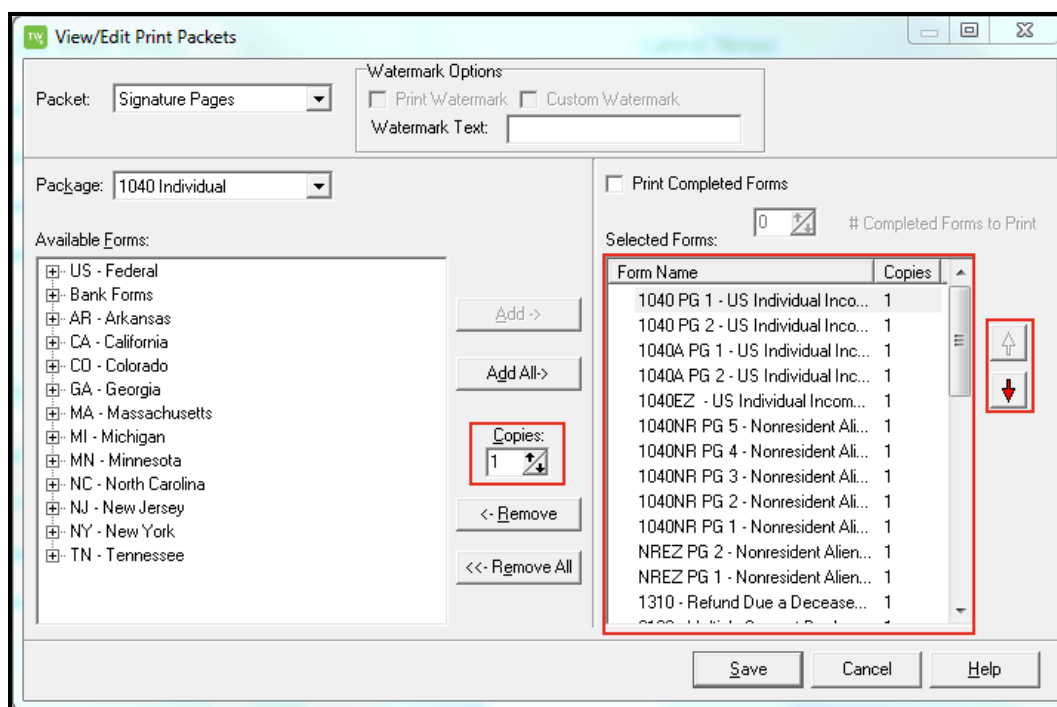


4. For some copies, you can add a watermark. To do this, check the box to print the watermark.

5. If you want to create your own watermark text, select **Custom Watermark**.
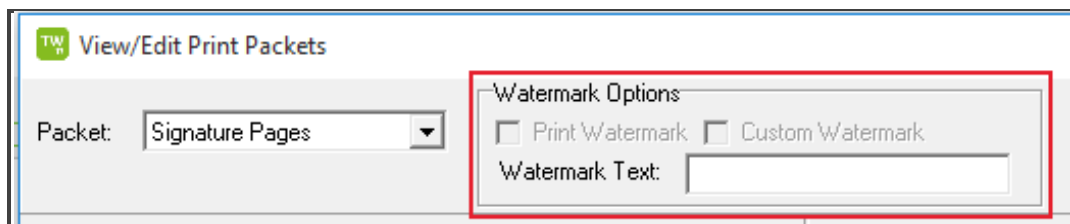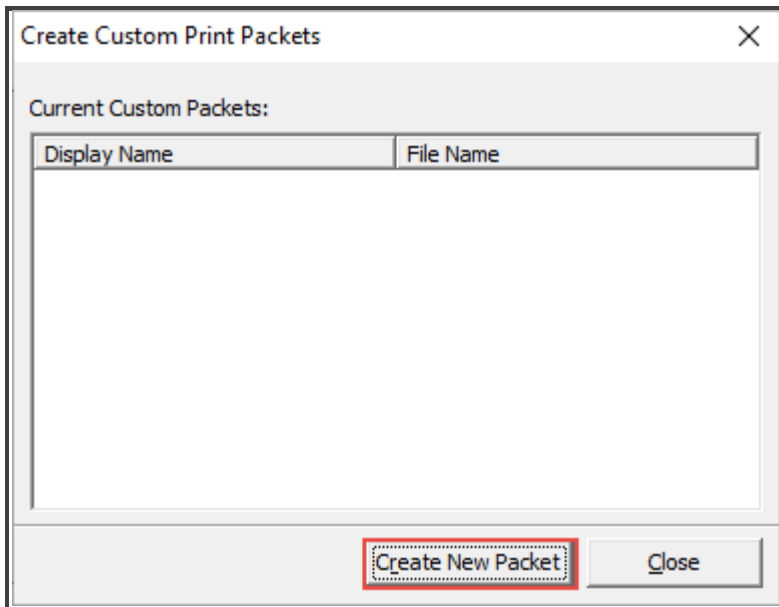


ℹ️ Follow these steps for each packet and each return type you print.

You can also create your own custom print packet. To do this:

1. On the **Tools** menu, click **Utilities/Setup Assistant**.

2. On the **Setup** menu, click **Manage Print Packets**.
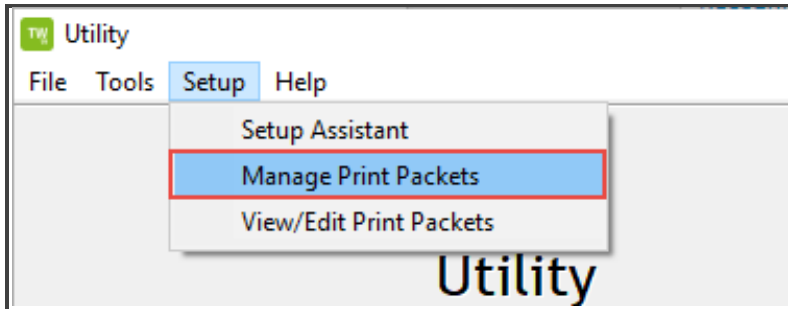


3. TaxWise displays the Create Custom Print Packets dialog box. Click **Create New Packet**.



4. TaxWise displays the Create New Packet dialog box.  Type the name you want for this print packet, and then the template you want to base this packet on. Click **Create**.
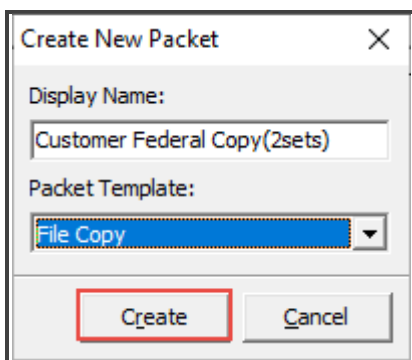
5. TaxWise displays the Status dialog box confirming that the custom print packet successfully created. Click **OK**.

**Status** ✕

(240) Custom print packet successfully created.

OK
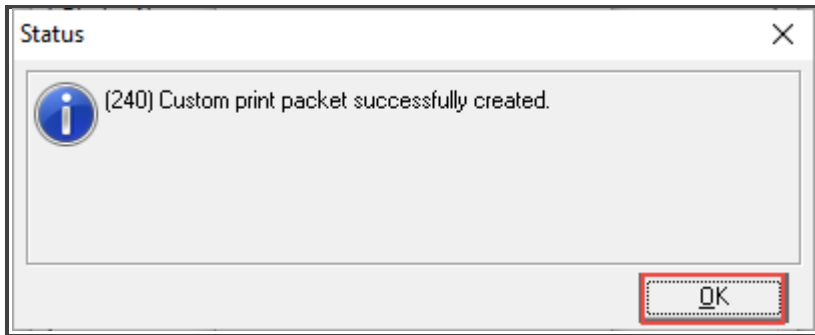
6. TaxWise returns to the Create Custom Print Packets dialog box. You will see listed any custom print packets created by this user. Click **Close** to exit.

**Create Custom Print Packets** ✕

Current Custom Packets:

| Display Name | File Name |
|---|---|
| MRCustom 1040 | CustomPacket1.PFL |
| Customer Federal Copy(2sets) | CustomPacket2.PFL |
| Test Packet | CustomPacket3.PFL |

Create New Packet          Close