

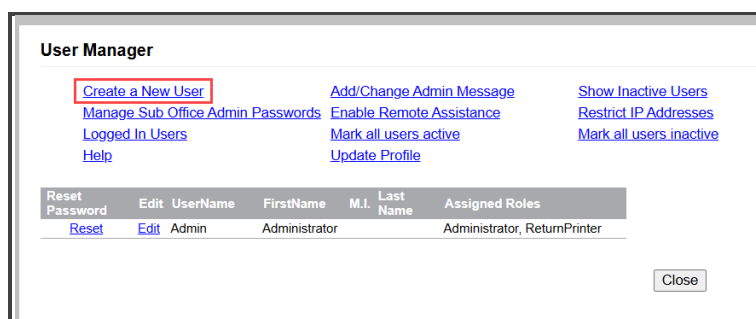
TaxWise® Online Learning Portal

Manage Users

Use the Manage Users feature to add users and passwords. This section also allows the Admin user to manage user roles.

To add a new user:

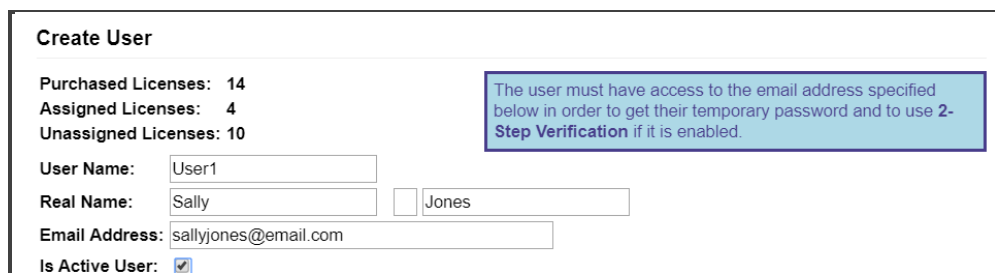
1. From the User Manager dialog box, click **Create a New User**.



The User Manager dialog box contains several links at the top: [Create a New User](#) (highlighted with a red box), [Add/Change Admin Message](#), [Show Inactive Users](#), [Manage Sub Office Admin Passwords](#), [Enable Remote Assistance](#), [Restrict IP Addresses](#), [Logged In Users](#), [Mark all users active](#), [Mark all users inactive](#), [Help](#), and [Update Profile](#). Below these links is a table with columns: Reset Password, Edit, UserName, FirstName, M.I., Last Name, and Assigned Roles. The table contains one row for the 'Admin' user. A 'Close' button is located at the bottom right.

| Reset Password | Edit | UserName | FirstName | M.I. | Last Name | Assigned Roles |
|-----------------------|----------------------|----------|---------------|------|-----------|------------------------------|
| Reset | Edit | Admin | Administrator | | | Administrator, ReturnPrinter |

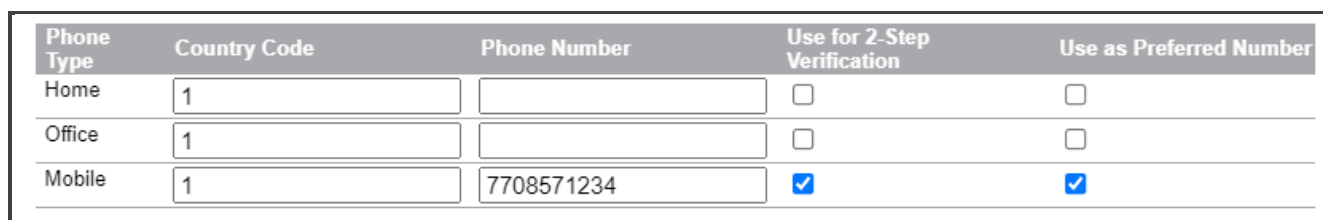
2. In the Create User screen, type the required information in the fields provided.



The Create User screen displays license information: Purchased Licenses: 14, Assigned Licenses: 4, and Unassigned Licenses: 10. A blue box contains a note: "The user must have access to the email address specified below in order to get their temporary password and to use 2-Step Verification if it is enabled." The form fields are: User Name (User1), Real Name (Sally Jones), Email Address (sallyjones@email.com), and Is Active User (checked).

-  Make sure the **Is Active User** check box is selected.

3. Next, complete any phone numbers associated with the user. This is used as part of the 2 Step Verification process. If you do not have the number, the user can enter it when they first log in.



| Phone Type | Country Code | Phone Number | Use for 2-Step Verification | Use as Preferred Number |
|------------|--------------|--------------|-------------------------------------|-------------------------------------|
| Home | 1 | | <input type="checkbox"/> | <input type="checkbox"/> |
| Office | 1 | | <input type="checkbox"/> | <input type="checkbox"/> |
| Mobile | 1 | 7708571234 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

4. In the Assign Roles section, select a **Possible Role** and use the arrows to move this role to the **Assigned Roles** box. In order for users to be able to log in, you must add the **Licensed User** role to all users.

Assign Roles

Possible Roles

Assigned Roles

PasswordMaintenance
eSignature
Interviewer
SuperUser
TemplateManager
Administrator
Reviewer
EfileManager
CheckPrinter
ExportGrid
InterviewProcessor
ReturnPrinter

>>
<<

ReturnPreparer
LicensedUser

- Once you have assigned the appropriate security roles, click **Save**.

Create User

Purchased Licenses: 3
Assigned Licenses: 2
Unassigned Licenses: 1

The user must have access to the email address specified below in order to get their temporary password and to use **2-Step Verification** if it is enabled.

User Name: User1
Real Name: Sally Jones
Email Address: sallyjones@email.com
Is Active User: ☒

| Phone Type | Country Code | Phone Number | Use for 2-Step Verification | Use as Preferred Number |
|------------|--------------|--------------|-------------------------------------|-------------------------------------|
| Home | 1 | | <input type="checkbox"/> | <input type="checkbox"/> |
| Office | 1 | | <input type="checkbox"/> | <input type="checkbox"/> |
| Mobile | 1 | 7708571234 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Assign Roles

Possible Roles

Assigned Roles

ExportGrid
InterviewProcessor
ReturnPrinter
Support
PasswordMaintenance
eSignature
Interviewer
TemplateManager
Administrator
Reviewer
EfileManager
CheckPrinter

>>
<<

LicensedUser
SuperUser

Save Cancel

- i** In order for users to be able to log in, you must add the **Licensed User** role to all users. For additional information on User Roles, review the next section.

User Roles

The user roles available can be classified as main user roles and add-on user roles. The table below is the list of Main User Roles.

| User Role | Description |
|-----------------------|--|
| Administrator | The Administrator role allows access to all program features as well as access to the user settings for all users. |
| SuperUser | The Superuser role is the highest role a preparer can have, next to the Administrator Role. A superuser can create returns, verify return status, print, submit e-files, print reject details, and view acknowledgements. A superuser can also move, delete, and restore their returns. A superuser can use the eSignature option from within an open return. |
| ReturnPreparer | The ReturnPreparer role allows a preparer to create new returns and verify return status. This user role cannot access any of the e-filing functions. |
| Reviewer | The Reviewer roles allows a preparer to create new returns, verify return status, and move returns. This role can also print the reject details and view acknowledgements but cannot submit e-files. |
| Interviewer | The Interviewer roles allows a preparer to create new returns verify return status. However, any user assigned the Interviewer role, will only be able to start a new return via the Interview mode. |

All the users in the table above have access to the Dashboard view and can access their User Settings.

The table below is a list of the Add-on User Roles. These roles must be assigned in addition to one of the following user roles: SuperUser, ReturnPreparer, Interviewer, and Reviewer.

| User Role | Description |
|----------------------------|---|
| TemplateManager | Allows a user the ability to create and edit return templates and assign them to users. |
| EfileManager | Allows a user the ability to submit e-files. |
| PasswordMaintenance | Allows a non-admin user to reset user passwords and manage user details such as name, email address, and active/inactive user status. This user cannot edit role assignments. |
| InterviewProcessor | Allows the user to ability to import interviews. |
| CheckPrinter | Allows the user to print checks. |
| ReturnPrinter | Allows the user to print returns. |
| ExportGrid | Allows the user to Export the return list function under View More Actions menu. |
| ReturnDeleter | Allows the user to delete and restore returns. |
| eSignature | Allows the user access to the eSignature |
| Support | If your TaxWise has sub-offices, you can assign this role to users giving them access to the Login As feature. Users with this role will be able to log in to the sub-offices without having to logout of the Main Office's site of TaxWise Online. |