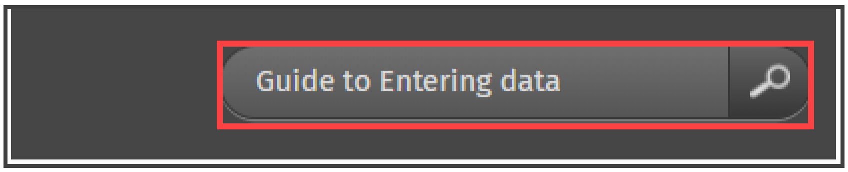
TaxWise® Online Learning Portal

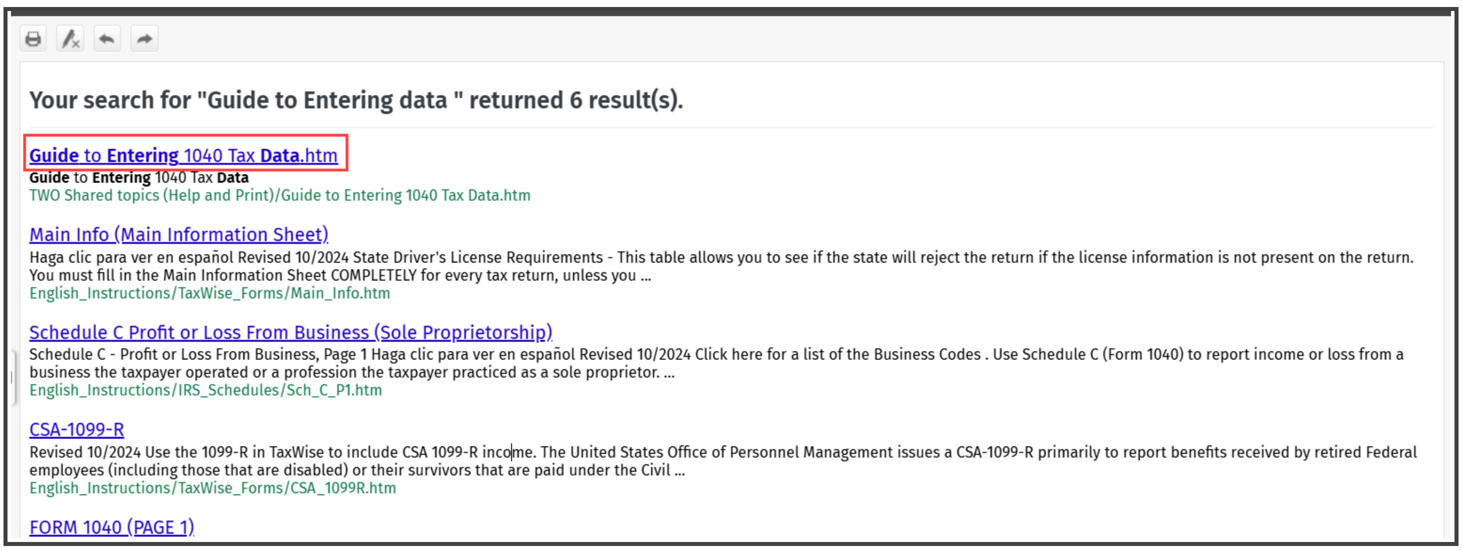
Entering Taxpayer Data

To access the Guide to Entering 1040 Tax Data:

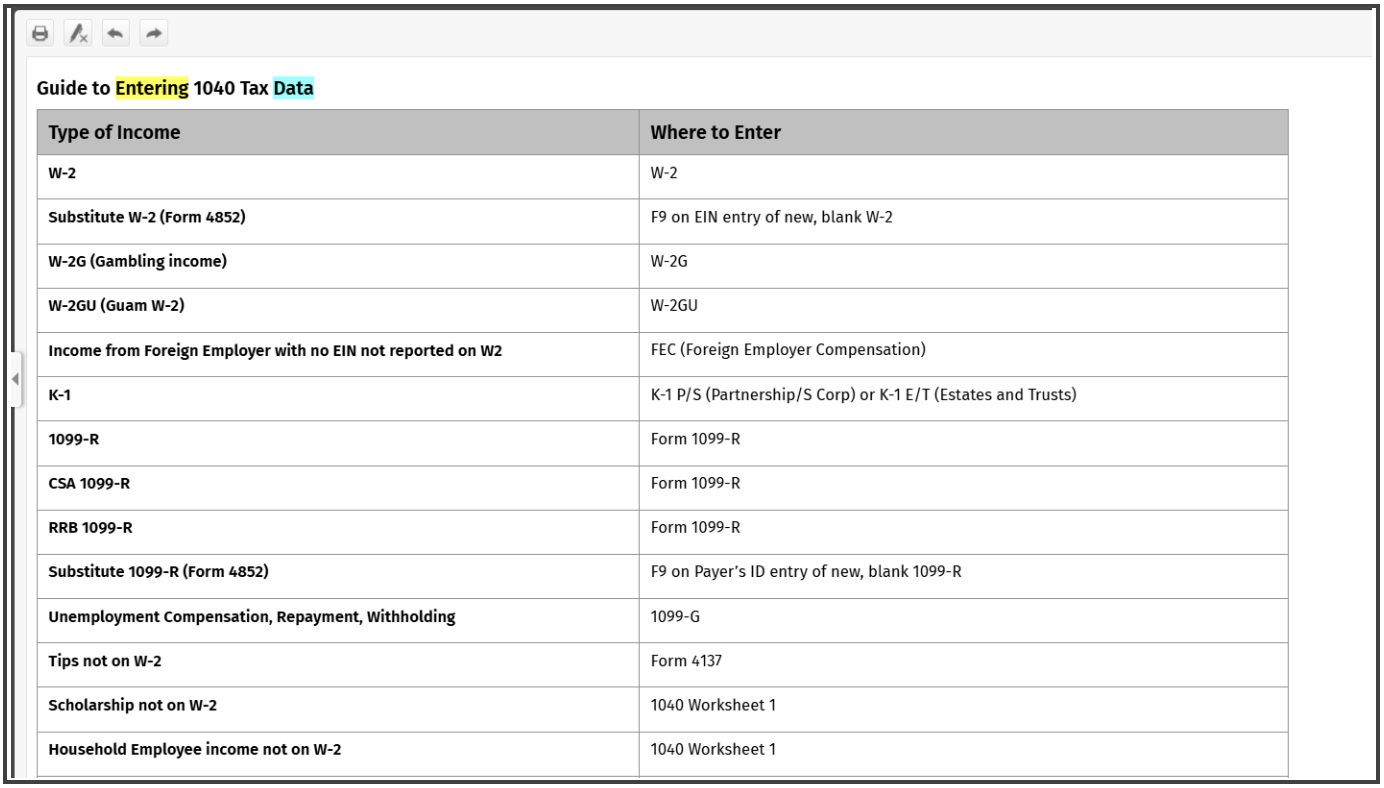
1. Click *F1*, to load Program Help.
2. Click the Search tab, and in the search field type *Guide to Entering data* and click the **Search** button.



3. TaxWise Online Program Help displays the search results. Click the title of the help article you want to access.



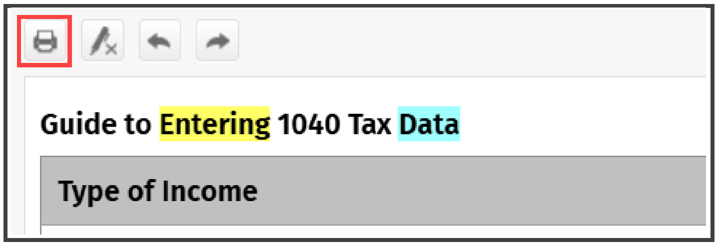
4. TaxWise Online displays the article in the display pane to the right.



Guide to Entering 1040 Tax Data

Type of Income	Where to Enter
W-2	W-2
Substitute W-2 (Form 4852)	F9 on EIN entry of new, blank W-2
W-2G (Gambling income)	W-2G
W-2GU (Guam W-2)	W-2GU
Income from Foreign Employer with no EIN not reported on W2	FEC (Foreign Employer Compensation)
K-1	K-1 P/S (Partnership/S Corp) or K-1 E/T (Estates and Trusts)
1099-R	Form 1099-R
CSA 1099-R	Form 1099-R
RRB 1099-R	Form 1099-R
Substitute 1099-R (Form 4852)	F9 on Payer's ID entry of new, blank 1099-R
Unemployment Compensation, Repayment, Withholding	1099-G
Tips not on W-2	Form 4137
Scholarship not on W-2	1040 Worksheet 1
Household Employee income not on W-2	1040 Worksheet 1

5. Use the printer icon at the top to print this guide.

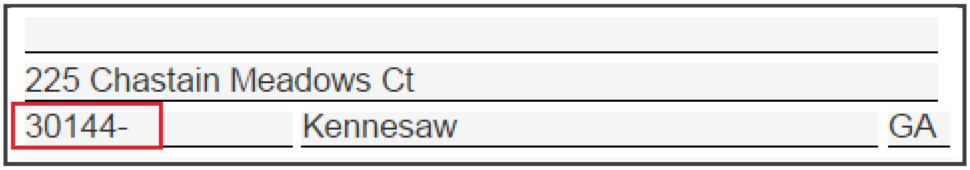


Completing the Main Information Sheet

Use the Main Information Sheet as the primary entry form for information in the return. TaxWise Online displays this form when you open a return. Complete the Main Information Sheet before entering data on any other forms. This information will carry throughout the return.

Zip Code Locator

Use the Zip Code Locator to enter the city and state. To complete the city and state information. Enter the **Zip Code** and press **Enter**. TaxWise Online auto-fills the city and state.

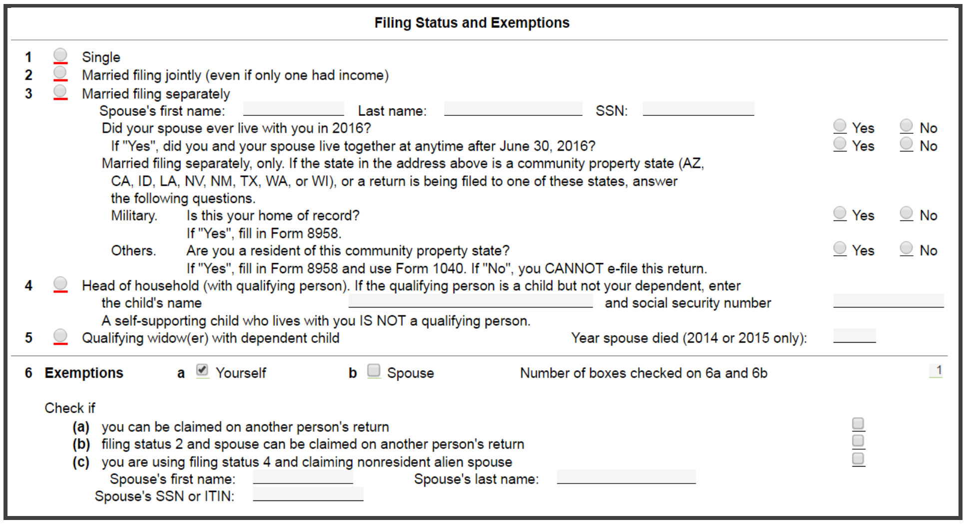


Due to refresh rate differences, it may take a couple of seconds for the city and state to load.

Filing Statuses

Select the appropriate check box for the taxpayer's filling status. For some filing statuses, TaxWise Online makes other boxes in this section required.

- If the taxpayer's filing status is married filing separately, type the spouse's name and Social Security number in the appropriate boxes. Then, read the questions carefully and select the **Yes** or **No** check box for each question.
- If the taxpayer's filing status is head of household, and the qualifying child is <u>not</u> the taxpayer's dependent, type the child's name and Social Security number in the appropriate boxes.
- If the taxpayer's filing status is qualifying widow or widower with dependent child, type the year the spouse died in the appropriate box.

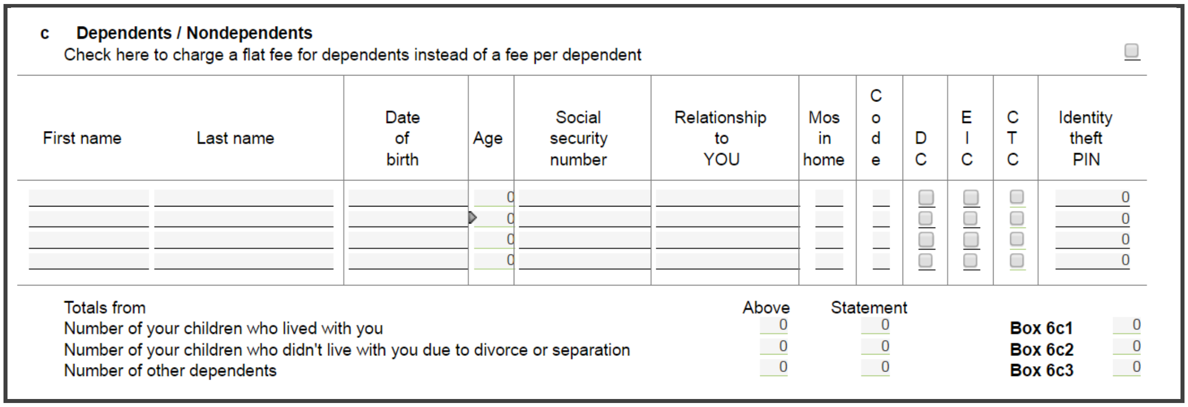


Filing Status and Exemptions

1 Single
2 Married filing jointly (even if only one had income)
3 Married filing separately
Spouse's first name: Last name: SSN:
Did your spouse ever live with you in 2016? Yes No
If "Yes", did you and your spouse live together at anytime after June 30, 2016? Yes No
Married filing separately, only. If the state in the address above is a community property state (AZ, CA, ID, LA, NV, NM, TX, WA, or WI), or a return is being filed to one of these states, answer the following questions.
Military. Is this your home of record? Yes No
If "Yes", fill in Form 8958.
Others. Are you a resident of this community property state? Yes No
If "Yes", fill in Form 8958 and use Form 1040. If "No", you CANNOT e-file this return.
4 Head of household (with qualifying person). If the qualifying person is a child but not your dependent, enter the child's name and social security number
A self-supporting child who lives with you IS NOT a qualifying person.
5 Qualifying widow(er) with dependent child Year spouse died (2014 or 2015 only):
6 **Exemptions** **a** Yourself **b** Spouse Number of boxes checked on 6a and 6b 1
Check if
(a) you can be claimed on another person's return
(b) filing status 2 and spouse can be claimed on another person's return
(c) you are using filing status 4 and claiming nonresident alien spouse
Spouse's first name: Spouse's last name:
Spouse's SSN or ITIN:

Dependents

Enter the dependents and select the dependent care and earned income credit check boxes for any dependents who are qualifying children for those credits. Make sure you type all of the information for every dependent and non-dependent, including the Social Security number, months in home, dependent code and other information.



c Dependents / Nondependents
Check here to charge a flat fee for dependents instead of a fee per dependent

First name	Last name	Date of birth	Age	Social security number	Relationship to YOU	Mos in home	Code	DC	EIC	CTC	Identity theft PIN
			0								0
			0								0
			0								0
			0								0

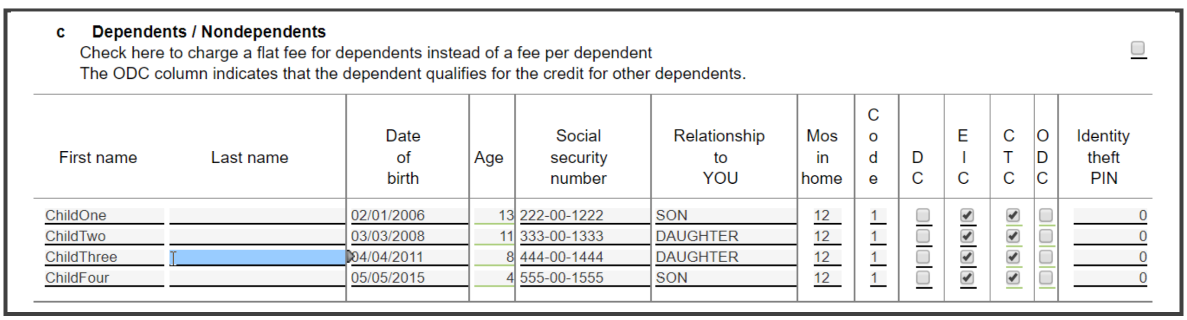
Totals from	Above	Statement		
Number of your children who lived with you	0	0	Box 6c1	0
Number of your children who didn't live with you due to divorce or separation	0	0	Box 6c2	0
Number of other dependents	0	0	Box 6c3	0

More than 4 Dependents

If you have a taxpayer with more than four dependents, you will have to add the additional dependent worksheet.

To add more than 4 dependents:

1. On the Main Information Sheet, add the first four dependents in the Dependent/Nondependents section.

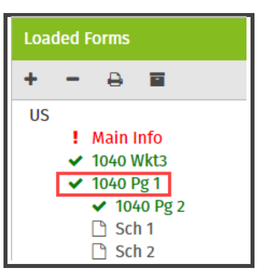


c Dependents / Nondependents
Check here to charge a flat fee for dependents instead of a fee per dependent
The ODC column indicates that the dependent qualifies for the credit for other dependents.

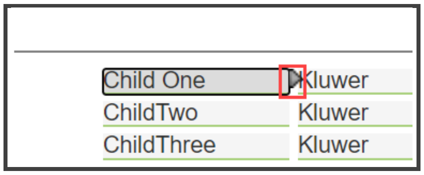
First name	Last name	Date of birth	Age	Social security number	Relationship to YOU	Mos in home	Code	DC	EIC	CTC	ODC	Identity theft PIN
ChildOne		02/01/2006	13	222-00-1222	SON	12	1		✔	✔		0
ChildTwo		03/03/2008	11	333-00-1333	DAUGHTER	12	1		✔	✔		0
ChildThree		04/04/2011	8	444-00-1444	DAUGHTER	12	1		✔	✔		0
ChildFour		05/05/2015	4	555-00-1555	SON	12	1		✔	✔		0

List non-dependents on the Main Information Sheet. Children who qualify for Earned Income Credit (EIC) or dependent care credits must be entered on the Main Information Sheet as well.

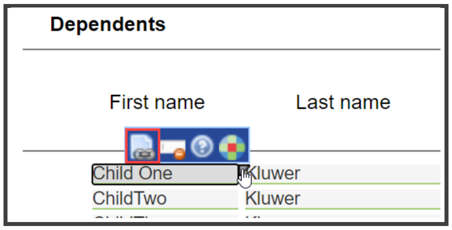
2. Next, in the Loaded Forms section, click on Form 1040 page 1.



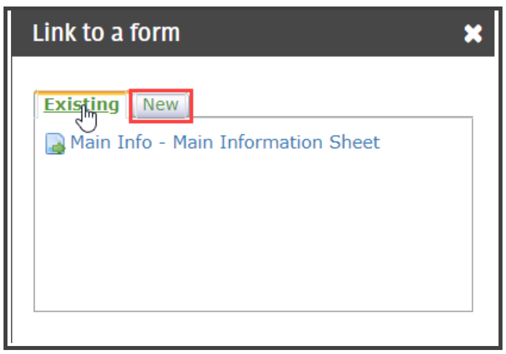
3. From the Dependents section, from any of the name fields, click the arrow to the right of the field.



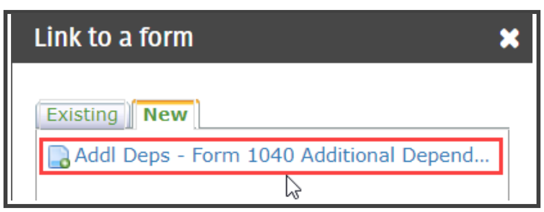
4. On the menu, click the **Link** icon.



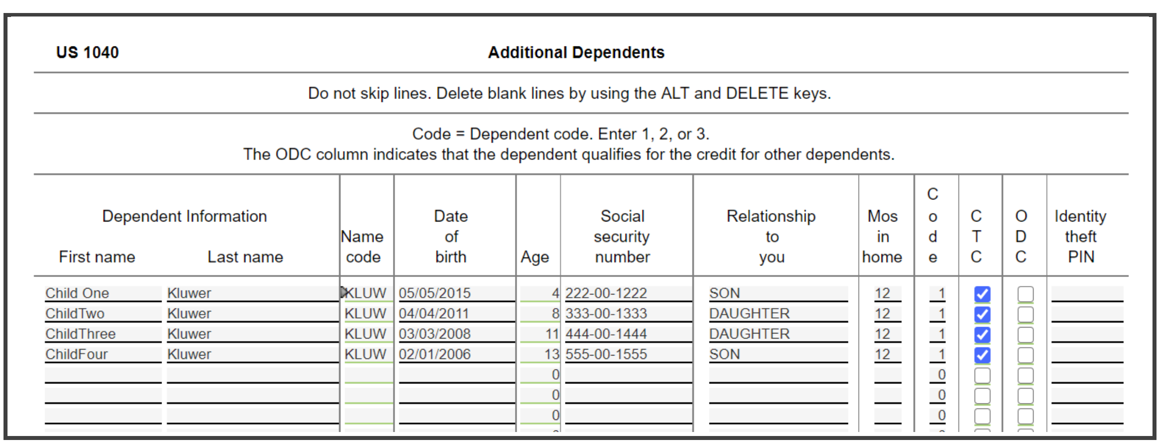
5. TaxWise Online displays the Link to a Form dialog box, click the **New** tab.



6. Under the New tab, Select the **Addl Deps – Form 1040 Additional Dependents Worksheet**.



7. TaxWise Online displays the Additional Dependents worksheet, were we see listed the first four dependents entered on the Main Information Sheet. From here, you can add the additional dependents.



US 1040 **Additional Dependents**

Do not skip lines. Delete blank lines by using the ALT and DELETE keys.

Code = Dependent code. Enter 1, 2, or 3.
The ODC column indicates that the dependent qualifies for the credit for other dependents.

Dependent Information First name	Last name	Name code	Date of birth	Age	Social security number	Relationship to you	Mos in home	Code	CTC	ODC	Identity theft PIN
Child One	Kluwer	KLUW	05/05/2015	4	222-00-1222	SON	12	1	☑	☐	
ChildTwo	Kluwer	KLUW	04/04/2011	8	333-00-1333	DAUGHTER	12	1	☑	☐	
ChildThree	Kluwer	KLUW	03/03/2008	11	444-00-1444	DAUGHTER	12	1	☑	☐	
ChildFour	Kluwer	KLUW	02/01/2006	13	555-00-1555	SON	12	1	☑	☐	
				0				0	☐	☐	
				0				0	☐	☐	
				0				0	☐	☐	

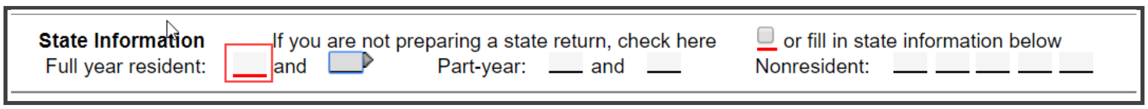
Do not use the Additional Dependents statement if there are four or fewer dependents or non-dependents. Doing so causes an e-file error.

Adding State Forms to a Return

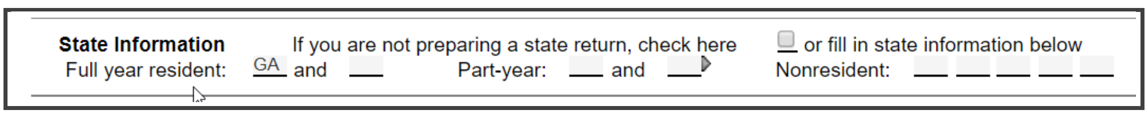
If you are preparing a state return for the client, you must identify the state on the State Information section, of the Main Information Sheet. Up to nine states may be attached to a Federal return.

To add state forms:

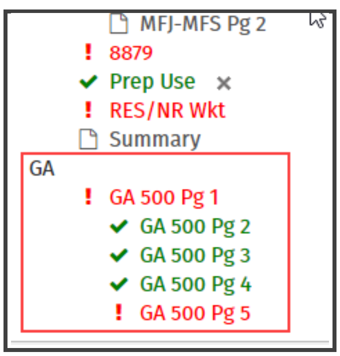
1. On the Main Information Sheet, go to the Sate Information section. Enter the state abbreviation(s) in the appropriate fields. For this example, the taxpayer is a resident of the state of Georgia. Enter the initials GA, in the Full resident field.



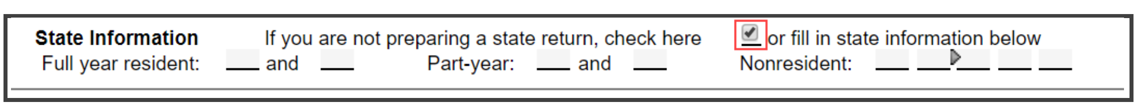
2. When you enter the state initials, the red, is cleared from this section.



3. The state forms will load below the federal forms in the Loaded Forms section.



If you do not need to complete a state return, select the checkbox in the State Information section.



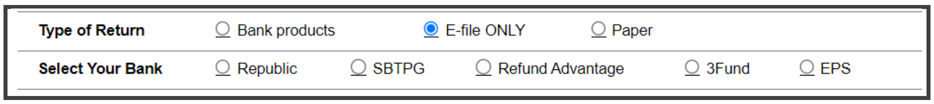
Type of Return

In the Type of Return section of the Main Information Sheet, select the appropriate check box for how you will file the return for the taxpayer.

Bank Products - Select when the taxpayer is applying for a settlement solution with an electronically filed return. Diagnostics checks for inconsistencies in the return and electronic filing errors, as well as bank application errors. Types of bank products include: Electronic Refund Checks (ERC) and Direct Deposit Refunds (DDR).

E-File ONLY - Select this check box when you electronically file, or e-file, the return and the taxpayer is not applying for a settlement solution, such as an electronic refund check. Diagnostics checks for inconsistencies in the return and electronic filing errors.

Paper - Select this check box when mailing a return to the IRS. Paper file if the return does not qualify for e-filing or if the taxpayer chooses to paper file. When you run Diagnostics for a paper-filed return, TaxWise Online checks for inconsistencies only.



If you select bank products, you must also select your banking partner. Review the lesson on Completing Bank Form, later in this course.

Bank Account Information

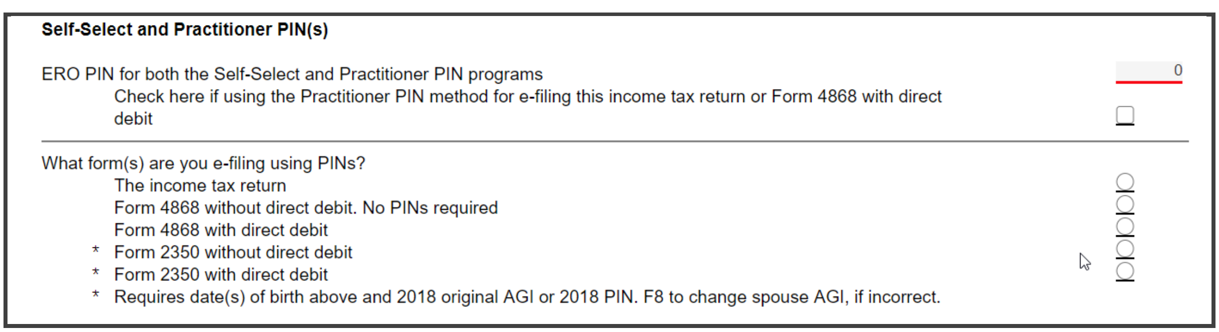
Enter the taxpayer's bank account information in the Bank Account Information section if the taxpayer is e-filing or mailing the return and wants the refund direct deposited or wants the balance due deducted from the bank account.

Self-Select and Practitioner PIN(s)

When preparing a return for electronic filing, the IRS requires a PIN as an electronic signature. The ERO, the taxpayer and the spouse must sign the return electronically with a PIN. For the PIN, you can use any five-digit number, except all zeroes.

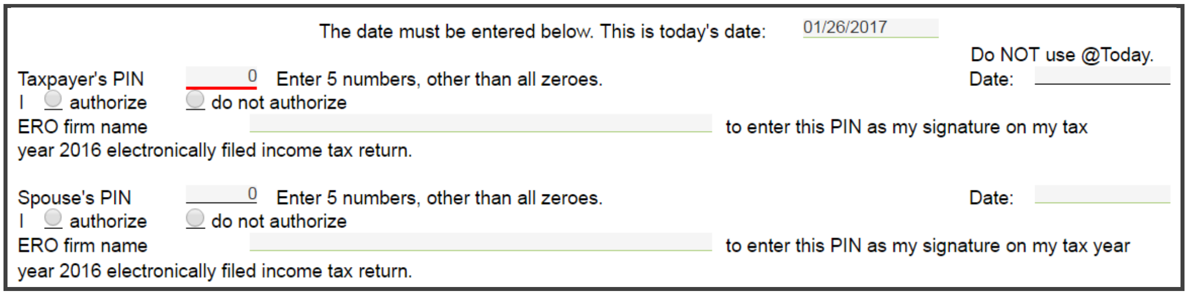
ERO PIN

To sign the return with a PIN, use the Self-Select and Practitioner PIN(s) section., enter a five digit PIN, choose if you are using Practioner PIN by checking the box then check the box for The income tax return under What form(s) are you e-filing using PINs?



Taxpayer and Spouse PINs

The taxpayer and spouse can enter their own PINs if using Self-Select or authorize the ERO to enter them by using Practitioner PIN. Taxpayers can use a different PIN each year. TaxWise Online does not generate PINs automatically.



The date must be entered below. This is today's date: 01/26/2017

Do NOT use @Today.

Taxpayer's PIN 0 Enter 5 numbers, other than all zeroes. Date:

I authorize do not authorize

ERO firm name to enter this PIN as my signature on my tax year 2016 electronically filed income tax return.

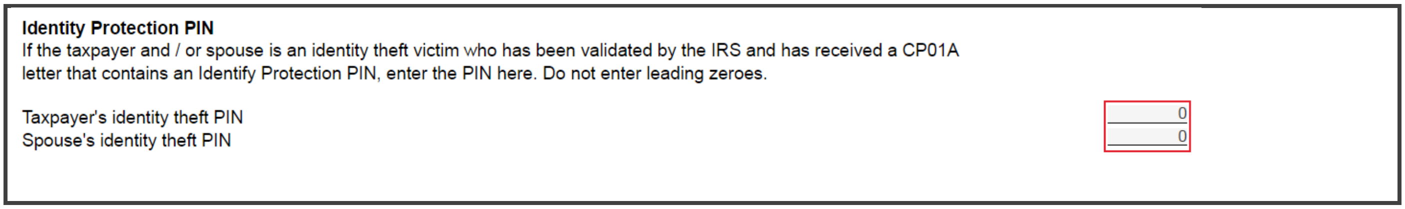
Spouse's PIN 0 Enter 5 numbers, other than all zeroes. Date:

I authorize do not authorize

ERO firm name to enter this PIN as my signature on my tax year year 2016 electronically filed income tax return.

Identity Protection PIN

If the taxpayer or spouse was a victim of identity theft and have an Identity Protection PIN. Type this PIN in the **Taxpayer's identity theft PIN** field. Do not enter any leading zeroes with this PIN.



Identity Protection PIN

If the taxpayer and / or spouse is an identity theft victim who has been validated by the IRS and has received a CP01A letter that contains an Identify Protection PIN, enter the PIN here. Do not enter leading zeroes.

Taxpayer's identity theft PIN 0

Spouse's identity theft PIN 0

Third Party Designee

Select the **Yes** or **No** check box to indicate whether the taxpayer wants to allow another person to discuss his or her tax return with the IRS. If you select **Yes**, TaxWise Online makes the designee's name, phone number and PIN required for electronically filed returns.

As the designee, select a PIN. You can use any five digits, other than all zeroes.

Third Party Designee

Do you want to allow another person to discuss this return with the IRS? Yes No

Designee's name: Designee's PIN (cannot be 00000): 0

Designee's telephone:

Preparer Information Section

Preparer information can be completed one of two ways:

- Return Templates
- User Settings

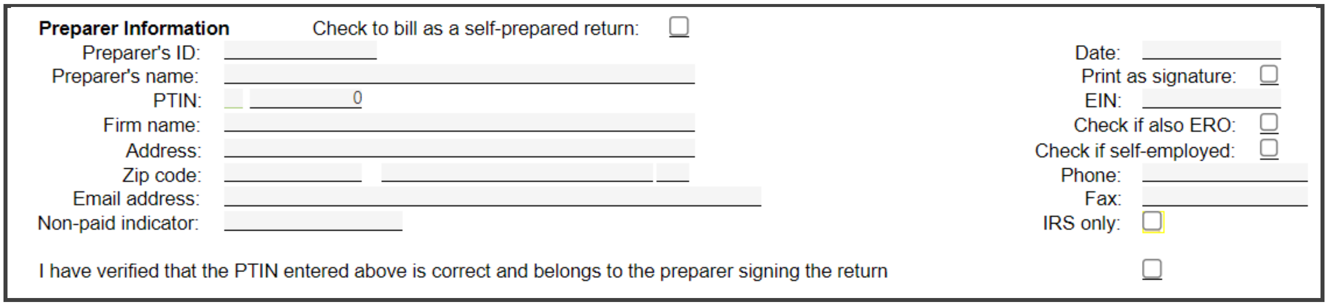
If there is only one preparer, then the preparer can complete this information using Return Templates.

For additional information on setting up Return Templates, review the Setting up TaxWise Online lesson, in the Product Registration & Setup course.

If there are multiple preparers, each preparer should complete their Preparer Information under their user settings.

For additional information on User Settings, review the *Enter Preparer and ERO Information* lesson in this course.

If you do not enter information in Return Templates or User Settings, you must type the information in the fields for each return.



Preparer Information Check to bill as a self-prepared return:

Preparer's ID:

Preparer's name:

PTIN: 0

Firm name:

Address:

Zip code:

Email address:

Non-paid indicator:

Date:

Print as signature:

EIN:

Check if also ERO:

Check if self-employed:

Phone:

Fax:

IRS only:

I have verified that the PTIN entered above is correct and belongs to the preparer signing the return