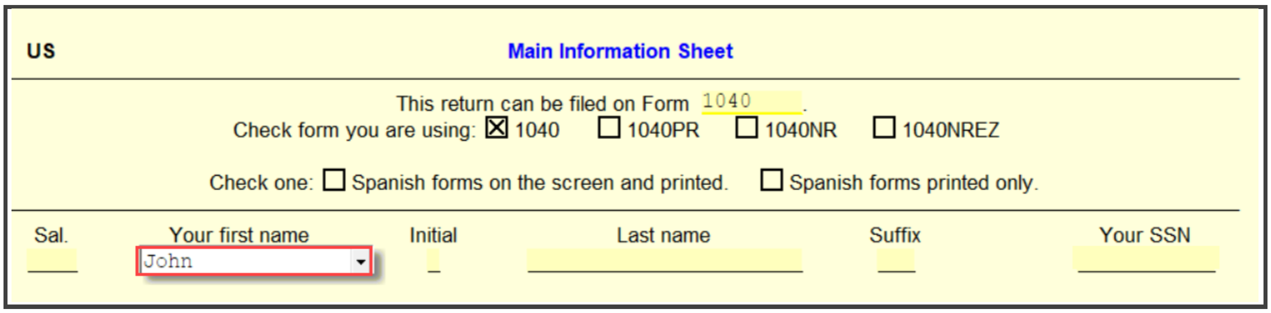
Entering Return Data

Main Information Sheet

Use the Main Information Sheet as the primary entry form for information in the return. TaxWise 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.

1. Begin by typing the taxpayer's name in the designated fields. These are underlined in black, meaning they are direct entry. Place your cursor in the field to begin typing.



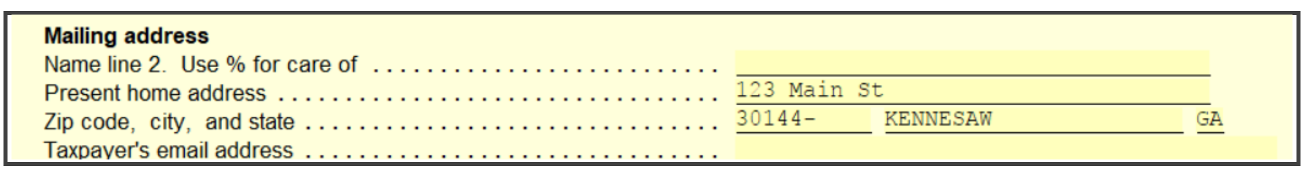
You can use your mouse or press the **Tab or Enter** key to move from field to field.

2. Type the spouse's name and SSN if applicable, or continue moving through the fields to the Address field.

Zip Code Locator

Use the Zip Code Locator to enter the city and state. To complete the city and state information:

1. Enter the **Zip Code,** and press **Enter**. TaxWise auto-fills the city and state.



Birthdates

Type the taxpayer's birthdate in the field. TaxWise automatically calculates the age in the field below.

Birth date	06/06/1976
Age for Federal tax purposes	43

Taxpayer Information

In the Taxpayer Information section, select the checkboxes to indicate whether the taxpayer is excluding income from Puerto Rico, whether they had health insurance through the Marketplace, and if the taxpayer dealt in any virtual currencies.

Taxpayer Information

Special processing		
Did the taxpayer's address change since last year's return?	☐ Yes	☒ No
Are you excluding Puerto Rico income from this tax return?	☐ Yes	☒ No
If "Yes", enter the amount of income excluded	0.	
Did the taxpayer, spouse, or any dependent receive insurance through the Marketplace? See Form 8962	☒ Yes	☐ No
If the return was rejected for F8962-070 (e-file database indicates that Form 8962 or a binary attachment with an explanation must be attached), check here to attach a PDF with an explanation of why Form 8962 is not being filed with the return	☐	
At any time during [illegible] did the taxpayer or spouse (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?	☐ Yes	☒ No

Filing Statuses

Select the appropriate check box for the taxpayer's filling status. For some filing statuses, TaxWise 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 not 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: ________
Check here if the spouse is a nonresident alien . . . . ☐
Did your spouse ever live with you in 2024? . . . . ☐ Yes ☐ No
If "Yes", did you and your spouse live together at anytime after June 30, 2024? . . . . . . ☐ 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 surviving spouse (with qualifying child) . . . . . Year spouse died (2022 or 2023 only): ____
If the qualifying child is not your dependent, enter the child's name . . . . . ________ ________ and social security number . . . ________
☐ Check here if treating a nonresident alien or dual-status alien spouse as a U.S. resident for the entire tax year, and enter their name (see instructions and attach statement if required)
Name . . . . ________ ________

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 the information for every dependent, including the Social Security number, months in home, dependent code and other information.

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
Jason	Jones	05/26/2007	11	[redacted]	SON	12	1	☒	☒	X	☐	0
Lisa	Jones	09/08/2001	17	[redacted]	NEPHEW	12	1	☐	☒	☐	X	0
			0					☐	☐	☐	☐	0
			0					☐	☐	☐	☐	0

The checkboxes labelled **DC**, **EIC**, **CTC**, and **ODC** are used to indicate whether the taxpayer will claim Child and Dependent Care Credit, Earned Income Credit. Depending on the information entered, TaxWise determines whether the Child Tax Credit or Other Dependent Credit applies for each dependent.

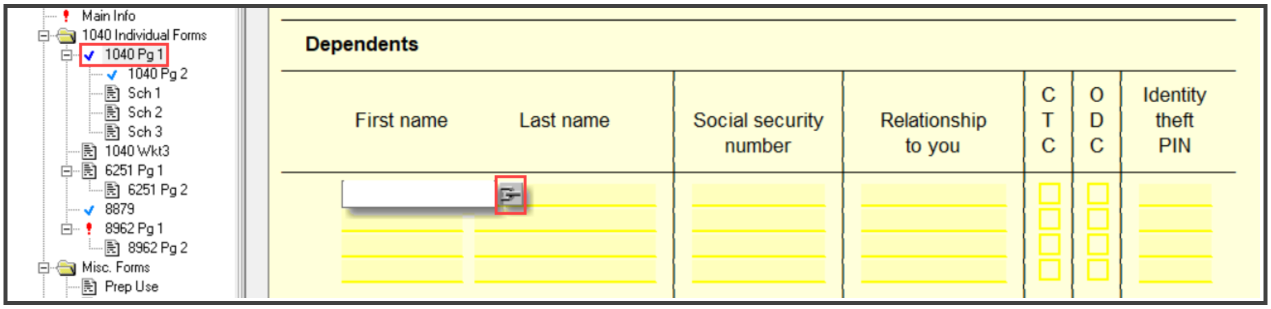
1. If this dependent was issued an Identity theft PIN by the IRS, type this number in the Identity theft PIN field. If a PIN was issued and is not entered, the return will be rejected by the IRS.

Additional Dependents

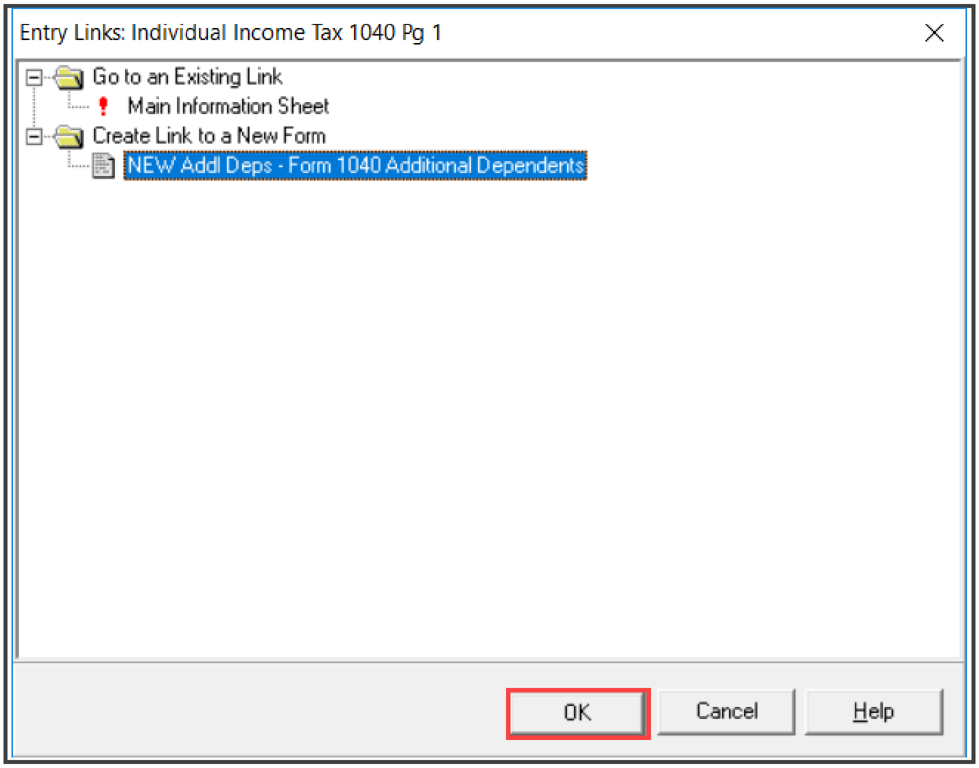
If you need to enter more than 4 dependents, you must add the Additional Dependents worksheet. You can link to this worksheet from Form 1040, Page 1. To do this:

1. Click **Form 1040** in the Forms Tree.
2. Scroll down to the **Dependents** section and click one of the lines.

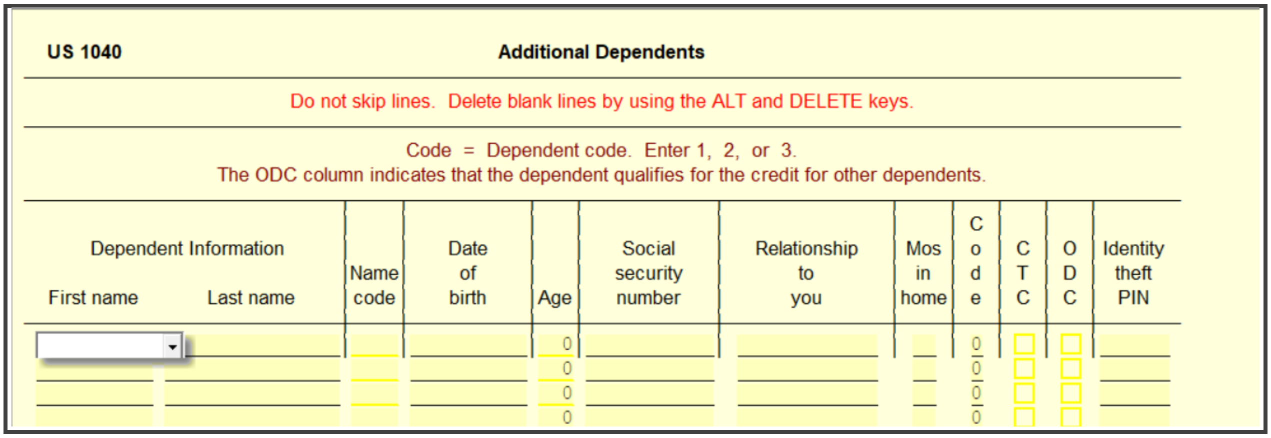
3. Click the **Link** icon that displays next to the field.



4. TaxWise displays the Entry Links dialog box. Select the NEW Addl Deps – Form 1040 Additional Dependents worksheet and click **OK.**

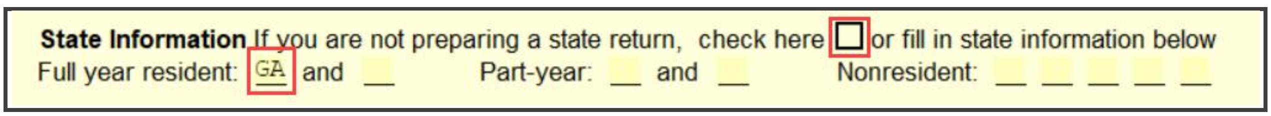


5. TaxWise opens the form. Continue entering the dependent information.

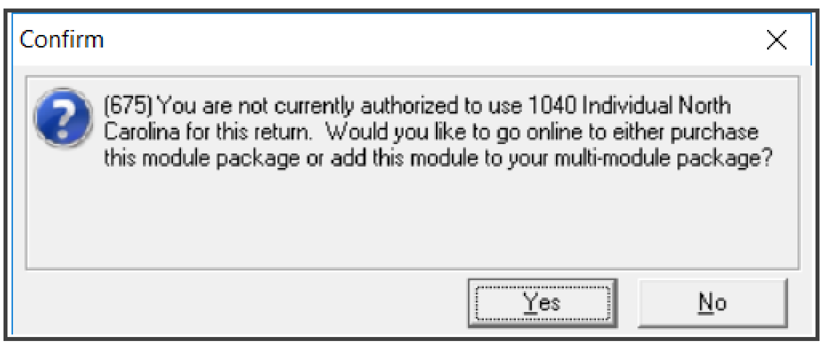


Adding State Forms

If you are not preparing a state return, select the checkbox to indicate this. If you are preparing a state return, type the state abbreviation in the Full year, Part-year, or Nonresident fields.



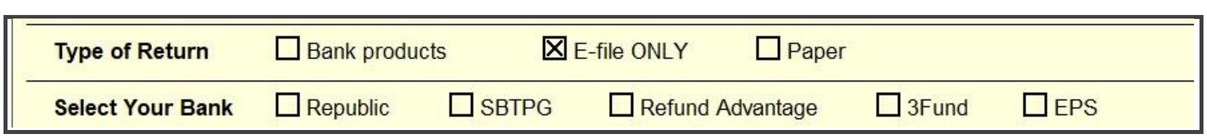
If you have downloaded the state module from the TaxWise Solution Center, TaxWise automatically loads the state forms in the return. If you have not downloaded the state module, you receive a message stating you need to add the state to your package.



For more information on downloading states from the TaxWise Solution Center, review the lesson in the Product Registration and Setup module.

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.



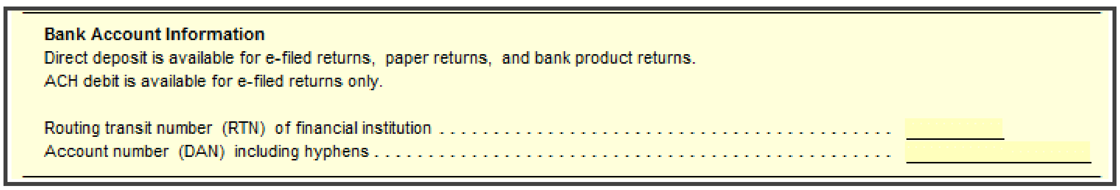
Bank Products - Select when the taxpayer is applying for a settlement solution with an electronically filed return. Diagnostics checks for inconsistencies in the return and electronic filing errors, as well as bank application errors. Types of bank products include: Electronic Refund Checks (ERC) and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

Bank Account Information

Enter the taxpayer's bank account information in the Bank Account Information section if the taxpayer wants the refund direct deposited or wants the balance due deducted from the bank account.



Bank Account Information
Direct deposit is available for e-filed returns, paper returns, and bank product returns.
ACH debit is available for e-filed returns only.

Routing transit number (RTN) of financial institution . . . .
Account number (DAN) including hyphens . . . .

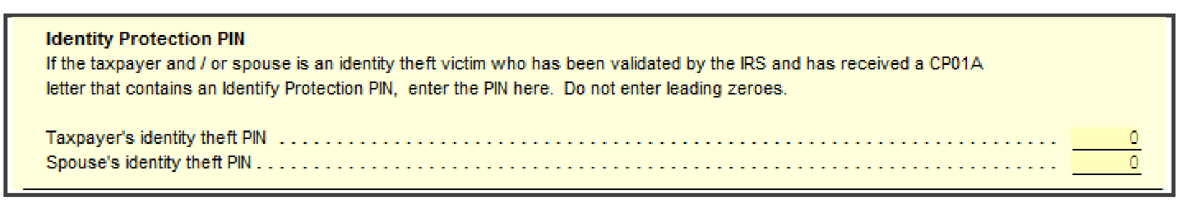
PIN Options

When preparing a return for electronic filing, the IRS requires electronic signatures. The ERO, the taxpayer and the spouse must sign the return electronically. The IRS uses electronic signatures as part of the verification process.

For more information on completing the PIN section, please view the lesson in the TaxWise Electronic Filing module.

Identity Protection PIN

If the taxpayer or spouse was a victim of identity theft and reported this theft to the IRS, he or she received a CP01A letter containing an Identity Protection PIN. Type this PIN in the **Taxpayer's Identity theft PIN** field. Do not enter any leading zeroes with this PIN.



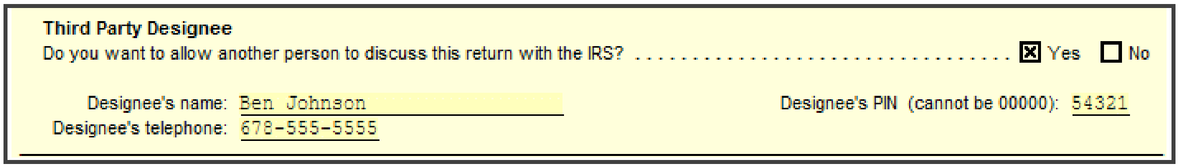
Identity Protection PIN
If the taxpayer and / or spouse is an identity theft victim who has been validated by the IRS and has received a CP01A letter that contains an Identify Protection PIN, enter the PIN here. Do not enter leading zeroes.

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 makes the designee's name, phone number and PIN required for electronically filed returns.

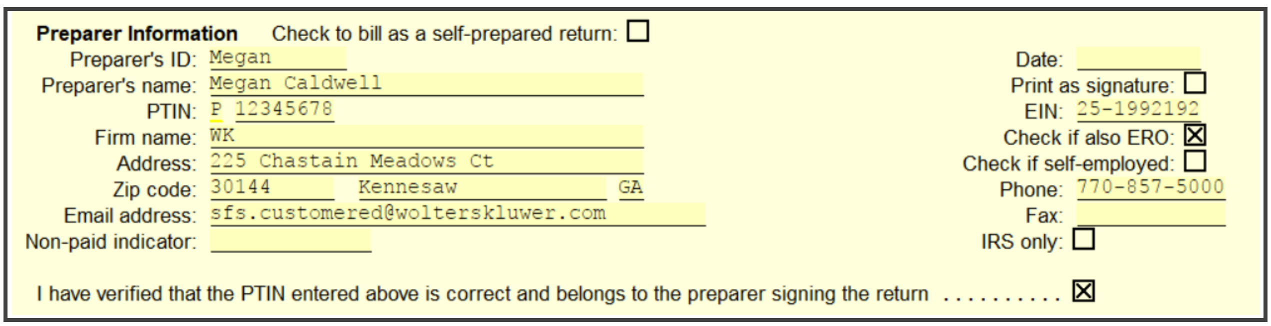
As the designee, select a PIN. You can use any five digits, other than all zeroes.



Preparer Information Section

The Preparer's ID provides a shortcut to enter the preparer information on the return. The first time you type in a Preparer ID and the remainder of the preparer's details, TaxWise saves it for later use. In future returns, you can type just the Preparer's ID, and TaxWise automatically completes the rest of the section from that stored data.

The Preparer's ID can be any combination of letters and numbers you choose.



The Preparer's ID does not store the preparer's e-mail address, fax number, or Print as Signature checkbox. Use Edit Tax Form Defaults or Setup Assistant to pre-set that information in all returns.

ERO PIN information for Self-Select and Practitioner PIN, as well as the Preparer information can be added in Tax Form Defaults or Setup Assistant to save time in keying this on every return.

1. Ensure that you also select the checkbox to verify that the PTIN listed is accurate and belongs to the listed preparer.
2. TaxWise carries the information from this form throughout the return to the appropriate forms and fields. Click a form in the Forms Tree to view other forms and continue entering data.