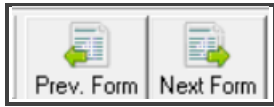


TaxWise® Desktop Learning Portal

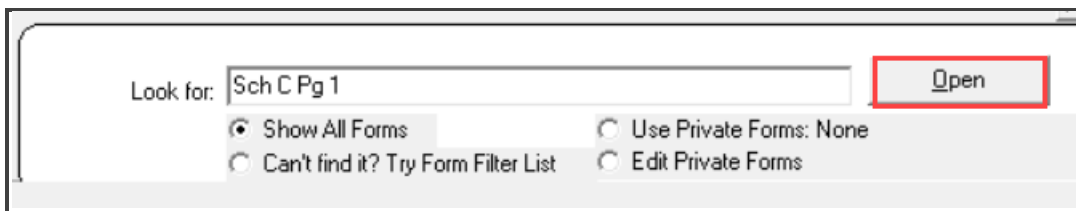
Tax & Accounting

Navigating and Adding Forms

You can move from form to form using the Forms Tree, or by using the **Previous Form** and **Next Form** buttons on the toolbar.



Additional forms can be added to a return by clicking the **Add Form/Display Form List** tab along the top of the return. Type the form name in the **Look for** field and click **Open**.



Linking to Forms

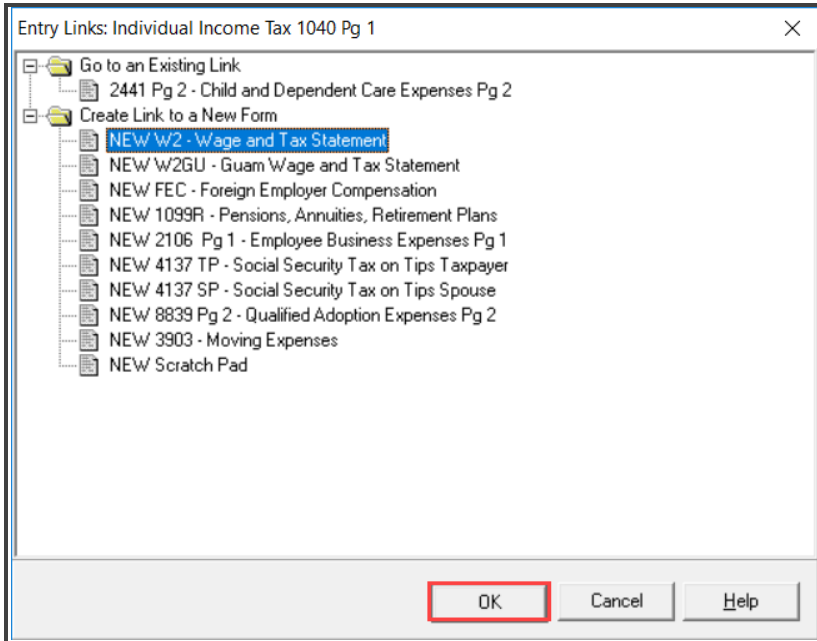
On many fields, TaxWise allows you to link to other forms to enter the data. If the form is already in the return, TaxWise displays it. If the form is not already in the return, linking to a new form adds the form to your Forms Tree.

For this lesson, we will link from Form 1040, Page 1, Line 1 to Form W-2.

Income	
1 Wages, salaries, tips, etc.	AB <input type="checkbox"/> FB <input type="checkbox"/> DCB <input type="checkbox"/> SNE <input type="checkbox"/> SSHIP <input type="checkbox"/>
Taxable scholarship not on Form W2	0.
Household employee income not on Form W2	0.
2a Tax-exempt interest	0.
b Taxable interest	0.

To add Form W-2 to an open return:

1. Click **the Link icon next to the field**. There are multiple income forms that link to Line 1, and TaxWise displays the Entry Links: US Individual Income Tax 1040 Pg 1 dialog box with the available form options.



2. Select the form you want to open and click **OK**. TaxWise displays Form W-2:

US W-2 Wage and Tax Statement

This W2 statement is for the: Taxpayer Spouse

Employee's name: Henry Holmes Employee's SSN: 458-99-2192

Check if this W2 is handwritten, altered, or appears not to be a true W-2.
 Check if this is the taxpayer's address shown on the W-2 **or**
 Check and make changes to the U.S. address or foreign address below.

U.S. address 123 Taxpayer Circle
 Zip code, city, and state 30066 MARIETTA GA
 Foreign street address _____
 Foreign city _____
 Foreign province / state _____
 Foreign Zip code _____
 Foreign country code _____

3. Type the information exactly as it appears on the Form W-2 the taxpayer received from the employer.

4. TaxWise calculates the amounts and displays the totals on Line 1 of Form 1040.

i If you need to add a second Form W-2 in a return, click the **Copy W-2** tab at the top of the form.



Follow these steps to link to other forms in the return.