

# TY 2010 Laptop & Printer Setup (draft) jjh

1. Laptop & Windows logon
  - a. User – “volunteer” (no quotes)
  - b. Password – “SEE SITE LEADER FOR PW” (Case-sensitive, no quotes)
2. Maximize laptop performance (we didn’t do this in 2010)
  - a. Right-click on My Computer
  - b. Click Properties, then click Advanced tab
  - c. Click Performance (Visual effects...) Settings button
  - d. Select “Visual Effects” tab and click the button beside “Adjust for best performance”
  - e. Click OK twice to close both windows
3. Load TW2010 from software CD. TW09 can also be installed at same time.
4. Double-click on Adobe Acrobat install file (.exe file) from same CD or Thumb Drive.
5. Right click on TW10 icon. Choose Properties -> Run -> Maximized -> Ok
6. Start TW10. Password for Admin is initially blank.
  - a. At startup, if a screen appears with various tax packages, only 1040 is authorized. Click on the box for “Do Not Auto Show.” Click “ok”
  - b. Click Tools > Utilities/Setup Options > Setup > Security Manager
    - i. Change **Admin** user password to “vita2010” all small no quotes
    - ii. Create **ORANGE** user with password = “vita2010” all small no quotes
7. TaxWise program Setup Options
  - a. For help, follow e-file Administrator Guide for more info, starting on page ?
  - b. If TaxWise program has already been set up – perhaps used for training somewhere, do this:
    - i. Click Tools > Utilities/Setup Options > Setup > Setup Options
  - c. Otherwise, the Setup Options window opens when you start TaxWise
  - d. Company Tab
    - i. EFIN comes from TaxWise and must correspond to the Reg Code you are asked for later. There are several EFINs used for ORANGE COUNTY RSVP sites
      1. Enter the EFIN
    - ii. Contact Name – MICHAEL GOLOBOYKATHY PORTER
    - iii. Company Name – ORANGE COUNTY RSVP VITA
    - iv. Street Address – 2551 HOMESTEAD RD

- v. City, State, Zip – CHAPEL HILL NC 27516
- vi. Phone – 919-968-2054
- vii. Company's EIN – leave this field blank
- viii. Company service bureau – leave this field blank
- iv. Click Next

e. General Tab

- i. Network options: - No network
- ii. Current Declaration Control Number (DCN) - for each site, set DCNs to 1X001 (X is computer number assigned by sticky dot on both computer and its case – check UPC coded tags), 2X001, 3X001, etc (1= Seymour, 2=Hillsborough, 4=Carolina Meadows, 5=Cedars unless they got TWO, 8X001=HOME users (see SC for your set of numbers), 91001=efile machine
- iii. TaxWise automatically numbers returns – Do NOT auto number
- iv. Miscellaneous options:
  - 1. Check only “Display User-defined and AutoPopulated history lists” and “Prompt Before Closing.”
  - 2. Remove other 2 checkmarks
- v. Click Next

f. Printer Setup Tab

- i. Windows defaults
- ii. Default printers – ignore
- iii. Options – check these boxes only
  - 1. Print in ALL CAPS
  - 2. Print each EFIN on separate report page
- iv. Click Next

g. Color Setup Tab

- i. We use the Default Settings:
- ii. “Classic” is selected in the left-hand window
- iii. “Page background” is selecting in the right-hand window
- iv. Click Finish

h. Register Software window

- i. EFIN will appear at top, as keyed into General Tab above
- ii. Reg Code must match EFIN. These 2 items are issued with TaxWise program CDs
- iii. Note: to change EFIN & Reg Code combination – as when changing sites for a laptop
- iv. Click Tools > Utilities/Setup Options > Setup and then click “Setup Options” and “Register Software”

v. Close Setup and go back to TaxWise home page

8. Two ways to install Federal and State updates:

- a. Close TaxWise, and then double-click on the icon to install current Comprehensive Updates (Federal, Individual, Miscellaneous and State .exe files) on your Thumb Drive or CD, or...
- b. Start TaxWise10, and then go online to TaxWise Customer Support and download the updates.
  - i. Note: you can either tell the download process to Save the updates as .exe files on your desktop, or have them installed directly into TaxWise. I want you to save on desktop.
  - ii. If you Save the updates, you can copy them onto a Thumb Drive or CD and then
    1. Double click on these files on your desktop, and
    2. Install the updates directly on other computers from your Thumb Drive or CD

9. Edit Tax Form Defaults (pg 49) Login as “Admin”

- a. Set up how you want the tax forms to work – set up Red fields, add forms to forms list, set local sales tax percents, etc. Many options are already set up for you.
- b. Click Tools > Edit Tax Form Defaults > highlight 1040 >ok
- c. Click “Yes” on “Any changes made will only affect subsequent new returns in this user. Continue?”
- d. Main Info form is automatically opened

- i. First name – Red (F3)
- ii. Mailing address INCLUDING Apartment number  
– Red Note: Name line 2 (in the mailing address is reserved for deceased spouse name if widow(er))
- iii. Daytime telephone – Red
- iv. Birth date – Red
- v. Taxpayer occupation – Red
- vi. Filing status – all options Red
- vii. State information: Full year resident – enter “NC” but only if state software has arrived and is loaded, otherwise leave this off and enter it after state software is loaded.
- viii. E-File only – checked
- ix. ERO pin – 98765 (designates us as a volunteer preparer)
- x. The 2 boxes ERO pin – checked
- xi. Taxpayer pin – 27516
- xii. I Authorize – checked
- xiii. Spouse pin – leave as 0
- xiv. I Authorize – leave unchecked
- xv. Third party designee – check “No”

xvi.

Preparer Information:

1. PTIN – use SIDN numbers (the “S” added automatically)
2. EIN – blank & not Red
3. Firm name – ORANGE COUNTY RSVP VITA
4. Address – 2551 HOMESTEAD RD
5. Zip – 27516
6. Phone – 919-968-2054
7. Fax – blank

xvii. Preparers’ Use Fields

xviii. Line 4 should be made red and preparer should enter his/her initials (didn’t do this this year yet) Don’t know if we will do this this year.

xix. For next year also, Line 5 should be used for QR initials (although don’t make red as not all sites have Internet. Seems pointless now

xx. Line’s 11 & 12 should have Red response boxes with drop-down lists. If the boxes are not red click in each of the fields and F3 them – should now be red

xxi. F2 (save)

e. 1040 Pg 2

i. Below line 76 – EIN should be blank and NOT Red

ii. Line 40 – Link to Schedule A

f. Schedule A

i. Line 5b – Link to Sales Tax Worksheet

1. Sales Tax [NC] (Sales Tax Worksheet for NC)

2. Halfway down worksheet, for “Enter the taxpayer’s state...,” on Line 1 – enter

“NC”

3. Line 2 – opposite yellow “YES” box, enter “B”

4. Line 3 – click “YES” box, and then enter “2.0” in percent field

5. Verify amount is “?” on Line 11 at bottom of form

ii. F2 (save)

g. Schedule B

i. Lines 7a & 8 - check “NO” box

ii. F2 (save)

h. Sch EIC Wkt (Add the Earned Income Credit Worksheet )

i. To add worksheet

1. Click “Add Form/Display Form List” tab.

2. In “Look for” field, enter “Sch EIC wkt” and click OK

3. In the results, double-click “Earned Income Credit Worksheet” to add the worksheet to forms tree and open worksheet

ii. Lines 18, 19 & 20 – remove Xs and Red from all 6 boxes.

iii. F2 (save)

g. 8867 (Paid preparer's EIC checklist)

i. Click box at top of form – to not use this form

ii. F2 (save)

h. 8879 (IRS e-file Authorization)

i. Top line – enter the EFIN

ii. PTIN – enter SIDN (the “S” is added automatically)

iii. Enter Firm name, address, phone and zip code

iv. EIN – leave blank and not Red (F3)

v. F2 (save)

i. NC 400 Pg 1 – go to bottom and check VITA/TCE

j Check the forms tree:

i. The Red ! items – Main Info, 1040 Pg 1, NC 400 Pg 1

ii. The Blue ✓ items – 1040 pg 2, 8879, NC 400 pg 2

10. Close the return – which saves all changes

11. Customize Print Packets

a. Click Tools > Utilities/Setup Options > Setup > View/Edit Print Packets

b. E-File clients DON'T KNOW ABOUT 2010 software YET!

i. We use Signature Pages (for RSVP's files) & File Copy (client's copies) only

1. In the Packet window, select the “Signature Pages” packet

a. We only want forms 8879, Main Info to print

b. In right-hand window, select all 5 of the 1040-type forms if they are present

c. Click “Remove” to remove these 5 forms from the right-hand list or “Remove all”

2. In the Packet window, select the “File Copy” packet

a. When you change from Signature Pages to File Copy, TaxWise will ask you if you want to save the work you did for the Signature pages.

i. Click “Yes”

b. Click “Clear All”

c. Click “Add All”

c. Clients who mail their returns

i. We use Taxpayer Federal Copy, Taxpayer State Copy, (Sch EIC Wkt) & State Copy to be Mailed, and Signature Pages only

1. Federal Copy In the Packet window, select the Taxpayer
  - a. When you change from File Copy to Taxpayer Federal Copy, TaxWise will ask you if you want to save the work you did for the File Copy pages.
    - i. Click “Yes”
2. For each of the 4 packets, verify all forms  
are included.
3. If not, click “Remove All”, and then click  
“Add All”.
4. Click “Save”

12. Attach assigned printers and install print drivers.

- a. Test all laptops to ensure all drivers for all assigned printers are installed
- b. Install drivers as required from CDs, Thumb Drives or Internet

13. Test printers using Windows printer test page or TaxWise.

14. Collect printer cables, printer power cords, A/B switches, toner cartridges, docking stations, and surge protectors for sites.

15. Check bags for the proper power cord, mouse, Ethernet cord, mouse pad.

HINTS: If you setup the laptops before the state software is released, you may not see the NC forms in the forms tree after you can finally add the state software. Try going into Main Info, erasing NC in full year resident and then type it right back in. (jjh)