

Date: January 31, 2012
To: ERO
Cc: TCS, SC, NLT, NTC, TC
From: National Technology Committee, AARP Foundation Tax-Aide
Subject: ERO Bulletin 2012-05: TaxWise 2011 Issues

The following are several items that could be of assistance while using TaxWise 2011.

Deleting Returns in TaxWise 2011 (Desktop)

This year TaxWise has added a new feature in the TaxWise 2011 desktop software that allows the restoring of deleted tax returns. When a return is deleted using TaxWise Explorer, it's not really gone and can be restored by typing the SSN in the box to create a new return. TaxWise then displays a confirmation message asking if you would like to restore the previously deleted return. This can be a handy feature, but sometimes you really do want returns deleted. At sites using the TaxWise software installed on each computer, after the return had been successfully transferred to the transmitting computer, for security reasons, you may want it completely deleted the returns from the computer that originally prepared the return.

To do this easily, one of our volunteers in Florida, Lee Boszak, has built a tool that will empty the TaxWise 2011 "Return Bin," which is the folder where "deleted" returns are stored (\UTS11\ReturnBin). This tool is simple, safe, and effective. It works like the Windows "Empty Recycle Bin" tool, except that it does not provide for selective removal of returns from the Return Bin. It is attached to ERO Bulletin and is called "Remove Deleted Returns." It will also be posted on the Extranet and ShareNet websites. Save the attached .xex file, rename it to .exe, and execute it. It will not do anything to your system until you tell it what to do using the friendly GUI.

Printing (or Not Printing) the Prep Use Form (Desktop and TWO)

If you just print a return in both TaxWise 2011 TWO and Desktop it will include the new Prep Use Form. Here is how to prevent it from printing. If you are using TWO, create "ERO Defined" print sets by choosing "Print Sets" from the "Setting" menu and do not include the Prep Use Form. With the Desktop software, the Admin user can create print packets from the "Utility Menu." If you use the "File Copy" or any of the other packets just remove the Prep Use form from the right site list of forms to be printed. In the Desktop software when using "Classic Print," you can deselect the Prep Use Form to prevent it from printing.

Uncheck the box at the top of the form that says "Check here if using this form" will also prevent it from printing. But it will also turn off the red in the tree when the required fields are not completed. Ensuring that these questions are answered is very important, so it is strongly recommended that removing the check not be defaulted.

More Default Recommendations (Desktop and TWO)

There are a few more default recommendations. These recent changes include the following for both the Desktop and TWO software versions:

Changes to these documents since the January 21, 2012 version:

- 1099-R: No boxes should be checked in the state boxes to the left of lines 12 and 15.

- Main Information Sheet, Preparer Information Section, after entering “AARP Foundation,” the directions should say “**UndoRed**,” not “**MakeRed**” as the blocks are already red.
- 1040, Page 2: Similar to the situation in the Main Information sheet, adding “AARP Foundation” also caused some blocks to become red. “**UndoRed**” in those blocks.
- Sched EIC and the EIC worksheet were removed from the tree. These items automatically appear when the taxpayer is eligible for EIC.

Changes to these documents since the December 12, 2011 version:

- Entered “AARP Foundation” in the Main Info Form, Preparer Information Section, Preparer’s name. That made several fields “Required,” and they had to be made not required (“**UndoRed**”).
- 1099-MISC form
 - **MakeRed**, Payer’s Information, Street Address
 - **MakeRed**, Payer’s Information, Zip Code
- Each Form 8949
 - **UndoRed** in Line 1a, Description of Property

The complete default documents are dated January 27, 2012 and are posted on the Volunteer ShareNet and will be posted on the Extranet. A new default file for the Desktop “Admin” User including these changes is also on the ShareNet and will soon be on the Extranet. If your defaults were updated prior to this change, it may be easier to just make these few changes to your existing default file.

Reminder: Don't forget to register your donated, site-provided and personal computers that will be used for TWO on a wireless network. The required scans and the registration website is in the "Computer Security Scanning Procedure" document on the ShareNet and Extranet in the "Security" section of the Technology Hardware page.