

## Site Specific TWO Entries

(Reference: IRS Pub 3189, TaxWise User Manual and AARP for all required or recommended settings)

TWO has a Master Template on which you can base the site template or, if you have subscribed to the AARP National Template or a state template, you can base the site template on one of them. For TWO, the Main Information Sheet and Form 8879 are in the Return Templates.

*TaxWise Online allows you to create templates in Training and Publish to production*

- Login as Admin**



**Client Login**  
Please login to your account by completing the form below

Client ID:

Username:

Password:

Remember Me

Warning: Three unsuccessful login attempts will lock your account.  
Forgot your password? [Click here](#)

Enter the **Client ID** for your site

Type "**Admin**"

Enter your **Registration Code** (if 1<sup>st</sup> time logging in) or established password. *Immediately upon your first login you will be prompted to change your password.*

Click **Login** button

## Creating Return Templates In TWO

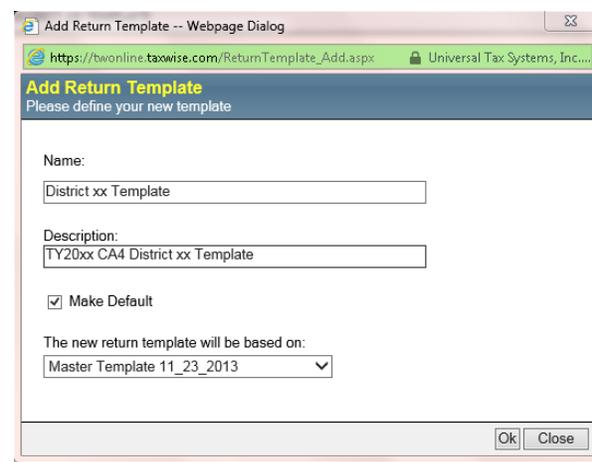


Click the **Return Templates** icon on the toolbar

Click the **New** icon



- Enter a name for the return template in the **Name** box and press the **Tab** key,
- Enter a detailed description in the **Description** Box.
- If you want this to be the default template, select the **Make Default** box.
- If you choose to base the template on an existing template, select the template from the **"The new return new return template will be based on:"** drop down list
- Click **"OK"**



**Add Return Template**  
Please define your new template

Name:

Description:

Make Default

The new return template will be based on:



Delete	Edit	Publish	Name	Default	Users	Descri
✗	✎	📄	Master Template 11_23_2013	Users	Users	
✗	✎	📄	DISTRICT 19 TEMPLATE	✓	Users	DISTR

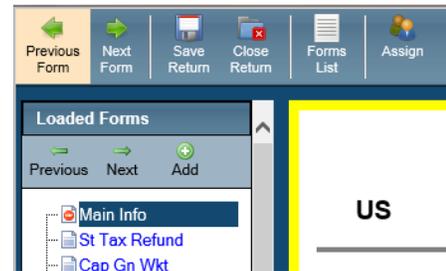
- Click to edit your new template

*Note: You cannot modify the pre-set Default template (s)*

*The yellow background indicates that you are in the Return Templates mode and any changes made to this template will only affect newly created returns*

You can now make your default entries on the Main Information Sheet and the 8879 Form by using the above steps for TWD

- Use the **F3** key or **Ctrl+Spacebar** key for toggling “Red” on and off in a field



## Main Information Sheet Entries

- Scroll down to the bottom of the page to the **Preparer Information** section

<b>Preparer Information</b>		Check to bill as a self-prepared return: <input type="checkbox"/>
Preparer's ID:	<input type="text"/>	Date: <input type="text"/>
Preparer's name:	<input type="text" value="AARP FOUNDATION TAX-AIDE"/>	Print as signature: <input checked="" type="checkbox"/>
PTIN:	<input type="text" value="0"/>	EIN: <input type="text"/>
Firm name:	<input type="text"/>	Check if also ERO: <input type="checkbox"/>
Address:	<input type="text"/>	Check if self-employed: <input type="checkbox"/>
Zip code:	<input type="text"/>	Phone: <input type="text"/>
Email address:	<input type="text"/>	Fax: <input type="text"/>
Non-paid indicator:	<input type="text"/>	IRS only: <input checked="" type="checkbox"/>

### Entries:

- **Print as signature:** - checked
- **IRS only:** - checked
- **Preparer's name:** - enter “AARP FOUNDATION TAX-AIDE”
- **PTIN:**- enter the eight digits **SIDN** for your site
  - The letter “S” will automatically be entered in the left hand box. **Lock the entry.**
  - If the computer is to be used at more than one site create a template for each one
- **Firm name:** - enter your site's name as shown on the confirmation sheet that came with the TaxWise software AND the **SIDN** (Example: Anywhere Senior Center S70050000)
- **Address:** - enter the site's physical address.
- **Zip code:**- enter either the 5 or 5 + 4 digit code for the site
  - If the auto-filled city information is incorrect, enter the correct information
- **Phone:** - enter the site's phone number
  - **DO NOT** use your phone number as the entry in this box prints out on the client's 1040 page 2 return

**Lock these entries.** by using **Ctrl+L** while the field is focused (notice yellow and padlock around the locked field). **This is VERY important.**

- All the other fields should be blank.

## Go to Form 8879

At the top of the form

- **Your EFIN** - enter the correct EFIN associated with the **SIDN** that was entered on the Main Information Page
- **Lock the entry**

US 8879	IRS e-file Signature Authorization
Your EFIN: <input type="text"/>	<div style="border: 1px solid orange; padding: 5px; color: red; text-align: center;">Enter the six digits number associated with your Site ID number</div>

At the bottom of the form in the **Electronic Return Originator (ERO) Information** section

Electronic Return Originator (ERO) Information		
ERO's ID: <input type="text"/>	Also paid preparer: <input type="checkbox"/>	Date: 09/18/2014
SSN: <input type="text"/>	PTIN: <input type="text"/> 0	Self-employed: <input type="checkbox"/>
ERO signature: <input type="text"/>		Print signature: <input checked="" type="checkbox"/>
Firm's name: <input type="text"/>		EIN: <input type="text"/>
Firm's address: <input type="text"/>		Phone: <input type="text"/>
Zip code: <input type="text"/>		IRS only: <input checked="" type="checkbox"/>

- **Date:** field entry will automatically be entered when a return is started
- **Print as signature:** - checked
- **IRS only:** - checked
- **PTIN:** field - enter your site's unique eight digits **SIDN**.
  - The letter "S" will automatically be entered in the left hand box
- **Firm name:** field, enter your site's name as shown on the confirmation sheet that came with the TaxWise software AND the **SIDN** (Example: Anywhere Senior Center S70050000)
- **Firm Address:** field, enter the site's physical address.
- **Zip code:** field, enter either the 5 or 5 + 4 digit code for the site
  - If the auto-filled city information is incorrect, enter the correct information
- **Phone:** field, enter the site's phone number
- **Lock the entries**
- All the other boxes should be blank
- Turn the red off in any boxes that are still red using the **F3** key