

Customer Support Site: My Information Page



2010 IRS Training

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225 Chastain Meadows Court NW
Suite 200
Kennesaw, GA 30144

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MY INFORMATION OBJECTIVES:

During this lesson, you will learn how to...

- Edit the My Information Page.
- View Product Information.
- Setup Subscriptions
- Schedule Reports

Working with the My Information Page

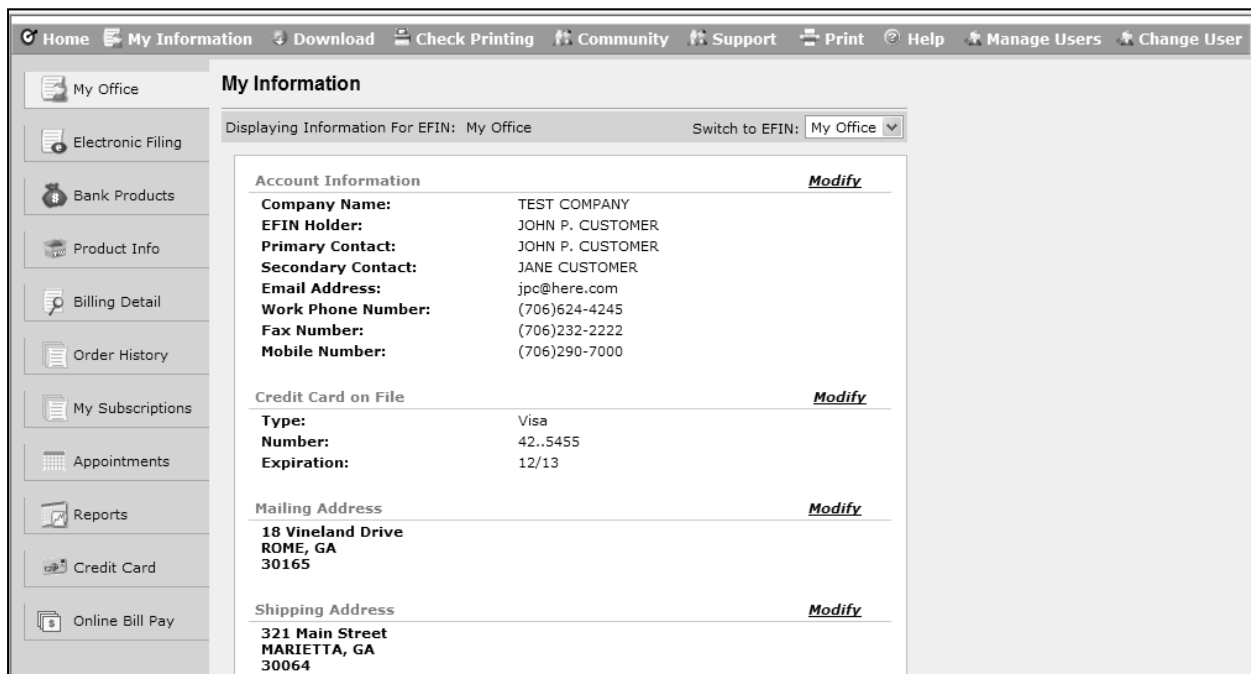
The **My Information** page allows you to view important information about your site's profile, including:

- My Office
- Electronic Filing
- Product Info
- Reports

The My Office Page

To view your **My Office** page, click **My Information** on the navigation bar.

The Customer Support site displays the **My Information** page:



The screenshot shows a web browser window with a navigation bar at the top containing links for Home, My Information, Download, Check Printing, Community, Support, Print, Help, Manage Users, and Change User. The main content area is titled "My Information" and displays information for EFIN: My Office. The page is organized into several sections, each with a "Modify" link:

- Account Information**:
 - Company Name: TEST COMPANY
 - EFIN Holder: JOHN P. CUSTOMER
 - Primary Contact: JOHN P. CUSTOMER
 - Secondary Contact: JANE CUSTOMER
 - Email Address: jpc@here.com
 - Work Phone Number: (706)624-4245
 - Fax Number: (706)232-2222
 - Mobile Number: (706)290-7000
- Credit Card on File**:
 - Type: Visa
 - Number: 42..5455
 - Expiration: 12/13
- Mailing Address**:
 - 18 Vineland Drive
 - ROME, GA
 - 30165
- Shipping Address**:
 - 321 Main Street
 - MARIETTA, GA
 - 30064

TaxWise displays your **General Information**, including:

- **Account Information**

- Company
- Contact
- Customer Number
- **Credit Card on File: Not Applicable**
- **Mailing Address**
- **Shipping Address**

The information on the **My Information** page corresponds to the information TaxWise has on file for the EFIN assigned to the client id that was submitted during the order process. Click on **Modify** to make any changes needed.

The Product Information Page

To view Product Information, click the **Product Info** link. The Customer Support site displays the **Product Information** page.

By default, your resident state has been added to your product information.

To view Product Information, click the **Product Info** link.

The Customer Support site displays the **Product Information** page:

TaxWise CCH Small Firm Services
a Wolters Kluwer business

Home My Information Download Check Printing Community Support Print Help Manage Users Change User

My Office Electronic Filing Bank Products **Product Info** Billing Detail Order History My Subscriptions Appointments Reports Credit Card

Product Information

Displaying Information For EFIN: My Office Switch to EFIN: My Office

Taxwise Software Reg Code: **7787-7778-UEPC-JF77-T7M6**

No 1040 states have been purchased.
- [Add states to my package](#)

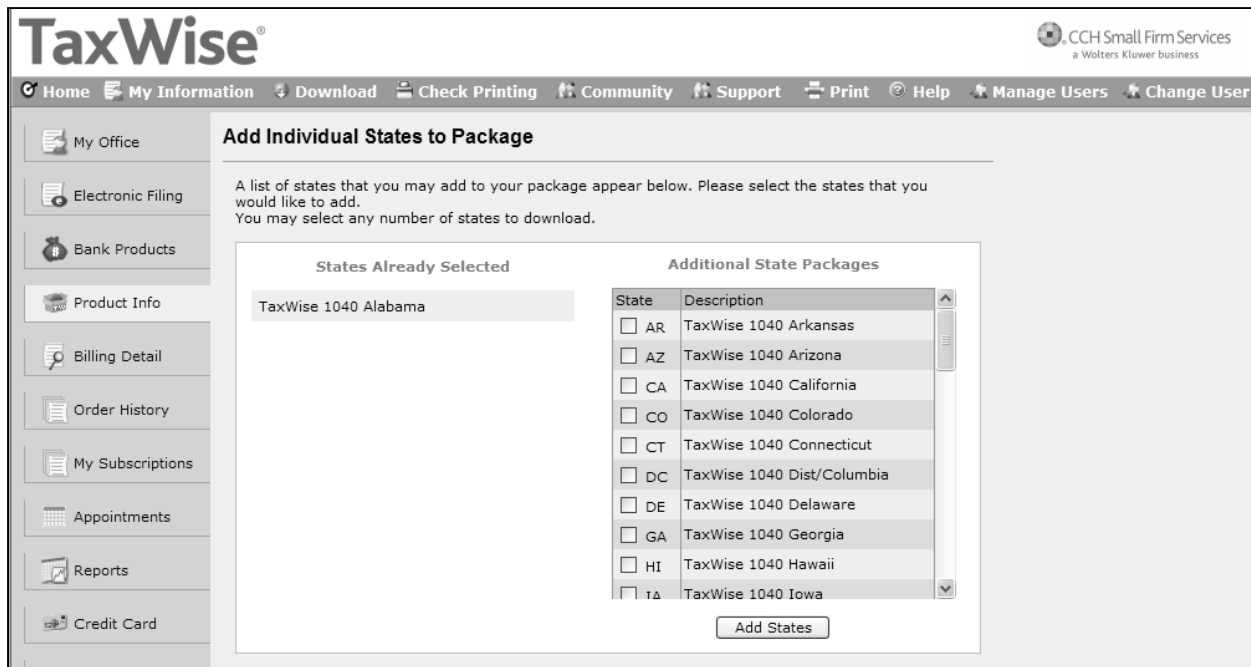
No business states have been purchased.
- [Add states to my package](#)

Year	Product	Activation Code
2009	TaxWise 1040 Package	
2009	TaxWise Power Accounting Packa	
2009	TW Client Write Up	25035-00007-41240-08045
2009	TaxWise 1040 Indirect	
2009	TaxWise CD ROM	
2009	RAL Marketing Kit	
2009	TW Central Office Manager	
2009	ATX Tax Prep Prtner Std Bundle	774-085-061-004
2009	IntelliConnect Online Research	
2009	ATX Client WU with Live Payrol	00200-00440-91460-57091
2009	ATX Tax Prep Partner 1040	774-085-061-004

To add additional states to your TaxWise package, use the following steps:

1. Click the **Add states to my package** link under **Individual States Purchased**.

The Customer Support site displays the **Add Individual States to Package** page:



The left column identifies the states you have already added, and the right column identifies the states available to add.

2. Select the box for each state you want to add.

This step allows you to identify the states to activate. You do not need to activate all the states at once; instead, add them only as you need them.

3. Click **Add States**.

TaxWise displays the following confirmation dialog box:



4. Click **OK** to add the state.

The Customer Support site adds the state(s) selected to the **States Already Selected** list, takes you back to the **Product Information** page, and increases the number next to **Individual States Purchased** by the number of states added.

5. To download the state(s) added, click the individual or business **Go to state updates** link.

Individual States Purchased: 1	No business states have been purchased.
- Add states to my package	- Add states to my package
- Go to state updates	

My Subscriptions

The Subscriptions Settings page of the Customer Support Site will allow you to receive the latest information about TaxWise and the Tax Industry through **E-mail** and **Text Messages** to your cell phone.

Simply check the box for the method and provide the appropriate e-mail address and/or mobile number and carrier.

1. Then check the box for any or all of the following categories:

- TaxWise Customer Service E-mails
- TaxWise CCS Hot Topics
- TaxWise Shipping Schedule

Subscription Settings

Check For Email Subscription

Email:

Check for text message to your cell phone. Note: Check with your carrier for all applicable text messaging charges.

Mobile Number:

Mobile Carrier:

TaxWise Customer Service E-Mails TaxWise CSS Hot Topics

TaxWise Shipping Schedule

2. Click **Add/Update Subscriptions** to save your choices.

The Reports Page

The Customer Support site provides you with a variety of reports that you can download and customize. Based on the parameters you define, UTS runs the reports for you after business hours and makes them available for you to download the next day.

To see the available reports, click the **Reports** link on the **My Information** page.

The Customer Support site displays the **My Reports** page:

The screenshot shows the TaxWise interface. At the top, there is a navigation bar with links: Home, My Information, Download, Check Printing, Community, Support, Print, Help, Manage Users, and Change User. The main content area is titled 'My Reports' and includes a sub-link 'How do I use this feature?'. Below this is a table with two columns: 'Reports' and 'Subscribe'.

Reports	Subscribe
Acceptance Summary Report	<input checked="" type="checkbox"/> Cancel
Awaiting IRS Ack Summary	<input checked="" type="checkbox"/> Cancel
Awaiting State Ack Summary	<input checked="" type="checkbox"/> Cancel
Birthday Report	<input checked="" type="checkbox"/> Cancel
Check Print Summary Report	<input type="checkbox"/> Cancel
Client List	<input type="checkbox"/> Cancel
Client List w/o SSN	<input type="checkbox"/> Cancel
Daily Tax Program Statistics E-File (part 1)	<input type="checkbox"/> Cancel
DCN Report	<input type="checkbox"/> Cancel
Deposited RAL/ERC Fee Summary Report	<input type="checkbox"/> Cancel
EFIN Acceptance Summary	<input type="checkbox"/> Cancel
ERC/RAL Check Counts	<input type="checkbox"/> Cancel
IRAL Accepted no E-file	<input type="checkbox"/> Cancel
IRS Disclosure Authorization Report	<input type="checkbox"/> Cancel
IRS Electronic Filing Summary	<input type="checkbox"/> Cancel
IRS Extension Summary	<input type="checkbox"/> Cancel
IRS Summary Report (acceptance)	<input type="checkbox"/> Cancel
Management Report	<input type="checkbox"/> Cancel
Military Preparer Summary	<input type="checkbox"/> Cancel

The following table describes some of the applicable reports currently available for scheduling from the Customer Support site:

Report	Description
Acceptance Summary Report	Lists all returns for which the electronic file was accepted by the IRS. The Total and Grand Totals columns provide the total number of returns, IRS-accepted e-files, and state accepted e-files.
Birthday Report	Lists all taxpayers, spouses, and dependents by birth date (month, day, and year) so that you can send birthday greetings to your clients.
Check Print Summary Report	This report provides information on all checks printed for each client. The totals include the number of returns for which a check has been printed.
Client List	This report provides a list of all clients with phone numbers and federal return status. The totals include total number of clients for each EFIN and grand total of all clients.
Deposited RAL/ERC Fee Summary Report	This report provides a list of all bank product returns and indicates when the fees were deposited to your account. The totals include the total number of returns, amount of fees requested, and amount of fees deposited.
EFIN Acceptance Summary	This report provides totals of accepted returns for each EFIN and the grand total of all accepted returns.
ERC/RAL Check Counts	This count provides total of RAL checks and ERC checks, a combined total of both RAL and ERC checks for each EFIN, and grand totals of all RALs and ERCs.
IRS Electronic Filing Summary	This report lists each return for which an electronic file has been created. The totals provide the number of e-files created, e-files accepted, and e-files rejected.

Report	Description
IRS Summary Report	Provides totals of statistical information such as the number of returns for each filing status, the number of returns that qualified for EIC, the average EIC, EIC total, and a number of returns for a few of the other credits, etc for each EFIN.
IRS Summary Report (acceptance)	Same as the IRS Summary Report except only shows totals from accepted returns.
Office Information Report	Generates a return list that shows general information about each client's return. Totals are not provided on this report.
Outstanding IRS Reject Report	Lists the totals for all rejected returns by EFIN. The Total and Grand Total columns provide the total number of accepted and rejected returns, as well as grand totals for both.
Outstanding Rejects	Provides a list of the totals for all rejected and accepted returns, including the returns that have been accepted, the returns that have been rejected, and the rejected returns that have not been accepted.
Paper and 1040X Report	Provides totals of paper returns and 1040X returns. SSNs, what type of return, and the date the EFC received it are listed. (Not applicable for TaxWise Online users.)
Prep Use Field Report	Lists the SSN, Taxpayer's last name, and each Preparer Use field, providing totals of the number of returns for each EFIN and grand total of all.
Preparer Summary	This report lists returns by Preparer ID and includes preparer totals per EFIN. Totals are provided for each EFIN on the report
Preparer Summary (new)	Displays each return, its status, bank, and other statistical information. This report provides totals.

Report	Description
Preparer Summary (summary – no detail)	Lists only the totals of Preparer Summary report for each EFIN.
RAL Summary	This report lists all of the bank product returns in the database. It shows the totals for each EFIN, including the number of qualifying returns, number of RALs, total amount of RALs, total number of ERCs, number of RALs/ERCs approved and declined, number of RALs/ERCs cancelled, and total amount of ERCs.
Unpaid RAL Summary	This report provides information on the RAL returns for which the RAL has not been repaid by the IRS direct deposit. The report includes only RALs for which the checks have been printed.

By using the **Reports** page to schedule and define your reports, you can:

- Download reports to Excel or another application, which allows you to cut, copy, and paste data and create highly customized reports.
- Print only the reports you need, which allows you to save paper.
- Run reports using the TaxWise database, which ensures the completeness of your report.
- Receive reports that are not normally included with TaxWise, such as the Birthday Report.

To schedule a new report, use the following steps:

1. Click the **Reports** link on the **My Information** page.

The Customer Support site displays the **My Reports** page.

2. In the **Subscribe** column, choose one of the two formats:
















- Subscribe to the uncompressed version  of this report.

- Subscribe to the compressed  (“zipped”) version of this report.

The Customer Support site moves that report to the top of the list and displays a **Cancel** link:

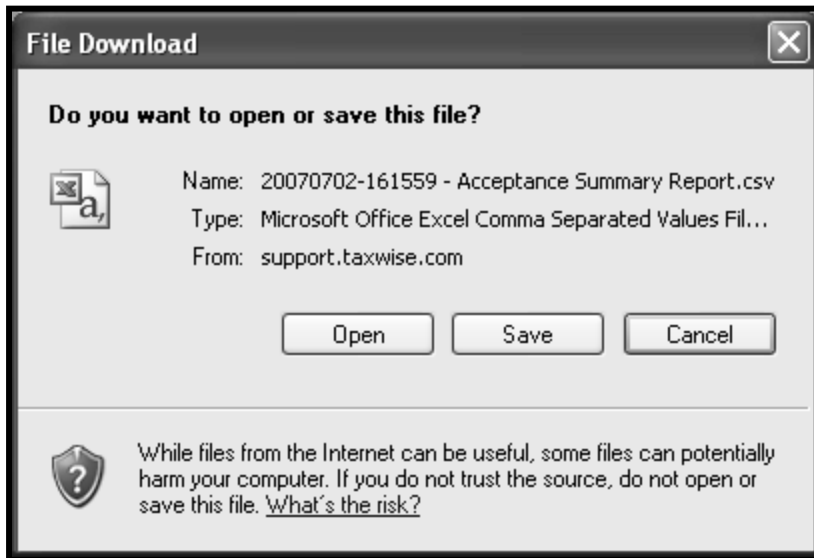
Reports	Subscribe
<input type="checkbox"/> Client List	 Cancel
<input type="checkbox"/> EFIN Acceptance Summary	 Cancel
<input type="checkbox"/> ERC/RAL Check Counts	 Cancel
<input type="checkbox"/> Paper and 1040X Report	 Cancel
<input type="checkbox"/> Prep Use Field Report	 Cancel
<input type="checkbox"/> Preparer Summary (new)	 Cancel
<input type="checkbox"/> Preparer Summary (summary - no detail)	 Cancel
<input type="checkbox"/> Birthday Report	 
<input type="checkbox"/> Deposited RAL/ERC Fee Summary Report	 
<input type="checkbox"/> IRS Electronic Filing Summary	 
<input type="checkbox"/> IRS Summary Report	 
<input type="checkbox"/> IRS Summary Report (acceptance)	 
<input type="checkbox"/> Preparer Summary	 
<input type="checkbox"/> Acceptance Summary Report	 
<input type="checkbox"/> Check Print Summary Report	 
<input type="checkbox"/> Office Information Report	 
<input type="checkbox"/> Outstanding IRS Rejects Report	 
<input type="checkbox"/> Outstanding Rejects	 
<input type="checkbox"/> RAL Summary	 
<input type="checkbox"/> Unpaid RAL Summary	 

3. Expand the row of the report by clicking to the (+) plus sign to display the date and time the report was generated.

Reports	Subscribe
<input type="checkbox"/> Acceptance Summary Report	 Cancel
 8/25/2008 4:00:43 PM	 Delete  Download
<input type="checkbox"/> Awaiting IRS Ack Summary	 Cancel
<input type="checkbox"/> Awaiting State Ack Summary	 Cancel
<input type="checkbox"/> Birthday Report	 Cancel
<input type="checkbox"/> Check Print Summary Report	 
<input type="checkbox"/> Client List	 
<input type="checkbox"/> Client List w/o SSN	 
<input type="checkbox"/> Daily Tax Program Statistics E-File (part 1)	 

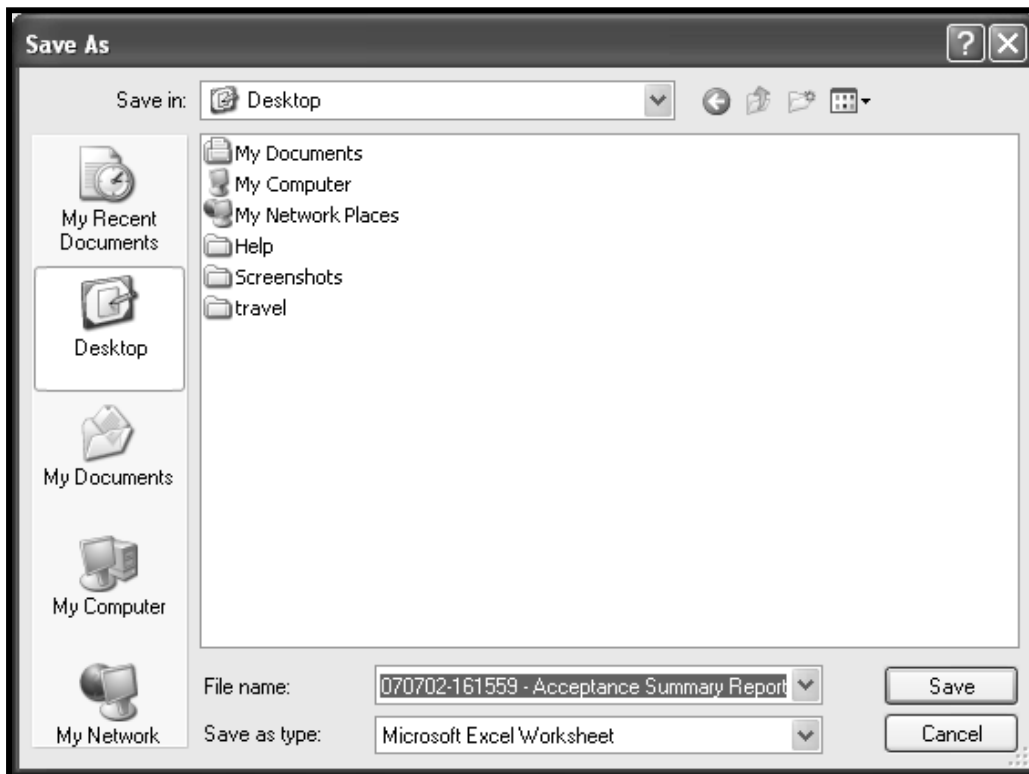
4. Do one of the following:
 - Click **Delete** to delete the report.
 - Click **Download** to open or save the report.

If you click **Download**, Windows displays the **File Download** box:



5. Click **Save**.

Windows displays the **Save As** dialog box:



6. Navigate to where you want to save the report and click **Save**.

If you choose to save the report, you can change the name of the file when the **Save As** dialog box displays.

To delete a report, use the following steps:

1. From the **Reports** page, click the plus sign (+) next to the report to delete.
2. Click **Delete**.

TaxWise automatically cancels a report if it has not been viewed in 15 days.