

# Intro to the Return Screen

# Topics

- Finding an Existing Return
- Creating a New Return
- The Return Screen
- Worksheet Details
- Adding / Deleting Forms / Worksheets
- Diagnostics
- Printing the Return
- Extra Credit

# Finding an Existing Return

- Using Open Return button
- Using Return list
- Using Search

# Creating a New Return

- Training SSNs / EINs
  - TaxPrep4Free: nnn-xx-yyyy / nn-nxxyyyy
  - IRS Pub 4491-W: nnn-xx-xxxx / nn-nxxxxxx
  - Use:
    - nnn: from scenario
    - From your Training Coordinator
      - xx: Your Magic 2-digit number
      - yyyy: 4-digit number for Client Id
- Use “Go to Tax Forms”
  - NOT “Go to Interview”

# The Return Screen

- Top Row Buttons
- Left Pane
  - Refund Monitor
  - Form Tree
- Worksheet Area

# Worksheet Detail

- CAPS LOCK ON
- Fields
  - Mouse Cursor vs Entry Cursor
  - Types / Color Coding
    - Type changes dynamically
  - Value Types
    - Text / Number
    - Special (SSN, EIN, Zip, Telephone, Date, T/S/J)
  - Triangle
    - Link, Toggle Estimated, Calculator, Override, Help
- Keyboard Shortcuts
  - Tab / Return
    - Recalculation / Round-Trip
  - Others: Ctrl-Space; Ctrl-E
- Special Main Info
  - PINs & Preparer Use Fields

# Adding/Deleting Forms/Worksheets

- Most Forms are already in your tree (from the Template)
- Categories
  - Required / Optional / Multiple copies / TP-SP copies
- Adding Forms/Worksheets
  - Add another instance of existing Form
  - Add Form button
  - Via link from another form/field
- Deleting Forms/Worksheets
- Scratch Pads

# Diagnostics

- Run Diagnostics Button
- Diagnostics Panel
  - Errors / Warnings / etc.
    - Clickable
  - Create e-File(s)
  - Close Diagnostics Panel



# Printing the Return

- Print Return button
  - Printable return is generated on the server
  - Open in new window (or tab)
  - Send to printer
  - Close print window (or tab)

# Extra Credit

- TaxWise Online
  - Remaining buttons (Save, Close, etc.)
  - Collapsing Refund Monitor & Form Tree
  - What to do if waiting.....
- Internet Explorer
  - Maximize
  - F11
  - Issues with Zoom
  - Adjusting window width to control font size

# DEMO