



DETALLADO ENTRENAMIENTO CLIENTES NUEVOS

Induccion Cliente Nuevo

Temas a tratar:

- **Menu Principal**
- **Configuración Inicial**
- **Adición (Preparador/Transmisor - ERO)**
- **Default Settings**
- **Otras Características-Misceláneas**
- **Reportes**
- **Aplicación Banco-Envíos simultaneos- Efile**

Induccion Cliente Nuevo

Continuacion -Temas a tratar

- **Control de envíos electrónicos (Efile)**
- **Clientes anteriores – Conversion de Datos**
- **Clientes Nuevos y Actuales**
- **Comenzando Cliente Nuevo**



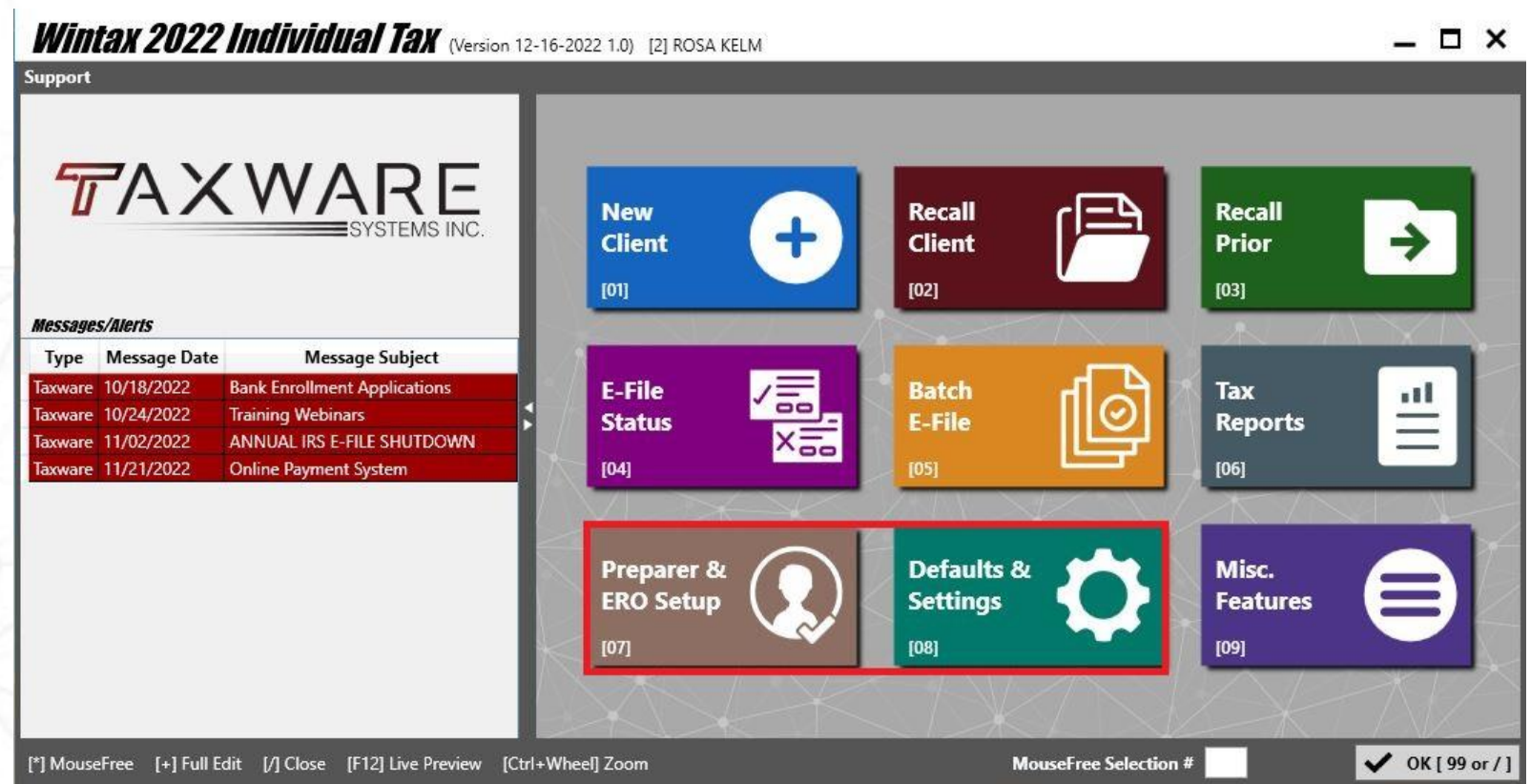
Menu Principal

- Consulta y acceso rápido
- Programas de Negocios y Contabilidad
- Conexion rápida soporte al cliente
- Otros programas especificos



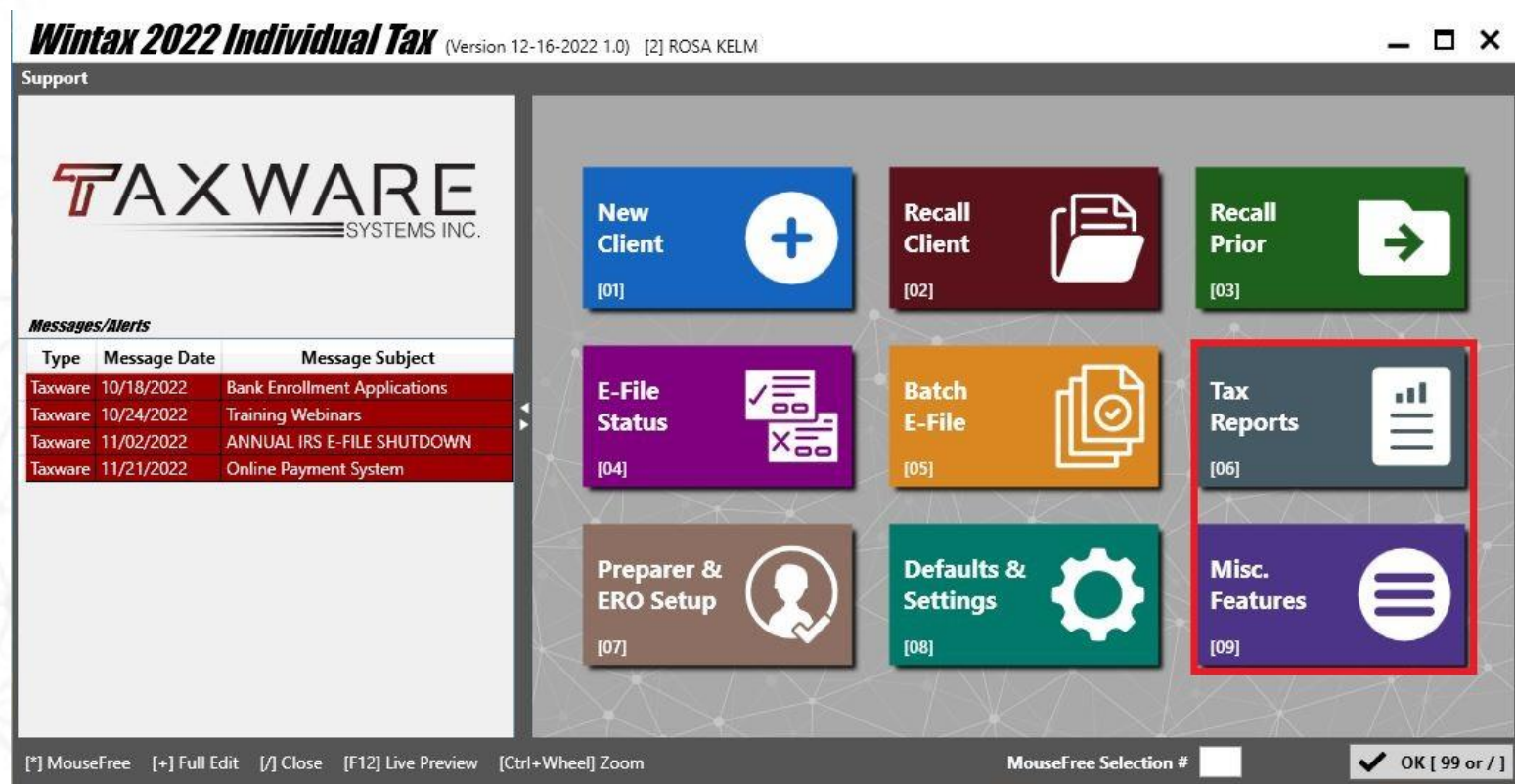
Configuración Inicial

- Adición (Preparador/Transmisor-ERO)
- Default Settings



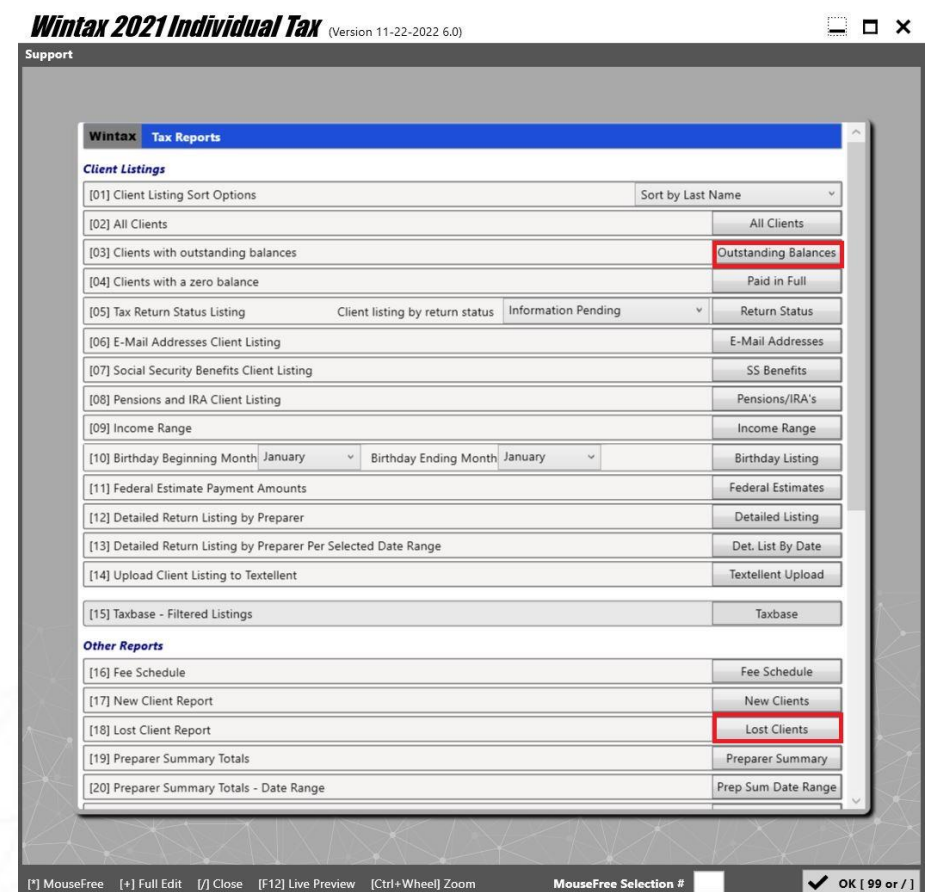
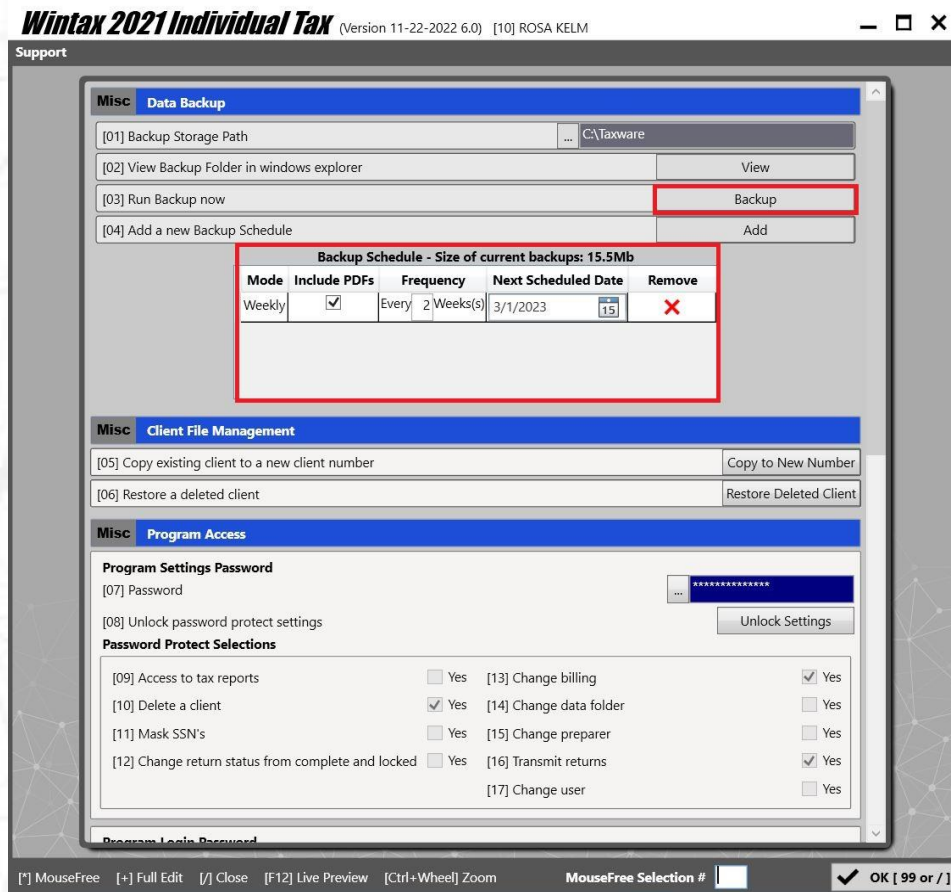
Miscelaneos - Reportes

- Características Miscelaneas
- Reportes



Miscelaneos - Reportes

- Otras Caracteristicas- Miscelaneas
- Reportes



Control de Envios Electronicos

- Aplicacion Bancaria
- Envios Multiples e Individuales

Wintax 2022 Individual Tax (Version 12-16-2022 1.0) [2] ROSA KELM

Support

TAXWARE SYSTEMS INC.

Messages/Alerts

Type	Message Date	Message Subject
Taxware	10/18/2022	Bank Enrollment Applications
Taxware	10/24/2022	Training Webinars
Taxware	11/02/2022	ANNUAL IRS E-FILE SHUTDOWN
Taxware	11/21/2022	Online Payment System

You have 2 available acks

New Client [01]

Recall Client [02]

Recall Prior [03]

E-File Status [04]

Batch E-File [05]

Tax Reports [06]

Preparer & ERO Setup [07]

Defaults & Settings [08]

Misc. Features [09]

[*] MouseFree [+/-] Full Edit [/] Close [F12] Live Preview [Ctrl+Wheel] Zoom MouseFree Selection # [] ✓ OK [99 or /]

Control de Envios Electronicos

- Aplicacion Bancaria
- Envios Multiples e Individuales

Wintax 2022 Individual Tax (Version 12-16-2022 1.0) [2] ROSA KELM

Support

ELF Electronic Filing Main Menu

[01] Batch Transmit Returns	Transmit Returns
[02] Receive Acknowledgements	Get Acks
[03] EFILE Return Tracking	Tracking Reports
[04] ERO Information	ERO Information
[05] 2022 Bank Product Settings	Bank Product Settings
No Pre-Configured Bank	
[07] Transmit Automatic Extension Form 4868	E-File Form 4868

Direct Transmitter - Only Needed If Using IFA

[08] Transmitter Information	Transmitter Info
[09] Select Transmitter	Select Transmitter

Current Transmitter in Use

No. ETIN

[*] MouseFree [+/-] Full Edit [/] Close [F12] Live Preview [Ctrl+Wheel] Zoom Mo OK [99 or /]

Wintax 2020 Individual Tax (Version 08-03-2021 6.8)

Support

Get Acks Rebuild Print

Client Search

Taxpayer SSN
Taxpayer Last Name
Taxpayer Full Name
Client ID
Return Date
Transmission Date
Acknowledgment Date

Client ID	Taxpayers SSN	Name(s)	Gov Code	Status	Return Date	Trans Date	Ack Date	Expanded Information
1	400-00-4365	Smith, John	FED	Accepted	03-15-2021	03-15-2021	03-15-2021	Client ID
2	400-00-7601	Woodard, Jacob	OH	Accepted	03-15-2021	03-15-2021	03-15-2021	Taxpayer First
3	400-00-7901	Villanueva, Sandra	FED	Accepted	03-15-2021	03-15-2021	03-15-2021	Taxpayer Last
4	400-00-7901	Townsend, Kyle	HI	Accepted	03-15-2021	03-15-2021	03-15-2021	Taxpayer SSN
5	400-00-7905	Prin, Leticia	FED	Accepted	03-15-2021	03-15-2021	03-15-2021	Gov Code
6	400-00-7905	Hampton, Juan	HI	Rejected	03-15-2021	03-15-2021	03-15-2021	Status
7	400-00-7903	Alexander, Yu	FED	Accepted	03-15-2021	03-15-2021	03-15-2021	Preparation Date
8	400-00-7903	May, Charles	HI	Accepted	03-15-2021	03-15-2021	03-15-2021	Transmission Date
9	400-00-7904	York, Greg	HI	Rejected	03-15-2021	03-15-2021	03-15-2021	Ack Date
10	400-00-7902	Cobb, Chuck	FED	Accepted	03-15-2021	03-15-2021	03-15-2021	Accepted Date
11	400-00-7902	Kaufman, Delora	HI	Accepted	03-15-2021	03-15-2021	03-15-2021	Submission ID
12	400-00-7941	Bowman, Sarah	FED	Accepted	03-15-2021	03-15-2021	03-15-2021	Refund
13	400-00-7941	Kramer, Matthew	HI	Accepted	03-15-2021	03-15-2021	03-15-2021	Balance
14	400-00-7942	Hardin, Lauren	FED	Accepted	03-15-2021	03-15-2021	03-15-2021	Print 9325
15	400-00-7942	Torres, Isabelle	HI	Accepted	03-15-2021	03-15-2021	03-15-2021	Reprint Ack
16	400-00-7944	Halley, Ella	HI	Accepted	03-15-2021	03-15-2021	03-15-2021	Reprint Ack
17	400-00-1234	Wang, William	FED	Accepted	03-15-2021	03-15-2021	03-15-2021	Show History
18	400-00-1235	Valenzuela, Melinda	NC	Accepted	03-15-2021	03-15-2021	03-15-2021	ADA History
19	400-00-1236	Shaw, Bruce	FED	Accepted	03-15-2021	03-15-2021	03-15-2021	
20	400-00-1237	Bauer, Travis	FED	Awaiting Acknowledgement	03-15-2021	03-15-2021	03-15-2021	
21	400-00-1238	Woodard, Scott	NC	Accepted	03-15-2021	03-15-2021	03-15-2021	
22	400-00-1239	Melton, Lester	FED	Accepted	03-15-2021	03-15-2021	03-15-2021	
23	400-00-1240	Davidson, Felicia	FED	Awaiting Acknowledgement	03-15-2021	03-15-2021	03-15-2021	
24	400-00-1241	Bakemship, Jason	FED	Accepted	03-15-2021	03-15-2021	03-15-2021	
25	400-00-1242	Bryant, Linda	FED	Accepted	03-15-2021	03-15-2021	03-15-2021	
26	400-00-1243	Lutz, Crystal	FED	Accepted	03-15-2021	03-15-2021	03-15-2021	

E-File Status Filter

ALL
ACCEPTED
REJECTED
AWAITING ACK

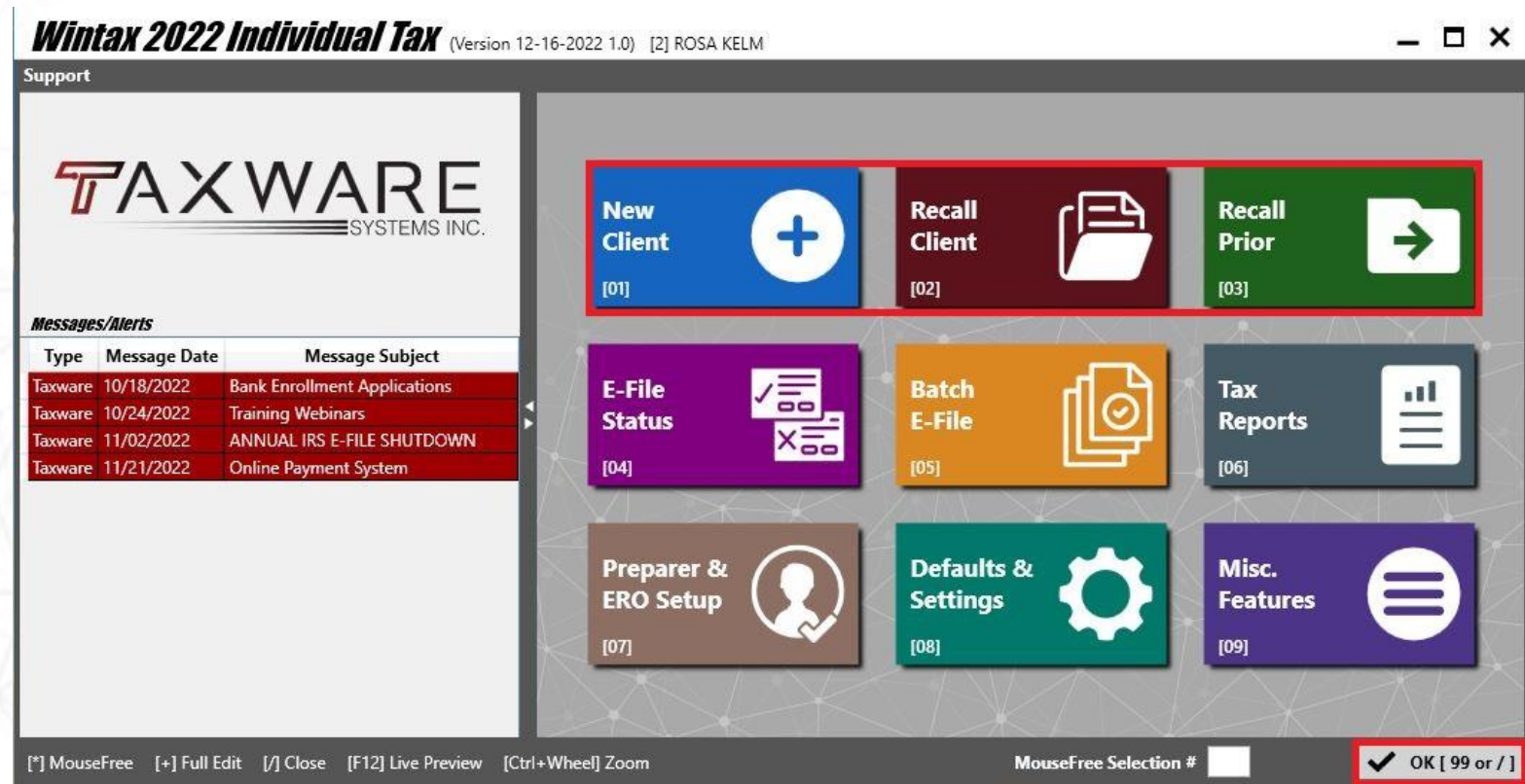
Station ID Filter

ALL

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Clientes Nuevos - Actuales

- Clientes anteriores – Conversion de Datos
- Clientes Nuevos y Actuales



Preparando un Impuesto

Temas a cubrir en esta sección:

- **Empezando un cliente**
- **Información Básica**
- **Descripción de cómo funciona el programa**
- **Cómo Reportar Ingresos**
- **Cómo Buscar una Forma**
- **Otros Ingresos, Ajustes y Pagos**
- **Créditos Educativos**
- **Crédito de Niños EIC, 8867, Due Diligence**
- **Menú de Resumen (summary)**

Comenzando un Cliente

- **Cliente Nuevo**
- **Cliente Actual**
- **Cliente Anterior - Conversion**
- **Asignación # ID – No Sobrescribir**



Cliente Actual

- Filtrar /Organizar Informacion
- Informacion Rapida

Client Pick List Data

Contact Settings E-Mail Client Text Client E-Mail TW Support

Lester Melton
5896 Vineyard Ave
ONTARIO CA 91761
Filing Status Single
Home Phone (555) 555-5555
Daytime Phone (555) 555-5555
TP SSN 400-00-1239
SP SSN
Preparation Date 05-06-2022
Direct Deposit Bank Name
RTN
Acct #
Preparer Name PREPARER NAME
Federal Refund \$7,661.00
State Refund \$7,810.00

Tax Billing Information

Amount Billed	220.00
Total Amount Paid	0.00
Balance Due	220.00
[01] Amount of New Payment	0.00

Tax Status

[02] Return Status Information Pending

ELF Status

Entity	Status
FED	Transmit

E-File Status

FED - Accepted
Transmission Date 03-15-2021
Acceptance Date 03-12-2021
Submission ID 0000002021047100000
View Acknowledgment View

New Client Reconstruct Get Acks Edit Client Grid

Current Path C:\Taxware\SettingsAndData\Wintax21\ClientData\FOR DEMO USE ONLY
Prior Path C:\Taxware\SettingsAndData\Wintax20\ClientData\FOR DEMO USE ONLY

Client Recall!
Pressing [F2] after highlighting a client will bring up the expanded information window.

Client ID	Full Names	Taxpayer First Name	Taxpayer Last Name	Return Status	Bank Product	E-File Status	Taxpayer SSN	Taxpayer E-Mail	Prior Year Unpaid Bill	Bill Balance Due	Date Return Started
[01] Client ID											
[02] Full Names											
[03] Taxpayer First Name											
[04] Taxpayer Last Name											
[05] Taxpayer SSN											
[06] Taxpayer E-Mail											
[07] Date Return Started											
	8	Pino, Edgard	Edgard	Pino	Information Pendi	RT	XXX-XX-0104		0.00	205.00	10-24-2022
	9	York, Greg	Greg	York	Under Review	No	Rejected	XXX-XX-7904	0.00	505.00	04-01-2022
	10	KELM, ROSA	ROSA	KELM	Information Pendi	No	XXX-XX-0203	ROSEK@GMAIL.C	135.00	180.00	10-24-2022
	20	Bauer, Travis	Travis	Bauer	Information Pendi	No	Awaiting Acknow	XXX-XX-1237	225.00	225.00	02-21-2022
	22	Melton, Lester	Lester	Melton	Information Pendi	No	Accepted	XXX-XX-1239	205.00	220.00	02-20-2022

Client Type

CURRENT
PRIOR
ALL

E-File Status

ACCEPTED NO E-FILE
REJECTED NO STATUS
AWAITING ACK NOT ACCEPTED
ON EXTENSION ALL

Preparer Filter

ALL

Informacion Basica

Navigation

- 1040 Line Input** [01]
- Forms & Schedules** [02]
- Summary** [03]
- Exit Return** [04]

Basic Information [05] Preparation Date 12-09-2022

Taxpayer Information

[06] Filing Status ☐ Single
[07] First Name ROSA Middle Initial Last Name KELM Suffix
[08] SSN 400-01-0203 [09] Date of Birth 09-11-1975 Age 46
[10] Occupation [11] Taxpayer Blind? ☐ Yes

Address Information

[17] Address 1234 SPRUCE Apartment
[18] City RANCHO CUCAMONGA State CA Zip 91730
[19] Address Change? ☐ Yes [20] Address Type ☐ Domestic
[21] County Name County Code
[22] School District Name School District Code

Contact / License Information

[23] Phone numbers, Driver's License, Protection PIN
Daytime Phone (909) 931-3131 Work Phone (909) 931-3131 Home Phone
Phone / Driver's License / Protection PIN

Dependent Information

[24] Add [25] Change/Delete [26] Restore

First Name	M.I.	Last Name	Suffix	Age	Birth Date	SSN	Relationship	Months Home
Josh		KELM		4	09-25-2017	400-01-0102	SON	12

- No. seguro, Direccion, licencia, Pin proteccion, correo electronico
- Licencia y PIN proteccion
- Information Dependientes
- Categories especiales efile
- Preparador, Transmisor
- Nombre archive depreciacion

Como Fluye el Programa

Navigation

- 1040 Line Input** [01]
- Forms & Schedules** [02]
- Summary** [03]
- Exit Return** [04]

Basic Information [05] Preparation Date 12-20-2022

Taxpayer Information

[06] Filing Status ☐ Single

[07] First Name Edgard Middle Initial Last Name Pino Suffix

[08] SSN 400-00-0104 [09] Date of Birth 11-29-1988 Age 33

[10] Occupation Worker [11] Taxpayer Blind? ☐ Yes

Address Information

[17] Address 1121 Line Ave Apartment

[18] City UPLAND State CA Zip 91786

[19] Address Change? ☐ Yes [20] Address Type ☐ Domestic

[21] County Name Los Angeles County Code

[22] School District Name School District Code

Contact / License Information

[23] Phone numbers, Driver's License, Protection PIN Phone / Driver's License / Protection PIN

Daytime Phone (909) 123-4568 Work Phone (909) 123-4568 Home Phone

Dependent Information

[24] Add [25] Change/Delete [26] Restore

First Name	M.I.	Last Name	Suffix	Age	Birth Date	SSN	Relationship	Months Home
Mary		Pino		4	12-25-2018	400-01-0103	DAUGHTER	12
Thomas		Pino		7	07-01-2015	400-01-0106	SON	12

- **Informacion Basica**
- **Line Input or Forms/Schedules**
- **Menu Resumen (Summary)**
 - **validación, impresión y envío**

Line Input vs Form/Schedules

Form 1040 Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return **2022** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status ☐ Single ☐ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)

Check only one box. If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent.

Your first name and middle initial Last name Your social security number

If joint return, spouse's first name and middle initial Last name Spouse's social security number

Home address (number and street), if you have a P.O. box, see instructions. Apt. no. Presidential Election Campaign

City, town, or post office. If you have a foreign address, also complete spaces below. State ZIP code Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund.

Foreign country name Foreign province/state/country Foreign postal code ☐ You ☐ Spouse

Digital Assets At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐ Yes ☐ No

Standard Deduction Someone can claim: ☐ You as a dependent ☐ Your spouse as a dependent ☐ Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness You: ☐ Were born before January 2, 1958 ☐ Are blind Spouse: ☐ Was born before January 2, 1958 ☐ Is blind

Dependents (see instructions): If more than four dependents, see instructions and check here ☐

(1) First name Last name (2) Social security number (3) Relationship to you (4) Check the box if qualifies for (see instructions): Child tax credit Credit for other dependents

Income

1a Total amount from Form(s) W-2, box 1 (see instructions) 1b

b Household employee wages not reported on Form(s) W-2 1c

c Tip income not reported on line 1a (see instructions) 1d

d Medicaid waiver payments not reported on Form(s) W-2 (see instructions) 1e

e Taxable dependent care benefits from Form 2441, line 26 1f

f Employer-provided adoption benefits from Form 8839, line 29 1g

g Wages from Form 9919, line 6 1h

h Other earned income (see instructions) 1i

i Nonexcludable combat pay election (see instructions) 1j

2 Add lines 1a through 1j 1z

2a Tax-exempt interest 2b Taxable interest

3a Qualified dividends 3b Ordinary dividends

4a IRA distributions 4b Taxable amount

5a Pensions and annuities 5b Taxable amount

6a Social security benefits 6b Taxable amount

c If you elect to use the lump-sum election method, check here (see instructions) ☐ 7

7 Capital gain or (loss). Attach Schedule D if required. If not required, check here 7

8 Other income from Schedule 1, line 10 8

9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income** 9

10 Adjustments to income from Schedule 1, line 26 10

11 Subtract line 10 from line 9. This is your **adjusted gross income** 11

12 **Standard deduction or itemized deductions** (from Schedule A) 12

13 Qualified business income deduction from Form 8995 or Form 8995-A 13

14 Add lines 12 and 13 14

15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your **taxable income** 15

Standard Deduction for:

- Single or Married filing separately, \$13,850
- Married filing jointly or Qualifying surviving spouse, \$26,800
- Head of household, \$13,450
- If you checked any box under Standard Deduction, see instructions.

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 113208 **Form 1040** (2022)

Line Input **View Prior** **TWPDF Archive** **PDF** **ELF Tracker (16)** **Forms Search**

Forms/Schedules Used

Form 1040 - U.S. Individual Income Tax Return

Schedule 1 - Additional Income and Adjustments to Income

Schedule 2 - Additional Taxes

Schedule 3 - Additional Credits and Payments

Schedule B - Interest and Dividend Income

Schedule SE - Self-Employment Tax

Form 5329 - Additional Taxes on Qualified Plans (Including IRAs) and Other Tax-Favored Investments

Form 8962 - Premium Tax Credit (PTC)

W-2 Listing

Recovery Rebate Credit Worksheet

Form 8879/8453 - IRS E-File Signature

Prior Forms/Schedules

[01] Schedule A	Itemized Deductions	[47] Form 8606	Nonrefundable IRAs
[02] Schedule B	Interest and Dividends	[48] Form 8615	Child Tax
[03] Schedule C	Business Income	[49] Form 8801	Prior Year Min Tax
[04] Schedule D	Capital Gains/Loss	[50] Form 8812	Additional Child Tax Credit
[05] Schedule E	Supplemental Income	[51] Form 8814	Child's Interest
[06] Schedule EIC	Earned Income Credit	[52] Form 8815	Exclusion of Interest
[07] Schedule F	Farming Income	[53] Form 8821	Tax Info Authorization
[08] Schedule H	Household Employment	[54] Form 8822	Change of Address
[09] Schedule J	Farm Income Averaging	[55] Form 8824	Like Kind Exchanges
[10] Schedule R	Elderly/Disabled Credit	[56] Form 8828	Recapture Fed Mtg Sub
[11] Schedule SE	Self-Employment Income	[57] Form 8839	Adoption Credit
[12] Form 1116	Foreign Tax Credit	[58] Form 8846	Employee Tips
[13] Form 1310	Deceased Refund	[59] Form 8853	MSA Deduction
[14] Form 2106	Employee Bus. Expense	[60] Form 8859	DC First-Time Homebuyer
[15] Form 2210/F	Underpayment Penalty	[61] Form 8862	EIC After Disallowance
[16] Form 2441	Child/Dependent Care	[62] Form 8863	Education Credit
[17] Form 2555	Foreign Earned Income	[63] Form 8880	Retirement Savings Credit
[18] Form 2848	Power of Attorney	[64] Form 8885	Health Coverage Tax Credit
[19] Form 3800	General Business Credit	[65] Form 8889	Health Savings Accounts
[20] Form 3903	Moving Expenses	[66] Form 8903	Domestic Production
[21] Form 4136	Fuels Credit	[67] Form 8910	Alternative Vehicle Credit
[22] Form 4137	Unreported Tip Income	[68] Form 8917	Tuition and Fees Ded
[23] Form 4255	Recapture Inv Credit	[69] Form 8919	Uncollected SS/Medicare
[24] Form 4506	Request for Copy	[70] Form 8936	Electric Vehicle Credit
[25] Form 4562	Depreciation	[71] Form 8938	Enrollment Financial Assist

- **Line Input**
 - Linea por Linea
- **Forms/Schedules**
 - Formas Directas
- **Busqueda y Uso Rapido**
 - Numero/Descripcion

Reportando Ingresos

Recall Prior Year

[01] Add [02] Change/Delete [03] Scan a W-2 **W2** W-2 (Standard)

TP/SP	Payor Name	SDI/Equiv.	SS/Med WH	SWT	FWT	Federal Gross	State Gross
-------	------------	------------	-----------	-----	-----	---------------	-------------

[04] Add [05] Change/Delete **1099R** 1099R

TP/SP	Payor Name	SWT	FWT	Federal Gross	Fed Taxable	RRB	Type
Taxpayer	GRAYSON LAW FIRM	250	3,000	15,000	15,000		Pension
Taxpayer	WIDGETS N SUCH	500	2,500	12,000	12,000		IRA

[09] Add [10] Change/Delete **W2** W-2G

TP/SP	Payor Name	SWT	FWT	Federal Gross
-------	------------	-----	-----	---------------

[11] Add [12] Change/Delete **1099 Other** 1099-Misc, 1099-NEC, 1099-K

TP/SP	Payor Name	SWT	FWT	Federal Gross	Type
Taxpayer	MICHAEL KINDER AND SONS INC	0	0	500	Misc
Taxpayer	AR WALMART	0	0	5,000	NEC
Taxpayer	Mobile Accessories for Cell	0	0	3,000	K

Mas Comunes

- W-2s
- 1099R
- W-2G
- 1099-Misc
- 1099-NEC
- 1099-K

Otros Ingresos /Ajustes

1040 Income	1040 Payments
[01] Additional wages	[19] Federal tax withheld 350
[02] Taxable state tax refunds	[20] 2020 Estimated Tax payments 2,500
[03] Alimony received	[21] Recovery Rebate Credit
[04] Date of original divorce or separation agreement	[22] Paid with extension
[05] Unemployment compensation	[23] Excess FICA and RRTA tax withheld
[06] Total social security benefits	[24] Regulated investment company credit
[07] Other Income	1040 Other
[08] Did you have any financial interest in any virtual currency? <input type="checkbox"/> Yes	[25] Overpayment to be applied to estimates (This option should only be used if not producing estimate coupons for 2021)
1040 Adjustments	[26] Additional tax
[09] Educator expenses	[27] Tax from recapture of education credit (ECR)
[10] Self-employed SEP and SIMPLE plans	[28] Other credit Form number
[11] Self-employed health insurance deduction	[29] Additional payment
[12] Penalty on early withdrawal of savings	[30] Interest included in payment
[13] Alimony Paid	[31] Penalties included in payment
[14] Traditional IRA contributions	
[15] Roth IRA contributions	
[16] Interest paid on student loans	
[17] Jury duty pay given to employer	
[18] Other adjustment	
Description	

- Ingreso
 - desempleo 1099-G
- Ajustes
 - gastos educativos
- Pagos
 - pagos estimados
- Otros
 - pagos adicionales
 - intereses & penalidades

Credito de Niños (EIC)

Print Preview Notes [F4] TWPDF Archive

[01] Check box if filing status is head of household and you were married ☐ Yes

[02] If married, did you live with your spouse at any time during the last 6 months of 2022? (Only applies to HOH or MFS) ☐ Yes

[03] If yes to 2nd question, are you legally separated according to your state law under a written separation agreement and you lived apart from your spouse at the end of 2022? ☐ Yes

[04] Was taxpayer a qualified former foster youth or a qualified homeless youth? ☐ Yes

[05] If MFJ, was spouse a qualified former foster youth or a qualified homeless youth? ☐ Yes

[06] Was taxpayer a specified student in 2022? (In school at least 5 months for the year and carried at least 1/2 the normal workload for course of study) ☐ Yes ☐ No

[07] If MFJ, was spouse a specified student in 2022? (In school at least 5 months for the year and carried at least 1/2 the normal workload for course of study) ☐ Yes ☐ No

EIC Information About Your Qualifying Children

[08] Paid preparer's due diligence checklist **Due Diligence** Changes to qualifying children must be made in Dependent Information on the Basic Information menu. Dependents can also be accessed from the Due Diligence menu.

	First Name & Initial	Last Name and Suffix	Age/DOB	SSN	Relationship	Months Lived With	Identity Protection PIN	Born Before 2004 and under age 24 at the end of 2022 and a student	Disabled in 2022
[09] Child #1	Mary	Pino	4/ 12-25-2018	400-01-0103	DAUGHTER	12		<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
[10] Child #2			0/					<input type="checkbox"/> Yes	<input type="checkbox"/> Yes
[11] Child #3			0/					<input type="checkbox"/> Yes	<input type="checkbox"/> Yes

EIC Other Information

[12] Taxable scholarship or fellowship grant included in 1040 line 7 (OVERRIDE)

[13] Investment Income (OVERRIDE)

[14] Nontaxable combat pay election (OVERRIDE)

[15] Clergy Only - Amount from 1040, line 7 that was also reported on Schedule SE, line 2

[16] Was the taxpayer (or the taxpayer's spouse) a nonresident alien for any part of 2022? ☐ Yes

[17] Print 'NO' next to the line for EIC on 1040 or 1040-SR. Reason's to check this box include the following: ☐ Yes

- Taxpayer, spouse or a qualifying child has an SSN that is not valid for employment and was issued solely to apply for or receive a federally funded benefit
- Taxpayer lived less than half the year in the United States
- Taxpayer was a nonresident alien for any part of the year and filing status is not married filing jointly

[18] Allow EIC even if due diligence questions have not been answered completely? (This is an OVERRIDE and the 8867 will NOT be attached) ☐ Yes

[19] Exclude Notice 2014-7 payments entered in Other Income for EIC purposes ☐ Yes

- Respuesta Requerida
- Respuesta año anterior
- Un click – año anterior

Support

1040 Line Input >> Earned Income Credit (EIC) >> Due Diligence Wizard

Preview Print Recall Prior

[01] Name of person(s) who provided information to preparer Edgard Pino

[02] Schedule C questions Schedule C questions [03] Additional questions Additional questions

[04] Could taxpayer be a qualifying child of another person for the EIC or Child Tax Credit? ☐ Yes ☒ No

[05] Was the taxpayer's main home and the spouse's main home if filing jointly, in the United States for more than half the year? ☐ Yes ☐ No

[06] Is the taxpayer eligible to be claimed as a dependent on anyone else's return? ☐ Yes ☐ No

[07] Did you interview the taxpayer, ask adequate questions, and document the taxpayer's responses to determine that the taxpayer is eligible to claim the credit(s)? ☒ Yes ☐ No

[08] Did you review adequate information to determine that the taxpayer is eligible to claim the credit(s) and in what amount? ☒ Yes ☐ No

[09] Did any information provided by the taxpayer, a third party, or reasonably known to you appear to be incorrect, incomplete or inconsistent? ☐ Yes ☒ No

[10] If 'Yes' to question 9, did you make reasonable inquiries to determine the correct or complete information? ☐ Yes ☐ No

[11] If 'Yes' to question 9 and 10, did you document your inquiries? ☐ Yes ☐ No

[12] Did you satisfy the record retention requirement? ☒ Yes ☐ No

[13] Did the taxpayer have any of these credits disallowed or reduced in a previous year? ☐ Yes ☒ No ☐ N/A

[14] If 'Yes' to question 13, did you complete the required recertification form(s)? ☐ Yes ☐ No ☐ N/A

[15] Have you determined that this taxpayer is, in fact, eligible to claim the EIC for the number of children for whom the EIC is claimed, or to claim EIC if the taxpayer has no qualifying child? (Applies to EIC Only) ☒ Yes ☐ No

[16] Did you explain to the taxpayer the rules about claiming EIC when a child is the qualifying child of more than one person (tie-breaker rules) (Applies to EIC Only) ☒ Yes ☐ No ☐ N/A

[17] Have you determined that the taxpayer was unmarried or considered unmarried on the last day of the tax year and provided more than half the cost of keeping up a home for the year for a qualifying person? (Applies to head of household filers only) ☐ Yes ☐ No

[18] Do you certify that all of the answers you have given are, to the best of your knowledge, true, correct and complete? ☒ Yes ☐ No

	Dependents	EIC	ON EIC	CTC/ACTC/ODC	Non-Dependents	EIC	ON EIC
[19]	Mary Pino	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
[20]	Thomas Pino	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			

Add Non-Dependent

MouseFree Selection # OK [99 or /]

Menu de Resumen Final

- **Menu Resumen (summary)**
 - **Corregir Errores**
 - **Adición de estados**
 - **Información bancaria**
 - **Facturas**
 - **E-file**
 - **Productos Bancarios**

Menu Resumen Final

Support
Summary

Notes [F4] TWPDP Archive Load Contact Center EFTPS

Federal Refund 6,276 CA Refund 1,630 Total Refund 7,906	Tax Summaries and Diagnostics [01] Display Summary Display Summary [02] Display Detail Summary Detail Summary [03] Display Diagnostics Intuitive Diagnostics [04] Display Validity Checks Validity Checks [05] Prior Year Comparison Prior Year Compare	Tax Other Options/Data [17] Direct Deposit Information Direct Deposit [18] Electronic Payment Electronic Payment [19] Billing Information Billing Information [20] E-File Information E-File [21] Return Status Information Pending [22] Amount to pay on 1040-V [23] Amend this return 1040-X Amended [25] MFJ-MFS comparison MFJ-MFS [26] Efile exception (Form 8948) Form 8948 [27] Elections Elections [29] Tax Planning Tax Planning [30] Electronic Signature E-Sign [31] Copy name and address to clipboard Clipboard
Basic Information [40] Forms & Schedules [10] 1040 Line Input [11] Exit Return [41]	Tax Print Options [06] Print Complete Return Print Return [07] Preview Complete Return Preview Return [08] Form Print Form Print [24] Archive return to PDF file Archive Return [09] Print Setup/Defaults Print Setup Print file -- #1 Change Print Profile Tax Primary State [12] Primary state CA [13] Primary State Input State Input Tax Secondary States [14] Add [15] Access [16] Delete	Notes used on this return (hit F4 to view in detail) General Return Notes: EXPENSES LIST STILL PENDING

[*] MouseFree [+/-] Full Edit [/] Close [F12] Live Preview [Ctrl+Wheel] Zoom MouseFree Selection # OK [99 or /]

- **Diferentes Opciones**
 - Validacion errores
 - Ver, Imprimir, Guardar- pdf
 - Productos Bancarios
 - Adicion de estados
 - Informacion bancaria
 - E-file, Firma Electrónica
 - 1040X
 - Planeacion Impuestos

E-File – Producto Bancario

Refund Advantage Bank Application

Options: Preview Bank Appl, Bank Product Estimate, Print 7216 Consent Forms

Bank Refund Advantage Bank application Menu

[01] Bank Product Selection: RT Refund Transfer

Loan Type: N/A

[02] Disbursement Method: Check

Tax Prep Fee: 180.00

Bank product E-File Fee: .00

Transmitter Fee: 12.00

Service Bureau Fee: .00

[03] Taxpayer's Primary Phone: [Redacted]

[04] Phone Type: Home

[05] Use TP Primary Phone for Text Message Updates: ☐ Yes

[06] Taxpayer's Secondary Phone: [Redacted]

[07] Phone Type: Home

[08] Use TP Secondary Phone for Text Message Updates: ☐ Yes

Signature Confirmations

[13] Consent to Use form is signed? ☒ Yes

[14] Consent to Disclose form is Signed? ☒ Yes

[15] Bank Applications are signed? ☒ Yes

[16] Fees over \$400 is signed? ☐ Yes

Taxpayer Driver's License / ID Information

[17] Taxpayer Date of Birth: 11-29-1988

[18] Taxpayer ID Type: Drivers License

[19] Drivers License Number: H6952654

[20] Issuing State abbreviation: CA

[21] Issuing Country if Not State ID: [Redacted]

[22] Issue Date: 01-01-2020

[23] Expiration Date: 01-01-2025

[24] Preferred Language: English

[25] Primary Taxpayer is Active Military: ☐ Yes

[26] Taxpayer's E-mail Address: [Redacted]

[27] Use Taxpayer's Email for Notification? ☐ Yes

[28] Security Question: What is your Mother's Maiden Name?

[29] Security Question Answer: Ana

Spouse Driver's License / ID Information

[30] Spouse Date of Birth: [Redacted]

[31] Spouse ID Type: None

[32] Drivers License Number: [Redacted]

[33] Issuing State abbreviation: [Redacted]

[34] Issuing Country if Not State ID: [Redacted]

[35] Issue Date: [Redacted]

[36] Expiration Date: [Redacted]

[37] Spouse is Active Military? ☐ Yes

Physical Residential Address if DIFFERENT from 1040 (must NOT be PO Box)

[38] Street Address: [Redacted]

[39] City: [Redacted]

Print Bank Application

Create PDF of Bank Application

- Como seleccionar Bps.
- E-File firma (8879)
- Automatico # envío con fecha
- 8453 Attachments

Create E-File PDF's, Electronically Sign, A2A E-File, Transmit 4868

EFile E-File Information

[01] ERO: 1

[02] Print 8879: Number Of Copies 1, Print 8879, Preview 8879

[04] Print 8453: Print 8453, Preview 8453

[06] E-File Status: [Redacted]

Entity Status

Entity	Status
FED	Rejected
CA	Rejected
MS	No Status
IN	No Status
ME	No Status

[07] Bank Product Selection: No Bank Product

[08] Bank Product Application: Bank Application, Print 7216 Forms

1040 Direct Deposit of Refund

Name of financial institution: [Redacted]

Routing transit number: [Redacted]

Account number: [Redacted]

Account Type: [Redacted]

[09] Direct Deposit Information: Direct Deposit

8879 PIN Authorization Information

[12] Taxpayer PIN (5 Digit Numeric): 89735

[13] Spouse PIN (5 Digit Numeric): 29745

[14] PIN Signature Date: 02-20-2019

[15] Taxpayer Identity Protection PIN: [Redacted]

[16] Spouse Identity Protection PIN: [Redacted]

E-File E-File Settings and Defaults

[10] Imperfect Return Indicator: ☐ Yes

Default E-File status (#5 above) setting when 8879 is printed: ☐ Transmit, ☐ Pending

[11] Other RAL Type Setup: Other RAL Type Setup

E-File E-File Attachments to Form 8453

[17] Form 8283 page appraisal attached: ☐ Yes

[18] Form 8332 release of exemption attached: ☐ Yes

[19] Form 3468 historic structure certificate: ☐ Yes

[20] Form 3115 change in accounting method: ☐ Yes

Sugerencias

- ☐ Registrarse como cliente –Website (www.TaxwareSystems.com)
- ☐ Adicionar precios en el setup inicial
- ☐ Seleccionar las formas a imprimir
- ☐ Preguntas adicionales (Due diligencia)
- ☐ Familiarizarse vista previa (Sch A,B,C...)
- ☐ Programar Back Up (Data)
- ☐ Otras opciones Externas (archivo base datos-data)
- ☐ Crear folder soporte documentos y PDFs
- ☐ Mantener Notas – F4
- ☐ **Practicar, Practicar y preguntar...**

Entrenamiento y Videos

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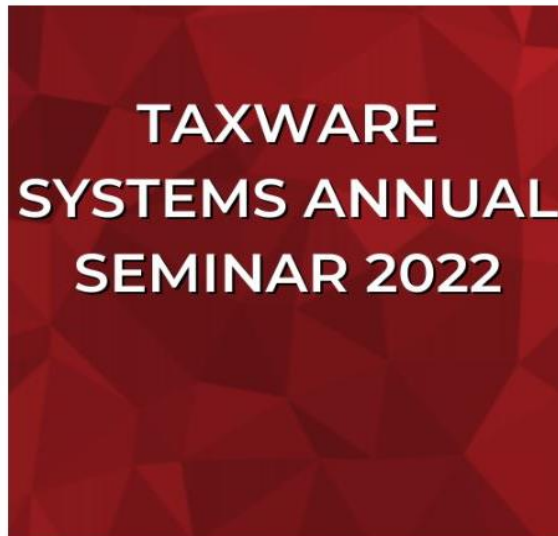
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TAXWARE ANNUAL SEMINAR 2022

December 13, 2022 / in Uncategorized / by Chris



Below you will find all the recordings, additional information as well as a list of the prize winners for each session. **This page will be updated with additional recordings and information over the week of the seminar.**

[Read more >](#)

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