

## RSVP Directions for using TaxWise Step-by-step Training

The RSVP TaxWise Training CD has limited functionality and should only be used for developing and strengthening your computer data entry skills. You might find it useful to **complete** and **print** Step-by-step Returns 1, 2 and 3 in this training program and Practice Return 1 on the "Training" page at the [http://home.earthlink.net/~tax\\_volunteer](http://home.earthlink.net/~tax_volunteer) web site on the Internet. Your printed returns can be offered to your e-filing Coordinator or Local Coordinator to help establish your qualifications to do e-filings.

### Important Requirements for Creating SSNs and EINs

- SSNs and EINs can begin with any 3 digits.
- For the last 6 digits of each SSN or EIN, **you must use your EFIN for example (265964).**

### Starting TaxWise

Most people find the "Short cuts" to be useful so you might want to print it before you start TaxWise Training. You can find it in TaxWise by Clicking "Help" and then selecting "Keyboard Shortcuts" and then print.

Start TaxWise by double clicking the TaxWise 2002 icon on your desktop or in your program list. Move your mouse to "Help" and select "TaxWise Training." Enlarge the "Welcome to TaxWise Training" window by clicking on the small square box in the upper right corner of the "Welcome to TaxWise Training" window.

Slowly move your mouse over the vertical bar separating the left and right windows. When your cursor becomes a double pointed horizontal arrow, hold down the left mouse button and drag the mouse to the right to enlarge the width of the left window.

Click on the plus sign next to "Practice Returns" in the left window then

Click on the plus sign next to "1040": then

Click on the plus sign next to "Beginner Returns" then

Click on the plus sign next to "Return 1" then

Click on "Objectives for Return1."

After reading the objectives, you can print out all of the steps for Practice Return 1 by clicking on the gray box titled "Practice Return 1" and or just click on "Next: Log in to TaxWise and start the first Return."

You will notice that the window on the left list where you are and how you got there. When you have read the information in the right window, you can perform those steps by moving your mouse to the "Windows Task Bar," usually located at the bottom of your monitor's screen, and clicking on "Tww02." You can use this method to switch back and forth between "Tww02" and "TaxWise Training Guide."

If you want to interrupt your training until another time, select "File" then "Exit TaxWise." Your work will automatically be saved. To return and continue your training, double click the TaxWise 2002 icon on your desktop, cancel connecting to the Internet (if requested), select "Training" (if not already selected) and then "OK" in the Login box. Click "OK" on the 1040 screen and then under the "File" menu select "Open Return List." Double click on the Practice Return SSN you wish to work on. Then go to the "Help" menu and select "TaxWise Training." As before adjust the windows then start clicking on the plus signs in the left window until you find where you left off. Click on that page and continue.