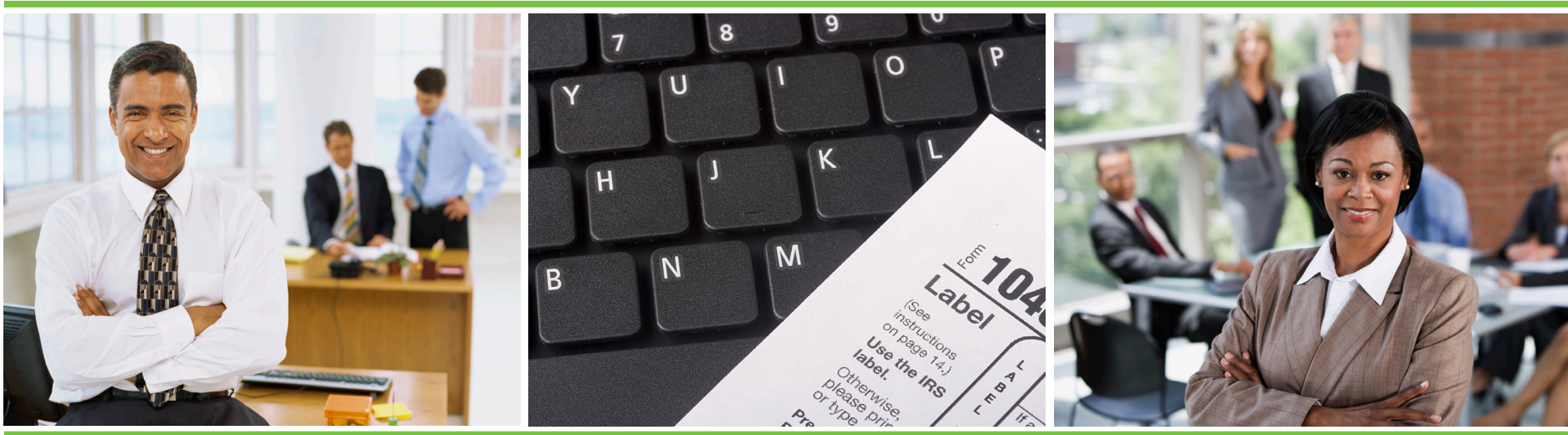


IRS Volunteer/TaxWise 2011 Tax Season Quick Reference Guide

Resources to help you this tax season





Software Issues

Operating System

IRS-Loaned Equipment – Contact the Enterprise Service Desk at 866-743-5748.

Partner-Owned Equipment – Contact your partner's IT or Tech Support department.

TaxWise

- ✓ Access program help by using the F1 key
- ✓ Access the TaxWise Knowledge Library at support.taxwise.com
- ✓ Use Chat to speak with a TaxWise representative by logging into the TaxWise Solution Center at support.taxwise.com and selecting the **Chat** link
- ✓ Contact TaxWise Customer Support by phone at 800-411-6391. Before you call:
 - * Know your EFIN and Client ID
 - * Write down the exact error message

Hardware Issues

IRS-Loaned Equipment – Contact the Enterprise Service Desk at 866-743-5748.

Partner-Owned Equipment – Contact your partner's IT or Tech Support department.

Troubleshooting TaxWise Online

Problems loading a page

- Go to **Internet Options**
- Delete Temporary Internet Files
- Delete Cookies
- Refresh or restart Internet Explorer

Problems viewing diagnostics

Check the resolution, located in the bottom right-hand corner of your screen, and set the resolution to 100 percent.

Staying informed during tax season

Tune into TaxWise TV (taxwisetv.com) each day at 9 a.m. Eastern during tax season for the latest news.



Preparer Training

Tax law and TaxWise software training is available via Link & Learn Taxes at www.irs.gov. Most TaxWise lessons last eight to 10 minutes. Download PDF guides accompanying each TaxWise lesson for future reference.

→ E-filing begins Tues., Jan. 17, 2012. The last day to submit timely e-filed returns is Tues., April 17, 2012. ←

Handling Rejects

Rejected returns should be handled within 48 hours. Check the following on any rejected return:

- Are the social security numbers entered correctly for the taxpayer and/or spouse?
- Does the EIN match the Company name?
- If the taxpayer has children, is the social security number correct for each child?

If you are unsure how to fix a rejected Federal return, contact the IRS e-file Help Desk for Rejected Returns at 866-255-0654.

If you are unsure how to fix a rejected state return, contact the state e-file Help Desk for Rejected Returns for the state in question.

TaxWise Volunteer Support: 800-411-6391

Accessing Prior Year returns

Tax Year	Website
2010	https://twonline.taxwise.com/10
2009	https://twonline.taxwise.com/09
2008	https://twonline.taxwise.com/08

Important Form Changes for 2011

Several important forms have changed for the 2011 tax season, including:

- Schedule C
- Schedule D
- 8949 – Capital Gains and Losses

Learn more at www.irs.gov.



Helpful Phone Numbers

IRS VITA/TCE Hotline (volunteers only)
800-829-8482

IRS e-file Help Desk
866-255-0654

IRS Forms & Publications
800-829-3676

IRS Taxpayer Advocate
877-777-4778

IRS Tax Help for the Hearing Impaired (TDD)
800-829-4059

Social Security Administration
800-772-1213

TaxWise Customer Support
800-411-6391



**Important 2011 tax season information at your fingertips.
Keep this IRS Volunteer/TaxWise 2011 Tax Season
Quick Reference Guide on your desk for use during tax season.**

TaxWise®

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"It's special people, like you, who take the time and effort necessary to help those in need. All of us in SPEC commend your efforts and appreciate the support you provide our VITA and TCE programs. Thank you."

*Michael Beebe, Director, Stakeholder Partnerships,
Education and Communication (SPEC) for the IRS*