

Link & Learn **As of 11/10/2009**

Practice Lab

Getting Started

Table of Contents

The Practice Lab Home Page	1
Help Center.....	3
Message Center.....	4
Creating Returns in Practice Lab Using the Interview Process	5
Accessing Help.....	5
Using the Contents Button.....	6
Using the Search Button.....	6
Completing the Interview	7
Completing the Interview Step by Step	9
Navigating the Tax Return.....	9
Understanding Color Coded Entries	10
Using Shortcut Keys.....	11
Understanding the Forms Tree.....	11
Adding and Linking to Forms.....	11
Using the Refund Monitor.....	13

FAQ

Q: The return information does not automatically update when I enter data.

A: To calculate and save you must select the SAVE button on the tool bar at the top of the screen. Due to the various internet connectivity speeds, the Practice Lab is utilizing the application mode that does not auto-refresh.

Q: Can I print the tax return?

A: No. The print function in the Practice Lab has been disabled since all the tax forms have not been released by the IRS. You can minimize the Practice Lab screen in order to view the tax return and the test at the same time. You can also utilize Alt+tab to toggle between the Practice Lab and the Link & Learn test.

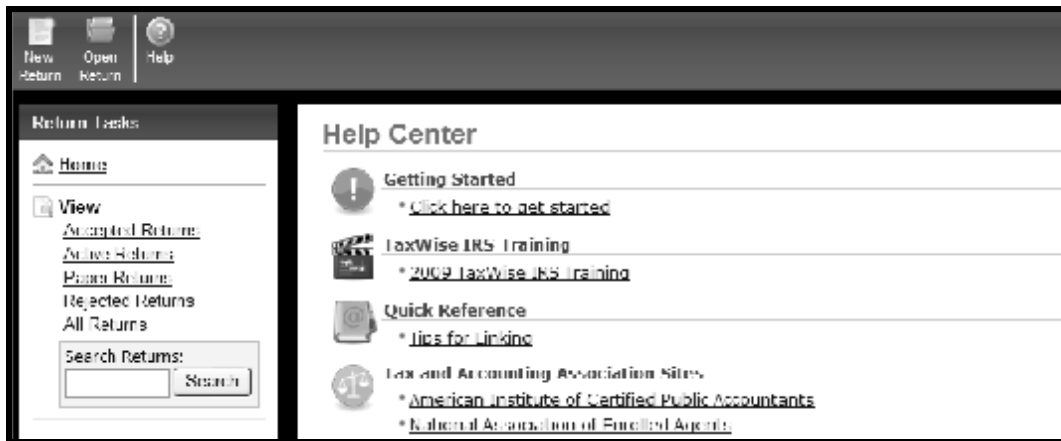
Q. The forms indicate that I should use function keys in some areas. How can I follow the on-screen instructions:

A. TaxWise Online and TaxWise Desktop share the same form engine and calc files. Since the majority of our users are still using the desktop application, the form backgrounds contain references to the desktop function keys.

On screen instructions	Practice Lab equivalent
F3	Ctrl+Spacebar
F8	Ctrl+Enter
F9	Select the link icon

The Practice Lab Home Page

The following illustration depicts the Practice Lab home page:



The following table describes the buttons on the home page while logged in as a user:

OPTION	DESCRIPTION
New Return	Allows you to create a new return.
Open Return	Allows you to open a return by SSN.
Help	Opens the help file for the Practice Lab.
Log Out	Logs you out of the Practice Lab.

The following table describes the links on the homepage:

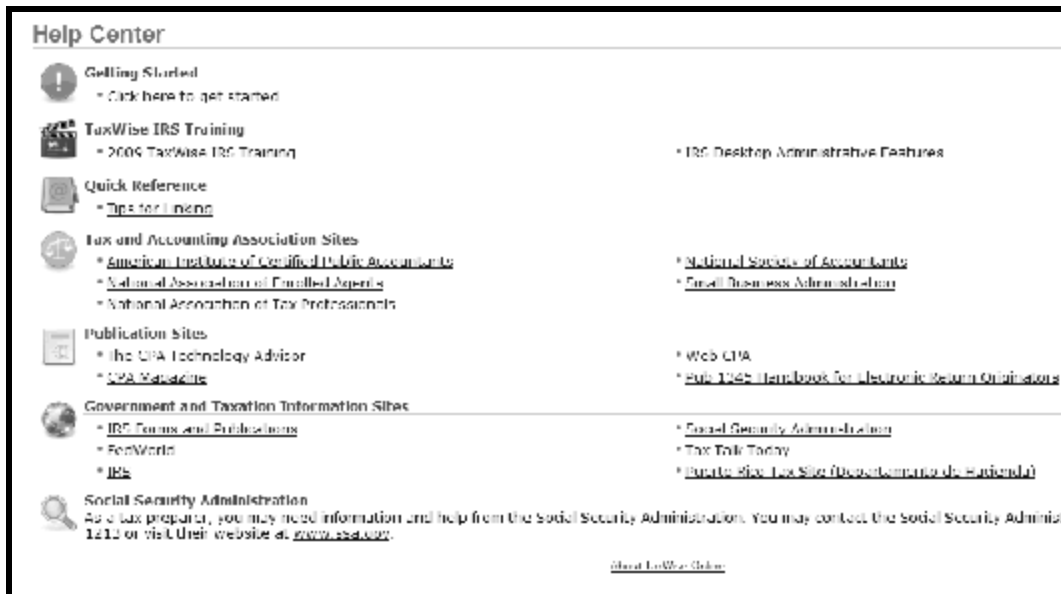
OPTION	DESCRIPTION
Accepted Returns	Not applicable for the Practice Lab
Active Returns	Displays all returns that have not been IRS accepted or rejected
Paper Returns	Displays all returns with the return type of Paper
Rejected Returns	Not applicable for the Practice Lab
All Returns	Displays a list of all returns for the user

Help Center

The Practice Lab home page contains links to web resources that are available for additional assistance. Included are links to **Tax and Accounting Association Sites**, **Government and Taxation Information Sites**, **Publication Sites**, **Quick Reference**, and the **Social Security Administration** website.

- 1 The TaxWise IRS Training section contains the pre-recorded lessons that can be used for end-user training.
- 1 The Quick Reference section is updated periodically with Step-by-Step instructions for new features added after the initial release of the application.

Click on a link and Internet Explorer displays the page in another window:



Message Center

The Message Center is a one-way communication center to the Practice Lab users. Each message is color-coded to represent levels of urgency.

- **Green** – normal. This is a broadcast message for all users. This type of message typically contains “how-to” messages.
- **Yellow** – warning. This is a broadcast message for all users. This type of message typically contains reminders about the weekly outage for server re-boots and information about Federal and state updates.
- **Red** – critical.

To see a message from the **Message Center**, use the following steps:

1. Click the message link in the **Message Center** dialog box.



A dialog box with the message and its category will be displayed.

2. After reading the message, click **Close** to return to the home page.

Creating Returns in Practice Lab

Using the Interview Process

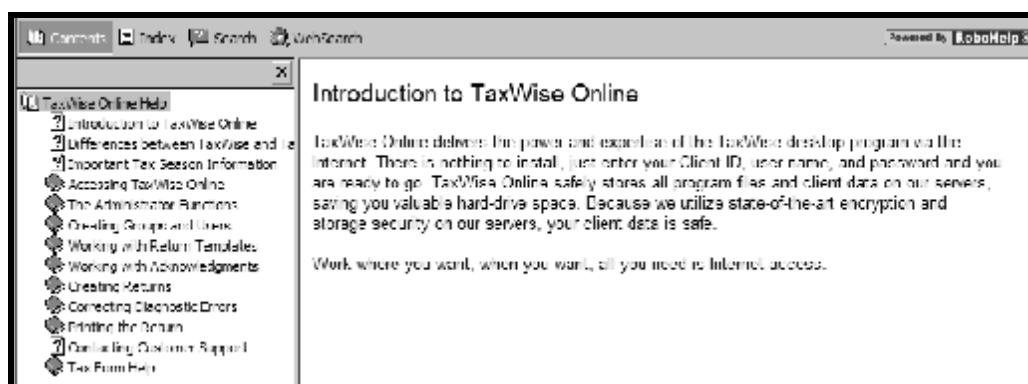
In this unit, you will learn how to use the Practice Lab Help, complete the Interview, navigate the tax return, understand the Forms Tree, add and link to forms, and use the Refund Monitor.

The program provides you with a series of interview questions to ask your client. Then it loads forms based on the answers to these interview questions. You also have the opportunity to load additional forms.

Accessing Help

To get Help in the Practice Lab, click the **Help** button  from the home page or from within a tax return.

The Practice Lab Help opens in a separate browser window:



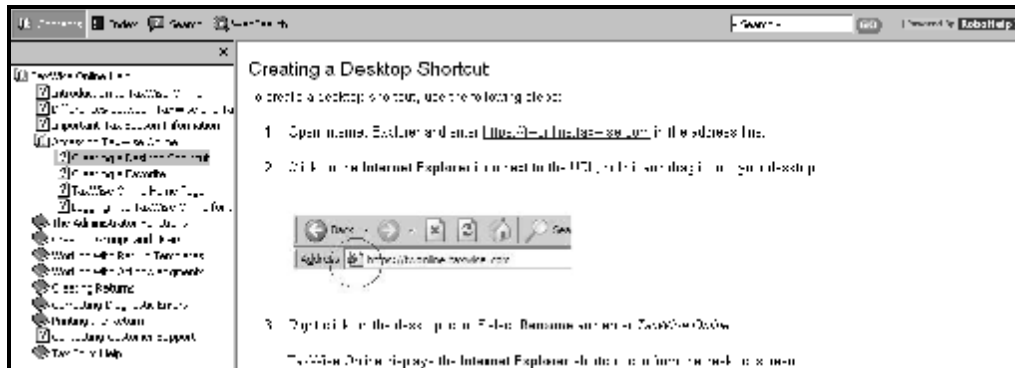
The Help toolbar consists of three options:

- Contents
- Index
- Search

Using the Contents Button

To use the **Contents** button, click the closed book icon to see the subjects covered in that book.

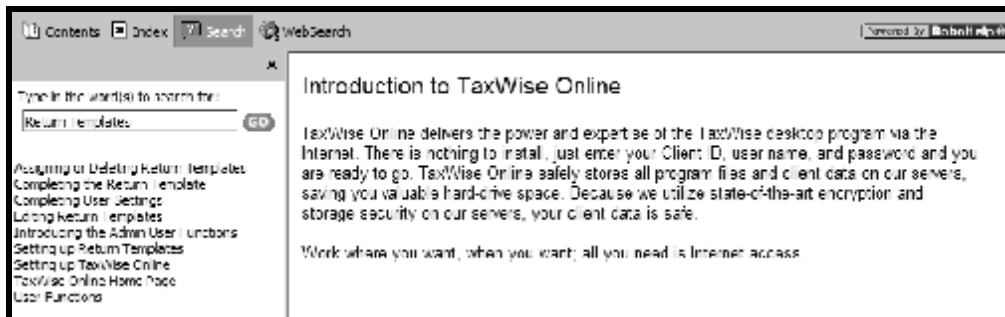
To display information for a particular topic, click the question mark icon to the left of the topic. Note that when you click the question mark icon, the Practice Lab Help displays the information for that topic in the right pane, as illustrated below:



Using the Search Button

If you want the Practice Lab Help to search all the text in the help file, you must use the **Search** button. Once you click the **Search** button, you can enter the keyword for which you want to search. The search returns a list of every possible match in the help file.

To view a topic in the list that the Practice Lab Help displays simply double-click that topic, and the Practice Lab Help displays the information in the right pane, as illustrated below:



Completing the Interview

The program allows you to create a return based on a series of interview questions.

To start a return using the interview process, use the following steps:

1. Click the **New Return** button.

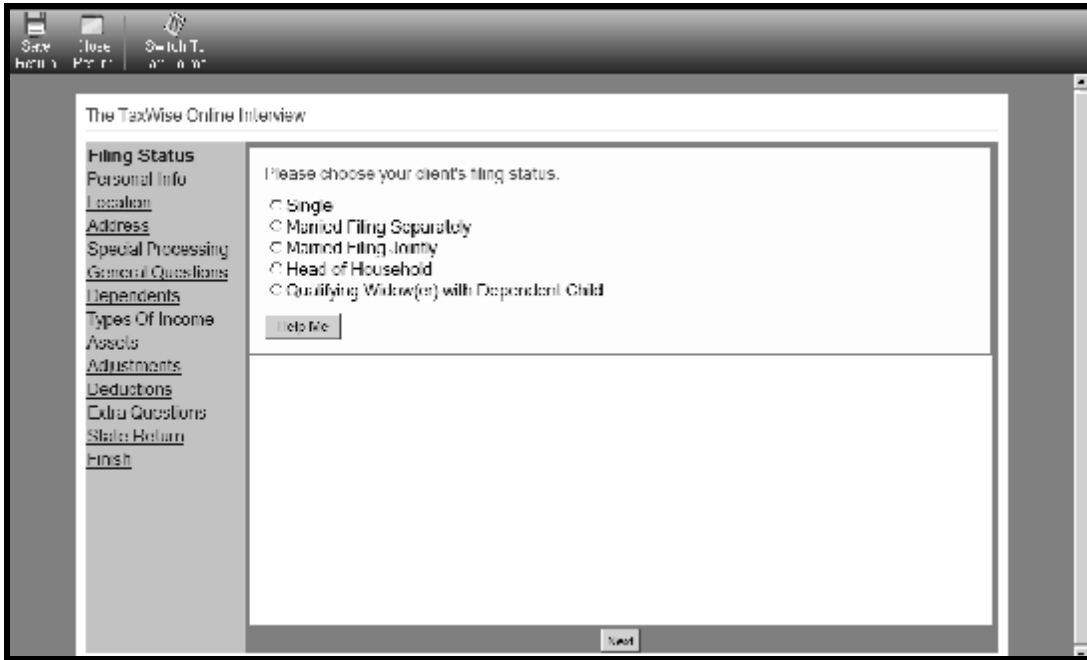
The **Create New Return** dialog box will be displayed:



101-40-2678

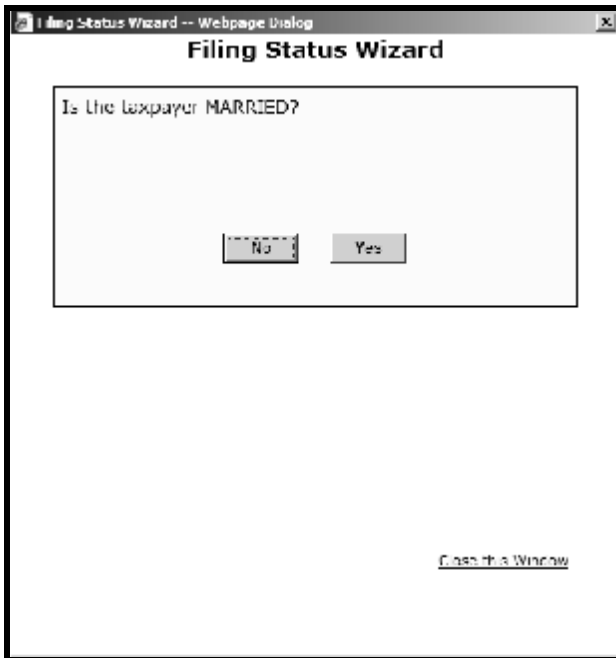
2. Enter the taxpayer's SSN in the **Social Security Number** box and press the **Tab** key.
- 1 **Note:** You must use your User ID as the last 6 digits of the SSN
3. Re-enter the taxpayer's SSN in the **Confirm Social Security Number** box.
4. Click **Go to Interview**.

The Filing Status page will be displayed:



5. Select the appropriate Filing Status.

If you are not sure which Filing Status applies click on the **Help Me** button to use the Filing Status Wizard.



6. Once you have determined and selected the Filing Status click on the link to **Close this Window** and then click the **Next** button.

Completing the Interview Step by Step

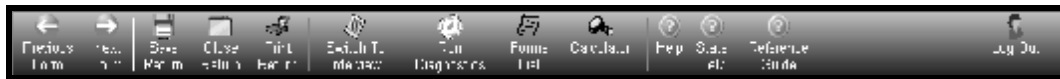
- 1 You can go directly to the tax forms by clicking the **Switch to Tax Forms** button at any point during the interview process.
- 1 The demographic information in the interview is dependent upon the filing status of the taxpayer.
- 1 Click Previous to go back one page.

To complete the interview, use the following steps:

- 1 Complete all interview questions as they pertain to the taxpayer and spouse, clicking Next to go to the next page.
- 1 Enter the ZIP Code and press **tab** or **enter** and the program will populate the city and state.
 - 2 To enter dependents, you must click the **Edit** button next to dependent fields.
- 1 You can only enter four dependents during the interview process. If you have more than four, you must enter the remaining dependents on the appropriate form in the return forms view.
 - 3 The forms that the program pre-loads are dependent upon the income and deductions you select.

Navigating the Tax Return

- 1 Do not use Internet Explorer to navigate tax returns. Instead, use the Practice Lab toolbar. To minimize the Internet Explorer toolbar, press **F11**.



The following table describes the buttons used when completing a return from the tax forms:

OPTION	DESCRIPTION
Previous Form	Opens the previous form in the Forms Tree.
Next Form	Opens the next form in the Forms Tree.
Save Return	Saves the return and performs calculations.
Close Return	Closes the active tax return.
Print Return	Prints the active tax return.
Switch to Interview	Switches from forms-based method to interview method.
Forms List	Displays the list of available forms to be added to the active

OPTION	DESCRIPTION
	tax return.
Calculator	Combines multiple figures to be entered into a single field
Help	Opens the Practice Lab Help file.
Reference Guide	Opens the Practice Lab User Guide
Log Out	Logs the user out of the Practice Lab.

Understanding Color Coded Entries

The program uses color coding to identify types of entries on forms.

The following table describes the color coding in the Practice Lab:

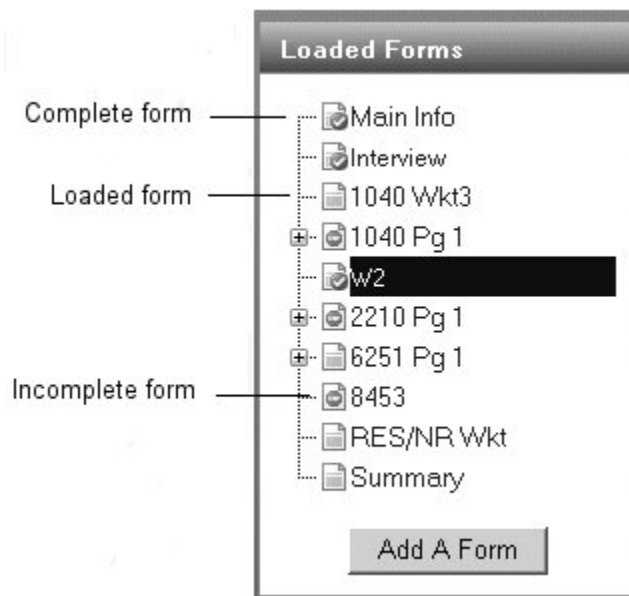
COMMAND	DESCRIPTION
Yellow	These entries are calculated by the program from information on supporting forms. You cannot type data directly into a calculated entry or delete the calculated value unless you override the calculation.
Green	These entries are non-calculated, and you can type data directly into them.
Red	These entries are required for e-filing. The program marks certain entries as required to assist you with preparing a complete and accurate tax return. You must complete entries for the program to check off the form as "complete" on the list of forms in the Tree. When you type data in a required entry, the text displays in green and converts the entry to a non-calculated entry when you refresh the return.
Blue	These entries are calculated entries that have been overridden by the preparer.

Using Shortcut Keys

COMMAND	DESCRIPTION
F11	Minimizes the Internet Explorer toolbar.
Ctrl+ Enter	Overrides an entry.
Ctrl+ Spacebar	Estimates and un-estimates an entry.

Understanding the Forms Tree

The Forms Tree to the left of the return shows all the forms that are currently loaded for the active return. The icons to the left of the form indicate whether a form has been loaded, is complete, or needs to be completed.



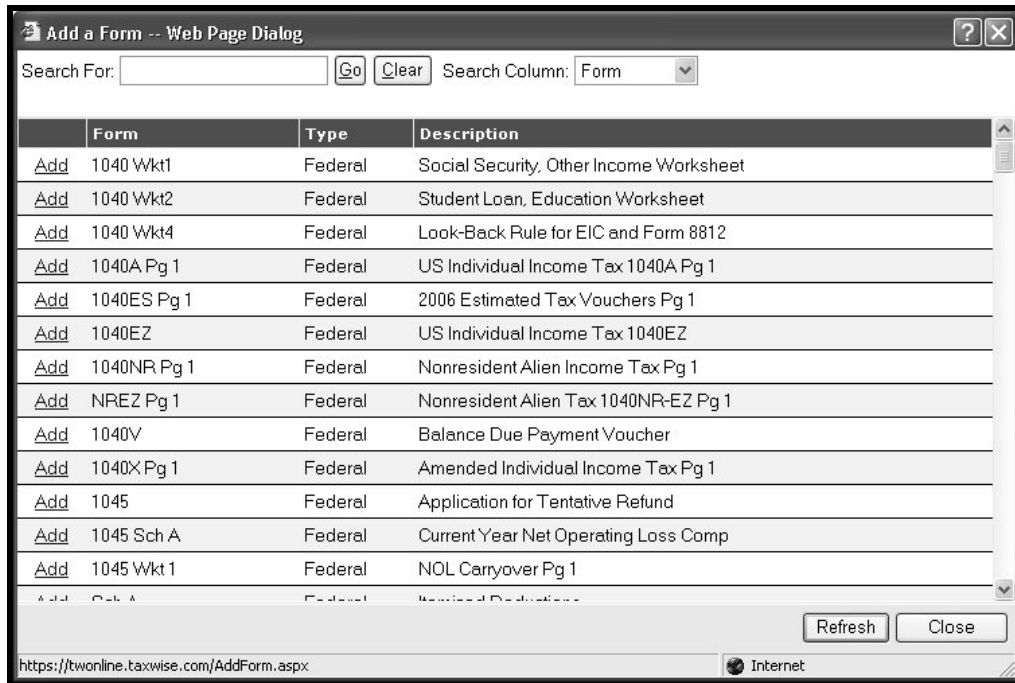
Adding and Linking to Forms

Adding a Form

To add a form to an open return, use the following steps:

- Do one of the following:
 - Click the **Add A Form** button at the bottom of the Loaded Forms Tree.
 - Click the **Forms List** button in the toolbar.

The **Add a Form** dialog box will be displayed:



2. Do one of the following:

- Choose the search criteria from the **Search Column** drop-down list. Enter the form name, form number or a brief description in the **Search For** box and click **Go**.
- Scroll through the forms list.

3. Click the **Add** link to load the desired form.

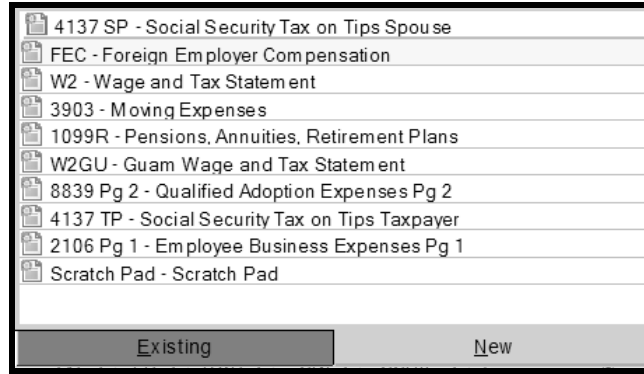
The program opens the form and displays it in the **Loaded Forms Tree**.

Linking to a Form

The **Link** icon  appears when an active entry can be linked to another form.

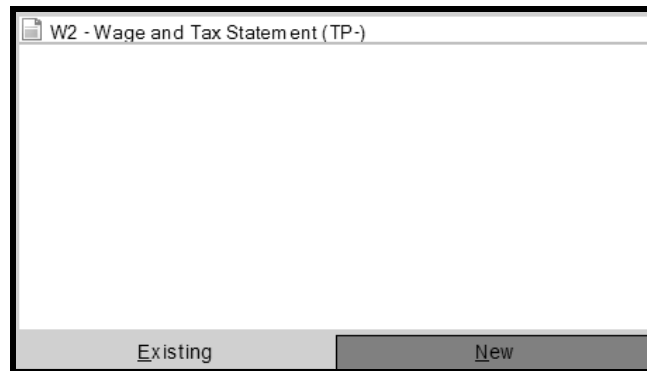
To link to another form using the **Link** icon, use the following steps:

1. Click the **Link** icon.
2. Do one of the following:
 - Click the **New** tab (the lighter tab is the active tab) and click the form you want.



1 The illustration above depicts the **New** tab when you click the **Link** button from Form 1040, line 7.

- 1 Click the desired form to add.
 - Click the **Existing** tab.



1 The illustration above depicts the **Existing** tab when you click the **Link** button from Form 1040, line 7.

Using the Refund Monitor

The Refund Monitor, shown to the left of your return displays the current AGI and the refund or balance due for the active return.



