

TaxWise Interview

This feature allows you or your staff to quickly interview clients and enter basic information to

- Determine whether a client qualifies for a refund.
- Provide incentives for new clients or price shoppers by offering free tax interviews.
- Answer telephone queries from prospective clients who want estimates of their refunds

Using Interview

You can start a return in Interview mode, or toggle to the Interview at any point while preparing a return.

To start a return in Interview mode:

1. Click **Start a New Return** on the Tasks You Do Most Often screen. Enter a Social Security Number and re-enter to validate. Select the **Start Return in Interview Mode** checkbox, and click **OK**.

Enter Social Security Number

SSN: [*****]

Re-key SSN: [_ - _]
for validation

File name: [*****]

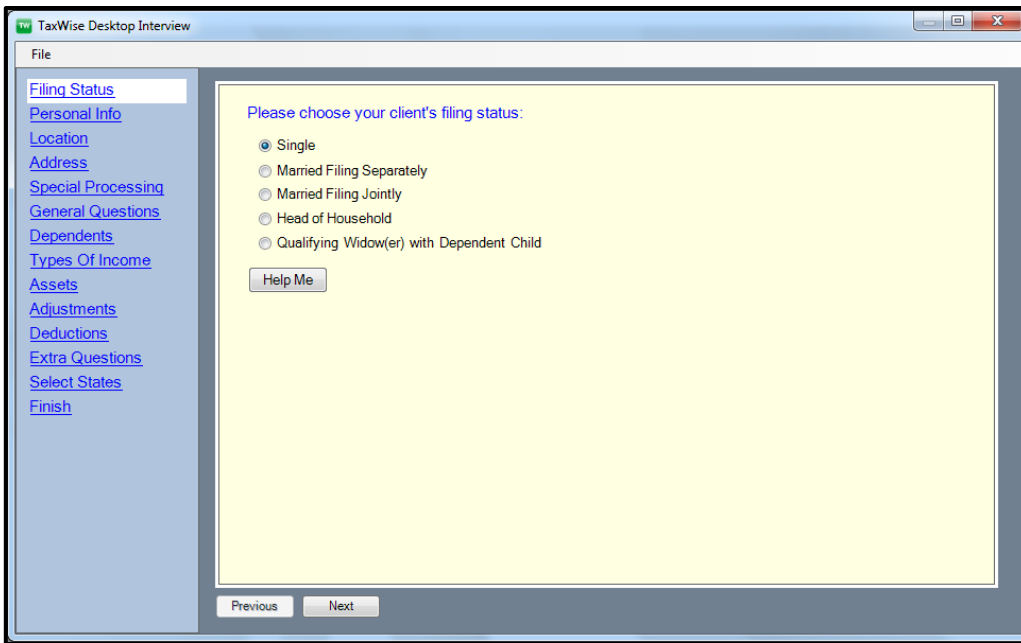
Use SSN to name file

Prompt if Return not Carried Forward

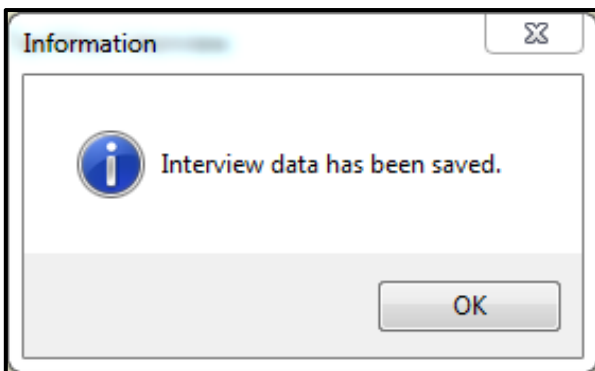
Start Return in Interview Mode

OK Cancel Help

2. TaxWise opens the Interview:



3. Answer each question on the screen by selecting the radio buttons or typing information as necessary.
4. Click **Next**, or use the links on the left to navigate the sections.
5. When you complete the interview, click **Finish** on the final screen.
6. TaxWise saves the data for you to use later. Click **OK**.



Transferring Interview Data to a Return

Once you complete an interview, the data is stored in your database. When you are ready to complete the return:

1. Click **Start a New Return** on the Tasks You Do Most Often screen.
2. Type the **Social Security Number** in the first field. TaxWise recognizes that data exists for the Social Security Number, and asks if you would like to load that data. Click **Yes**.

3. TaxWise opens the return, displaying all data you previously entered in the Interview.

US Main Information Sheet

This return can be filed on Form 1040EZ.

Check form you are using: 1040 1040A 1040EZ 1040PR 1040NR 1040NREZ

Check one: Spanish forms on the screen and printed. Spanish forms printed only.

Sal.	Your first name	Initial	Last name	Suffix	Your SSN
<input type="text"/>	<u>John</u>	<u>-</u>	<u>Doe</u>	<input type="text"/>	<input type="text"/>

If filing a **JOINT** return, enter your spouse's

Sal.	First name	Initial	Last name, if different from yours	Spouse's SSN
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Complete any remaining data for the return.

Switching Between the Interview and Tax Return

TaxWise 2016 allows you to switch between the Interview and the client's tax return. At any time while preparing a return, you can click Interview on the toolbar to open the Interview screen and input data.

