

## Printing

TaxWise allows you to print returns, reports and labels, either to paper or to PDF. Before you print returns, set your printing preferences in Setup Assistant and create print packets to save time when printing returns.

**i** For more information about setting printing preferences, review the *Setup Assistant* lesson on the TaxWise Education Library.

### Print Packets

Print packets are sets of forms you can edit to include only the forms you want to print with certain copies of the return. The default setting prints one copy of each completed form in the return, including IRS forms, schedules, worksheets and statements.

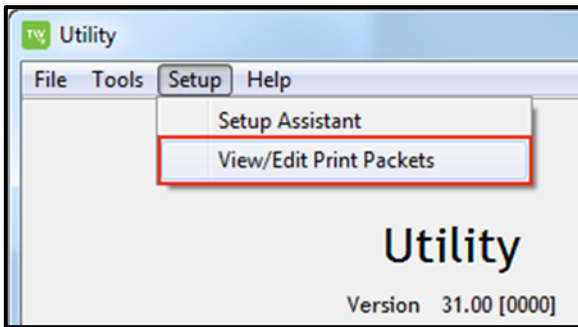
Each return type includes multiple print packets. Review the chart below for the available packets:

Print Packet	Contains	Use
<b>Signature Pages</b>	Main tax forms, disclosure forms, e-file authorization forms	Prints the pages the taxpayer needs to sign
<b>File Copy</b>	All forms in the return	Prints a copy of the return for your records
<b>Taxpayer Federal Copy</b>	All federal forms and schedules	Prints a copy of the federal return for the taxpayer's records
<b>Taxpayer State Copy</b>	All state forms and schedules	Prints a copy of the state return for the taxpayer's records
<b>Federal Copy to be Mailed</b>	All federal forms and schedules the IRS requires to be filed with the return	Prints a copy of the federal return for the taxpayer to mail

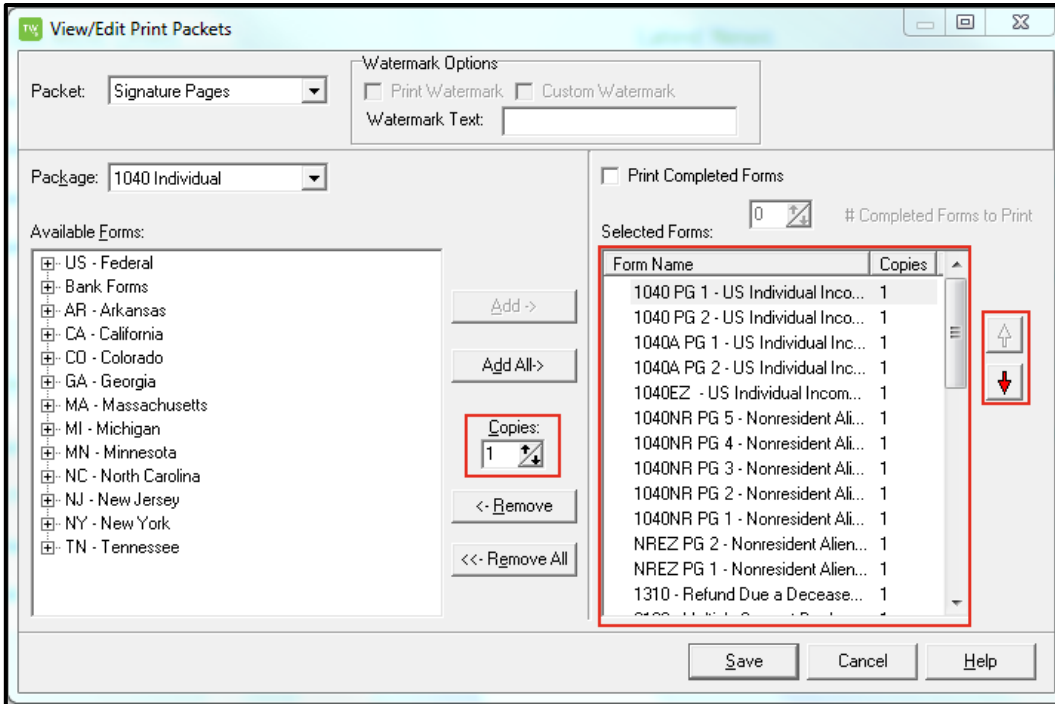
Print Packet	Contains	Use
<b>State Copy to be Mailed</b>	All state forms and schedules the state requires to be filed with the return	Prints a copy of the state return for the taxpayer to mail
<b>Organizer Packet</b>	All completed forms in the return	Prints a copy of all forms for the taxpayer to use to organize next year's tax information

To edit these packets:

1. Log in as admin.
2. On the **Tools** menu, click **Utilities/Setup Assistant**.
3. On the **Setup** menu, click **View/Edit Print Packets**.

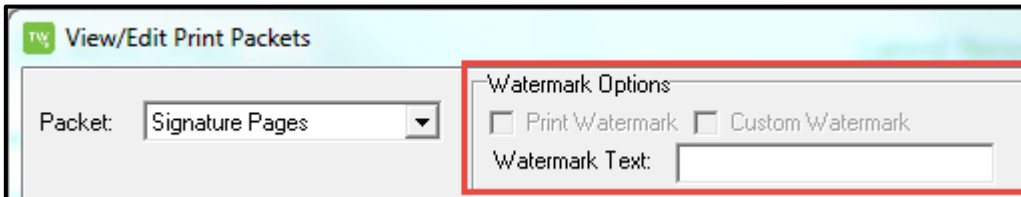


4. In the View/Edit Print Packets window, you can add or remove forms from your Selected Forms list, increase the number of copies of specific forms, and use the arrows to the right to rearrange the order in which the forms print.



For some copies, you can add a watermark. To do this:

1. Check the box to print the watermark.
2. If you want to create your own watermark text, select **Custom Watermark**.



**i** Follow these steps for each packet and each return type you print.