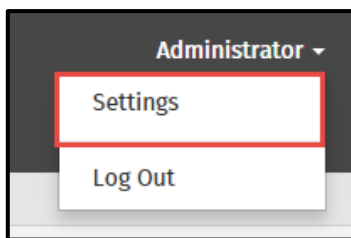


## Manage Users

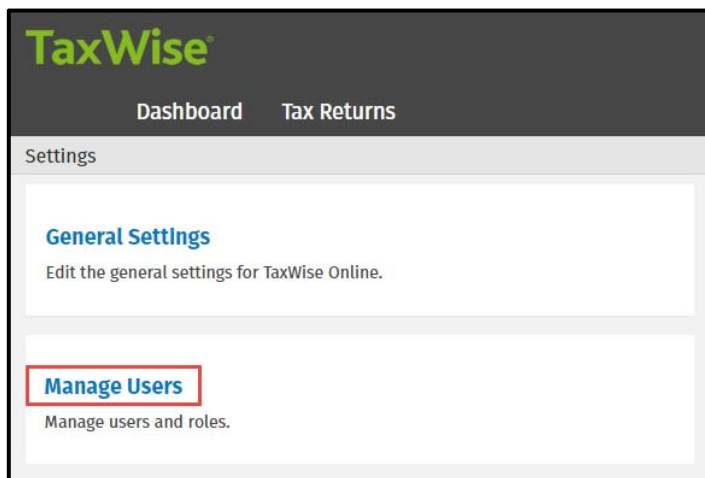
As the admin user, you have the ability to create user names, as well as to set roles to determine the level of access each user has in TaxWise Online.

To create a new user:

1. Log in as the admin user.
2. From the drop-down menu, click **Settings**.



3. Click **Manage Users**.



4. TaxWise Online displays the User Manager page. Click **Create a New User**.

**User Manager**

[Create a New User](#)
[Add/Change Admin Message](#)
[Show Inactive Users](#)
[Enable Remote Assistance](#)
[Restrict IP Addresses](#)
[Logged In Users](#)

[Mark all users active](#)
[Mark all users inactive](#)

Reset Password	Edit	UserName	FirstName	M.I.	Last Name	Assigned Roles
<a href="#">Reset</a>	<a href="#">Edit</a>	Admin	Administrator			Administrator, ReturnPrinter
<a href="#">Reset</a>	<a href="#">Edit</a>	AdrienneF	Adrienne		Fermoyle	ReturnPreparer
<a href="#">Reset</a>	<a href="#">Edit</a>	Alex	Alejandro		Callejas	ReturnPreparer
<a href="#">Reset</a>	<a href="#">Edit</a>	Alexis	Alexis		Davis	ReturnPreparer
<a href="#">Reset</a>	<a href="#">Edit</a>	AMcKoy	Adrain	K	McKoy	ReturnPreparer
<a href="#">Reset</a>	<a href="#">Edit</a>	Ana	Ana		Eloy	ReturnPreparer
<a href="#">Reset</a>	<a href="#">Edit</a>	AnaR	Ana		Rios	ReturnPreparer

5. TaxWise Online displays the Create User page. Complete the fields, including assigning a role for the user. See the table below for an explanation of each role.

**Create User**

Purchased Licenses: 20  
 Assigned Licenses: 0  
 Unassigned Licenses: 20

User Name:   
 Real Name:    
 Email Address:   
 Is Active User:

Assign Roles

Possible Roles	Assigned Roles
Interviewer SuperUser TemplateManager Administrator Reviewer EfileManager LicensedUser CheckPrinter ExportGrid InterviewProcessor ReturnPrinter	ReturnPreparer

Role	Description
Interviewer	This role has access to the Dashboard view and tax returns, can create a new return (in Interview Mode only), view the Return Query, and access his or her own user settings.
SuperUser	This role has access to the Dashboard view and tax returns,

can create a new return, view the Return Query, print and move returns and access his or her own user settings. This user can also submit e-files, view acknowledgements, print e-file rejects, and access reports.

#### TemplateManager

This role can view the Dashboard, access his/her own user settings, and can create return templates.

#### Administrator

This role has access to all features of the program, for his/her own user settings, as well as all other users.

#### Reviewer

This role can view the Dashboard, view all other users' returns, can move returns, and create new returns. This role can also print reject details, view acknowledgements for all returns, and can access his or her own user settings.

#### EfileManager

This role can view the Dashboard, access his or her own user settings, and submit e-files for all users.

#### LicensedUser

This role **must** be assigned to any user, along with other roles, for that user to be able to log in.

#### CheckPrinter

This role must be assigned along with another role. This role allows the user to print refund checks for taxpayers.

#### ExportGrid

This role must be assigned along with another role. This role allows the user to export the return list.

## InterviewProcessor

This role must be assigned along with another role. This role allows the user to import interviews from InterviewPLUS Online.

## ReturnPrinter

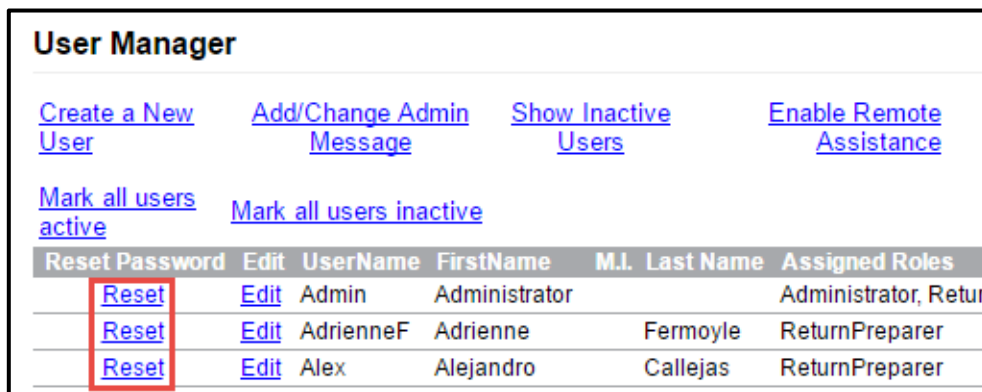
This role must be assigned along with another role. This role allows the user to print returns for any user.

6. Click **Save**.

- i** You can assign as many roles as needed to a user, but all users must include the **LicensedUser** role in order to log in.
- i** When you create a new user, the password the first time is the same as the user name. You will be prompted to create a unique password at that time.

## Reset Passwords

After 3 failed login attempts, TaxWise Online locks the user account. The admin user can reset the password for any other user by clicking the Reset link in User Manager.



**User Manager**

[Create a New User](#)   [Add/Change Admin Message](#)   [Show Inactive Users](#)   [Enable Remote Assistance](#)

[Mark all users active](#)   [Mark all users inactive](#)

Reset Password	Edit	UserName	FirstName	M.I.	Last Name	Assigned Roles
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<a href="#">Reset</a>	<a href="#">Edit</a>	AdrienneF	Adrienne		Fermoyle	ReturnPreparer
<a href="#">Reset</a>	<a href="#">Edit</a>	Alex	Alejandro		Callejas	ReturnPreparer

If the admin user, or any other user, forgets his/her password prior to failed login attempts:

1. Click the link provided on the login screen.

## Client Login

Please login to your account by completing the form below

Client ID

Username

Password

Remember Me

Warning:  
Three unsuccessful login attempts  
will lock your account.

Forgot your password? Click [here](#)

2. Enter your **Client ID** and **Username**, and click **Next**.

### Reset Password

Client ID

Username

3. Answer the security question you set up when you created your password, and click **Next**.

### Security Question

What is your favorite color?

4. TaxWise Online allows you to create a new password.