

## 2012 AARP New Volunteer

Attached above are several documents which you should print out for immediate use and future reference. The purpose of this part of the exercise is to provide you with information that is unique to you, that you will need and use frequently from now through the whole training program and the operational tax filing season.

By now you should have viewed the first eight videos at

<http://ty2011.taxprep4free/training/familiarization>

as previously instructed and should have some familiarity with what TaxWise data entry screens look like. (**If you haven't, get cracking.**)

The first document, in MSWord format, is your personal 'Cheat Sheet' which gives names and contact information for your personal training 'Coach' whom you may call or e-mail for help at any stage along the way – right away, if you need it just being able to Log On to and gain access to the TaxWise On line training tax prep program. It also contains the internet address of the TWO training program:

<https://twonline.taxwise.com/training11>

which is the same for everybody in the country; the 'Client ID' - the seven digit number which is unique to the Atlantic County AARP TCE site in English Creek, and **your** personal unique 'User Name' (STUDENT **xx**) all of which (plus a password) you will need every single time you need to open the TaxWise program from now until the filing season opens. At that time, once you start doing real returns some or all of these will change, depending on which of our locations you work at. The procedures for log on however, will be the same forever.

The last line on your 'cheat sheet' gives the address for the TaxWise Familiarization instructional and practice exercises that you will be using in the next phase of pre-classroom training. It is about to be repopulated with updated material. We will direct you to it in a few days. For the moment, **DO NOT access** this site but just follow the log on instructions referred to just below.

The second document, in Adobe Reader (.pdf) format contains simple, illustrated, instructions for logging on for the first time to the TWO training (and later, operational) website. We suggest you go on line with Internet Explorer (NO other browser will work) follow the step by step directions to do this at your earliest convenience. Do not try to start any tax returns, but practice logging on and off from time to time to get facile at it. **N.B.** After your 'first time login' (using your username for both user name AND password) you will thereafter log on with the

same Client ID, your User Name (STUDENTxx) and the new password that you created during first time login. Oddly enough, this very login process may be the single biggest pain in the neck you will encounter all year.

An important tip to stay out of trouble in Log On is to first set set the ‘Caps Lock’ key on your keyboard (Num Lock should always be on – there are lights somewhere on your keyboard that indicate these ). Thereafter do everything in capital letters, passwords and all. There is no real use for lower case in this business. (This first time log in document is also available as a video on the Familiarization web page that you have been using – we trust – up to now.)

The third document, also .pdf, contains instructions for recovery from failure to log on – you only get two free tries, the third failure locks you out. Basically it starts with doing the “Log On For The First Time” routine all over again and being required to make up a new password. New passwords cannot be IDENTICAL to any of your previously used passwords. You will be told to change yours every ninety days regardless, and it’s always done the same way. (Tip: You really only need to change one character to meet the ‘not previously used’ test.)

A simple tip to keep from getting locked out is first, if your login is rejected (red print appears telling you your username or password doesn’t pass) check that the Client ID is correct, check that the Caps Lock is set, check that your user ID is correct and try the password again. If it still fails you can avoid lockout by closing Internet Explorer, reopen it, access the TWO login page again (you should make it a ‘favorite’ – I put it on the ‘favorites bar’) and try again. Taxwise has no way of knowing it’s you again and you get two more free cracks at logon. If all else fails, call your coach.

Within a few days at most you will receive additional new instructions starting with a new internet address that will contain all of the familiarization materials INCLUDING the practice returns materials which have been improved and updated for compatibility with the tax\_year2011 TaxWise program that you will be using to do them. Instructions will also include COMPLETE information on exactly what to do and how to do it.

*Bon chance!*

Don