

Tax Wise Shortcut Keys & Tips

- ✓ With key combinations, HOLD DOWN the first key, TAP the second key)
- ✓ Make sure that when you are typing in TaxWise to use ALL CAPS
- ✓ Work to enter all documents that taxpayer presents to you
- ✓ Work to eliminate all Exclamation points and red fields, using F3 to estimate if necessary

TAB	Advance to the next field when entering data
SHIFT + TAB	Return to the previous field
F3	Estimate – change a Red field to Yellow
F5	Calculator
F8	Override – allow editing on an Estimated Field
F9	Link – allow you to create additional forms from the related line such as W-2 forms from Line 7, 8863 – Education Credits from Line 49, etc.
CTRL + F10	Add Form/Display List – allows you to search for a specific form by Form #
CTRL + D	Run Return Diagnostics – will check to see if it's ready to be filed and sent NOT if the return is prepared correctly. Make sure you get a Quality Review!
CTRL + X	Cut
CTRL + C	Copy
CTRL + V	Paste
ALT + TAB	Switch between applications, such as Training Materials and TaxWise screen Hold down ALT and tap TAB to switch between multiple applications
RIGHT CLICK	Will typically give you a menu of options to Link, Estimate, Override, Copy forms from the Forms Tree