

TaxWise Online Report Descriptions

Please note that in order to ensure accuracy on your reports, you should always run diagnostics and/or print your returns before running your reports.

1040 X Report

The 1040 X report shows returns containing 1040X with the status complete.

This report contains the following columns:

RETURN_ID – Primary identifier that allows you to merge multiple reports together

EFIN – EFIN that prepared the return

FIRST_NAME – Primary taxpayer's first name

LAST_NAME – Primary taxpayer's last name

TIN_Last_4 – last 4 characters of the primary taxpayer's Social Security number

Outstanding Rejects Report

This report contains information about all returns that are in a current rejected state.

This report contains the following columns:

RETURN_ID – Primary identifier that allows you to merge multiple reports together

EFIN – EFIN that prepared the return

USER_NAME – User name that created the return

TIN – Masked social security number, last 4 digits are displayed

LAST_NAME – Last name of the primary taxpayer

RETURN_STAGE – Return stage of the return

ACK_TYPE – Federal or State

AGENCY_ID – US or applicable state abbreviations

REJECTED – Last date return was rejected

REJECT_NUMBER – The reject rule number(s)

REJECT_CONDITION – The reject text correlating to the reject rule number

REJECT_VALUE – Value in the field that caused the reject

TWO Daily Statistics

This report shows totals for daily activity.

This report contains the following columns:

DATE – Date of activity (return created, return acknowledged, etc.)

RETURN_TYPE – Efile, Paper, etc.

CREATED_FEDERAL_RETURNS – Total number of Federal returns created

CREATED_STATE_RETURNS – Total number of state returns created

PREP_FEES – Total amount of prep fees for created returns

FED_REFUNDS – Total amount of Federal refunds for created returns

FED_BALANCE_DUE – Total amount of Federal balance due for created returns

STATE_REFUNDS – Total amount of state refunds for created returns

STATE_BALANCE_DUE – Total amount of state balance due for created returns

CREATED_FED_EFILES – Total number of Federal efiles created

CREATED_STATE_EFILES – Total number of state efiles created

ACCEPTED – Total number of accepted Federal and state returns

REJECTED – Total number of rejected Federal and state returns

COUNT_1040 – Total number of returns using Form 1040

COUNT_1040NR – Total number of returns using Form 1040NR

COUNT_1040NREZ – Total number of returns using Form 1040NREZ

COUNT_1040PR – Total number of returns using Form 1040PR

PAPER – Total number of returns filing as paper

CLIENT_ID – Client ID for the returns created

EFIN – EFIN for the returns created

TWO Returns Created by Date and Username

This report shows the number of returns created on a particular day by each user.

This report contains the following columns:

DATE_CREATED – Date return was created

USER_NAME – User name that created the return

EFILE – Count of return marked as efile

PAPER – Count of return marked as paper

OTHER – Count of returns not marked as any other return types

Bank Product – Count of returns marked as bank product

TWO State Return Detail

This report shows information about state returns including refund or balance due amounts and return type.

This report contains the following columns:

RETURN_ID – Primary identifier that allows you to merge multiple reports together

EFIN – EFIN that created the return

LAST_NAME – Primary taxpayer's last name

FIRST_NAME – Primary taxpayer's last name

SSN – Masked social security number, last 4 digits are displayed

STATE – Two digit state abbreviation

RETURN_TYPE – Bank, Paper, Efile

EFILE_STATUS – Current Efile status of the return (Created, Accepted, Rejected, None)

STATEBALANCEDUE – Amount of balance due on state return

STATEREFUND – Amount of refund on state return

IS_LINKED – True or False to indicate if Federal and state returns are linked

TWO Statistical Data (Details)

This report contains return information including filing status, amounts of AGI, CTC, EIC, etc.

This report contains the following columns:

RETURN_ID – Primary identifier that allows you to merge multiple reports together

LAST_NAME – Last name of the primary taxpayer

FIRST_NAME – First name of the primary taxpayer

USER_NAME – User name that created the return

EFILE_CREATED – Date efile was created

FILING_STATUS – Single, MFJ, HOH, MFS, QW

NUMBER_OF_DEPENDENTS – Number of dependents on the return

AGI – Adjusted Gross Income shown on return (Line 37)

CHILD_CARE_CREDIT – Amount of child care credit shown on return (Form 2441)

CHILD_TAX_CREDIT – Amount of child tax credit shown on return (1040 Wkt 3)

ELDERLY_CREDIT – Amount of elderly credit shown on return (Sch R)

TAX – Amount of tax before credits shown on return (Line 44)

EIC – Amount of EIC shown on return (Sch EIC)

EDUCATION_CREDIT – Amount of education credit shown on return (Form 8863)

UNEMPLOYMENT – Amount of unemployment shown on return (Line 19)

REFUND – Amount of refund or balance due shown on return

RETURN_TYPE – Paper, Efile, Bank Product

DIRECT_DEPOSIT – T or F to indicate whether direct deposit was used

STATE_REFUND – Amount of state refund or balance due

REJECTED_DATE – Date return was last rejected

ACCEPTED_DATE – Date return was accepted

TAXPAYER_AGE – Age of primary taxpayer

DATE_OF_BIRTH – Primary taxpayer’s date of birth

CITY – City shown on return

STATE – State shown on return

ZIP – Zip code shown on return

FORM8888 – T or F to indicate whether Form 8888 is used in the return

ITIN – Indicates whether an ITIN is on return

PREP_USE1 – Answers for prep use field 1

PREP_USE2 – Answers for prep use field 2

PREP_USE3 – Answers for prep use field 3

PREP_USE4 – Answers for prep use field 4

PREP_USE5 – Answers for prep use field 5

PREP_USE6 – Answers for prep use field 6

PREP_USE7 – Answers for prep use field 7

PREP_USE8 – Answers for prep use field 8

PREP_USE9 – Answers for prep use field 9

PREP_USE10 – Answers for prep use field 10

PREP_USE11 – Answers for prep use field 11

PREP_USE12 – Answers for prep use field 12

PREP_USE13 – Answers for prep use field 13

PREP_USE14 – Answers for prep use field 14

PREP_USE15 – Answers for prep use field 15

PREP_USE16 – Answers for prep use field 16

PREP_USE17 – Answers for prep use field 17

PREP_USE18 – Answers for prep use field 18

PREP_USE19 – Answers for prep use field 19

PREP_USE20 – Answers for prep use field 20

PREP_USE21 – Answers for prep use field 21

PREP_USE22 – Answers for prep use field 22

PREP_USE23 – Answers for prep use field 23

PREP_USE24 – Answers for prep use field 24

PREP_USE25 – Answers for prep use field 25

SCHED_A – Indicates 1 if Sch A is included in return, 0 if Sch A is not included in return

SCHED_B – Indicates 1 if Sch B is included in return, 0 if Sch B is not included in return

SCHED_C – Indicates 1 if Sch C is included in return, 0 if Sch C is not included in return

SCHED_D – Indicates 1 if Sch D is included in return, 0 if Sch D is not included in return

SCHED_E – Indicates 1 if Sch E is included in return, 0 if Sch E is not included in return

SCHED_F – Indicates 1 if Sch F is included in return, 0 if Sch F is not included in return

SCHED_R – Indicates 1 if Sch R is included in return, 0 if Sch R is not included in return

SCHED_SETP – Indicates 1 if Sch SETP is included in return, 0 if Sch SETP is not included in return

SCHED_SESP – Indicates 1 if Sch SESP is included in return, 0 if Sch SESP is not included in return

SCHED_EIC – Indicates 1 if Sch EIC is included in return, 0 if Sch EIC is not included in return

SCHED_CEZ – Indicates 1 if Sch CEZ is included in return, 0 if Sch CEZ is not included in return

EFIN – EFIN used to create return

TIN – Last 4 digits of the TIN

AGENCY_ID – State abbreviation

SAVERS_CREDIT – Dollar amount of Savers Credit (Form 8880)

S_BOND_SELECTED – Indicates if Savings Bond was selected on Form 8888

S_BOND_AMOUNT – Amount of Savings Bond requested on Form 8888

TWO eSignature Report

This report contains information about returns that have used eSignature.

This report contains the following columns:

RETURNID – Primary identifier that allows you to merge multiple reports together

ENVELOPEID – Envelope id from DocuSign is displayed

USERNAME – User name that created the return

LAST4TIN – Masked social security number, last 4 digits are displayed

FIRSTNAME – Primary taxpayer's first name

LASTNAME – Primary taxpayer's last name

SIGNERCOUNT – Number of signers

KBACOUNT – Number of users that used KBA (Knowledge Based Authentication) to verify signers

STATUS – Status of the envelope (Sent, Completed, Failed, Declined, etc)

SENTDATE – Date the envelope was sent for signatures

COMPLETEDDATE – Date the envelope was received with signatures

Refund Purchase Power Report

This report contains information about returns using Refund Purchase Power.

This report contains the following columns:

RETURN_ID – Primary identifier that allows you to merge multiple reports together

STATE – Status of the return (In Progress, Completed, Deleted, etc)

FIRST_NAME – Primary taxpayer's first name

LAST_NAME – Primary taxpayer's last name

INTERVIEW_RECEIVED – Date and time the interview was received

RETURN_STARTED – Date and time the return was started

RETURN_SIGNED – Date and time the return was signed

EIC – Amount of EIC shown on return (Sch EIC)

CTC – Amount of child tax credit shown on return (1040 Wkt 3)

REFUND – Amount of refund or balance due shown on return

FED_EFILE_SENT – Date and time the federal efile was sent

FED_EFILE_ACCEPTED – Date and time the federal efile was accepted

FEES_DEPOSITED – Date and time the fees were deposited