UNLIMITED TAXES & MORE, INC.®

"THE AFFORDABLE PROFESSIONAL ALTERNATIVE"

PROWEB

SECURITY ROLES AND PERMISSIONS

Contents

Setting up Security Roles and Permissions

After completing this lesson, you should be able to:

1. Identify the pre-defined security roles.
2. Determine which security role to use based on the allowed permissions.
3. Create a new security role.
4. Make a copy of an existing security role.
5. Edit an existing security role.
6. Assign security roles.
7. List and describe each security role permission.

In Unlimited Pro Online, use security roles to set the permissions for each preparer. You can use predefined security roles or create and manage your own roles.

Predefined Security Roles

In most cases, you can use the security roles that TaxSlayer Pro Online delivers with your software. You can choose from any predefined security roles for each user. Below is a listing of the predefined security roles assigned by Unlimited on behalf of the IRS.

- ADMINISTRATOR (TS)
- SUPERUSER
- PREPARER CURRENT YEAR
- PREPARER ALL YEARS
- INTERVIEWER
- REVIEWER

When you set up users/preparers, you can select the security roles. See *Adding Preparers* for information on selecting security roles for users.

NOTE: You cannot edit the predefined/assigned security roles and will not see them listed in your site's Security Role menu. You will be able to select a template from them when setting up users. See *Adding Preparers* for information on selecting security roles for users.

Creating Security Roles

You can create an unlimited number of security Roles for your site. To do this, use the following steps from the **Welcome** page:

1. Click **Select** on the **Configuration** line.

Unlimited Pro Online displays the **Configuration Menu** landing page:

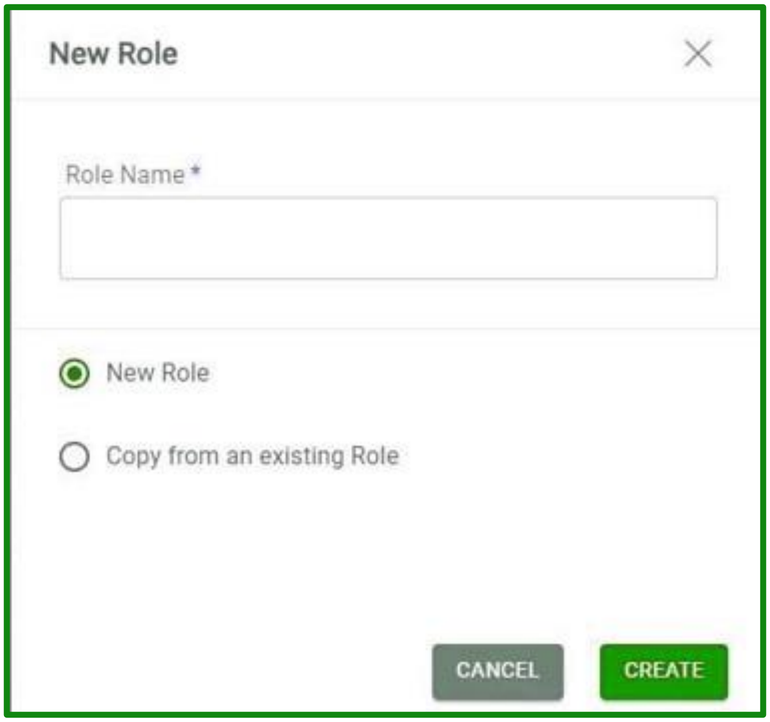
2. Click the **Roles & Permissions** line.

Unlimited Pro Online displays the **Roles & Permissions** page:

3. Click **NEW ROLE**.

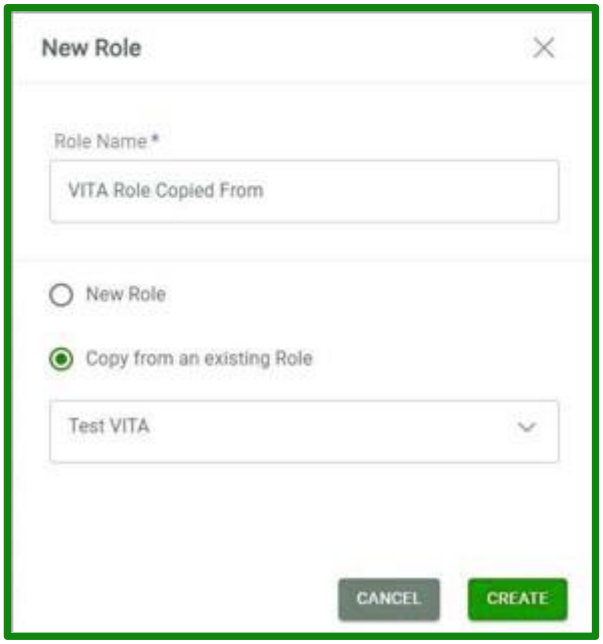
Note: Unlimited Pro Online stores previous year's roles as an existing Security Role.

Unlimited Pro Online displays the **New Role** page:



4. Type a name for your role in the **Role Name** box.
5. Select either **New Role** or **Copy from an existing Role**.
    a. If you select **New Role**, skip to Step 6.

If you select **Copy from an existing Role**, Unlimited Pro Online displays a new drop-down box:



b. Select the security role you want to use as a base for your new role from the drop-down box.

TIP: The **Copy from an existing Role** feature is useful if you know that an existing role is close to what you need for your new role. For example, if the SUPERUSER role is almost what your site needs, but you only need to add or remove a couple of permissions, you can start your new role based on the existing SUPERUSER role and make modifications.

6. Click **CREATE**.

TaxSlayer Pro Online displays the **Role** page:

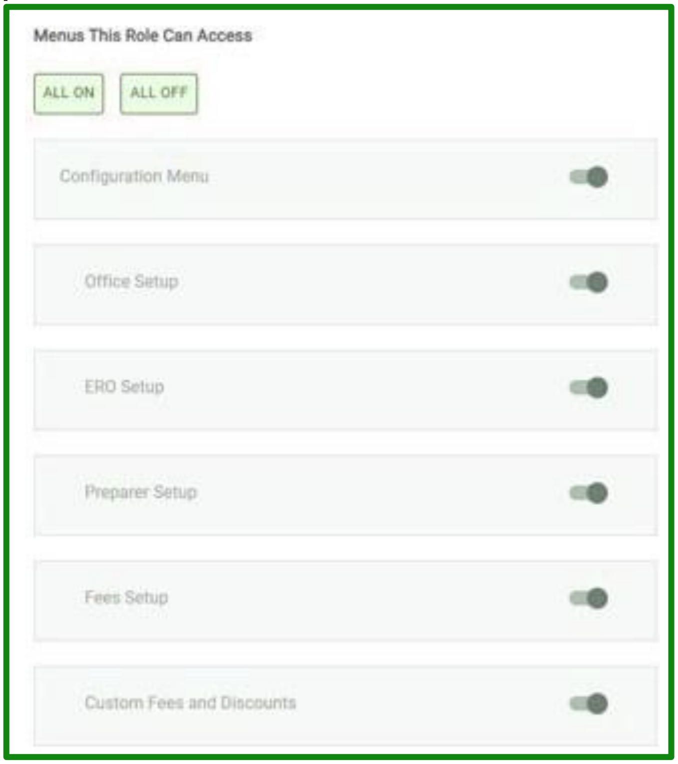
7. If you want to make this the default role for all new users, select the **Default Role** check box. TaxSlayer Pro Online will then automatically select this role when you create a new user. You can

still change that user's role if they need different permissions than the site's default role.

8. TaxSlayer Pro Online automatically selects all permissions. If you know that the permissions for this role will be limited, clear the **Select All** check box so that you can select permissions instead of clearing them.
9. Review each item for which you can allow access for this security role. Select or clear each check box to turn access for a permission on or off for this role.
10. Click **SAVE**.

Note that there are changes to Roles and Permissions (formerly Security Templates) beginning with the 2023 Tax Year.

1. Toggle permission for each menu on or off for the security role, as shown below:



2. Some permission names are slightly changed in the list. See the chart at the end of this topic for the previous and updated labels for each permission.

Unlimited Pro Online displays the

Roles & Permissions page with the new security role listed:

11. If you need to add more security roles, click **New Role** and follow the same steps for each security role.
12. When you finish adding security roles, click **Back** to return to the **Welcome** page.

Editing Security Roles

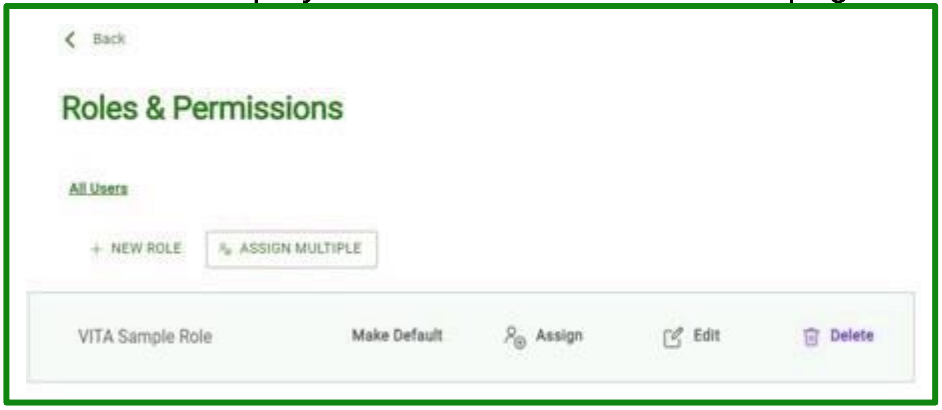
After you add security roles, you can edit those roles at any time. Remember, you cannot edit predefined/assigned security roles. To edit security roles, use the following steps from the **Welcome** page:

1. Click **Select** on the **Configuration** line.

TaxSlayer Pro Online displays the **Configuration** menu:

2. Click the **Roles & Permissions** line.

TaxSlayer Pro Online displays the **Roles & Permissions** page:



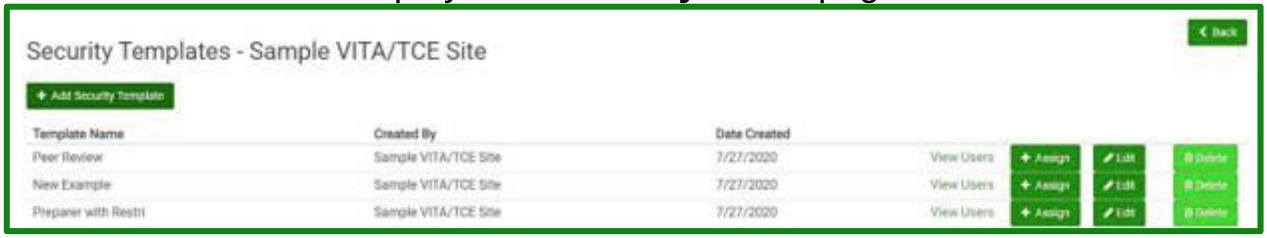
3. Click **Edit** for the security role you want to change.

Unlimited Pro Online displays the

Edit Security Role page:

4. Make any necessary changes to the role. Clear or select any permissions.
5. When you finish, click **SAVE**.

Unlimited Pro Online displays the **Security Roles** page:



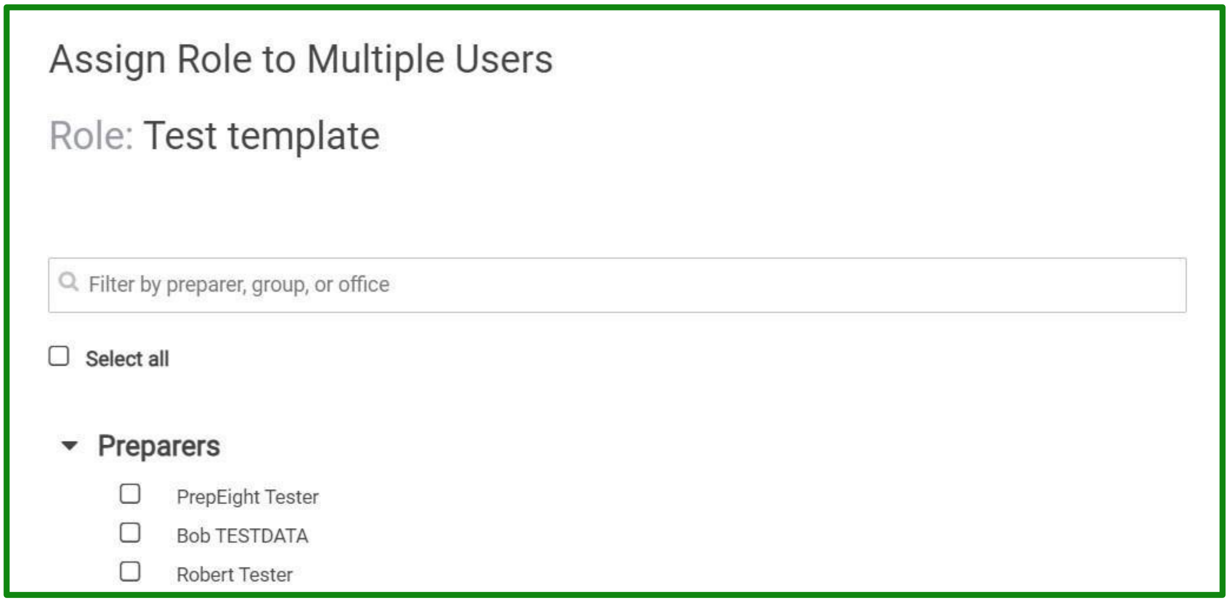
Assigning Security Roles

You should assign security roles while setting up preparers. However, if you already set up a preparer and need to add a security role or change the existing security role, you can do so from the **Security Roles** page. To do so, use the following steps:

1. On the security role you need to assign, click **Assign**.

Assign Role to Multiple Users page:

Unlimited Pro Online displays the



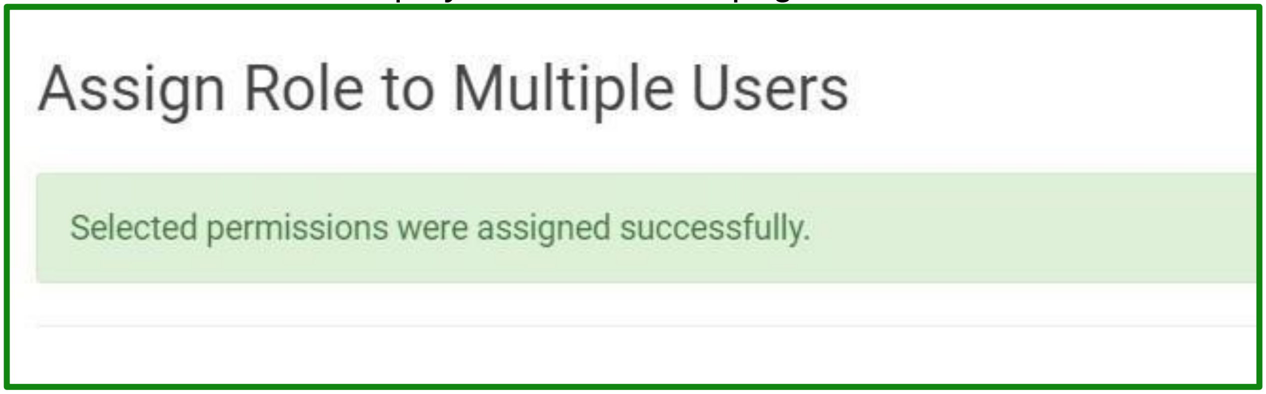
2. Select the check box(es) for any preparers to which you want to assign this role.

TIP: Type a name in the **search…** box to quickly find the preparer.

Select the **Select/Unselect all** check box to assign the role to all users. To display both active and inactive users, select the **Show Inactive Users** check box.

3. Click **Apply Change**.

Unlimited Pro Online displays a confirmation page:



4. Click **Back** to return to the **Welcome** page.

TaxSlayer Assigned Security Roles & Permissions

The following chart gives a definition of each Unlimited-assigned security role.

Role	High Level Definition – Assigned Permissions	Recommendation
ADMINISTRATOR (TS)	• Create new returns (all years) • Edit existing returns (all years) • Print returns • Mark returns as complete • Deactivate returns • Review returns • Configure all items • Generate reports • Transmit returns • Scanned Documents • Customer Portal	Assign to a limited number of coadministrators
SUPERUSER	• Create new returns (all years) • Edit existing returns (all years) • Print returns • Mark returns as complete • Review returns • Generate reports • Transmit returns • Scanned Documents • Customer Portal	Assign to more experienced preparers and quality reviewers

Role	High Level Definition – Assigned Permissions	Recommendation

PREPARER CURRENT YEAR	• Create new returns (current year only) • Edit existing returns (current year only) • Print returns • Mark returns for review • Scanned Documents • Customer Portal	Assign to preparers who are limited to current year returns; consider only allowing the preparer to see their own returns (configure this option in Preparer Setup)
PREPARER ALL YEARS	• Create new returns (all years) • Edit existing returns (all years) • Print returns • Mark returns for review • Scanned Documents • Customer Portal	Assign to preparers who can create returns for any year; consider only allowing the preparer to see their own returns (configure this option in Preparer Setup)
INTERVIEWER	• Create new returns (current year only) • Edit existing returns (current year only)	Assign to preparers who are only entering data to start a return when returns will be assigned to another preparer for completion
Role	**High Level Definition – Assigned Permissions**	**Recommendation**

REVIEWER	• Create new returns (current year only) • Edit existing returns (current year only) • Print returns • Review returns • Mark returns as complete • Scanned Documents • Customer Portal	Assign to current year quality reviewers who need fewer privileges than SUPERUSER

Security Permission Definitions

Tax Returns Section

This security permission option…	allows the user to…	and was formerly labeled as…
Create new tax returns	create tax returns for current and/or previous years.	Create Tax Returns
Open and Edit tax returns	view or edit previously created tax returns. You must use this option in conjunction with **Access Current Year Client List**.	View/Edit Existing Returns
Delete tax return notes	delete notes associated with the tax return.	Delete Return Notes
Set tax return passwords	add a password to a return. This option is required for opening and printing returns, as well as viewing client status.	Password Protect Return
View full taxpayer SSNs	view the client's entire Social Security number on the client list and other areas of the return.	View Full SSN
Email tax returns	see the option to email on the E-file section of the return.	Email Return
Print tax returns	generate a PDF of the tax return and access to generate a PDF when applicable at the form level.	Print Returns
Transmit tax returns to the IRS	transmit returns to the Unlimited Processing Center.	Send Returns to IRS

This security permission option…	allows the user to…	and was formerly labeled as…
Mark returns Ready to Review	mark that the return is ready for review, adding it to the Review Returns queue.	Mark Return for Review
Review other preparers' returns	review return(s) marked **Ready for Review** and either approve or fail the return.	Review Returns and Mark Review Decision
Bypass marking for Review	Clear this check box to require the preparer to always select **Ready for Review** during return preparation.	Do not Force Return Review
Revert returns back to In Progress	Select if you **do** want the preparer to change a return marked **Complete** back to **In Progress.**	Cannot Change Return Status back to In Progress
Mark returns Complete	indicate that the return is complete and ready for transmission.	Mark Return Complete
Mark returns Imperfect	see the option to mark a return imperfect. Marking a return imperfect allows the return to be retransmitted without changing the taxpayer's information after an IRS information match reject.	Display Imperfect Return
Deactivate returns	delete a return with an ***In Progress*** or ***Review Failed*** status. You cannot deactivate a rejected return	Deactivate return

Client List Section

This security permission option…	allows the user to…	and was formerly labeled as…
Access Client List (Current Year)	display the current year client list.	Access Current Year Client List
Access Client List (previous years)	display the client list for each of the three prior years.	Access Previous Years Client Lists
View Client Status	view the taxpayer's return status and return history.	View Client Status
View Refund Status on Client List	tkc pícpaící will →ɑt bc ablc to scc a íct"í→ı's ícr"→ıd stat"s.	View Refund Status
Access Accepted returns in Client List	view or edit previously accepted tax returns. You must use this option in conjunction with **Access Current Year Client List**.	Allow entry into Accepted returns
Access TaxesToGo Client List	the preparer will not be able to see any Taxes To Go clients in the office.	View TaxesToGo Client List

Preparers Section

This security permission option…	allows the user to…	and was formerly labeled as…
Assign Roles to users	assign security roles to certain preparers.	Assign Preparer's Security Template

Change the Preparer assigned to a tax return	change the preparer associated with a return via the Tools menu.	Change return preparer

Notifications Section

This security permission option…	allows the user to…	and was formerly labeled as…
Dismiss Message Center notifications	see the Main Menu Notifications as read-only.	Dismiss/Restore Main Menu Notifications

Client Apps Section

This security permission option…	allows the user to…	and was formerly labeled as…
Send Customer Portal invites	create a client/customer portal.	Customer Portal
Import returns from Desktop	see Import Desktop Returns on the Main Menu.	Import Desktop Returns
Import returns from TaxesToGo	View any Taxes To Go clients in the office.	Mobile App Import
View client App Chat History	view the taxpayer's chat history with all users from the Chat feature	View App Chat History
Import returns from eAPI	Applicable to a few offices only	Import eAPI Returns

Company/Group Users Section

This security permission option…	allows the user to…	and was formerly labeled as…
Access Office(s)	Not Applicable at the site level; must be assigned by TaxSlayer at the group level	Access Office

Documents Section

This security permission option…	allows the user to…	and was formerly labeled as…
Clear signatures	clear a Customer Portal signature to require the taxpayer to re-sign documents.	Allow Ability to Clear Signatures
Attach scanned documents	access Scanned Document feature and access files uploaded via Customer Portal	Scanned Documents
Delete scanned documents	delete documents from Scanned Documents.	Delete Scanned Document

Reporting Section

This security permission option…	allows the user to…	and was formerly labeled as…

Edit reports list	access Report Customization to remove reports not applicable to the site and also change the order to place the most used reports at the top of the category.	Edit and customize reporting display

Fees Section

This security permission option…	allows the user to…	and was formerly labeled as…
Edit default Minimum Preparer Fee	preparer will be able to alter the minimum prep fee on the Fees setup menu.	Edit Minimum Preparer Fee
Edit default Maximum Preparer Fee	preparer will be able to alter the maximum prep fee on the Fees setup menu.	Edit Maximum Preparer Fee
Override Electronic Filing Fee during EFile	edit any fees on the E-file section of the return.	Edit E-file Fee
Override Minimum Preparer Fee during E-File	edit any fees on the E-file section of the return.	Override Return Minimum Preparer Fee
Override Maximum Preparer Fee during E-File	edit any fees on the E-file section of the return.	Override Return Maximum Preparer Fee
Override Calculated Preparer Fee during E-File	edit any fees on the E-file section of the return.	Edit calculated preparer fee

Menus This Role Can Access Section

This security permission option…	allows the user to…	and was formerly labeled as…
Configuration menu	access the Configuration menu.	Configuration
Office Setup	access Office Setup.	Edit Office Setup
ERO Setup	access ERO setup.	Edit ERO Setup
Preparer Setup	access Preparers menu.	Add/Edit Preparers
Fees Setup	enter fees to capture fee savings for sites tracking this information.	Add/Edit Fees in Office Configuration
Roles & Permissions	access Security Roles.	Add and Configure Security Templates
Question Templates	access Custom Questions.	Change Questions and Available Answers
Taxpayer Profiles	access Taxpayer Profiles	Change tax profiles
Consent Forms	create and edit consents.	Change Consent Forms
Print Sets	access Print Sets.	Add or Edit Print Sets
Tags	access Tags.	Add or Edit Tags
IP Whitelist	access IP Whitelist.	Add or Edit Office IP Whitelist

Custom Credits	access Custom Credits.	Add or Edit Custom Credits
Reports	view reports, including the Acknowledgements Report.	View Reports
This security permission option…	**allows the user to…**	**and was formerly labeled as…**
Print Checks	View Print Checks on the Main Menu	Print Checks

Index