



# UNLIMITED

## TAXES & MORE, INC.®

"THE AFFORDABLE PROFESSIONAL ALTERNATIVE"

# PROWEB

## SECURITY ROLES AND PERMISSIONS

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# 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.

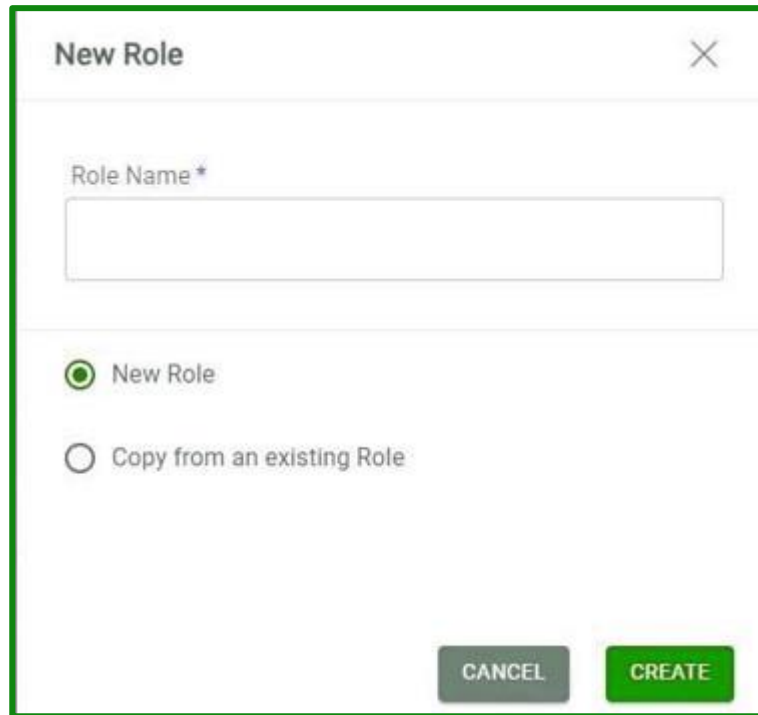
Unlimited Pro Online displays the **Roles & Permissions** page:



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:



The screenshot shows a 'New Role' dialog box. It has a title bar with the text 'New Role' and a close button (X). Below the title bar is a text input field labeled 'Role Name \*'. Underneath the input field are two radio button options: 'New Role' (which is selected, indicated by a green dot) and 'Copy from an existing Role'. At the bottom of the dialog are two buttons: 'CANCEL' and 'CREATE'.

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:

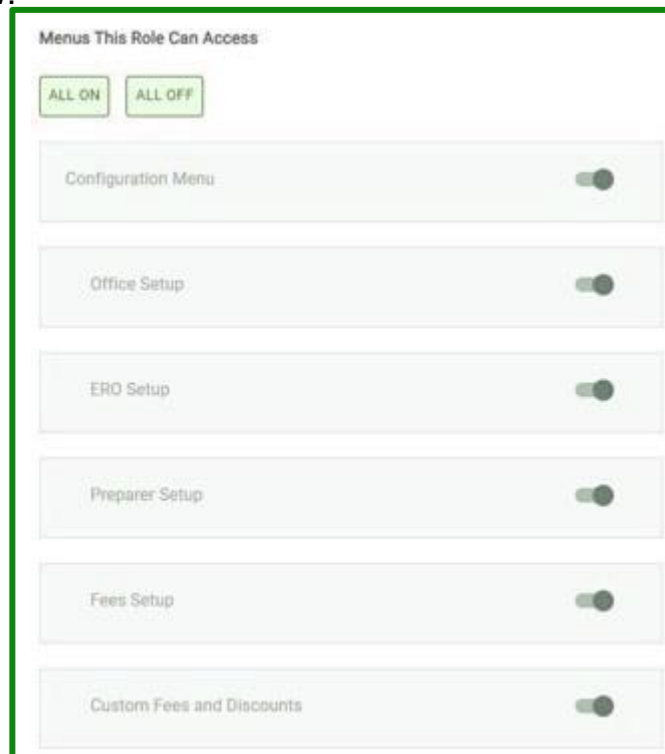
7. If you want to make this the default role for all new users, select the **Default Role** check box. TaxSlayer Pro Online will then automatically select this role when you create a new user. You can

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:



The screenshot shows a web interface titled "Menus This Role Can Access". At the top, there are two buttons: "ALL ON" and "ALL OFF". Below these are six rows, each representing a different menu or setup option. Each row has a label on the left and a toggle switch on the right. All toggle switches are currently turned on (indicated by a dark grey slider).

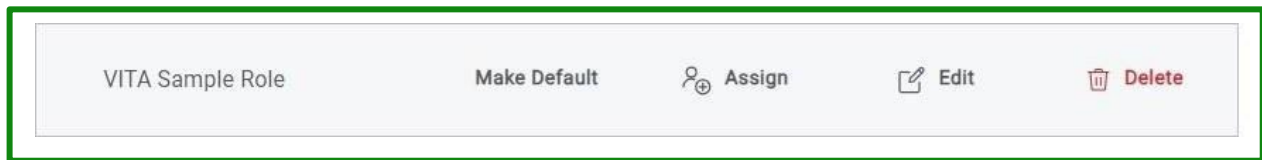
| Menu Item                 | Toggle Status |
|---------------------------|---------------|
| Configuration Menu        | On            |
| Office Setup              | On            |
| ERO Setup                 | On            |
| Preparer Setup            | On            |
| Fees Setup                | On            |
| Custom Fees and Discounts | On            |

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:

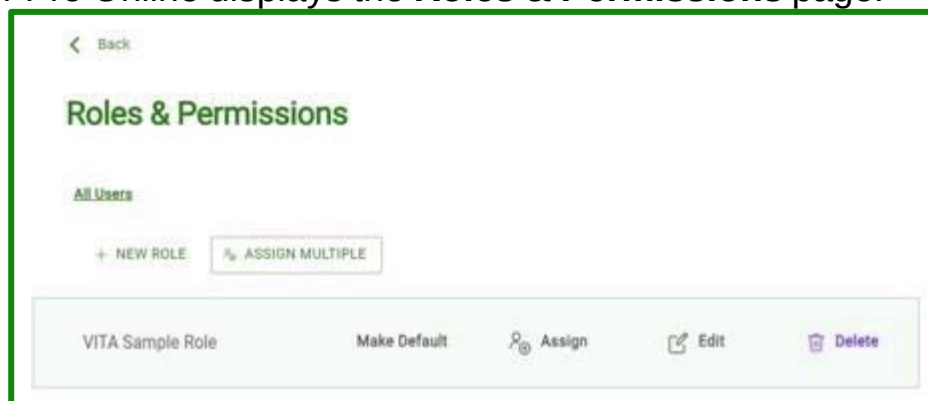
1. Click **Select** on the **Configuration** line.

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:

The screenshot shows the 'Edit Security Role' page for a role named 'VITA Sample Role'. It includes a text input field for the 'Role Name' containing 'VITA Sample Role', a checkbox for 'Default Role' which is unchecked, and a green button labeled 'Select All'.

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:

The screenshot shows the 'Security Roles' page with the title 'Security Templates - Sample VITA/TCE Site'. It features a table with three columns: 'Template Name', 'Created By', and 'Date Created'. Each row represents a security template and includes action buttons for 'View Users', 'Assign', 'Edit', and 'Delete'.

| Template Name       | Created By           | Date Created |            |          |        |
|---------------------|----------------------|--------------|------------|----------|--------|
| Peer Review         | Sample VITA/TCE Site | 7/27/2020    | View Users | + Assign | ✓ Edit |
| New Example         | Sample VITA/TCE Site | 7/27/2020    | View Users | + Assign | ✓ Edit |
| Preparer with Restr | Sample VITA/TCE Site | 7/27/2020    | View Users | + Assign | ✓ Edit |

## 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

Assign Role to Multiple Users

Role: Test template

Filter by preparer, group, or office

☐ Select all

▼ Preparers

- ☐ PrepEight Tester
- ☐ Bob TESTDATA
- ☐ Robert Tester

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:

Assign Role to Multiple Users

Selected permissions were assigned successfully.

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) | <ul style="list-style-type: none"> <li>• Create new returns (all years)</li> <li>• Edit existing returns (all years)</li> <li>• Print returns</li> <li>• Mark returns as complete</li> <li>• Deactivate returns</li> <li>• Review returns</li> <li>• Configure all items</li> <li>• Generate reports</li> <li>• Transmit returns</li> <li>• Scanned Documents</li> <li>• Customer Portal</li> </ul> | Assign to a limited number of coadministrators             |
| SUPERUSER          | <ul style="list-style-type: none"> <li>• Create new returns (all years)</li> <li>• Edit existing returns (all years)</li> <li>• Print returns</li> <li>• Mark returns as complete</li> <li>• Review returns</li> <li>• Generate reports</li> <li>• Transmit returns</li> <li>• Scanned Documents</li> <li>• Customer Portal</li> </ul>                                                              | Assign to more experienced preparers and quality reviewers |

| Role | High Level Definition – Assigned Permissions | Recommendation |
|------|----------------------------------------------|----------------|
|------|----------------------------------------------|----------------|

|                          |                                                                                                                                                                                                                                                                     |                                                                                                                                                                     |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PREPARER<br>CURRENT YEAR | <ul style="list-style-type: none"> <li>• Create new returns (current year only)</li> <li>• Edit existing returns (current year only)</li> <li>• Print returns</li> <li>• Mark returns for review</li> <li>• Scanned Documents</li> <li>• Customer Portal</li> </ul> | 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<br>YEARS    | <ul style="list-style-type: none"> <li>• Create new returns (all years)</li> <li>• Edit existing returns (all years)</li> <li>• Print returns</li> <li>• Mark returns for review</li> <li>• Scanned Documents</li> <li>• Customer Portal</li> </ul>                 | 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              | <ul style="list-style-type: none"> <li>• Create new returns (current year only)</li> <li>• Edit existing returns (current year only)</li> </ul>                                                                                                                     | Assign to preparers who are only entering data to start a return when returns will be assigned to another preparer for completion                                   |
| <b>Role</b>              | <b>High Level Definition – Assigned Permissions</b>                                                                                                                                                                                                                 | <b>Recommendation</b>                                                                                                                                               |

|          |                                                                                                                                                                                                                                                                                                |                                                                                   |
|----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| REVIEWER | <ul style="list-style-type: none"> <li>• Create new returns (current year only)</li> <li>• Edit existing returns (current year only)</li> <li>• Print returns</li> <li>• Review returns</li> <li>• Mark returns as complete</li> <li>• Scanned Documents</li> <li>• Customer Portal</li> </ul> | 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 <b>Access Current Year Client List</b> . | 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 <b>Ready for Review</b> 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 <b>Ready for Review</b> during return preparation.                                                                               | Do not Force Return Review                      |
| Revert returns back to In Progress | Select if you <b>do</b> want the preparer to change a return marked <b>Complete</b> back to <b>In Progress</b> .                                                                               | 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 <b>In Progress</b> or <b>Review Failed</b> 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 →ót bc ablc to scc a íct"í→'s ícr"→d 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 <b>Access Current Year Client List</b> . | 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

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

## Client Apps Section

| <b>This security permission option...</b> | <b>allows the user to...</b>                                          | <b>and was formerly labeled as...</b> |
|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| 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

| <b>This security permission option...</b> | <b>allows the user to...</b>                                                       | <b>and was formerly labeled as...</b> |
|-------------------------------------------|------------------------------------------------------------------------------------|---------------------------------------|
| Access Office(s)                          | Not Applicable at the site level; must be assigned by TaxSlayer at the group level | Access Office                         |

## Documents Section

| <b>This security permission option...</b> | <b>allows the user to...</b>                                                    | <b>and was formerly labeled as...</b> |
|-------------------------------------------|---------------------------------------------------------------------------------|---------------------------------------|
| 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

| <b>This security permission option...</b> | <b>allows the user to...</b> | <b>and was formerly labeled as...</b> |
|-------------------------------------------|------------------------------|---------------------------------------|
|                                           |                              |                                       |

|                   |                                                                                                                                                               |                                      |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|
| 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

| <b>This security permission option...</b>      | <b>allows the user to...</b>                                                | <b>and was formerly labeled as...</b> |
|------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------|
| 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

| <b>This security permission option...</b> | <b>allows the user to...</b>                                           | <b>and was formerly labeled as...</b>  |
|-------------------------------------------|------------------------------------------------------------------------|----------------------------------------|
| 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                          |
| <b>This security permission option...</b> | <b>allows the user to...</b>                         | <b>and was formerly labeled as...</b> |
| Print Checks                              | View Print Checks on the Main Menu                   | Print Checks                          |

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