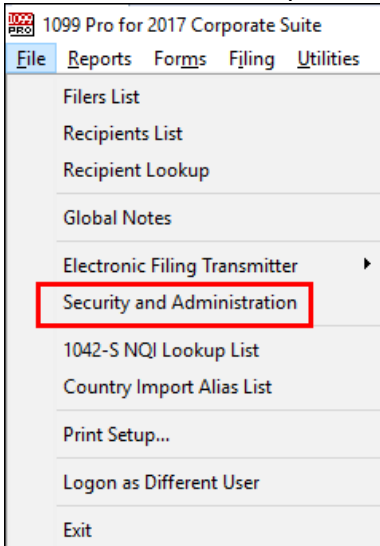NOTE: In this example, the users will be separated by form type, specifically Form W2. The process is the same for whichever form type needed.

Click on the "File" drop down menu and select "Security and Administration."

Then click on "Security Groups" from the top left menu.

Under Step 1, click on "Create and Manage Access Groups."

1. Create Access Groups

- Click on "Add."

- Highlight the form type, then click a check in the far left column, then click the "Modify Highlighted Record" button at the bottom:
  * A single access group can have multiple form types selected and configured.

- If the user needs to have full range of functionality on the form type they are granted, click "Select All Rights" and click "Save." To choose a different configuration, check the boxes that apply and click "Save."

- Name the Access Group at the top. The functionality granted on the form type will display below. Add optional notes on the right box then click "Save Changes to Group" at the bottom right. Then click close to get back to the main Security menu.

2. Create User Profiles

- Click on "Create and manage User Profiles for Filers and Access Groups."

- Click "Add" to create a new user profile.
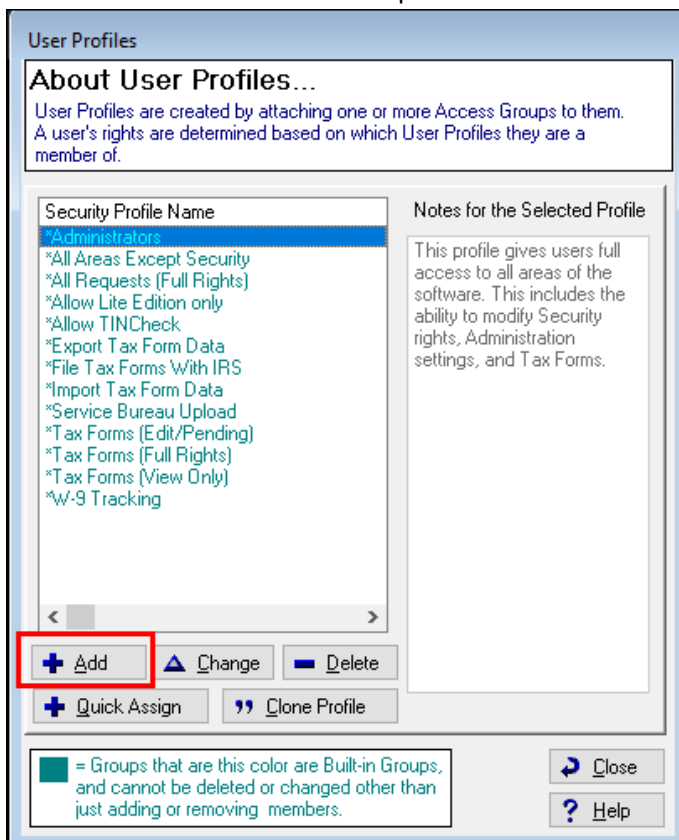
- Name the new user profile, check the box to apply to all filers, then locate the access group created with the steps above and check the far left column, then click "Save Changes to Group" button at the bottom right. Then click "Close" to get back to the main Security menu.

3. Remove Old Profiles

Optional, old profiles need to be identified and removed prior to assigning the replacement profiles. If this step is not required, skip to Step 4.

- Click on "Add/Update Individual Users" and then double click on the user's name.
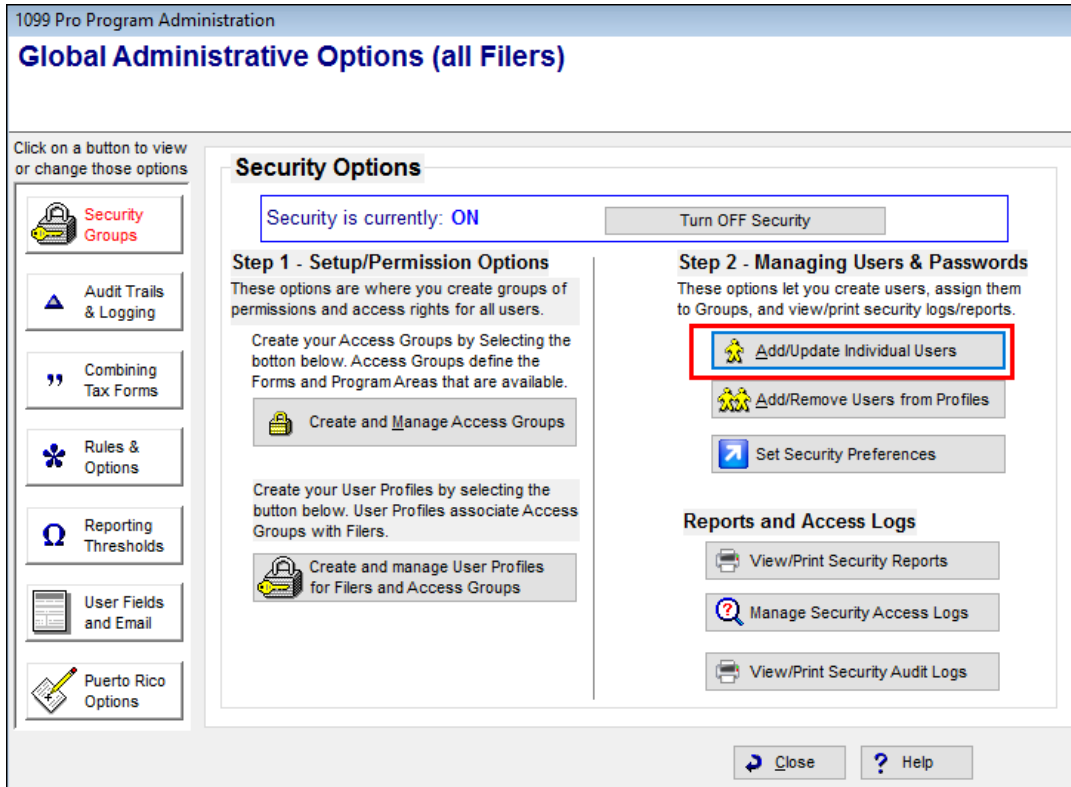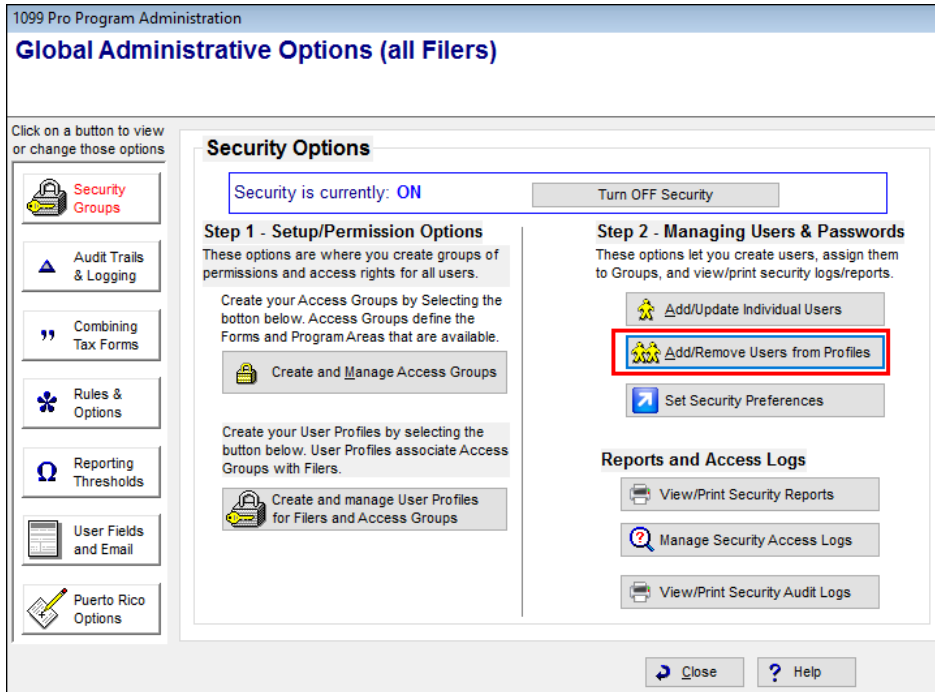

- Please note the profiles listed in this section here, click "OK" to go back to the user list, then "Close" to return to the main Security menu.
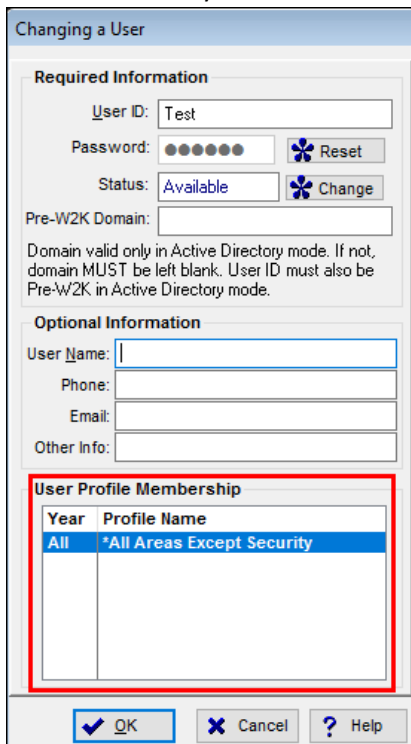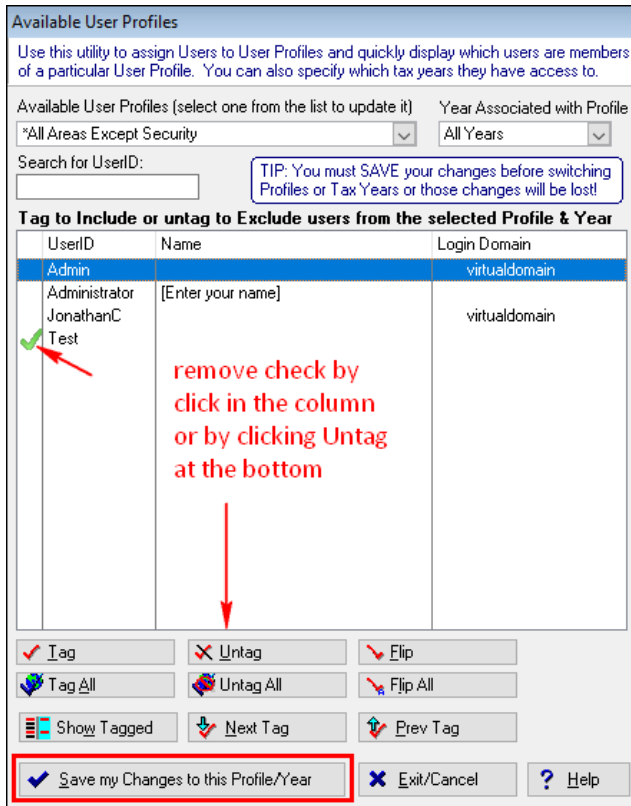
4. Assign Users to Profiles

- Click on "Add/Remove Users from Profiles."

- From the drop down menu, select the User Profile, as shown in the example above, "All Areas Except Security." Uncheck by clicking in the left column and click "Save my Changes to this Profile/Year."

- Click the drop down again and locate the new user profile.

- Check/Tag the user and click "Save my Changes to this Profile/Year"
  This process is required for each user.