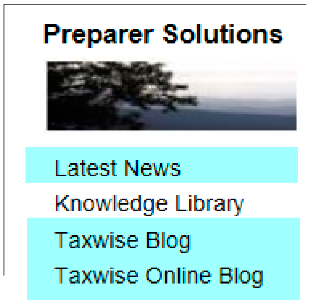
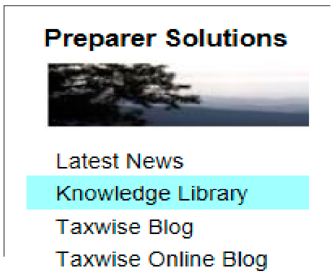
Self-Help Solutions Available to All Users 24/7 – Login is *Not* Required!



LATEST NEWS & TAXWISE BLOGS

Latest News and the ***TaxWise Blog*** have been synchronized so that you get the same important information at both sources. Even more convenient, ***Latest News*** is also provided on the home page in TaxWise 2013 so that you always have quick access.

The ***TaxWise Online Blog*** is for customers using our web-based TaxWise Online program.



KNOWLEDGE LIBRARY

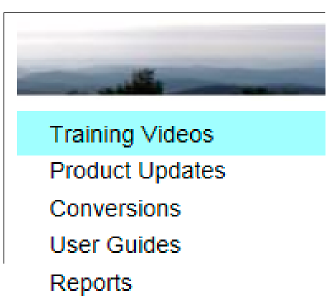
The ***Knowledge Library (Knowledge Base)*** is the **same resource used by our Customer Care agents** when you call with questions. The powerful search feature helps you quickly find answers yourself.

MODULE DELIVERY DATES & MORE (under Quick Links)

Shipping Schedule – The date we will begin shipping tax software; also Tax Research availability

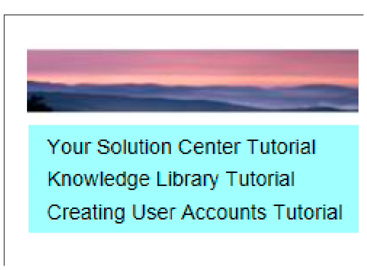
Module Delivery and Efile Dates – Dates when we expect to release federal and state form modules for download and when e-filing will be activated for those modules

Calendars and Charts – Important tax dates and deadlines; IRS decision charts for filing status, dependency and EIC; and more



TRAINING VIDEOS

These short ***Training Videos*** cover common questions from TaxWise users. The link is located under ***Preparer Solutions***.

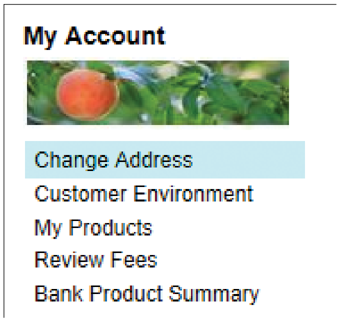


SOLUTION CENTER TUTORIALS

Learn how to use the Solution Center and Knowledge Library. These tutorials are found under ***How to Use Your Solution Center***.

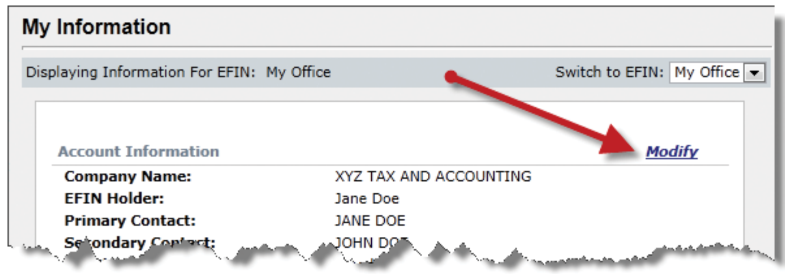
Self-Help for Account Owners & Managers – Login *Is* Required

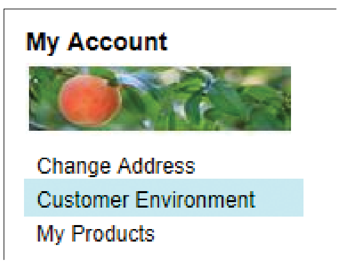
You must log in as ***Admin*** or another user name assigned ***Administrator*** rights. First time logging in? Click the ***Need Help?*** link on the login page for instructions.



CHANGE ADDRESS

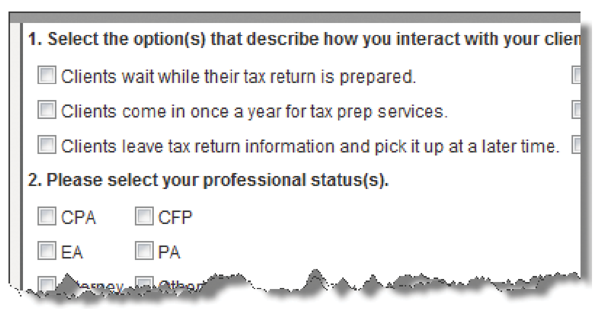
Click ***Change Address*** and log in as ***Admin***. You will go to the ***My Information*** page where you can verify and update your contact names, address, phone, email, credit card on file and more. To make changes, click ***Modify***. ***Only YOU can update your information!*** TaxWise Customer Care and Account Managers cannot do this for you.

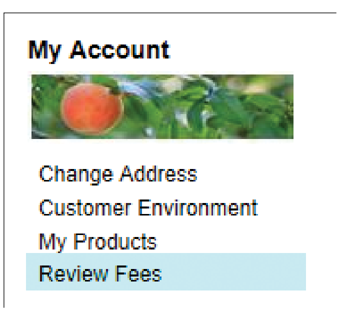




CUSTOMER ENVIRONMENT

Click ***Customer Environment*** and log in as ***Admin***. Help us serve you better by providing information about your business. We also ask for information about your computer system so you don't have to provide this every time you contact us.

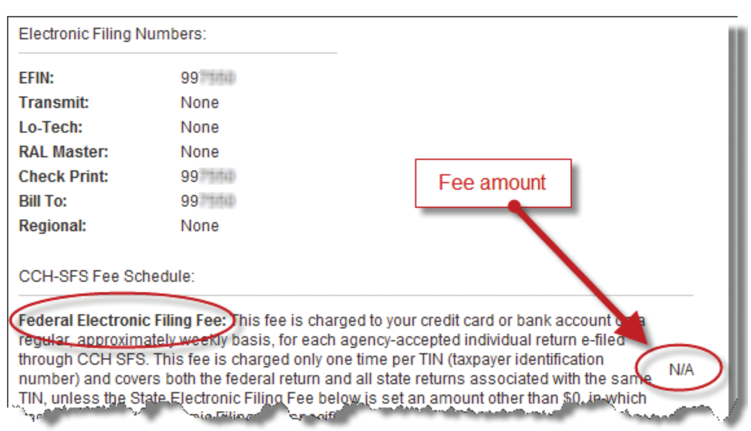




REVIEW YOUR FEES *BEFORE* TAX SEASON

Click ***Review Fees*** and log in as ***Admin*** to review your EFIN on file and your fees for e-filing and bank products.

Please REVIEW YOUR FEES BEFORE tax season begins!



Self-Help for Account Owners & Managers - Login *Is* Required

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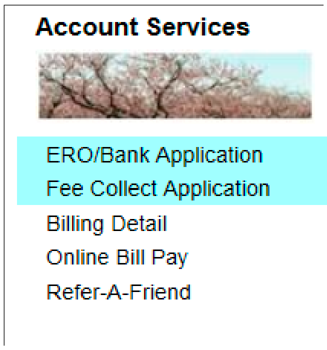
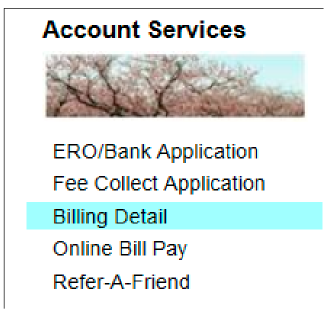


ENROLL IN A BANK PROGRAM OR FEECOLLECT

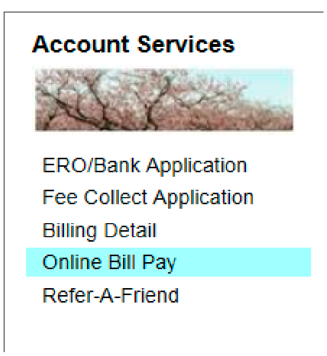
To enroll in a bank product program, click ***ERO/Bank Application*** and log in as ***Admin***.

To enroll in FeeCollect™, click ***FeeCollect Application***. (You cannot enroll in both.) For more information on these programs, contact your Account Manager.



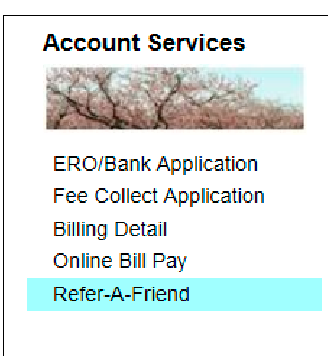
SEE YOUR BILLING DETAIL

Click ***Billing Detail*** to see detailed information on your billing for e-file fees and other transactions.



PAY BALANCES ONLINE

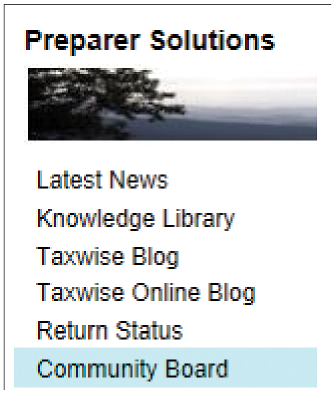
Click ***Online Bill Pay*** to pay an outstanding balance by credit card or ACH debit.



REFER-A-FRIEND – EARN $100

Use ***Refer-A-Friend*** to earn a credit of ***$100*** on your TaxWise account! Enter your friend's information, track the referral, and see complete terms and conditions by clicking ***Refer-A-Friend*** and logging in as ***Admin***.

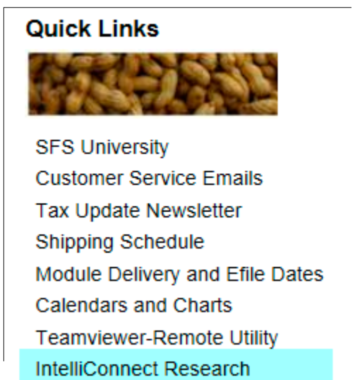
Self-Help for All Users - Login *Is* Required



JOIN THE TAXWISE COMMUNITY BOARD

Share answers and advice with your fellow TaxWise users on the ***Community Board.***

Before joining, you'll be prompted to create a community board name. Follow the prompts. Discussion groups focus on different areas – 1040 Basic, 1040 Advanced, e-filing, software and hardware, state issues, bank products and enhancements.



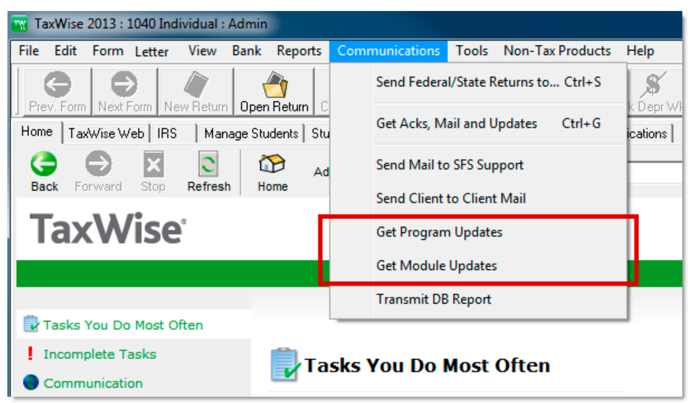
ACCESS YOUR ONLINE TAX RESEARCH

Click ***IntelliConnect Research*** to access your online tax research, if included in your tax package or you purchased it separately. To add tax research, call your Account Manager.

GETTING PRODUCT UPDATES

The easiest way to update TaxWise is to use **Get Program Updates** and **Get Module Updates** on the Communication menu in TaxWise. Remember, you need both program and module updates.

If you are on a network, make sure TaxWise is **closed at all workstations** before downloading and installing updates.

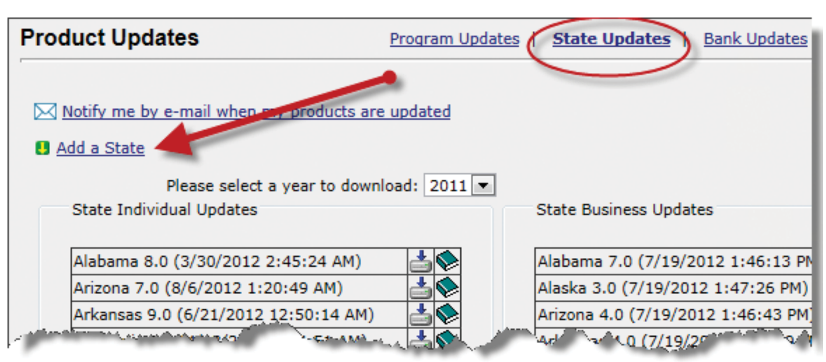


ADDING A STATE TO YOUR PRODUCT

You may need to add the specific states you want to your package in order to get the state software.

1. Log in to the Solution Center.
2. Click ***Download***.
3. Click ***State Updates***.
4. Click ***Add a State.***

Select the states to add to your package. (You must have purchased a package that includes states.) A few minutes later, you can download the state using **Get Module Updates** in TaxWise.

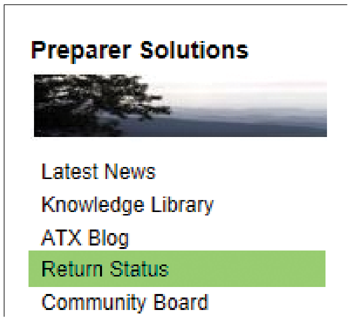


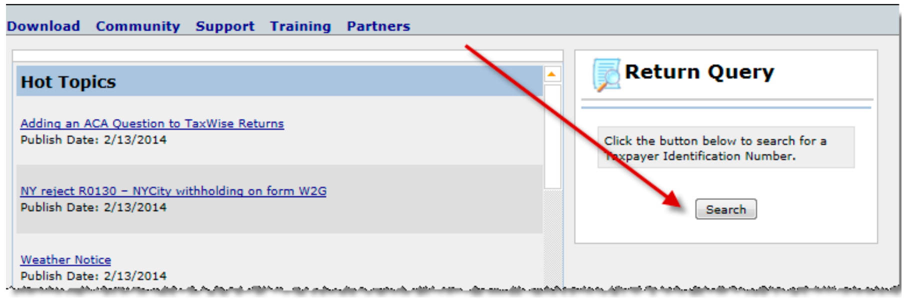
Tracking Your E-filed Returns - Login *Is* Required

Available to all users after logging in.

STEP 1

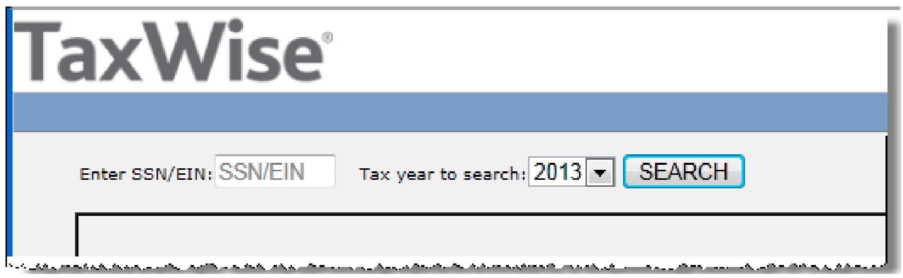
Click ***Return Status*** and log in. Under ***Return Query*** click ***Search***.





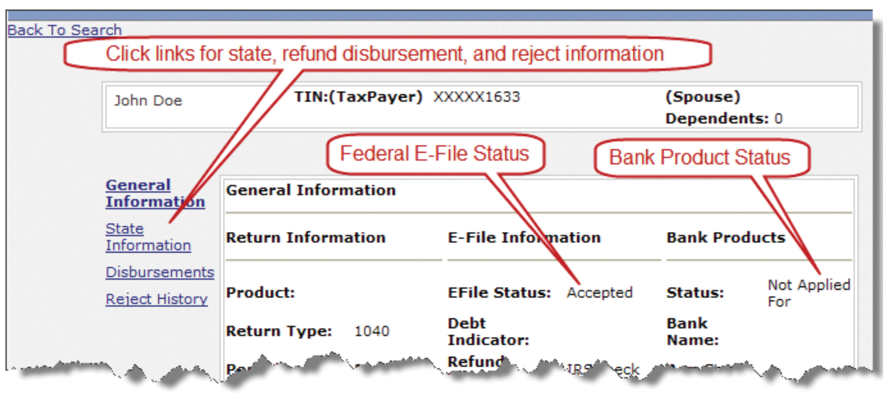
STEP 2

Enter the ***SSN or EIN*** of the return and click ***Search***. (If you are searching for a prior tax year return, select the appropriate tax year.)



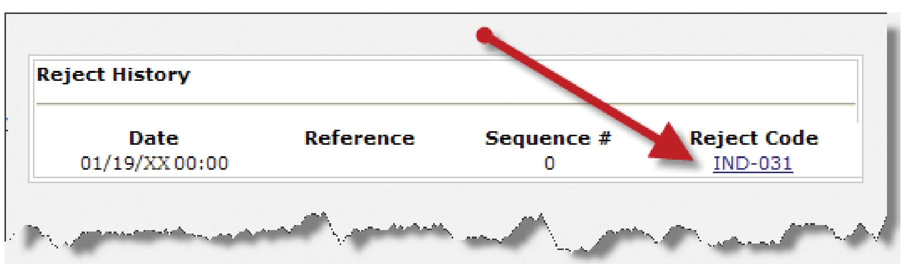
STEP 3

The first screen displays General Information, including ***federal e-file*** and ***bank product*** status. Click the other links for information on the ***state e-file(s), refund disbursement*** and ***reject codes***.



STEP 4

Click ***Reject History*** to see a list of all IRS rejects for this return.



STEP 5

Click the ***Reject Code*** link to see the explanation for the reject and the ***actual value*** causing the reject. In this example, the return was rejected because the SSN of the first dependent does not match what the IRS has on file from the Social Security Administration.