

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

## Preparer Solutions



Latest News  
Knowledge Library  
Taxwise Blog  
Taxwise Online Blog

## 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.

## Preparer Solutions



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## 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.



SFS University  
Customer Service Emails  
Tax Update Newsletter  
Shipping Schedule  
Module Delivery and Efile Dates  
Calendars and Charts  
Teamviewer-Remote Utility

## 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  
Product Updates  
Conversions  
User Guides  
Reports

## TRAINING VIDEOS

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



Your Solution Center Tutorial  
Knowledge Library Tutorial  
Creating User Accounts Tutorial

## 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 /s 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.

## My Account



- Change Address
- Customer Environment
- My Products
- Review Fees
- Bank Product Summary

## 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.

My Information

Displaying Information For EFIN: My Office      Switch to EFIN: My Office

Account Information

Company Name:	XYZ TAX AND ACCOUNTING
EFIN Holder:	Jane Doe
Primary Contact:	JANE DOE
Secondary Contact:	JOHN DOE

[Modify](#)

## My Account



- Change Address
- Customer Environment
- My Products

## 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.

1. Select the option(s) that describe how you interact with your client

- Clients wait while their tax return is prepared.
- Clients come in once a year for tax prep services.
- Clients leave tax return information and pick it up at a later time.

2. Please select your professional status(s).

- CPA       CFP
- EA       PA
- Attorney       Other

## My Account



- Change Address
- Customer Environment
- My Products
- Review Fees

## 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!**

Electronic Filing Numbers:

EFIN:	99****
Transmit:	None
Lo-Tech:	None
RAL Master:	None
Check Print:	99****
Bill To:	99****
Regional:	None

CCH-SFS Fee Schedule:

**Federal Electronic Filing Fee:** This fee is charged to your credit card or bank account on a regular, approximately weekly basis, for each agency-accepted individual return e-filed through CCH SFS. This fee is charged only one time per TIN (taxpayer identification number) and covers both the federal return and all state returns associated with the same TIN, unless the State Electronic Filing Fee below is set an amount other than \$0, in which case the State Electronic Filing Fee applies.

N/A

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

You must log in as **Admin** or another user name assigned **Administrator** rights.

## Account Services



- ERO/Bank Application
- Fee Collect Application
- Billing Detail
- Online Bill Pay
- Refer-A-Friend

## 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.

## Account Services



- ERO/Bank Application
- Fee Collect Application
- Billing Detail
- Online Bill Pay
- Refer-A-Friend

## SEE YOUR BILLING DETAIL

Click [Billing Detail](#) to see detailed information on your billing for e-file fees and other transactions.

## Account Services



- ERO/Bank Application
- Fee Collect Application
- Billing Detail
- Online Bill Pay
- Refer-A-Friend

## PAY BALANCES ONLINE

Click [Online Bill Pay](#) to pay an outstanding balance by credit card or ACH debit.

## Account Services



- ERO/Bank Application
- Fee Collect Application
- Billing Detail
- Online Bill Pay
- Refer-A-Friend

## 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 /s Required

## Preparer Solutions



- Latest News
- Knowledge Library
- Taxwise Blog
- Taxwise Online Blog
- Return Status
- Community Board

## 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.

## Quick Links



- SFS University
- Customer Service Emails
- Tax Update Newsletter
- Shipping Schedule
- Module Delivery and Efile Dates
- Calendars and Charts
- Teamviewer-Remote Utility
- IntelliConnect Research

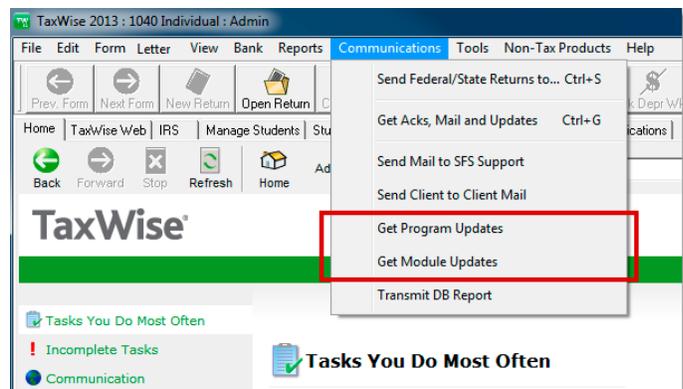
## ACCESS YOUR ONLINE TAX RESEARCH

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.

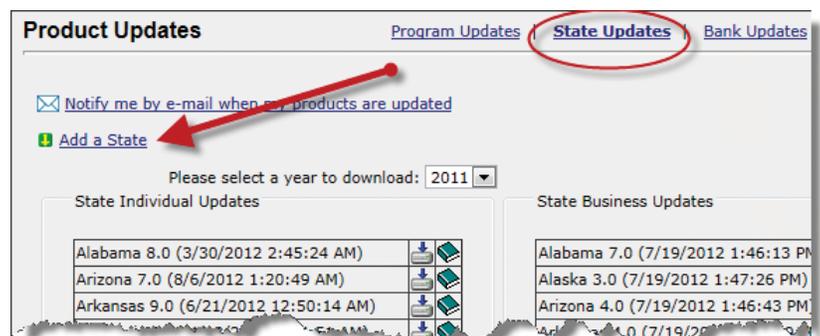


## ADDING A STATE TO YOUR PRODUCT

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 /s Required

Available to all users after logging in.

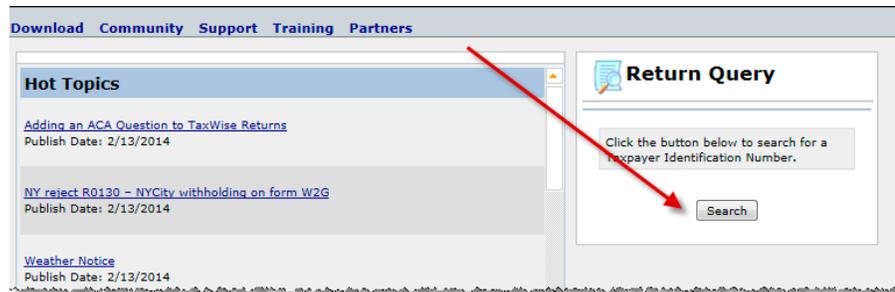
## STEP 1

Click [Return Status](#) and log in. Under [Return Query](#) click [Search](#).

**Preparer Solutions**



Latest News  
Knowledge Library  
ATX Blog  
**Return Status**  
Community Board



Download Community Support Training Partners

**Hot Topics**

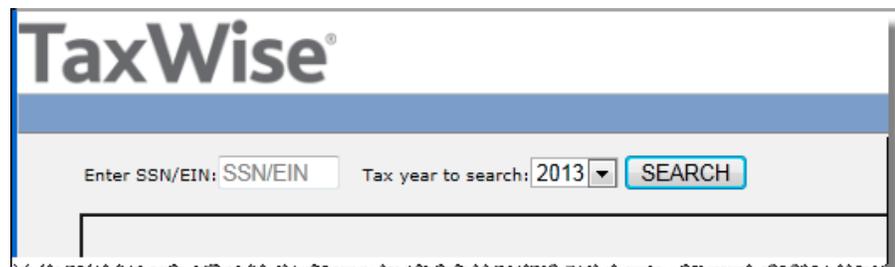
- [Adding an ACA Question to TaxWise Returns](#)  
Publish Date: 2/13/2014
- [NY reject R0130 - NYCity withholding on form W2G](#)  
Publish Date: 2/13/2014
- [Weather Notice](#)  
Publish Date: 2/13/2014

**Return Query**

Click the button below to search for a Taxpayer Identification Number.

## 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.)

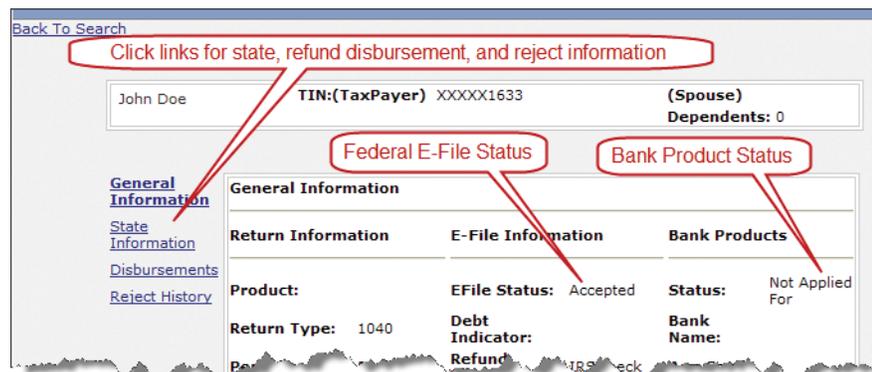


**TaxWise**

Enter SSN/EIN:  Tax year to search:

## 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**.



Back To Search

Click links for state, refund disbursement, and reject information

John Doe TIN:(TaxPayer) XXXXX1633 (Spouse) Dependents: 0

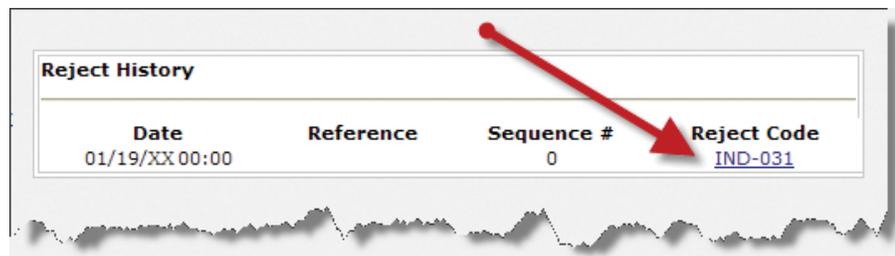
[General Information](#) [State Information](#) [Disbursements](#) [Reject History](#)

**Federal E-File Status** **Bank Product Status**

General Information	Return Information	E-File Information	Bank Products
Product:	Return Type: 1040	EFile Status: Accepted Debt Indicator: Refund	Status: Not Applied For Bank Name:

## STEP 4

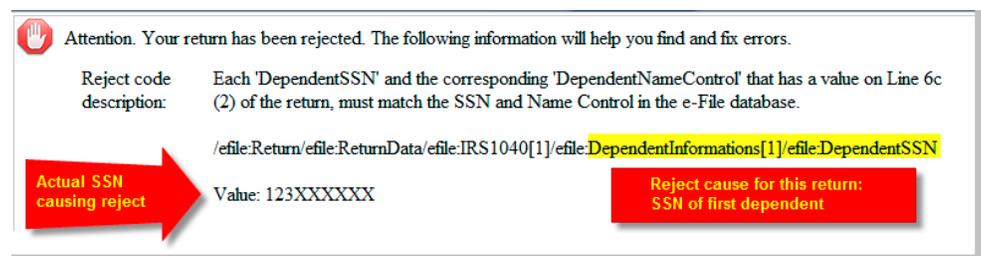
Click [Reject History](#) to see a list of all IRS rejects for this return.



Date	Reference	Sequence #	Reject Code
01/19/XX 00:00		0	<a href="#">IND-031</a>

## 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.



**Attention.** Your return has been rejected. The following information will help you find and fix errors.

Reject code description: Each 'DependentSSN' and the corresponding 'DependentNameControl' that has a value on Line 6c (2) of the return, must match the SSN and Name Control in the e-File database.

[/efile:Return/efile:ReturnData/efile:IRS1040\[1\]/efile:DependentInformations\[1\]/efile:DependentSSN](#)

**Actual SSN causing reject** Value: 123XXXXXX

**Reject cause for this return: SSN of first dependent**