

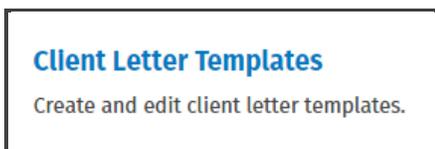
# TaxWise® Online Learning Portal

## New Client Letter Templates

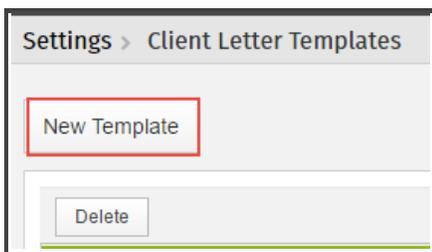
For Tax Year 2022, Wolters Kluwer reworked Client Letter Templates. You can create default client letters using the Client Letter templates feature. This allows you to set up standard letters to attach to your clients' returns.

To create a client letter template:

1. From the user drop down menu, select **Settings**.
2. From the Settings page, click **Client Letter Templates**.



3. Click **New Template**.



4. TaxWise Online displays the New Client Letter Template. From this screen:
  - Type a name for the template and a description.
  - Choose to create from scratch or use a pre-defined template.
  - Click **Create Template**.

**New Client Letter Template**

Add details for your new Client Letter template.

**Name:**

The new Client Letter template will be based on:

Create from scratch (blank template)

Start from existing one:

- Custom Templates
  - sample template
- Predefined Templates
  - 1040 Balance Due
  - 1040 Refund Letter**
  - Privacy Policy
  - SPEC Reject Letter

5. TaxWise Online displays the Edit Client Letter Template dialog page.

Dashboard Tax Returns Mobile Returns e-Filing Reports Textellent Conversations

Settings > Client Letter Templates > Engagement Letter 2

Search variables

- Part Year State
- Non-resident State
- Resident State
- Tax Form
- Price Sheet
- Bank
- Main Info
- Dates
- Firm
- Prep Use Form

Choose heading

Preparers firm name  
 Preparer address  
 Preparer city, Preparer state Preparer zip code

Current date

Taxpayer first name Taxpayer last name  
 Taxpayer street address  
 City, Taxpayer state Zip code

Dear Taxpayer first name,

Thank you for choosing our firm to prepare your income tax returns for tax year Current year in YYYY format. This letter confirms the services we will provide.

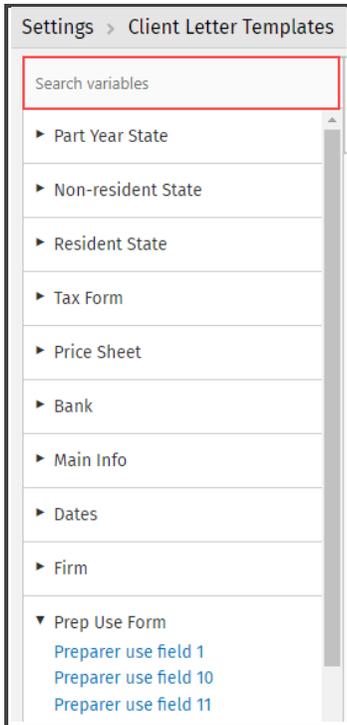
We will prepare your federal and state returns for tax year Current year in YYYY format based on information you provide. Although our work will not include procedures to discover irregularities or inaccuracies in the tax data you provide, we may ask for clarification of certain information, or additional information, so that we can prepare accurate and complete returns for you.

It is your responsibility to provide all necessary information related to income and deductions for tax year Current year in YYYY format, and to respond to our inquiries in a timely manner so that we are able to accurately complete your returns by the appropriate due dates.

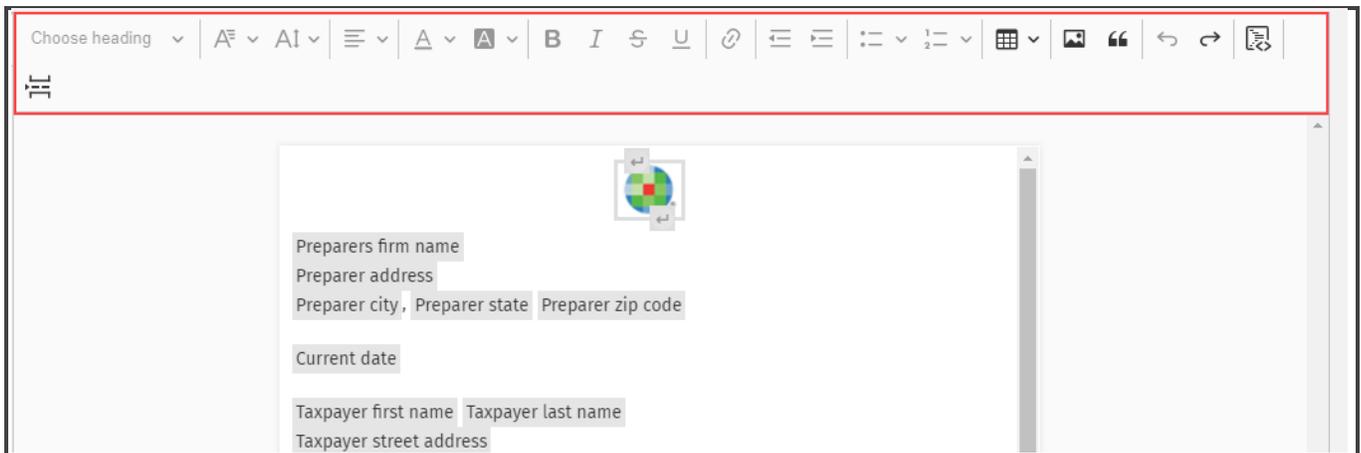
You are responsible for maintaining appropriate records, such as official tax documents you receive, receipts and substantiation for your deductions, and purchase and sales information for assets.

Editor Version: 0.7

6. On the left, you will see a list of variable categories. You can use the **Search Variables** field to search for a variable or expand the category sections to see the list of variables available in each section.



7. From here, you can type text, use the formatting bar, or add variables to customize the letter.



8. Once the changes have been made, you can:

- Click **Preview** to review changes made.
- Click **Save** to save changes made.

9. Click **Save**.

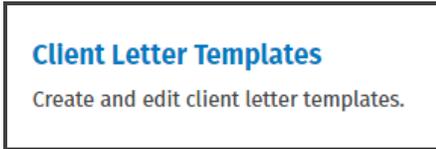
**i** When you choose to add a client letter inside a return, any custom templates display in the list, along with the pre-defined templates.

**i** You can also choose to load letters as part of your Return Templates.

## Sharing Client Letter Templates with Sub-Offices

To share Client Letter Template, you must log in as the Admin user or a user with the Administrator Role.

1. From the user drop down menu, select **Settings**.
2. From the Settings page, click **Client Letter Templates**.



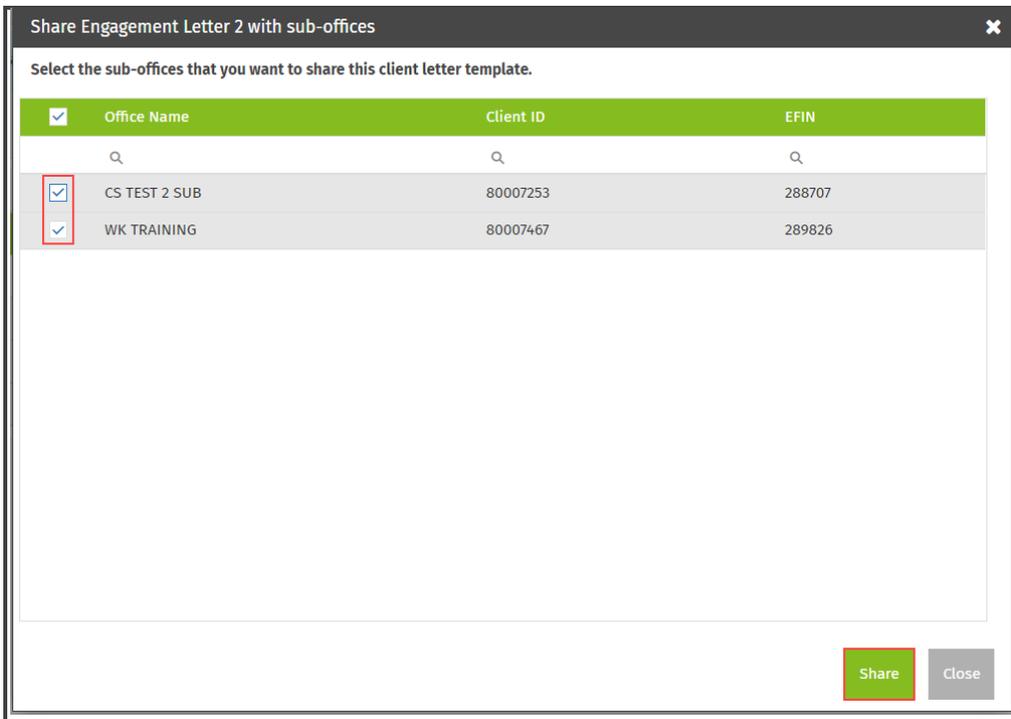
3. From the Client Letter Templates page, locate the custom client letter template you want to share, and click the **Share** link.



The screenshot shows a table with columns: Name, Description, Created Date, Last Edit Date, Edited By, Configure Sub-Offices, and Shared With Offices. The "Engagement Letter 2" row is highlighted, and the "Share" link in the "Configure Sub-Offices" column is circled in red.

Name	Description	Created Date	Last Edit Date	Edited By	Configure Sub-Offices	Shared With Offices
Engagement Letter 2	Client Engagement Letter 2	11/10/2022 4:02:07 PM	11/10/2022 4:37:54 PM	Admin	Share Un-Share	1
Engagement Letter Center	Engagement letter with center aligned logo	10/12/2022 12:29:41 PM	10/12/2022 12:29:49 PM	Admin		
Federal Letter	Federal letter	10/24/2022 12:54:16 PM	10/25/2022 6:48:31 PM	Admin		
Privacy Policy Center	Privacy policy letter with center aligned logo	9/16/2022 6:05:08 PM	10/12/2022 11:05:21 AM	Admin		

4. Select the sub-office(s) that you want to share the template with and click the **Share** button.



The screenshot shows a dialog box titled "Share Engagement Letter 2 with sub-offices". It contains a table with columns: Office Name, Client ID, and EFIN. Two rows are selected with checkboxes: "CS TEST 2 SUB" (Client ID: 80007253, EFIN: 288707) and "WK TRAINING" (Client ID: 80007467, EFIN: 289826). The "Share" button is highlighted in green.

Office Name	Client ID	EFIN
CS TEST 2 SUB	80007253	288707
WK TRAINING	80007467	289826

5. TaxWise displays a confirmation message stating that the templates were successfully shared with sub-offices. Click **Close**.



6. TaxWise Online returns to the Client Letter Templates list.
-  Note that you can un-share the client letter templates at any time.