

TaxWise® Online Learning Portal

2022 TaxWise Online Enhancements

New to the 2022 filing season, Wolters Kluwer has made several changes to the TaxWise Online Program.

These changes include:

- Changes made to Dashboard
- Changes to New Return dialog box
- Return Summary link on Return List
- Changes made to reporting in TaxWise Online
- Changes made to the Notification Panel
- New Client Letter Templates
- New Printing options
- Easy access to State Help
- Module Versions
- TheTaxBook integrated into TaxWise Online
- Protection Plus firm offering

Dashboard Changes

Late in 2022, Wolters Kluwer added some links to the Additional Resources section of the TaxWise Online Dashboard. The two added links relate to TaxWise Insiders. TaxWise Insiders is a platform to connect with your fellow TaxWise users and tax industry colleagues, all while celebrating your success and getting rewarded. When you join TaxWise Insiders, you will have a variety of challenges available to you that will earn you points. You can then use these points to redeem exclusive rewards. Our goal with TaxWise Insiders is to provide you with a platform to network, learn, and share

From the Additional Resources section, you can:

- Access TaxWise Insiders
- Join TaxWise Insiders

Additional Resources

- TaxWise Blog
- TaxWise Chat
- TaxWise Hot Topics
- TaxWise Online Learning Portal
- Access TaxWise Insiders
- Join TaxWise Insiders

Starting a New Return

Starting with the 2022 tax season, you will notice some changes were made to the Create New Return dialog box. You now have the ability to select the preparer that will be working on return as well as select the return template that will be applied to this return.

Create New Return

Select the type of return you wish to create

Start a New Return

Social Security Number:

Confirm Social Security Number:

Apply for ITIN

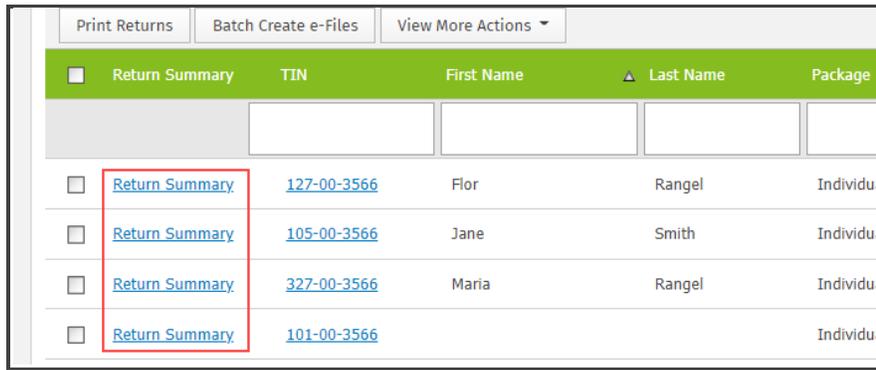
Select Preparer: ▼

Select Return Template: ▼

i If a Return Template has been assigned to a user, they will not be able to use any template other than the one assigned by the administrator.

Return Summary

You can access Return Summary from the Return List or from within an open return. Prior to filing season 2022, the Return Summary was an icon. Starting with Tax Year 2022, rather than an icon, you will have a Return Summary link.



<input type="checkbox"/>	Return Summary	TIN	First Name	Last Name	Package
<input type="checkbox"/>	Return Summary	127-00-3566	Flor	Rangel	Individu:
<input type="checkbox"/>	Return Summary	105-00-3566	Jane	Smith	Individu:
<input type="checkbox"/>	Return Summary	327-00-3566	Maria	Rangel	Individu:
<input type="checkbox"/>	Return Summary	101-00-3566			Individu:

2022 Report Changes

Going into Tax Year 2022, TaxWise Online has made some changes to the reporting capabilities withing the application.

Reports that were added starting with Tax Year 2022 are:

- **TWO Non-Returning Clients** - Generates report with a list of customers that have not returned for the current filing season.
- **Stale e-Files Report Tab** – Generates on screen report of all e-files that have been created, but not yet submitted. If you are a main office of a multi-office firm, you will see information for all your sub-offices.

Reports	
View Report Descriptions	State e-Files Report
Name	
1040X Report	
Outstanding Rejects	
TWO Daily Statistics	
TWO Non Returning Clients	
TWO Returns Created by Date and Username	
TWO State Return Detail	
TWO Statistical Data (Details)	
TWO eSignature Report	
TaxWise Mobile Report	

i In addition to the new reports, changes were made to the TWO eSignature Report. A column was added, so that you can identify if you have been billed.

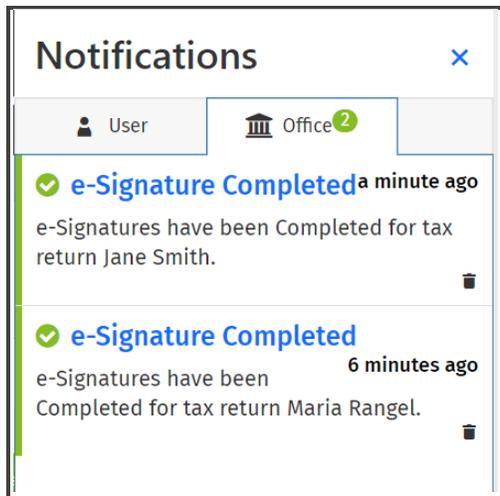
Changes made to the In-App Notification Panel

Prior to Tax Year 2022, the In App Notification Panel will provide notifications for:

- **User mentions in Client Notes** – The notification allows you to open client notes.
- **Additional document uploads through TaxWise Mobile** – The notification allows you to link to Vault to review the documents. The documents uploaded with the original submission do not trigger notification.
- **E-file Rejects** – The notification allows you to open the return.

For this year, you will also see notifications for:

- Bank Rejects
- Completed e-Signature envelopes



i Note that you will not receive a notification for e-Signature until all signatures are processed.

Client Letter Template Overview

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.

The changes include:

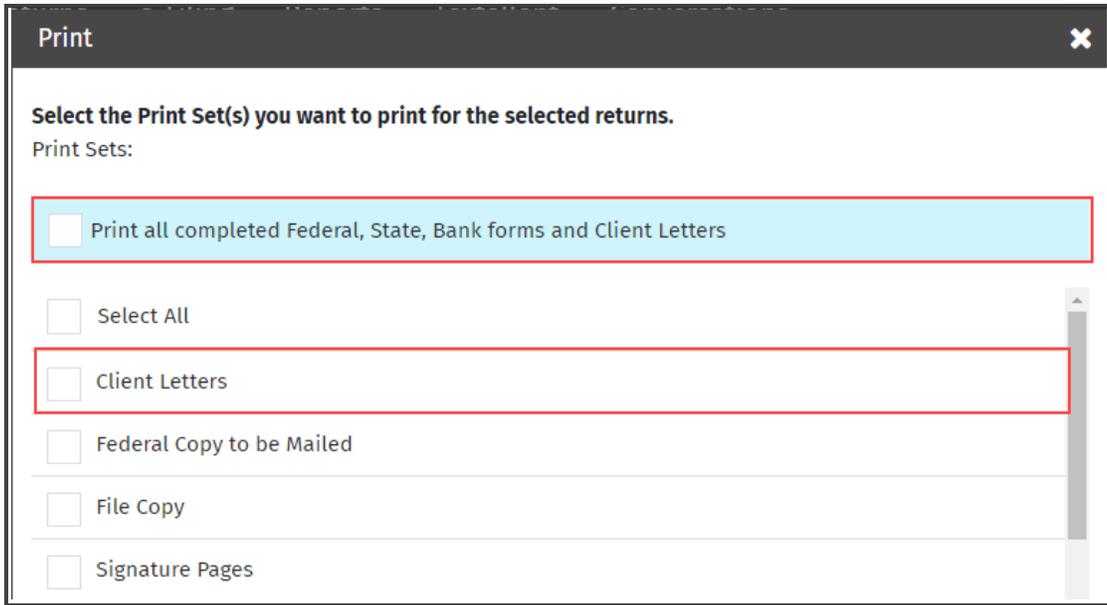
- The federal client letter templates have been modified to include conditions for both refund and balance due. You will no longer see two separate templates.
- State variables are now available for you to customize your client letter templates to include state specific information.
- We have added an engagement letter template.
- You can now add your client letters as part of your Return Templates.

i For additional information on customizing Client Letter templates, review the corresponding lesson that is part of the TaxWise Online Learning Portal.

2022 Printing Changes

There are two changes you will notice when printing returns from TaxWise Online.

- Ability to print client letter as part of your Print Set.
- New print option that you can select that allow you to select to Print all completed federal, state , and bank forms, along with Client Letters.

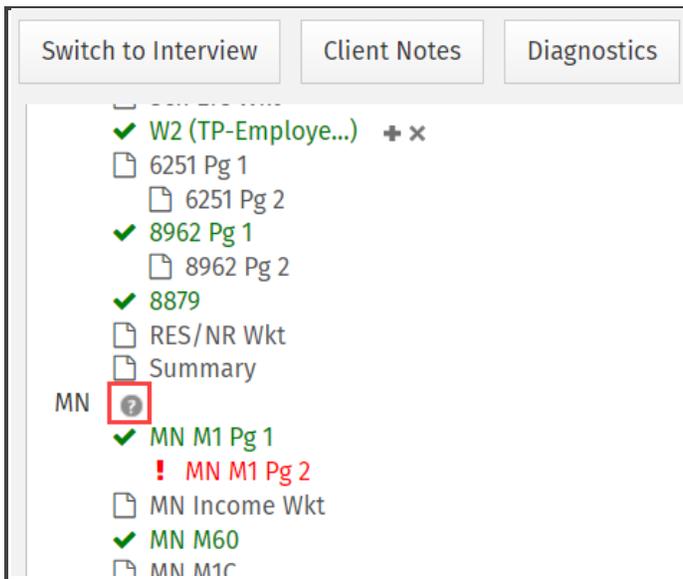


Easy access to State Help

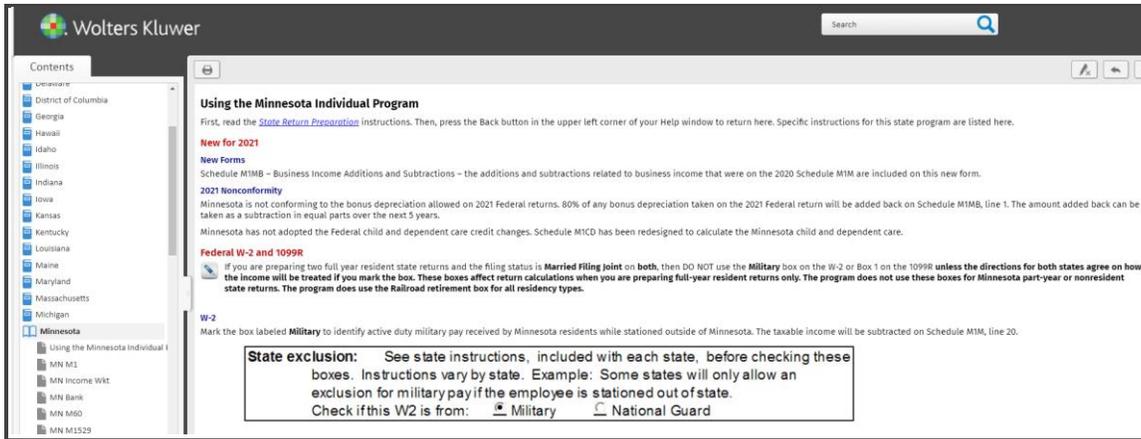
Going into Tax Year 2022, Wolters Kluwer has added access to State Help to the Loaded Forms section.

To access state help:

1. From within the open return, scroll down to the state forms section.
2. Next to the State abbreviation, click the help icon .



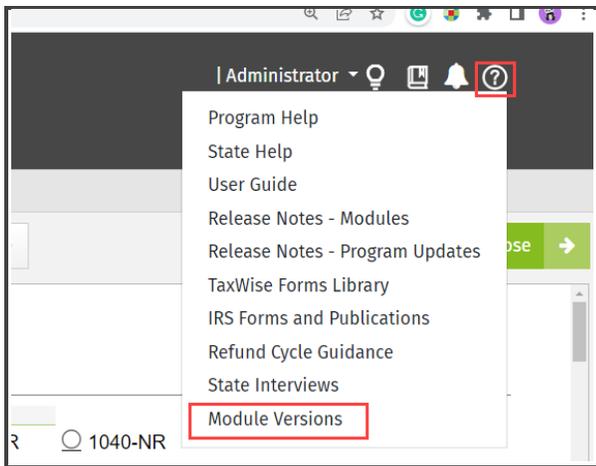
3. TaxWise Online launches TaxWise Help specific to the state loaded in your return.



Module Versions

You can now see what version of Modules you are running in TaxWise Online. To access this information,

1. Click the Help Icon, and select Module Versions



2. TaxWise Online displays the Module Versions page, where you see listed the various modules and their versions.

Module Versions		
Module Name	Version	Timestamp
Republic	2022.1	11/14/2022, 1:12 PM
Minnesota	2022.1	11/3/2022, 2:07 PM
Colorado	2022.1	11/3/2022, 2:04 PM
Santa Barbara	2022.1	11/3/2022, 2:00 PM
Individual US	2022.1	11/3/2022, 12:09 PM

Tax Book Integrated into TaxWise Online

TaxWise has partnered with The Tax Book to provide the most comprehensive and fastest way to find answers to your tax questions directly from within TaxWise Online. The Tax Book Web Library icon can be accessed from anywhere in TaxWise Online.



To access TheTaxBook Web Library:

1. Click **TheTaxBook** icon on the lower right corner, or use the keyboard combination **Alt + T**.
2. TaxWise Online launches TheTaxBook Web Library Search dialog box.
3. Type your search criteria and click **Go**.

The screenshot shows a dialog box titled "TheTaxBook WebLibrary Search" with a close button (X) in the top right corner. Below the title bar is a search input field containing the text "Child Tax Credit". To the right of the input field is a blue button with the text "Go" and a white right-pointing arrow. The input field and the "Go" button are highlighted with a red border.

4. TaxWise Online redirects you to a separate browser tab, where it launches the TheTaxBook log in screen.

TTB TAX PRODUCTS [Go to www.thetaxbook.cc](http://www.thetaxbook.cc)

Welcome to the Login Page for the TTB WebLibrary
You have 3 options to proceed.

1) Log in to your WebLibrary Subscription
Enter your Username and Password below. After you log in, leave the browser window open to access your subscription throughout the day.

TTB WEBLIBRARY

Username

Password

[Forgot Username/Password?](#)

Install a shortcut on your desktop to log in to your subscription.
[Click here](#) to install the shortcut.

2) Did you purchase a subscription to the WebLibrary from TaxWise?
If so, you need to activate your subscription to create your Username and Password.
[Click here](#) to activate your subscription.

3) Need to purchase a subscription to the WebLibrary?
[Click here](#) to purchase a subscription at discounted prices for TaxWise customers.

TTB WEBLIBRARY **TTB CLIENTHANDOUTS** **TTB ONLINECPE**

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5. There are three options on this screen:

- If you have purchased and activated your subscription, enter you Username and Password, and click **Login**.

TTB WEBLIBRARY

Username

Password

[Forgot Username/Password?](#)

- If you have purchased , but not activated your subscription, click the link in step 2, to activate your subscription.

Install a shortcut on your desktop to log in to your subscription.
Click [here](#) to install the shortcut.

2) Did you purchase a subscription to the WebLibrary from TaxWise?

If so, you need to activate your subscription to create your Username and Password.
Click [here](#) to activate your subscription.

3) Need to purchase a subscription to the WebLibrary?

Click [here](#) to purchase a subscription at discounted prices for TaxWise customers.

- If you need to purchase, click the link in step 3, to purchase a subscription at the discounted price designed for our TaxWise customers.

Install a shortcut on your desktop to log in to your subscription.
Click [here](#) to install the shortcut.

2) Did you purchase a subscription to the WebLibrary from TaxWise?

If so, you need to activate your subscription to create your Username and Password.
Click [here](#) to activate your subscription.

3) Need to purchase a subscription to the WebLibrary?

Click [here](#) to purchase a subscription at discounted prices for TaxWise customers.

6. For the purpose of this lesson, enter your credentials and click **Login**.
7. The TTB WebLibrary displays the search results.

The screenshot shows the TTB WebLibrary interface. At the top left is the logo 'TTB WEBLIBRARY' with a 'Switch Product' dropdown. On the top right, it says 'Welcome, [username]' with links for 'Help', 'Account', and 'Logout'. Below the logo is a search bar with 'Child Tax Credit' entered and a search icon. A left sidebar contains a navigation menu with categories like 'TheTaxBook Series', 'Deluxe & Supplement', 'All States', 'California Edition', 'Depreciation', 'SS & Medicare', 'What's New Early Edition', 'Occupations & Oddities', 'FastTaxFacts', 'Tax Industry News', 'Tools for Tax Pros', 'TheTaxBook Archives', 'Page Updates', 'Government Documents', 'Publications', and 'Forms & Instructions'. The main content area displays 'Displaying 50 of 861 results.' followed by a list of search results including 'Foster child - Child tax credit', 'Deluxe & Deluxe Supplement - Tax Credits (Page 11-8)', 'CTC | Child tax credit | ITIN - Child tax credit | Tax ID - child tax credit | CTC - Advance payment | Child Tax Credit and Credit for Other Dependents', and 'CTC - What's new'.

- The system should remember your login credentials for the day.

Protection Plus® Firm Offering

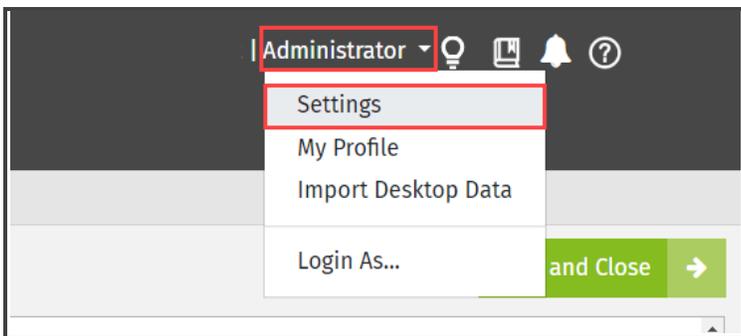
Protection Plus® audit assistance includes identity theft restoration services. Prior to Tax Year 2022, this could be offered to customers at a cost of \$45.95 with no cost to the tax professional.

Starting with Tax Year 2022, you have the option to opt to offer Protection Plus® at a firm level, which allow you to include this audit and identity theft protection to all your customers, for a cost to you of \$10 per return.

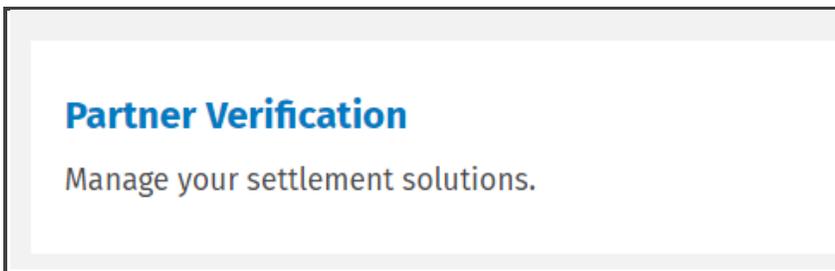
i We have seen customers choose to pass this expense on to their taxpayers using the price sheet.

To opt to offer Protection Plus® at the firm level, do the following:

1. Log in to TaxWise Online as the Admin user. From the Admin user menu, select **Settings**.



2. From the Settings page select **Partner Verification**.



3. Under the Additional Services section, click the **Protection Plus** link.

Additional Services

Service	Details
Protection Plus	Available
Protection Plus Fee	\$44.95
Protection Plus Add ON Fee	0.00
Versicom	Not Enrolled

Check if you are enrolled with Firm Level Protection Plus

4. On the Protection Plus Registration page, select your product. For the purpose of this lesson, select **TaxWise**.



5. On the Protection Plus and TaxWise Registration page, select one of the following options:
- **Firm-Level Program** – This option includes Protection Plus automatically on all your returns at a cost of \$10 per return.
 - **Per-Return Program** - This option is integrated with bank product returns at \$44.95 per return. With this option your taxpayer can elect to purchase Protection Plus or not.
6. For the purpose of this lesson, select **Firm-Level Program**.

Protection Plus + TaxWise Registration

By completing this registration, your firm will be enrolled to use Protection Plus for tax year 2022. We offer two different ways you can provide Protection Plus, select from the program options below to get started.

Program Options

<p>Firm-Level Program Most Popular</p> <p>Provide Protection Plus with all your returns</p> <p>\$10 per Return</p> <ul style="list-style-type: none">Program included for all 1040 returnsFlat rate for all returnsEnhance your services <p><input checked="" type="checkbox"/> Selected</p>	<p>Per-Return Program</p> <p>Provide Protection Plus as you go</p> <p>\$44.95 per Return</p> <ul style="list-style-type: none">Integrated with bank product returnsNo minimum number of enrollmentsOffer more options to your clients <p>Select</p>
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7. Complete your company information, as well as your estimated number of returns for 2022 and your EFIN.

Company Information

Company Name *	<input type="text"/>	Email *	<input type="text"/>
First Name *	<input type="text"/>	Last Name *	<input type="text"/>
Phone *	<input type="text"/>	Mobile	<input type="text"/>
Mailing Address *	<input type="text"/>	City *	<input type="text"/>
State/Province *	<input type="text" value="- Select -"/>	Zip Code *	<input type="text"/>
Estimated Number of Tax Returns for the 2022 Tax Season *	<input type="text"/>	EFIN *	<input type="text"/>

8. Then scroll down and complete your payment information. You will not be charged at the time this registration is submitted. This card will be charged periodically as you file tax returns.

Payment

You will not be charged at the time this registration is submitted. This card will be charged periodically as you file tax returns.



Card Number *

Expiration Date *

CVC *

9. By default, your Protection Plus subscription will auto renew.

Auto Renew

Yes

Never miss a year of Protection Plus. Include Protection Plus with every 1040 return until you cancel.

Provide Protection Plus to your clients for tax year 2022 only. To renew, you will need to manually enroll again next year.

By selecting the firm-level auto renew option:

- I understand that Protection Plus will be included for every individual tax return filed in this tax year and in future tax years until I notify Protection Plus that I would like to cancel.
- I authorize Tax Protection Plus LLC to charge the account I have on file \$10 for each of these returns.

10. To disable the auto-renew, select the slider to **No** in this section.

Auto Renew

No

Never miss a year of Protection Plus. Include Protection Plus with every 1040 return until you cancel.

Provide Protection Plus to your clients for tax year 2022 only. To renew, you will need to manually enroll again next year.

11. Read through the user agreement. By submitting this registration and signing below, you acknowledge to abide by these terms. To proceed, enter your name, which will serve as your electronic signature, and click **Submit**.

User Agreement

By submitting this registration and signing below, I acknowledge that:

I authorize Protection Plus to charge my account \$10.00 for every individual tax return filed; I agree to provide Protection Plus services to all of my individual tax return clients; I have read, understood and agree to the [Protection Plus User Agreement](#); I have read, understood and verified the accuracy of the information I have provided in the registration form; and I agree that this electronic signature has the same full legal force and effect as a handwritten signature or mark.

eSignature *

 **Submit**