

TaxWise® Online Learning Portal

Creating and Editing Client Letters

Client Letters allow you to communicate with your clients about their tax returns. TaxWise enables you to print custom letters for your clients with important information regarding their returns. The client letters include information about:

- Refund or balance due
- Where to mail the tax return
- Related state return information

TaxWise provides a standard client letter template for each tax package except for the Miscellaneous. Client letters are available in both English and Spanish. If the standard letter template does not meet your client needs, you can save the template with a different file name and customize it to suit your tax practice.

i If you wish to add a client letter to all returns, you can set this up in Tax Form Defaults.

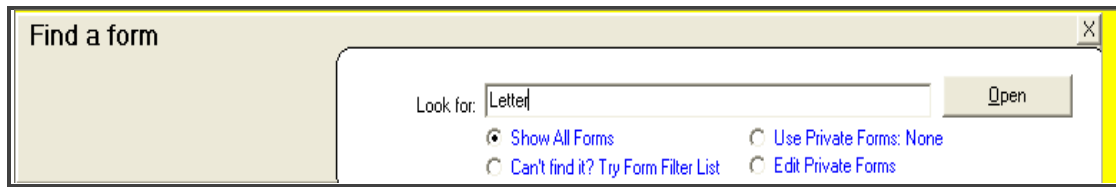
The screenshot shows the 'Main Information Sheet' form in the TaxWise interface. At the top, there are four tabs: 'Add Form/Display Form List (Ctrl+F10)', 'Copy This Form (Shift+F10)', 'Remove Form (Shift+F9)', and 'Close This Form (F10)'. The main content area is titled 'US Main Information Sheet'. It includes a section for 'This return can be filed on Form' with a dropdown menu set to '1040'. Below this are checkboxes for '1040PR', '1040NR', and '1040NREZ'. There is also a section for 'Check one:' with options for 'Spanish forms on the screen and printed.' and 'Spanish forms printed only.'. The form has several input fields for personal information: 'Sal.', 'Your first name', 'Initial', 'Last name', 'Suffix', and 'Your SSN' (with a placeholder '000-00-0000'). Below this is a section for 'If filing a JOINT return, enter your spouse's' with fields for 'Sal.', 'First name', 'Initial', 'Last name, if different from yours', and 'Spouse's SSN'. At the bottom, there is a 'Mailing address' field.

To add the client letter:

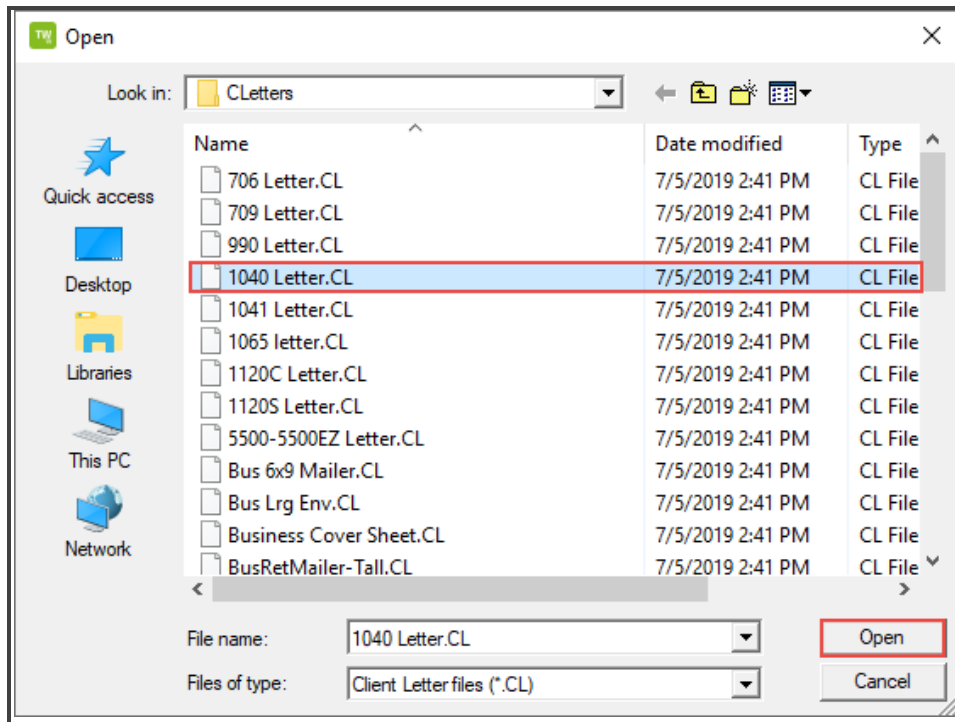
1. Click the **Add Form/Display Form List** tab.

This screenshot is similar to the previous one, showing the 'Main Information Sheet' form. However, the 'Add Form/Display Form List (Ctrl+F10)' tab is highlighted with a red rectangle, indicating the first step in the process.

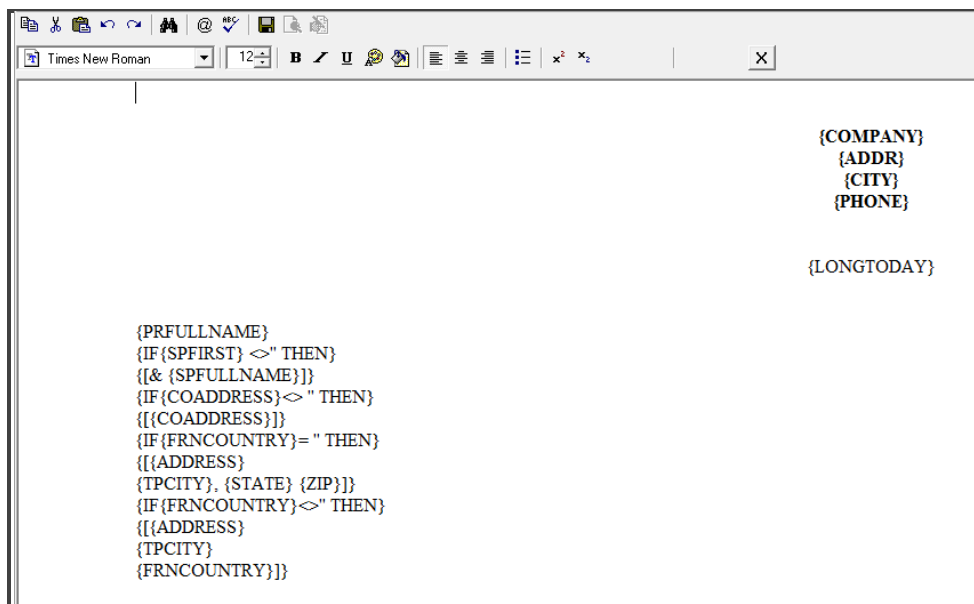
2. TaxWise displays the Find a Form page. In the Look for box, type **Letter**.



3. TaxWise displays a blank client letter in the background and the Open dialog box. Select the letter you want to use. Click **Open**.



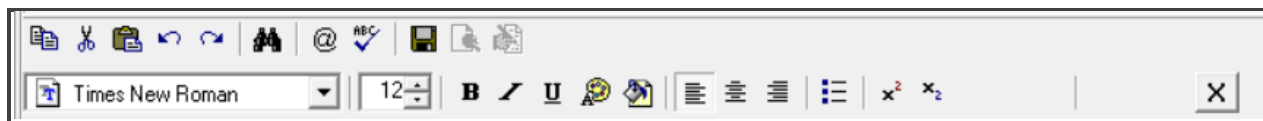
4. TaxWise displays the selected letter:



i You cannot preview or print client letter templates in Tax Form Defaults.

You can add additional text by typing directly into the template. Use the formatting bar along the top of the letter to make changes such as:

- Font size and color
- Adding bulleted or numbered lists
- Adding images
- Adding additional variables



i If you make changes to a template, you will need to save the template with a new name. TaxWise retains all default letters in addition to your edited versions.