

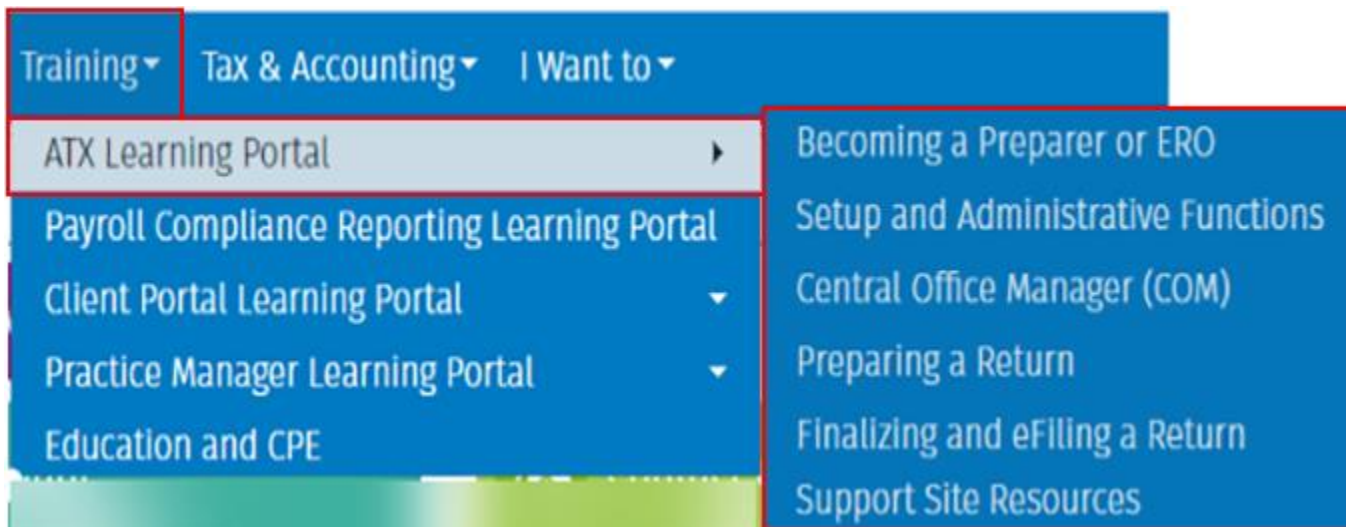
ATX™ Learning Portal

ATX Learning Portal

Wolters Kluwer offers both on-demand training options, as well as live Q&A sessions via webinar to assist you in setting up and using your tax program.

To access these training options:

1. Navigate and Login to <https://support.atxinc.com/>.
2. From the **Training** menu, hover over **ATX Learning Portal**, and select from the available learning paths.




i If you have not already logged in to the ATX Solution Center, you will be prompted to do so for this feature.

3. Login using your Client ID, username Admin, and your password.

The Support Site displays the selected Learning Path. There are three tabs on each page: Learn, Practice, and Engage.

ATX Learning Portal

The ATX Learning Portal provides a guided learning path designed to help you get the most out of your new software. Video guides, practice resources, and online support will ensure a quick and successful start to your ATX experience.




[Learn](#) [Practice](#) [Engage](#)

The **Learn** page contains several modules, which you can expand to see links for various videos on setting up and using your tax program.

Becoming a Preparer or ERO ▼

[Becoming a Preparer or ERO](#)

Click the link above to access the Learning Path.



- [Setup and Administrative Functions](#) >

- [Central Office Manager \(COM\)](#) >

- [Preparing a Return](#) >

- [Finalizing and e-Filing a Return](#) >

- [Support Site Resources](#) >

4. Within each module, click the links to access specific videos, or the **Additional Resources and Documentation** link to view the accompanying PDF documentation.

Accessing and Navigating ATX

In this module, you will learn how to download and install your ATX software, as well as how to bring forward prior year data. Click the links below to watch a specific lesson.



[Installing ATX](#)

[Converting Prior Year Returns](#)

[Downloading Prior Year Software](#)

[Rolling Over Returns](#)

[Accessing Help](#)

[Additional Resources and Documentation](#)

5. The **Practice** page contains practice return scenarios you can download to assist you in becoming more comfortable entering data in returns.

Learn [Practice](#) Engage

Below you will find practice scenarios for filing federal returns. Click the button for the scenario type you would like to key into ATX. Open the downloaded file to access provided scenarios. Key in each scenario into your tax program. Answer keys have been provided so you can check your work.

1040 Practice Scenarios

Beginner scenarios provide a basic understanding of common 1040 form usage and data entry. Intermediate scenarios include topics of, but not limited to, healthcare coverage, childcare expenses, and rental income. Advanced scenarios topics include, but not limited to, estimated payments, AGI adjustment, and other related topics. Click each Scenario to download Practice Return Data.

[Beginner](#) [Intermediate](#) [Advanced](#) [Answer Key](#)

1065 Practice Scenarios

Scenarios provided can be entered into the IRS 1065 form. Click the button below to download Practice Return Data.

[1065](#) [Answer Key](#)

1120 & 1120s Practice Scenarios

Scenarios provide can be entered into the IRS 1120 and the 1120s forms. Click the button below to download the practice return data.

[1120/1120s](#) [Answer Key](#)

- i** Note, the answer key will be updated periodically to include new calculations as they become available in new versions of the software.

- Click the **Beginner, Intermediate, Advanced, 1065 and/or 1120/1120s** buttons to download scenarios based on level of difficulty, or the **Answer Key** button to download the answers for each scenario.

1040 Practice Scenarios

Beginner scenarios provide a basic understanding of common 1040 form usage and data entry. Intermediate scenarios include topics of, but not limited to, healthcare coverage, childcare expenses, and rental income. Advanced scenarios topics include, but not limited to, estimated payments, AGI adjustment, and other related topics. Click each Scenario to download Practice Return Data.

[Beginner](#) [Intermediate](#) [Advanced](#) [Answer Key](#)

1065 Practice Scenarios

Scenarios provided can be entered into the IRS 1065 form. Click the button below to download Practice Return Data.

[1065](#) [Answer Key](#)

1120 & 1120s Practice Scenarios

Scenarios provide can be entered into the IRS 1120 and the 1120s forms. Click the button below to download the practice return data.

[1120/1120s](#) [Answer Key](#)

- The **Engage** page displays links to register for a live Q&A webinar, where you can ask questions on administrative features, or preparing returns in your tax program.

Learn [Practice](#) [Engage](#)

Once you have completed the ATX on-demand curriculum and you still have questions, you can register for a live question and answer session with a product expert. Use the links provided below to register for a live ATX Administrator or the ATX Preparer Question and Answer Session.

[ATX Administrator Question & Answer Session](#)

The live, Q&A session will focus on the administration roles and functions within ATX. Please complete the ATX on-demand curriculum before registration for this session.

[ATX Preparer Question & Answer Session](#)

The live, Q&A session will focus on the tax return preparer roles and functions within ATX. Please complete the ATX on-demand curriculum before registration for this session.

For more information on how to register for these sessions, refer to: [How do I register for ATX product training?](#)

To request assistance or to contact our support team, please visit [Support Site](#) to access additional product information or to open a support case.

- When you click one of the links to register for a Q&A session, you will be directed to the registration page for that event.

This webinar is offered several times. Select the date and time that works best for you.

Wed, Jun 19, 2024 11:00 AM - 12:00 PM EDT ▼

[Show in My Time Zone](#)

After reviewing the ATX on-demand content, this webinar provides attendees with an opportunity to ask specific questions they still have regarding setting up ATX, or other administrative roles within the program.

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Email Address*	
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-  Please complete the on-demand training on the Learn page prior to registering for a Q&A session.