

TaxWise® Online Learning Portal

Help Resources in TaxWise Online

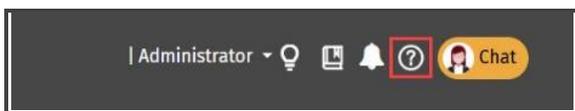
TaxWise Online provides several methods for getting help within the application. Review the following section to learn more about the TaxWise Online help features.

Program Help

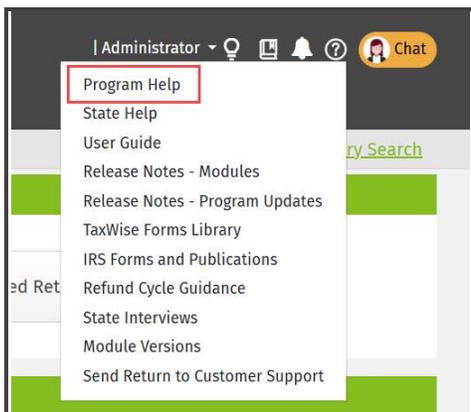
At any point in the program, inside or outside of a return, you can access Program Help. This tool allows you to browse or search for information on setting up your program, preparing returns, and navigating the software.

To access Program Help:

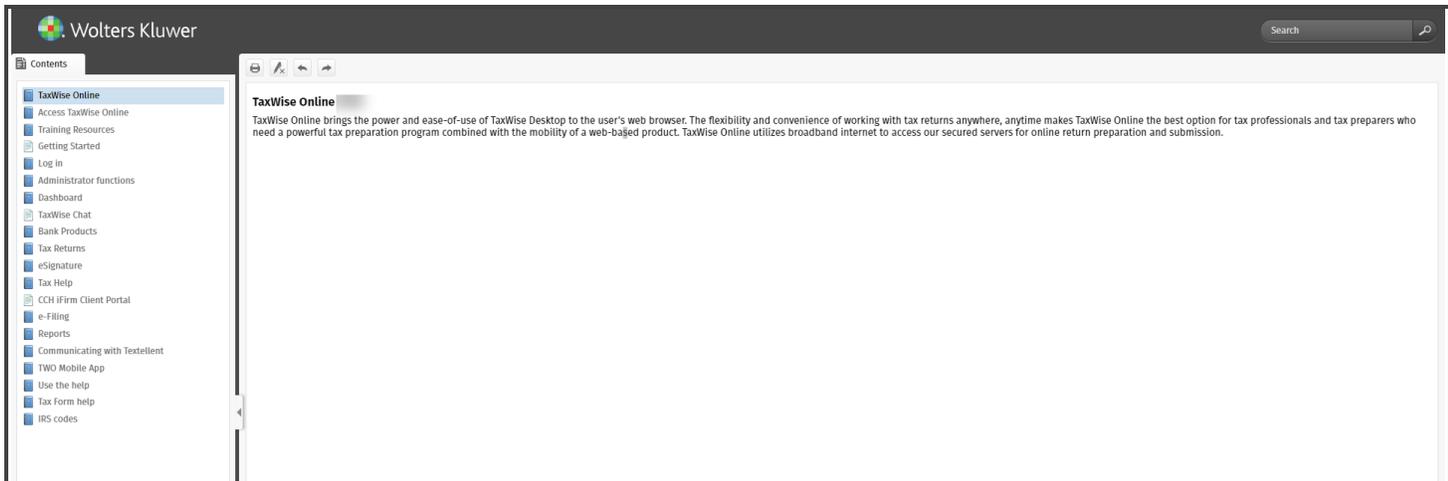
1. From the upper right-hand corner, click the help icon  or F1.



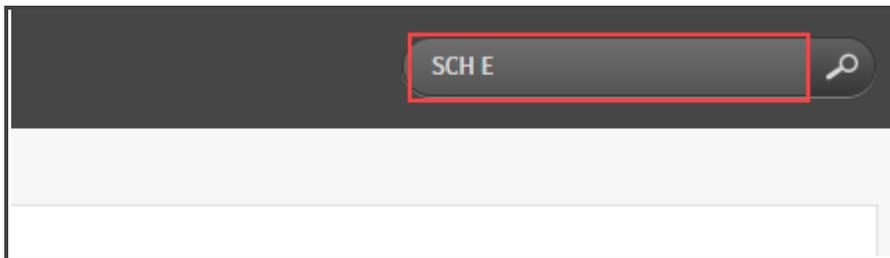
2. TaxWise Online displays the Help menu, click **Program Help**.



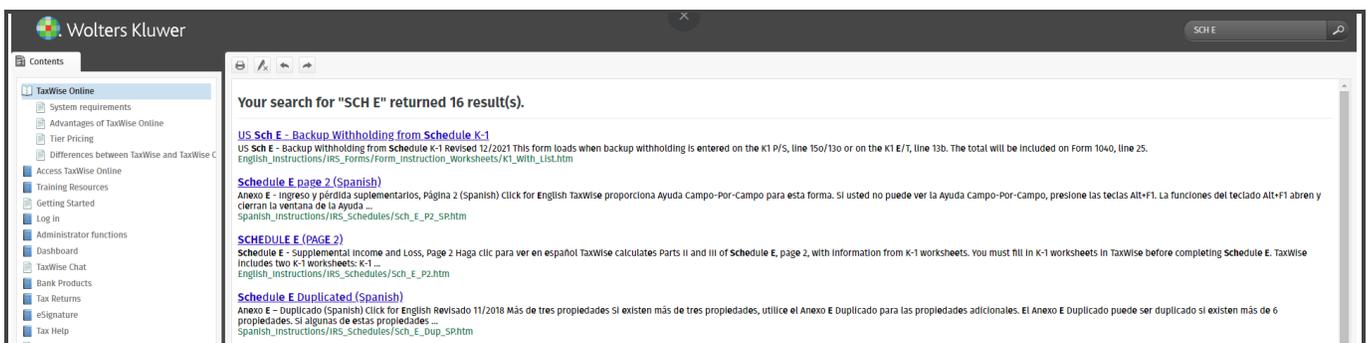
3. TaxWise Online displays the TaxWise Online Web Help dialog page.



4. Browse the contents by expanding each book icon to view the topics underneath. TaxWise Online displays the selected topic in the right pane.
5. An alternative would be to use the Search field to search for a specific topic. Type a keyword to search for, and then click search icon to view the results.



6. TaxWise Online list the possible help articles.



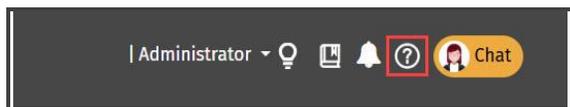
7. Click the title and TaxWise Online displays the information in the right pane.

State Help

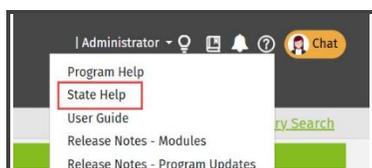
TaxWise Online help also provides program help files specific to state forms.

To access State Help:

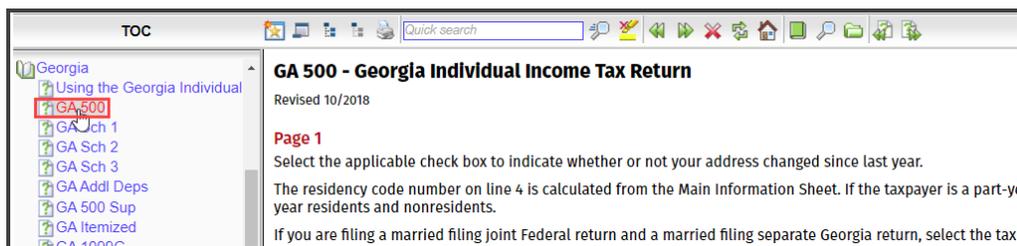
1. From the upper right-hand corner, click the help icon .



2. From the Help menu, select **State Help**.



3. Browse the TOC tab by expanding each book icon to view the state forms underneath. Select the form, and TaxWise Online displays the state specific program instructions in the right pane.



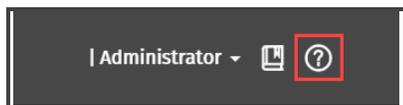
4. Use the icons in the top left to collapse the table of contents, navigate between topics, or print selected topics.



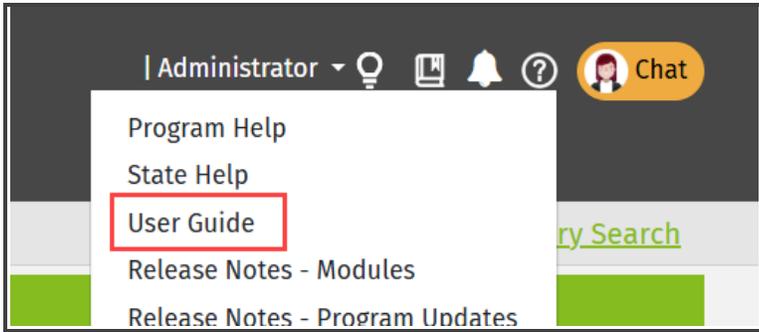
User Guide

You can also access a full PDF of the TaxWise Online user guide within the software. To access the User Guide.

1. From the upper right-hand corner, click the help icon.



2. From the Help menu, select **User Guide**.



3. A .pdf user guide will open in another browser tab. You can save the .pdf to your computer or print it.

Context sensitive help

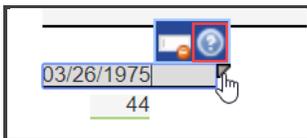
Context Sensitive Help provides you with field-level software help on many common forms. This information displays as a pop-up on the screen.

To access context sensitive help for a field,

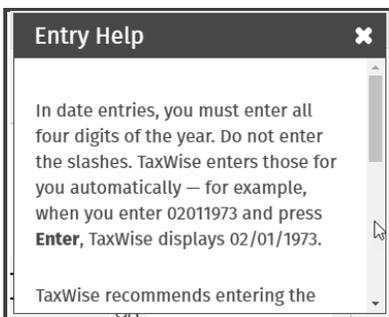
1. Click the arrow to the right of the field.



2. TaxWise Online displays two to five icons depending on the field. Click the help icon.



3. TaxWise Online displays the Entry help window with the details available for the selected field.



4. Click the **x** to close.

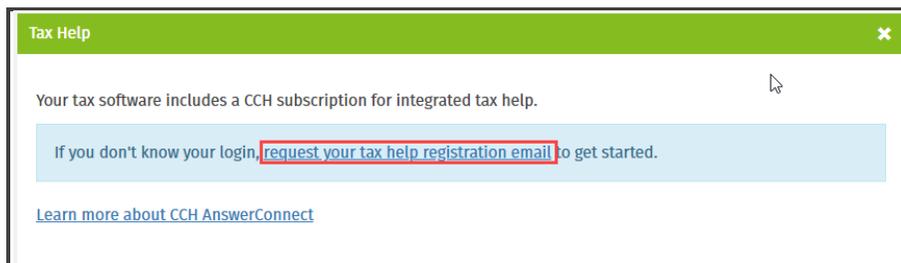
Tax Help

When you purchase TaxWise Online, you also receive a subscription for integrated tax help. This is provided through an online tax research platform, which allows you to search for answers quickly and prepare returns more efficiently.

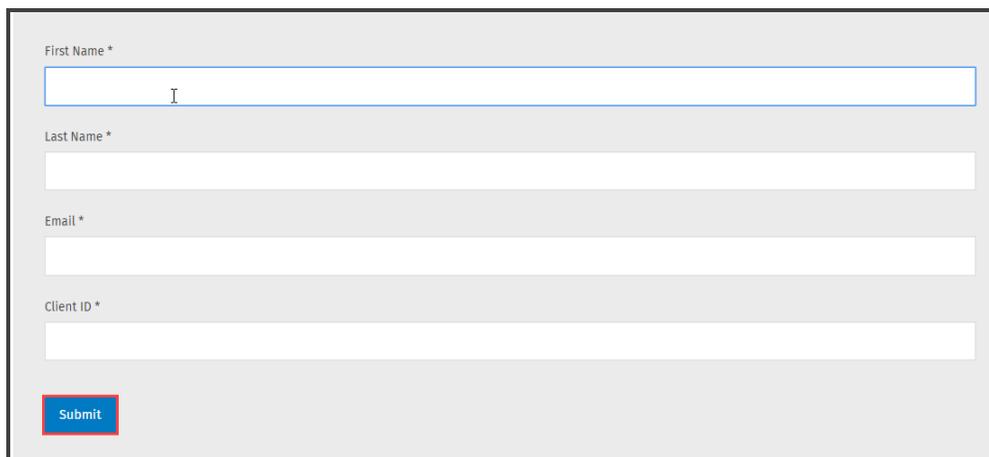
If you have not received your Answer Connect subscription email you can request it.

To request subscription email:

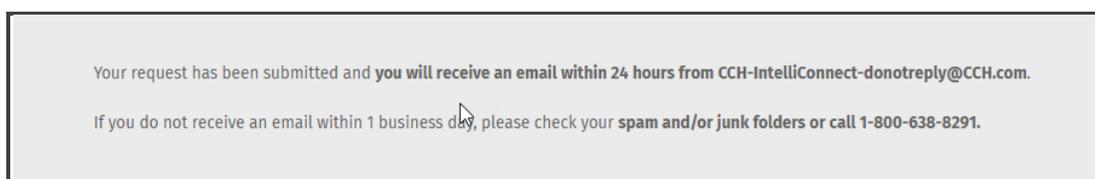
1. On the Dashboard there is a Tax Help widget, from here click the link to request your tax help registration email.



2. You are directed to the Research Register Email page. Complete your first name, last name, email address and Client ID. Then click Submit.



3. A confirmation message displays, acknowledging the receipt of your request. You should receive an email with your credentials within 24 hours, if not contact support.

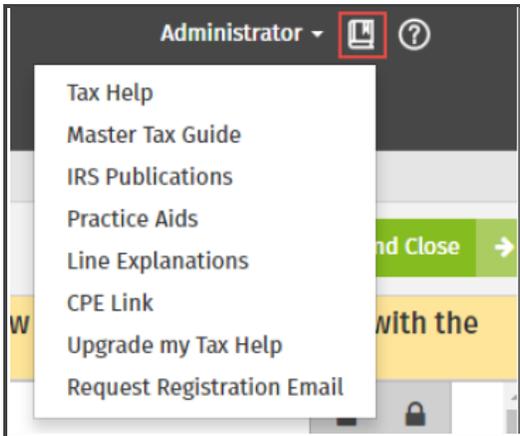


To access the Tax Help tools:

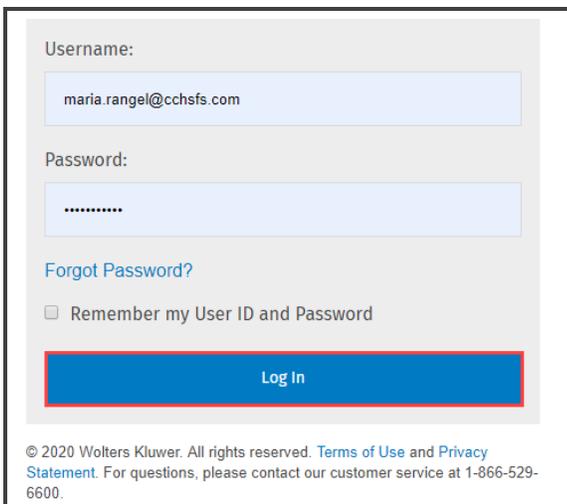
1. From the upper right-hand corner, click the tax help  icon.



2. TaxWise Online Displays the Tax Help menu, with the various available tools. Click Tax Help.



3. You are directed to a separate browser window, to enter your Answer Connect credentials. Enter your username and password, and click Log In.

A screenshot of the Answer Connect login form. It has a light gray background. At the top, it says 'Username:' followed by a text input field containing 'maria.rangel@cchsfs.com'. Below that is 'Password:' followed by a text input field with masked characters. There is a blue link for 'Forgot Password?'. Below the password field is a checkbox labeled 'Remember my User ID and Password'. At the bottom is a large blue button with the text 'Log In' highlighted with a red border. At the very bottom, there is a small copyright notice: '© 2020 Wolters Kluwer. All rights reserved. Terms of Use and Privacy Statement. For questions, please contact our customer service at 1-866-529-6600.'

4. You are now logged in to CCH AnswerConnect.



i For additional information on using Tax Help within a return, review the Integrated Research Features lesson, in the Preparing a return course.