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.



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IntWise Online Access TaxWise Online Training Resources Getting Started Gotting Started Joshboard Takinistator functions Dashboard TakWise Chat Bank Poducts Tak Returns Signature Signature Tak Help Coli firm Client Portal e-Filing e-Fortal e-Filing Reports Communicating with Testellent TWO Mobile App Use the help Tak Test	TaxWise Online TaxWise Online brings the power and ease-of-use of TaxWise Desktop to the user's web browser. The flexibility and convenience of working with tax returns anywhere, anytime makes TaxWise Online the best option for tax professionals and tax preparers who need a powerful tax preparation program combined with the mobility of a web-baged product. TaxWise Online utilizes broadband internet to access our secured servers for online return preparation and submission.	

- **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.

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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 O.



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**.

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Program Help)	
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Release Notes	s - Modules	
Release Notes	s - Program Updates	

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.

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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.

Tax Help	×
Your tax software includes a CCH subscription for integrated tax help.	
If you don't know your login, <mark>request your tax help registration email t</mark> o get started.	
Learn more about CCH AnswerConnect	

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

First Name *			
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Last Name *			
Email *			
Client ID *			
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.

Your request has been submitted and you will receive an email within 24 hours from CCH-IntelliConnect-donotreply@CCH.com.	
If you do not receive an email within 1 business dy, please check your spam and/or junk folders or call 1-800-638-8291.	

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.

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Log In	
rights reserved. Terms of Use and Privacy	
	ser ID and Password Log In

4. You are now logged in to CCH AnswerConnect.

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Search everything in CCH [®] AnswerConnect	Federal Tax Topics State Tax
Search by keyword, citation, topic or question	
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For additional information on using Tax Help within a return, review the Integrated Research Features lesson, in the Preparing a return course.