

# TaxWise® Online Learning Portal

## Adding and Printing Client Letters

Client Letters allow you to communicate with your clients about their tax returns. TaxWise Online enables you to print a letter with each return. You can add a standard letter, customize an existing client letter, or create your own.

The client letters include information about:

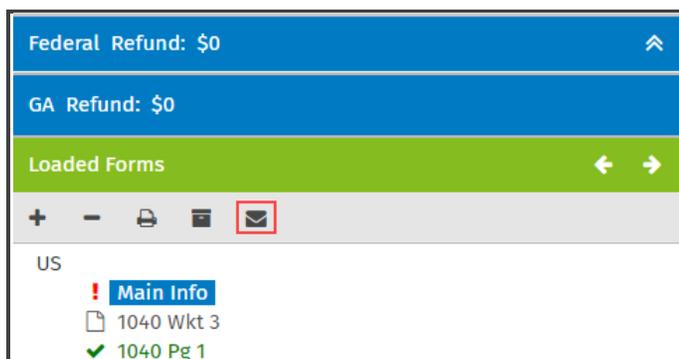
- Tax preparer's contact information
- Federal refund, balance or amount due
- Related state return information
- Where to mail the tax return

Prior to the 2022 filing season, the client letter was printed separate from the tax return. Starting with the 2022 filing season, you will be able to print your client letter along with your return. As part of this enhancement, you will also be able to add your client letters as part of your Return Templates.

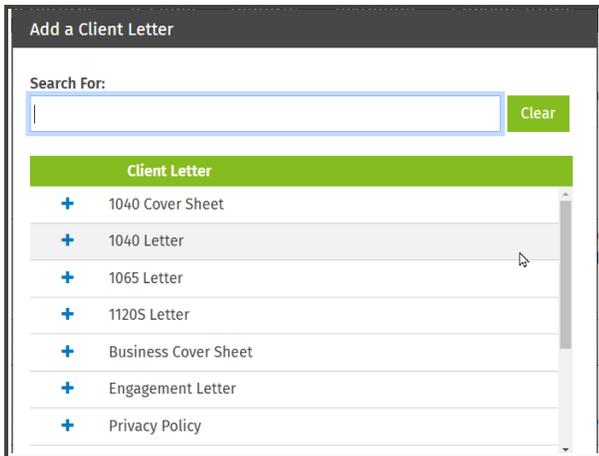
### Adding Client Letters to a Return

To add a client letter to a return:

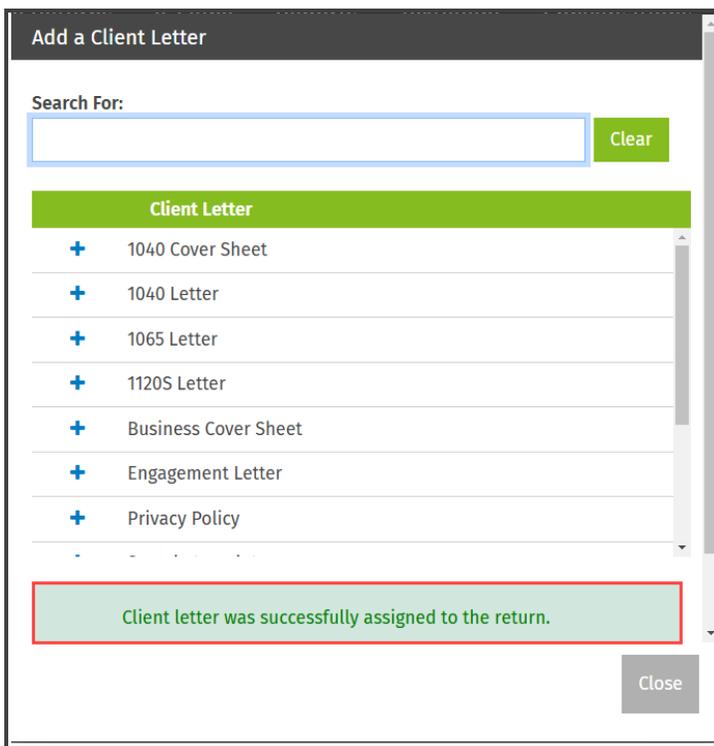
1. From an open return, under the Loaded Forms section, click the **Add a Client Letter** icon.



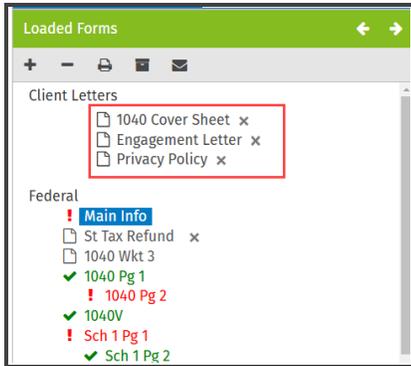
2. TaxWise Online displays the Add a Client Letter dialog box. Listed you will see the default Client Letter templates, as well as any custom templates you have created. Click the + icon next to the letter you want to add for this return.



3. TaxWise Online displays a confirmation message stating that the Client letter was successfully assigned to the return. Repeat the process to add additional client letters. Click **Close** when done.



4. Once you close the Add a Client Letter dialog box, you will see the client letters at the top of the Loaded Forms section.

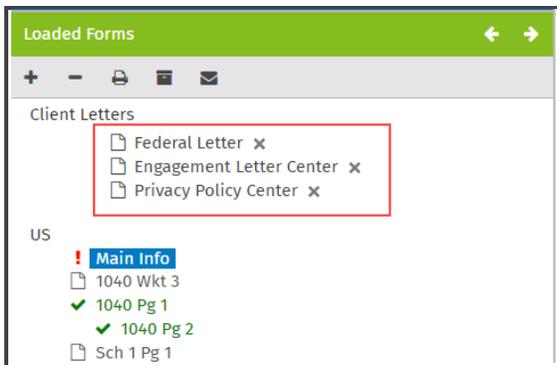


## Printing Client Letters

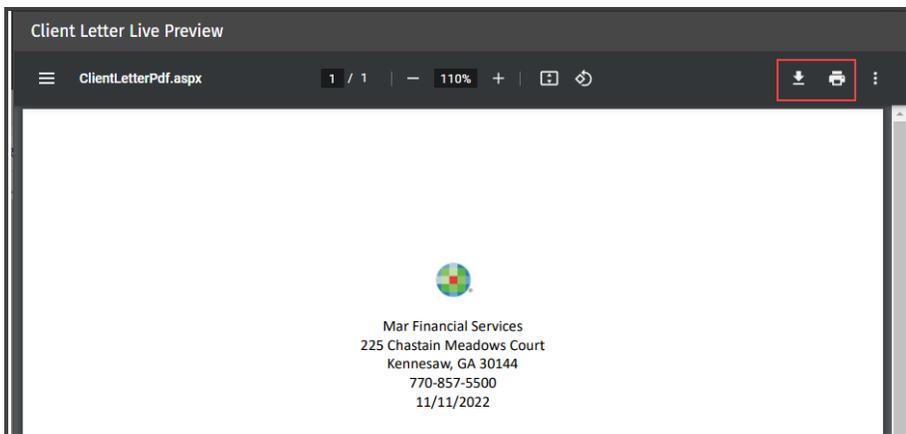
You can print client letters as part of your return or independently.

To print just the client letter:

1. From the Loaded Forms section, click the client letter.



2. TaxWise Online displays the Client Letter Preview dialog box. From the Client Letter Preview dialog box, choose to download or print the return by selecting the corresponding icon in the upper right corner.



You can print the client letter when printing your return. To do so:

1. Click the **Print Return** button.
2. TaxWise Online displays the Print dialog box. Adjust your print preferences if needed. You can select one of the following options to print the client letters:
  - Select **Print all completed Federal, State Bank forms and Client Letters**.
  - Select **Client Letters**, along with your other Print Sets.

**Print** [X]

Select the Print Set(s) you want to print for the selected returns.

Print Sets:

- Print all completed Federal, State, Bank forms and Client Letters
- Select All
- Client Letters
- Federal Copy to be Mailed
- File Copy
- Signature Pages