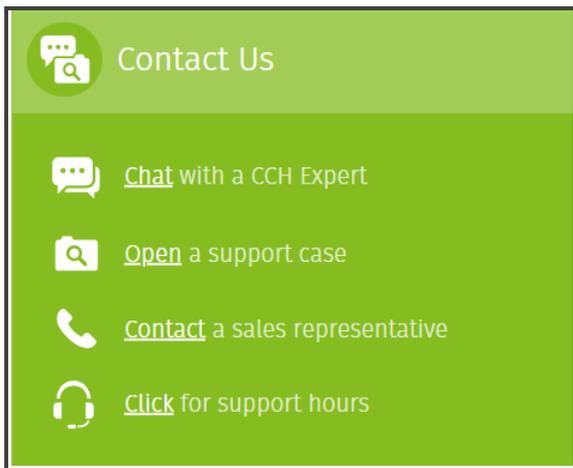


# TaxWise® Online Learning Portal

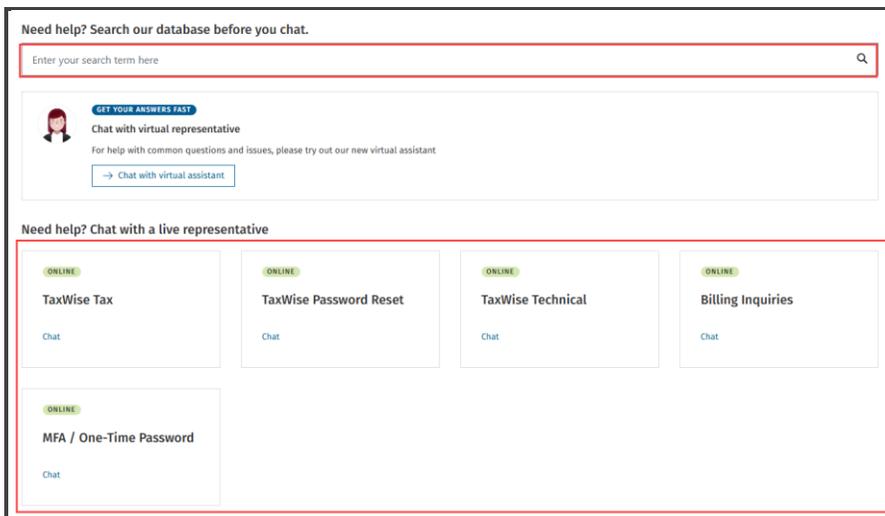
## Contact Us

From the Contact Us box, you can chat with a representative, create a case for a Customer Support representative to resolve, contact a sales representative, or find the hours our Customer Support department is available.

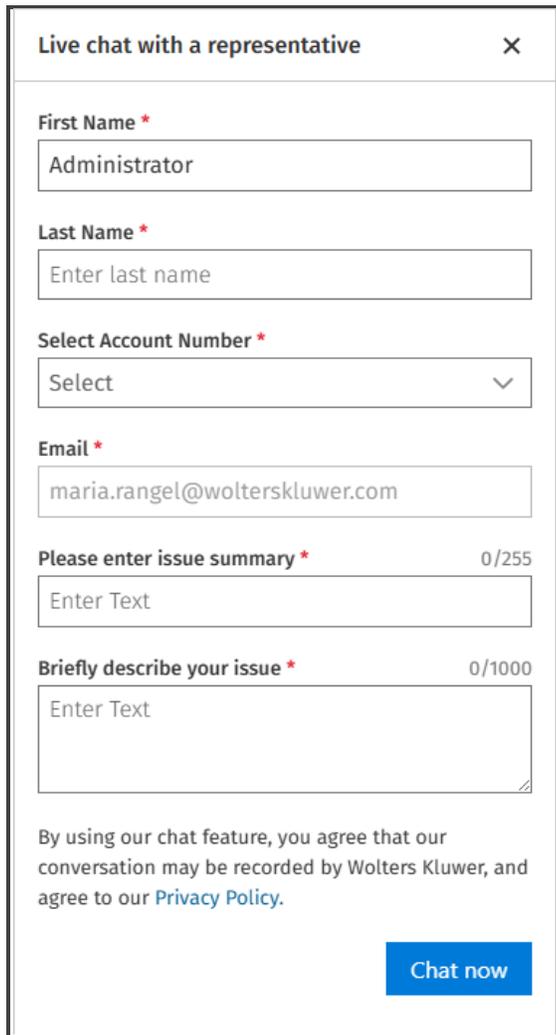


## Chat with a CCH Expert

1. Click **Chat with a CCH Expert** to view options to Search the Knowledge Base before you chat, chat with a virtual representative or click the **Chat with a live representative** button for the product you would like assistance with.



2. The TaxWise Solution Center displays a dialog box where you can enter your information and your question to begin the chat conversation.



**Live chat with a representative** ×

**First Name \***  
Administrator

**Last Name \***  
Enter last name

**Select Account Number \***  
Select ▾

**Email \***  
maria.rangel@wolterskluwer.com

**Please enter issue summary \*** 0/255  
Enter Text

**Briefly describe your issue \*** 0/1000  
Enter Text

By using our chat feature, you agree that our conversation may be recorded by Wolters Kluwer, and agree to our [Privacy Policy](#).

**Chat now**

3. Click **Chat Now**.

## Open a Support Case

1. Click **Open a Support Case** to begin submitting a question for a support representative to review and then contact you at a specified time to resolve. If you have not already logged in, you will be prompted to do so at this time.
2. From the available options, select which best describes your need. Options include Product or Technical Support, Billing & Accounts, Orders & Returns, and Interested in Product or Service.

## Which of the following best describes your need?



Product or Technical Support



Billing & Accounts



Orders & Returns



Interested in a Product or Service

3. For the purpose of this lesson, I selected Product or Technical Support.
4. Displayed you will see the Open a case page. Here you are prompted to :
  - Select your product
  - Enter your account number
  - Select the type of help you need
  - Provide a brief Issue Summary
  - Provide additional detail description about the issue.
5. Once this information has been entered, click **Next**.

Home > Open a support case > Product or Technical Support

### Open a case

Describe your issue      Contact Details      Case Created

Which of the following best describes your need?  
Product or Technical Support

Product \*  
TaxWise Online

Account Number \*  
800284

I Need \*  
 Help Using the Product  
 Technical Support (ex.: installation, configuration, printing)

Brief Issue Summary \*  
Unable to add form

Detailed Description \*  
I am having issues locating the input for the 1098T information.

Cancel    Next →

6. TaxWise will display a list of links to knowledge base articles that may be helpful in resolving your issue. If none of the articles help answer your question, click **Yes, Create a case**.

### Open a case

Describe your issue      Suggested Solution      Contact Details      Case Created

**i** Brief Issue Summary  
Unable to add form

Here are the links that might be helpful:

- [Where do I enter 1098-T information in TaxWise®?](#)
- [How do I enter Form 1098-T information in my TaxWise® Software?](#)
- [Taxwise was unable to find a form that matches your criteria](#)
- [Why am I not able to locate Form 1099-C for a 1040 return in TaxWise®?](#)
- [When adding forms in Taxwise the shortcut is not populating the form](#)

**Do you still want to create a new support case?**

7. Next, provide your contact information, so that we can contact you in regard to your issue. Once the information is complete, click **Open a case**.

### Open a case

Describe your issue      **Contact Details**      Case Created

**Brief Issue Summary**  
Unable to add form

<b>First Name</b> Administrator	<b>Last Name *</b> Rangel
<b>Company / Organization Name *</b> Mar Financial Services	<b>Phone Number *</b> 🇺🇸 (201) 555-0123
<b>Email Address</b> maria.rangel@wolterskluwer.com.sfstest	<b>ZIP/Postal Code *</b> 30165
<b>Alternate phone number</b> 	<b>Alternate email</b> 
<b>Best Time to Contact</b> After 2:30	

Cancel      ← Previous      **Open a case**

8. Displayed you will see a confirmation message that your case successfully opened. You can see its status, edits, its details, or attach files.

**Open a case**

Describe your issue      Contact Details      Case Created

**Brief Issue Summary**  
Unable to add form

**Thank you for submitting**  
Your case **18687442** was successfully opened. You can now see its status, edit details or attach files.

[Attach files](#)      [Go to all cases →](#)

## Contact a Sales Representative

1. Click the **Contact a sales representative** link to view the phone number where you can reach our sales department, as well as request a demo of a specific software, or register to attend a demo of a program and ask any questions you may have before making your purchase.

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## Click for Support Hours

1. Click the **Click for Support Hours** link to view the phone number, as well as charts indicating when phone and chat support is available during different times of year.

### ATX™ and TaxWise®: Support Hours of Operation

[✉ Send by e-mail](#)   
 [🖨 Print](#)   
 [🔗 Direct Link](#)

US Small Firms Tax and Accounting Services:  
 This article shows the Support Hours of Operation for 2025

- Phone Numbers:
  - ATX: (800) 638-8291
  - TaxWise and TaxWise Online: (866) 641-9473

The tables below show the support availability schedule for the following products:

- ATX
- ATX Pay-Per-Return
- ATX 1040
- ATX MAX
- ATX Total Tax Office
- ATX Advantage
- ATX Payroll Compliance
- TaxWise
- TaxWise Online
- TaxWise Desktop
- CCH iFirm
- CCH iFirm Portal
- CCH iFirm Practice Manager
- Client Accounting Suite

Support Schedule				
Dates		Hours of Operation		
		Monday – Friday	Saturday	Sunday
January 1 – March 9*	Phone	8:00 a.m. – 7:00 p.m.	10:00 a.m. – 2:00 p.m.	Closed
	Chat		10:00 a.m. – 6:00 p.m.	