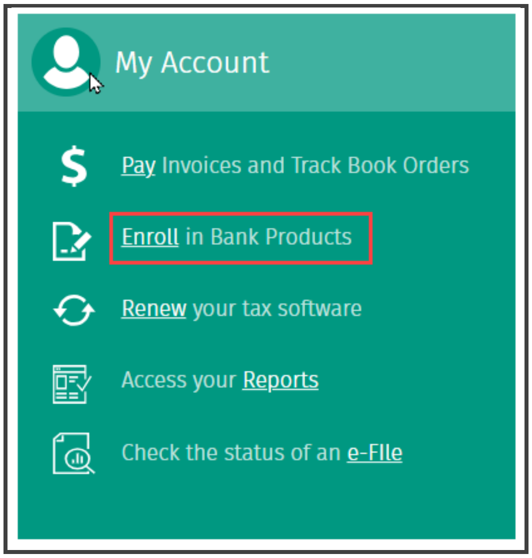
TaxWise® Online Learning Portal

Completing your ERO Bank Application

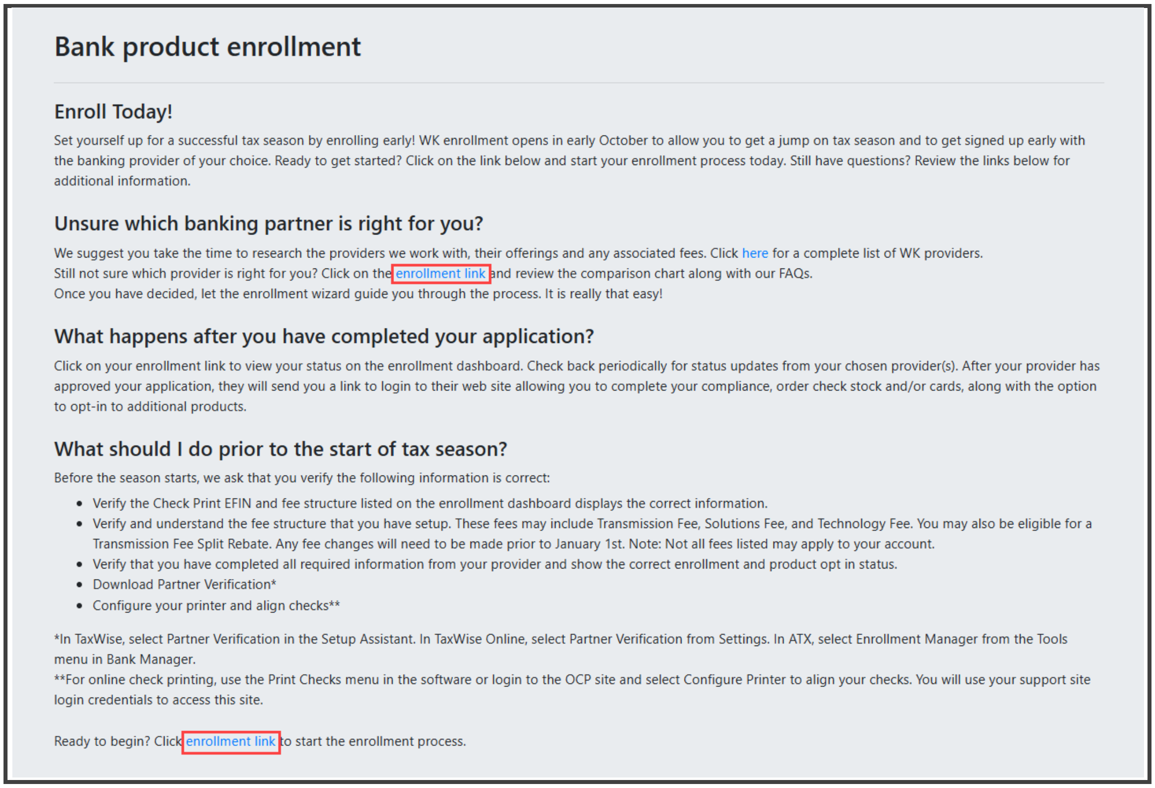
If you are interested in offering refund settlement solutions for your clients, you must first apply with one of the banking partners through the TaxWise Solution Center. To do this:

1. Go to https://support.taxwise.com/
2. Under My Account, click **Enroll in Bank Products**.



If you are not already logged in, you will be prompted to do so at this time.

3. You will be directed to the Bank Product Enrollment page. From here, click **enrollment link**.



Bank product enrollment

Enroll Today!

Set yourself up for a successful tax season by enrolling early! WK enrollment opens in early October to allow you to get a jump on tax season and to get signed up early with the banking provider of your choice. Ready to get started? Click on the link below and start your enrollment process today. Still have questions? Review the links below for additional information.

Unsure which banking partner is right for you?

We suggest you take the time to research the providers we work with, their offerings and any associated fees. Click here for a complete list of WK providers.
Still not sure which provider is right for you? Click on the enrollment link and review the comparison chart along with our FAQs.
Once you have decided, let the enrollment wizard guide you through the process. It is really that easy!

What happens after you have completed your application?

Click on your enrollment link to view your status on the enrollment dashboard. Check back periodically for status updates from your chosen provider(s). After your provider has approved your application, they will send you a link to login to their web site allowing you to complete your compliance, order check stock and/or cards, along with the option to opt-in to additional products.

What should I do prior to the start of tax season?

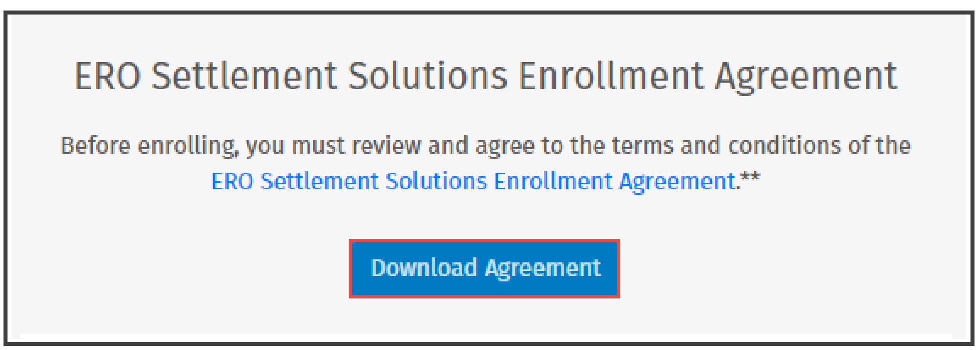
Before the season starts, we ask that you verify the following information is correct:

- Verify the Check Print EFIN and fee structure listed on the enrollment dashboard displays the correct information.
- Verify and understand the fee structure that you have setup. These fees may include Transmission Fee, Solutions Fee, and Technology Fee. You may also be eligible for a Transmission Fee Split Rebate. Any fee changes will need to be made prior to January 1st. Note: Not all fees listed may apply to your account.
- Verify that you have completed all required information from your provider and show the correct enrollment and product opt in status.
- Download Partner Verification*
- Configure your printer and align checks**

*In TaxWise, select Partner Verification in the Setup Assistant. In TaxWise Online, select Partner Verification from Settings. In ATX, select Enrollment Manager from the Tools menu in Bank Manager.
**For online check printing, use the Print Checks menu in the software or login to the OCP site and select Configure Printer to align your checks. You will use your support site login credentials to access this site.

Ready to begin? Click enrollment link to start the enrollment process.

4. You are directed to the Provider Enrollment Portal. Before enrolling, you must review and agree to the terms and conditions of the ERO Settlement Solutions Enrollment Agreement. Click **Download Agreement** and review the terms.

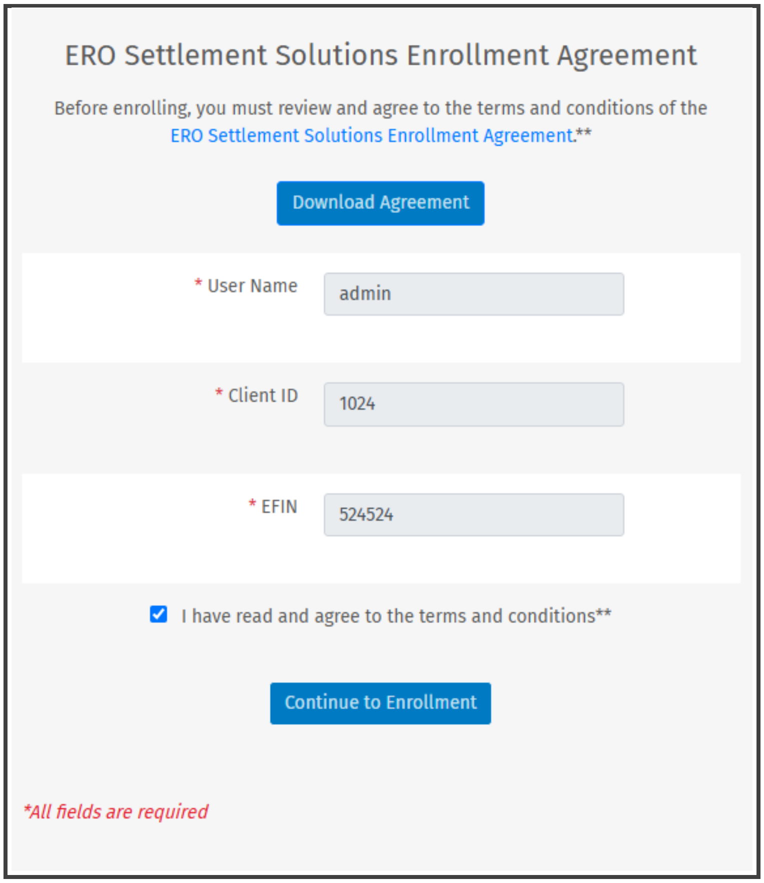


ERO Settlement Solutions Enrollment Agreement

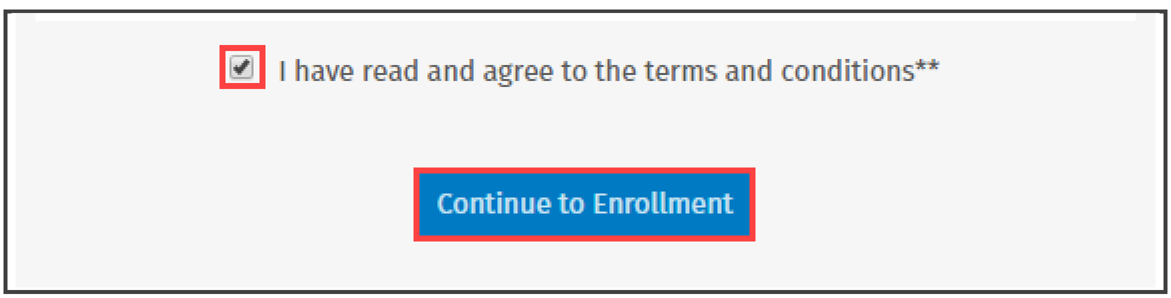
Before enrolling, you must review and agree to the terms and conditions of the ERO Settlement Solutions Enrollment Agreement.**

Download Agreement

5. Next, verify your username, Client ID, and EFIN in the appropriate fields.

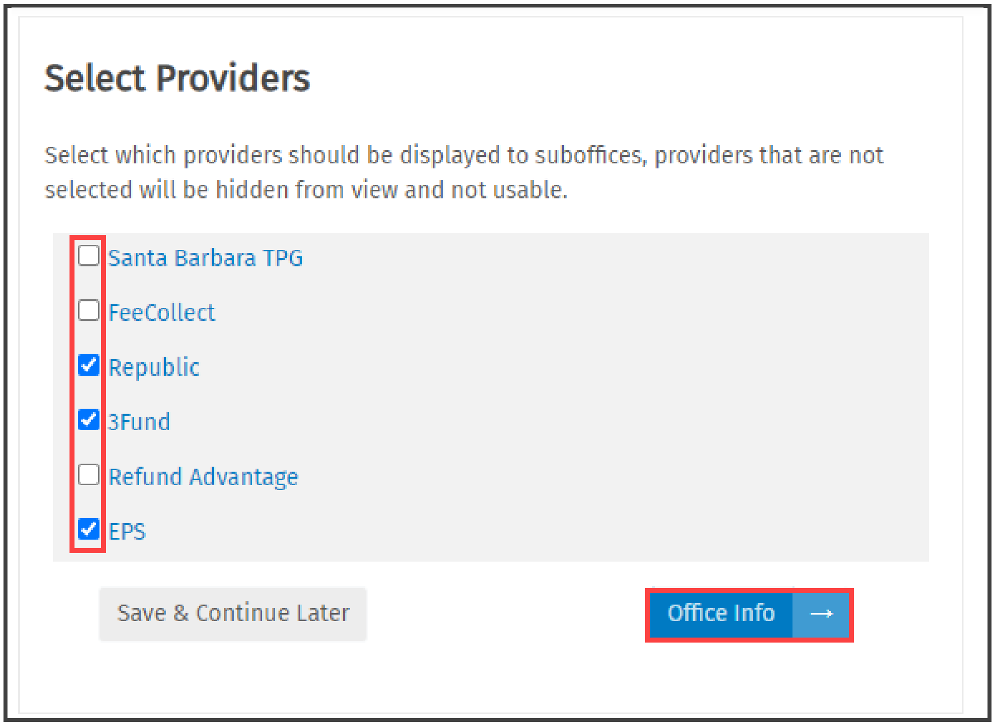


6. Select the checkbox indicating you have read and agree to the terms and conditions and click **Continue to Enrollment**.

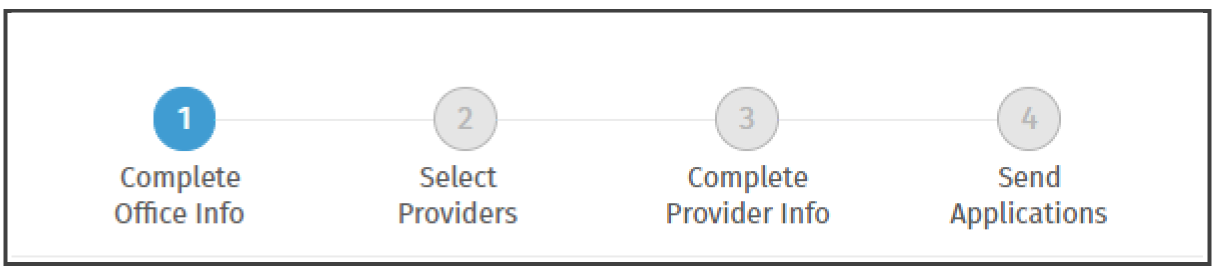


7. Displayed you will see the page. Select which providers should be displayed to suboffices, providers that are not selected here will be hidden from suboffices and not usable. If you are a suboffice or a single office user, you may not see this page.

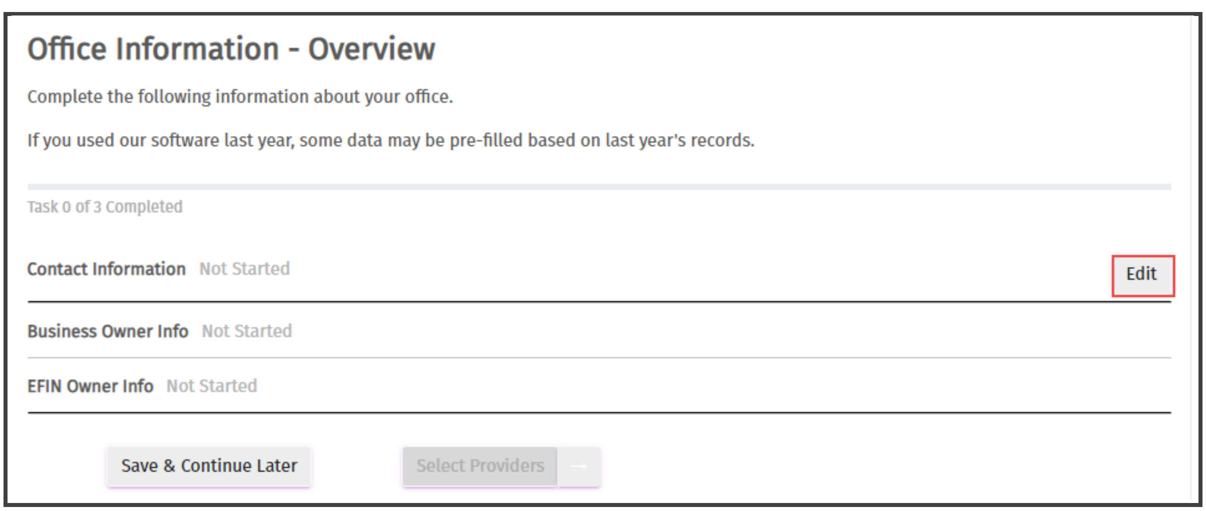
8. Once the providers have been selected, click **Office Info**.



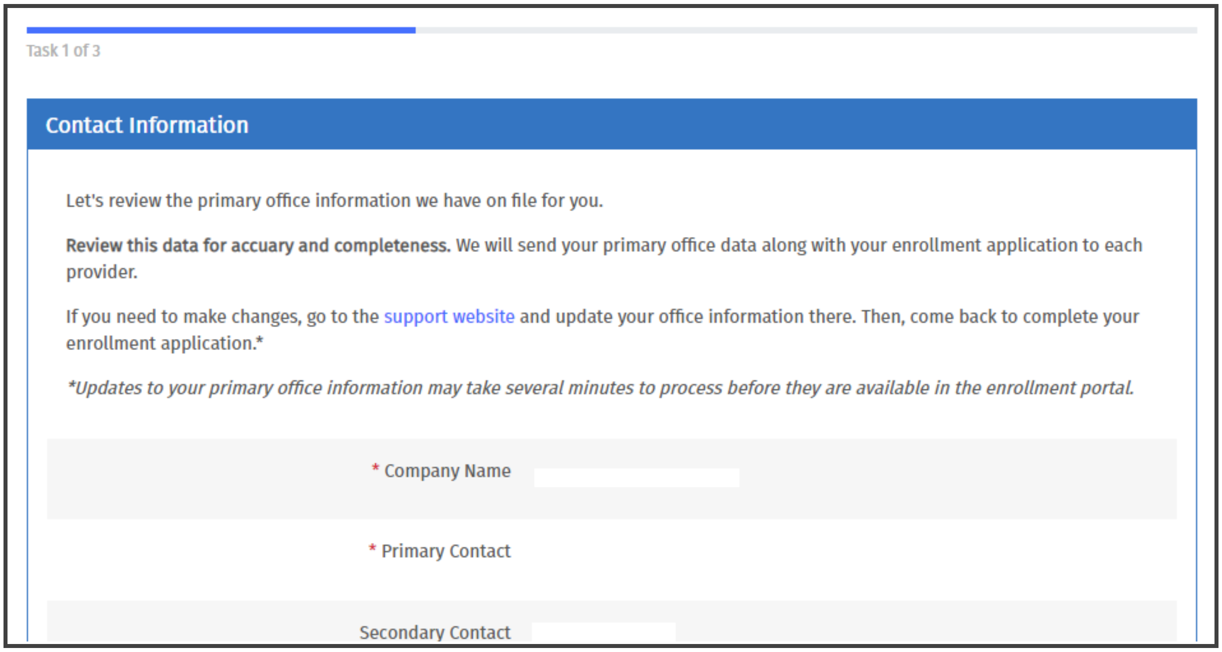
9. The page displays the progress of your enrollment.



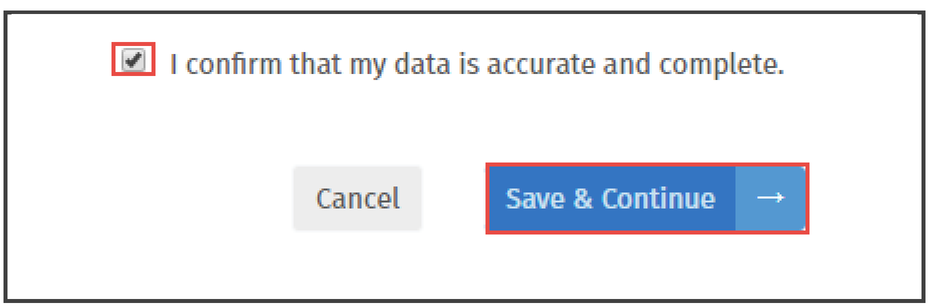
10. In Step 1, **Complete Office Info**, complete your contact information, business owner information and EFIN owner information. If you used our software last year, some data may be pre-filled based on last year's records. Verify that this information is correct; if not, update the information. Click **Edit** to begin completing this section.



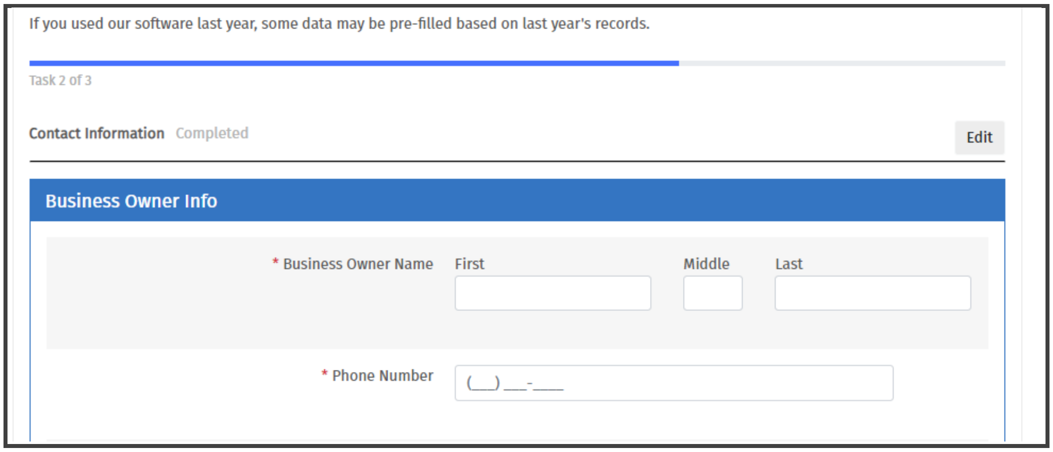
11. The portal displays the **Contact Information**. Please review for accuracy and completeness. If you need to make changes, go to the support website and update your office information there. Then come back and complete the enrollment application.



12. Click the check box to confirm the data is accurate, and then click **Save & Continue**.

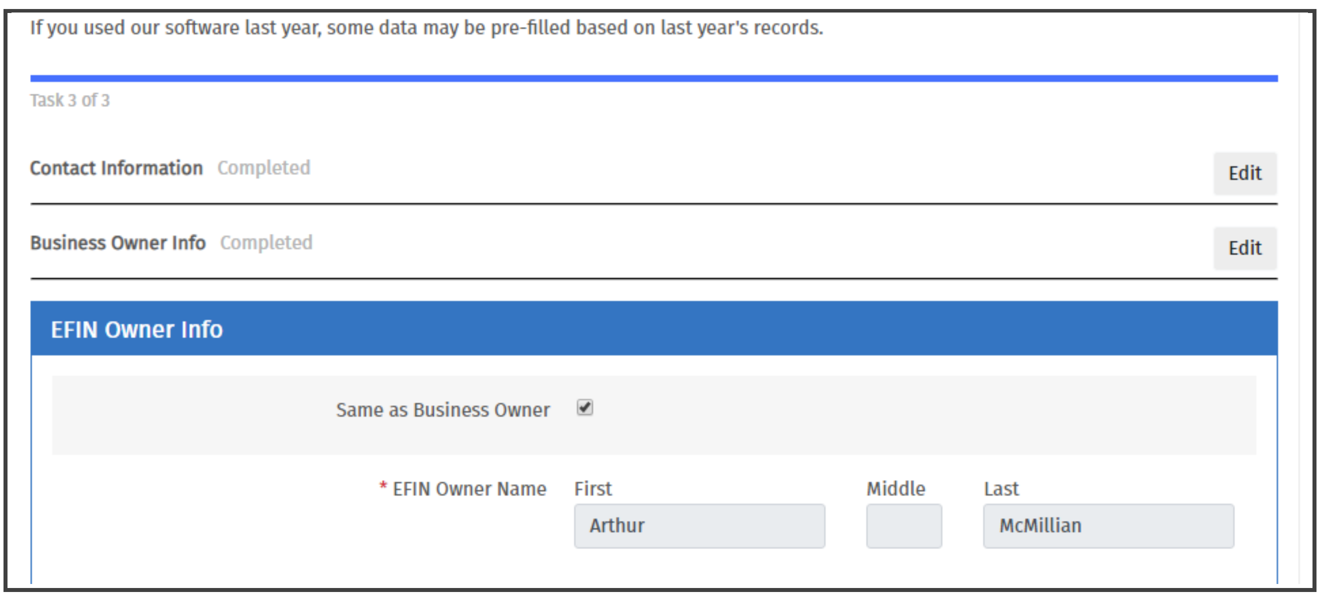


13. Next, complete the **Business Owner Info** section.



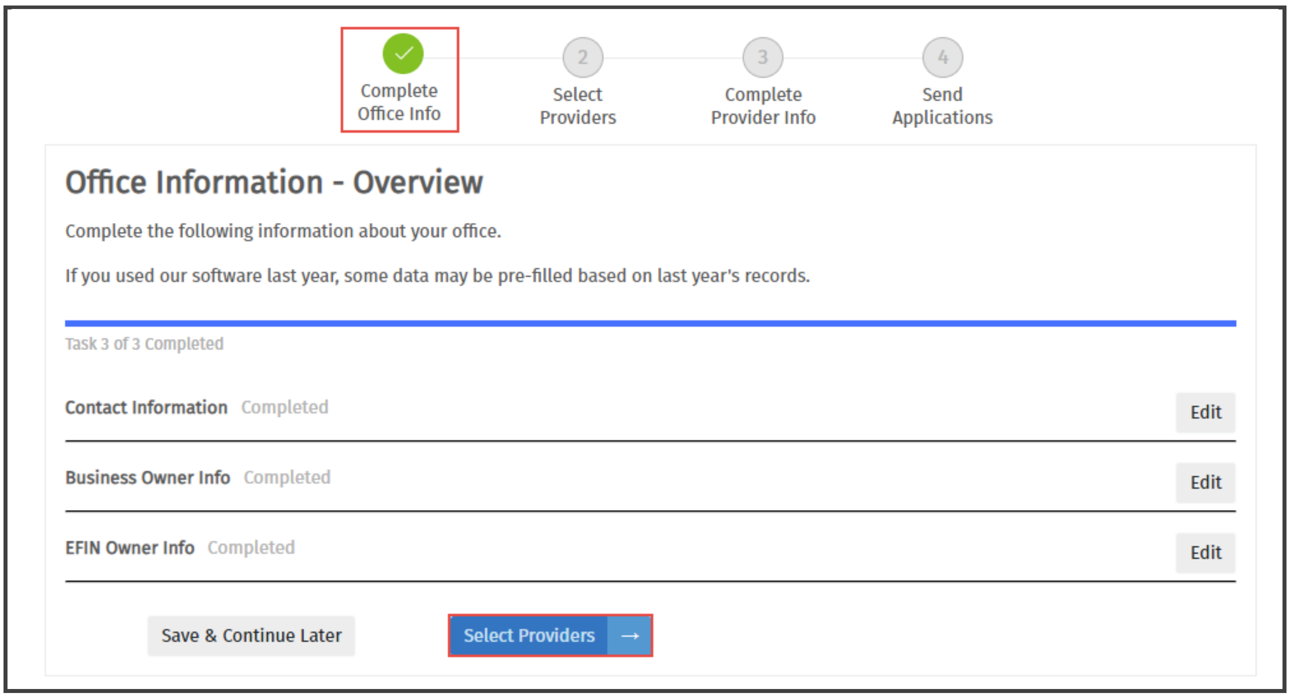
14. Click **Save & Continue**.

15. Finally, in the **EFIN Owner** information section, if the information for the EFIN owner is the same as the business owner, select the checkbox and the information automatically flows. If the EFIN owner is not the business owner, complete the information.

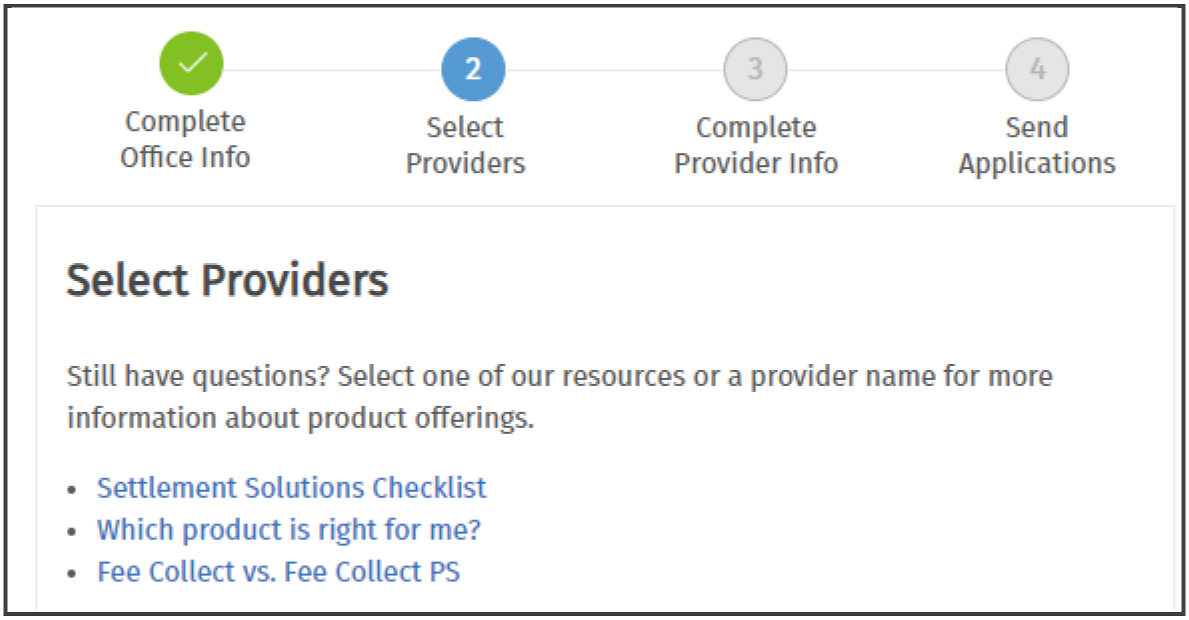


16. Click **Save & Continue**.

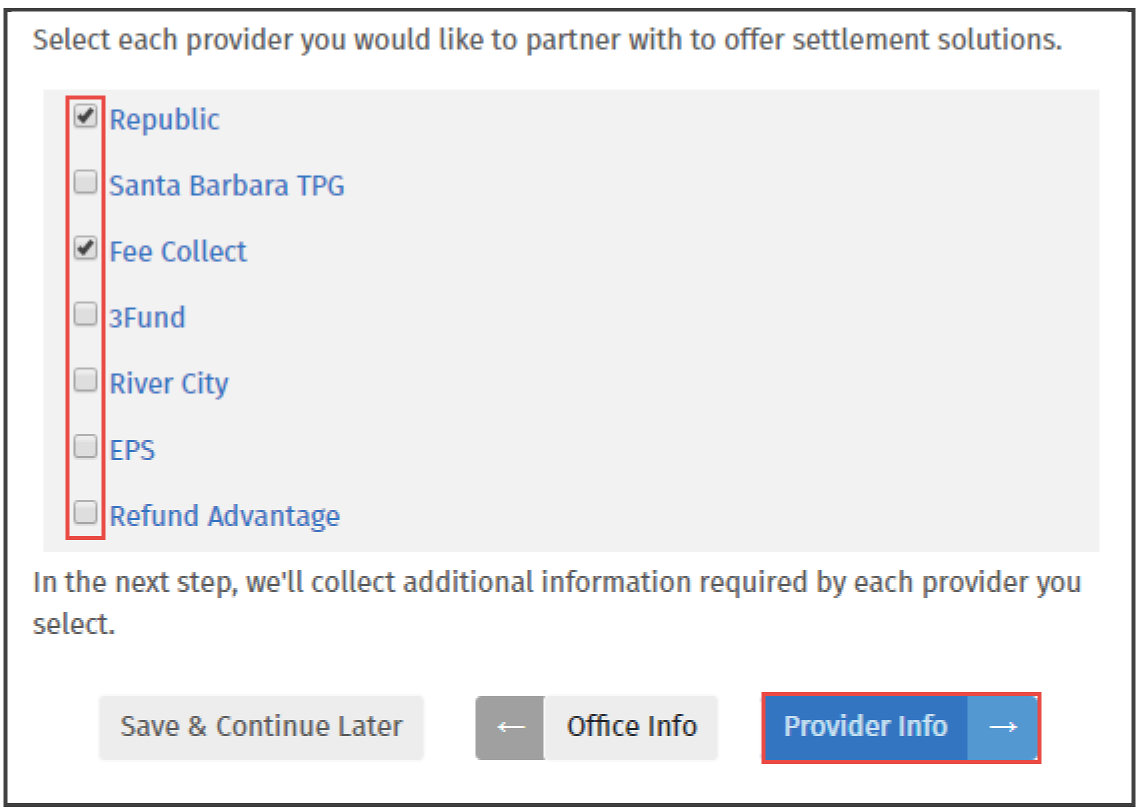
17. Once all the required information is complete, the Complete Office Info step is marked in green. To proceed to the next step, click **Select Providers**.



18. If you still have questions about your banking options, click the resources provided on this screen for additional information before making your choice.

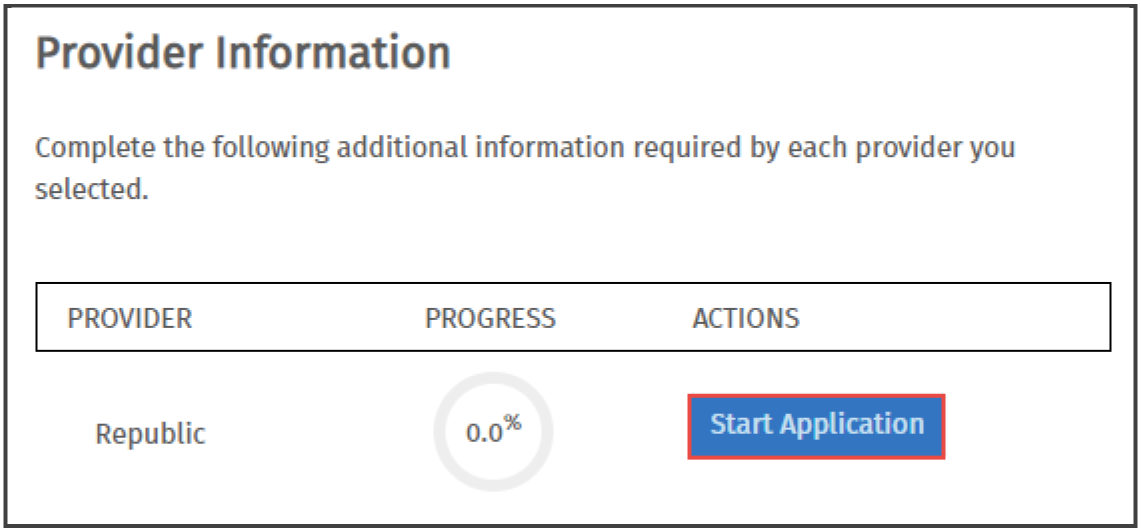


19. Select each provider you would like to partner with and click **Provider Info**.



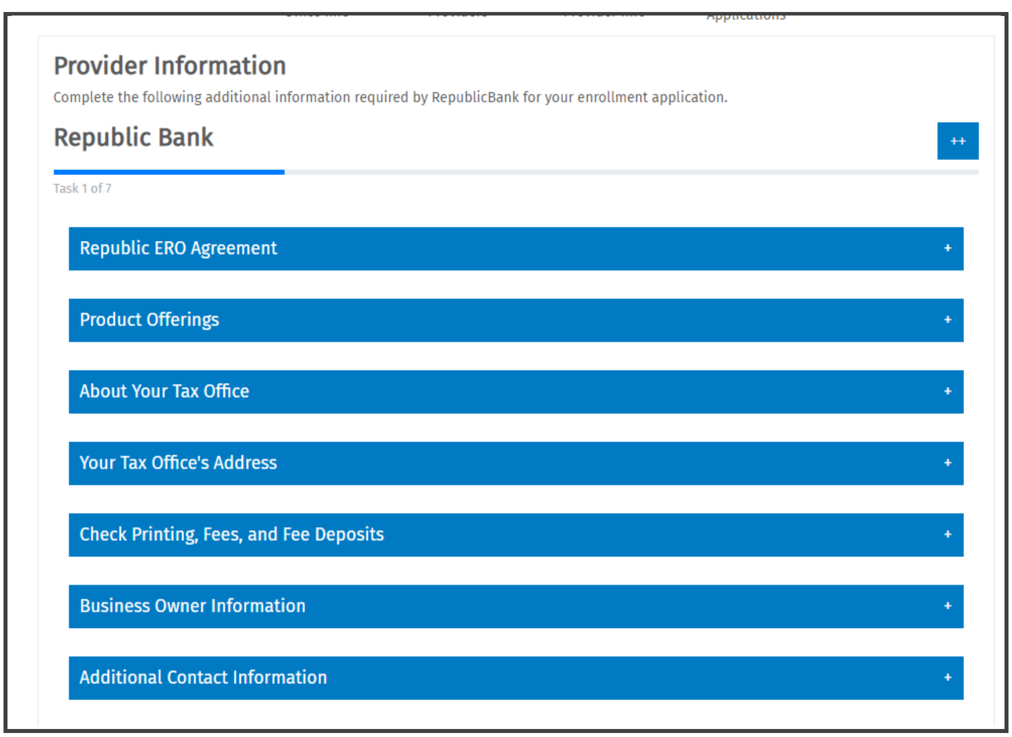
In the next step, you will provide additional information required by each provider you selected.

20. Complete the application for each provider you selected. Click **Start Application** to begin. Follow the on-screen prompts and instructions to complete you ERO application.

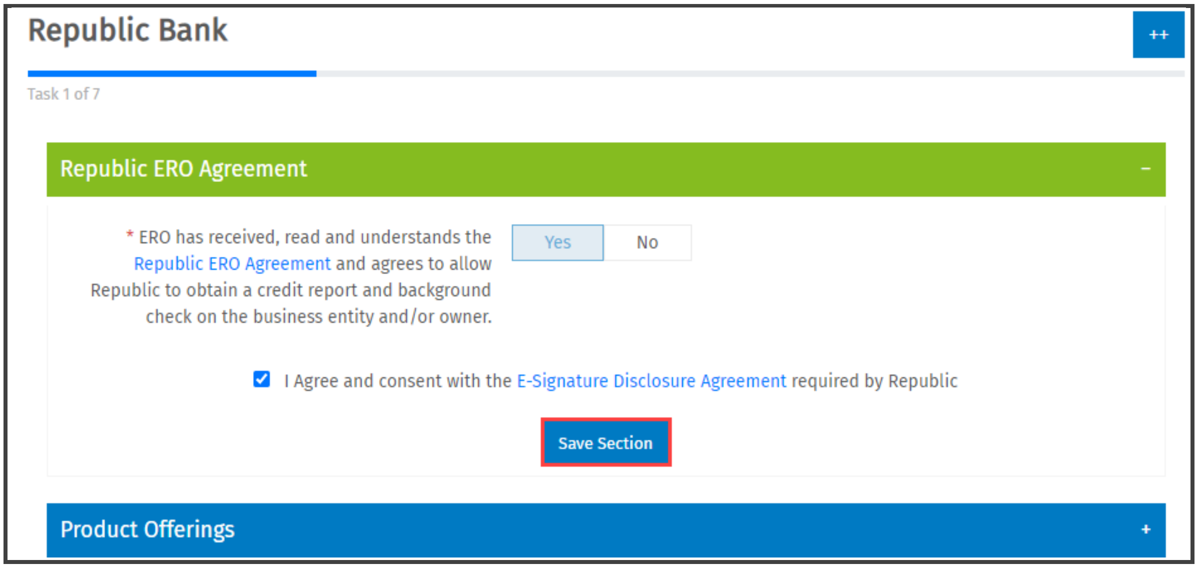


Displayed you will see the provider information overview. In this case we used Republic Bank. Each provider requires similar information, however the specific categories and sections for the application may vary by bank. The application for Republic bank consists of:

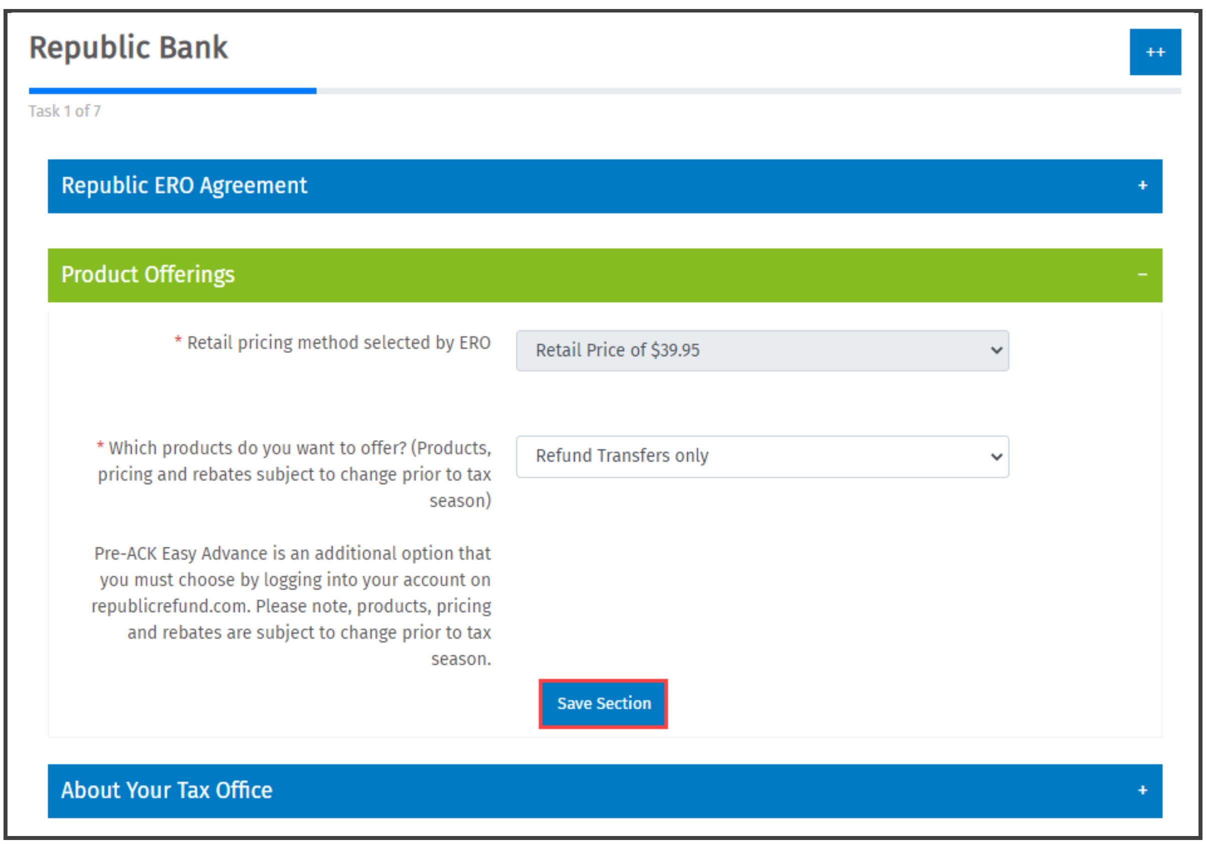
- Republic ERO Agreement
- Product Offerings
- About your Tax Office
- Your Tax Office's Address
- Check Printing, Fees , and Fee Deposits
- Business Owner Information
- Additional Contact Information



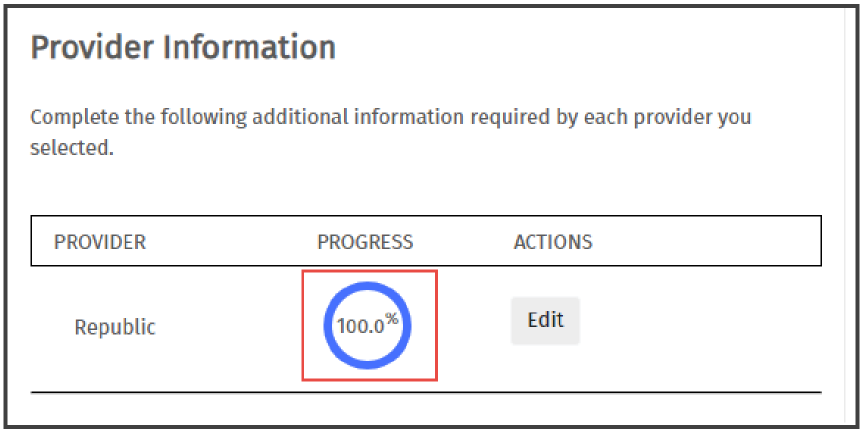
21. Click the + sign to expand the first section and work your way through. Once you complete the items in this section, click **Save Section**.



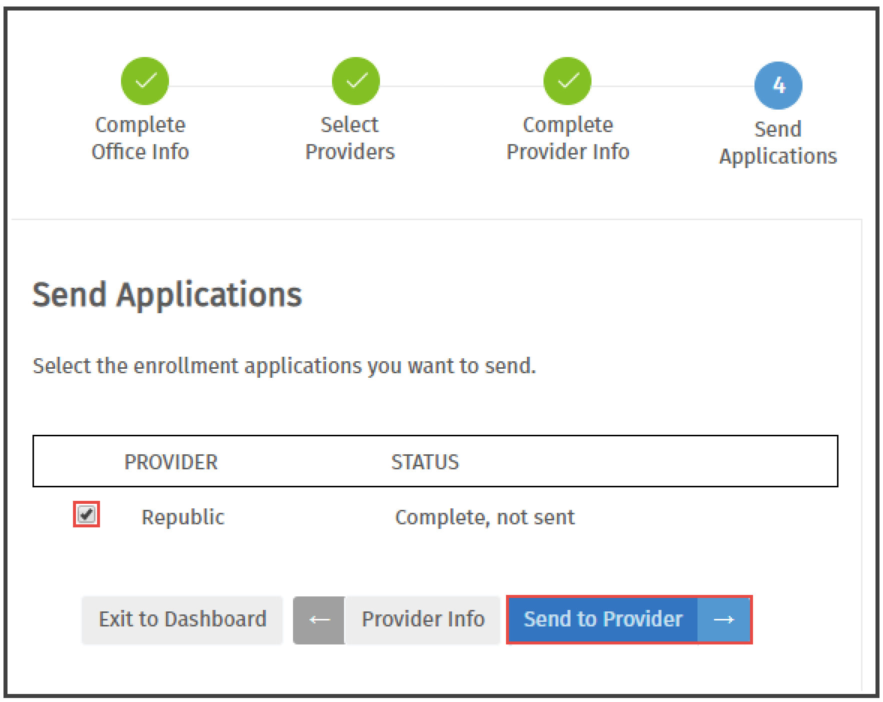
22. This will collapse the completed section and expand the next section. Repeat the process until you have completed all sections.



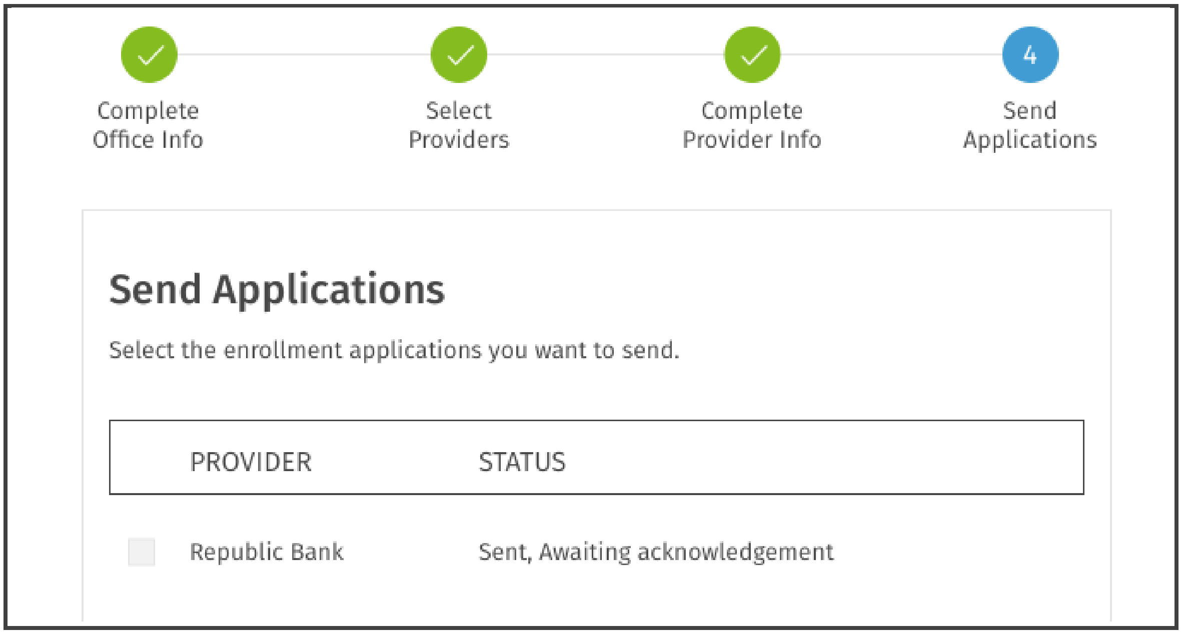
23. Once the provider application is complete, the progress displays 100 percent. Click **Send Applications** to submit.



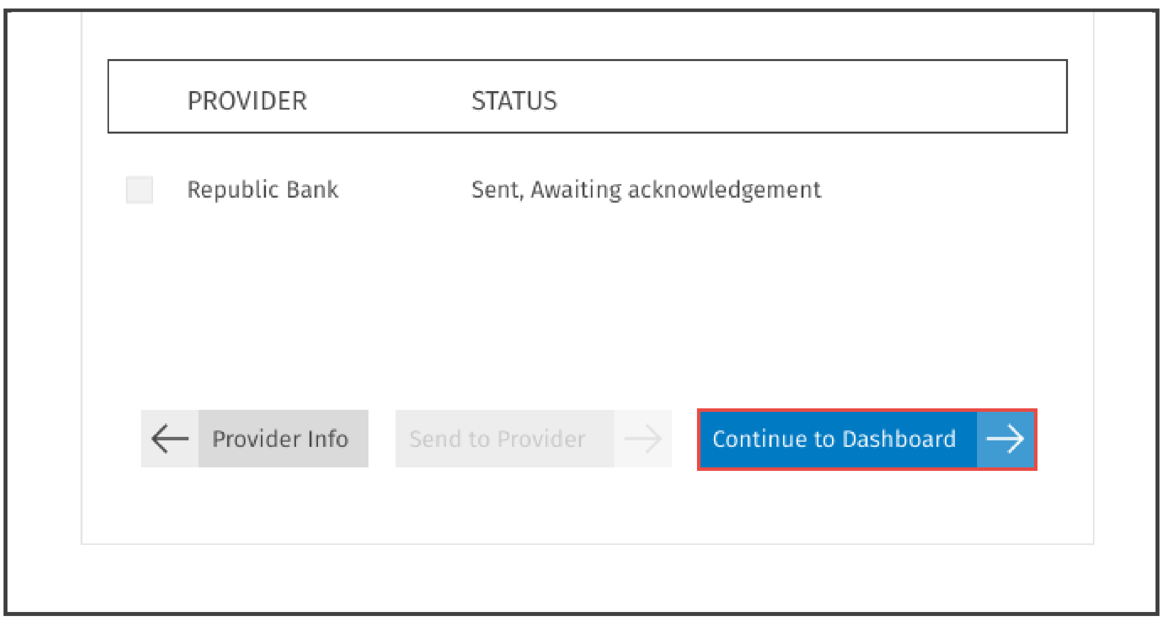
24. The portal displays the Send Applications page. Select the provider application(s) and click **Send to Provider**.



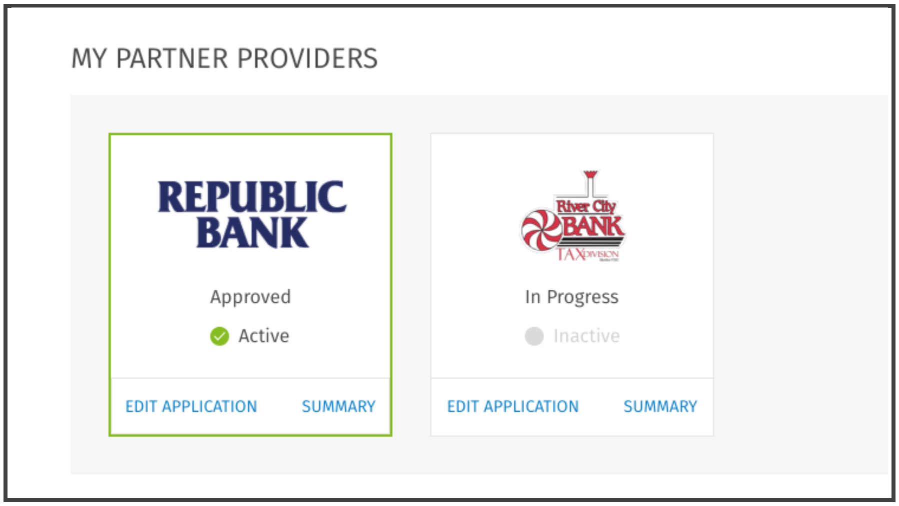
25. The status of the application updates to **Sent, Awaiting acknowledgement**.



26. TaxWise submits your application to the bank, and you will be notified after the bank processes your application. To check on the status of the application, click **Continue to Dashboard**.



27. The status of all applications as well as your active bank displays here.



In TaxWise Online, select Partner Verification from Settings. This will pull in your fees from your approved bank application. Verify that the amounts match what you signed up for.