

TaxWise® Learning Portal

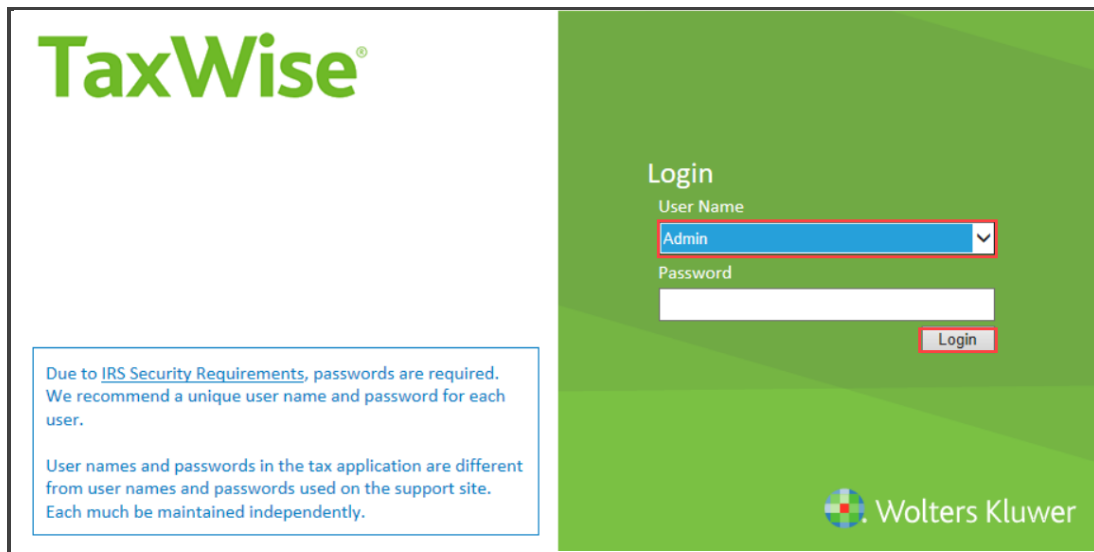
Logging in to TaxWise

After completing installation and the Setup Assistant, the next step is to establish a password for the Admin user. TaxWise requires all users to have unique usernames and passwords. The requirements for these passwords are:

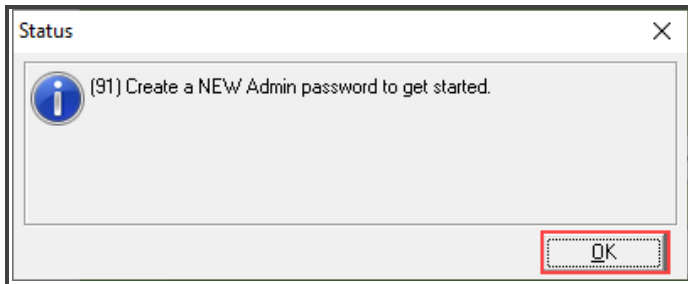
- 8-20 characters
- At least 1 upper case letter
- At least 1 lower case letter
- At least 1 number
- At least 1 special character/punctuation

To set an Admin password:

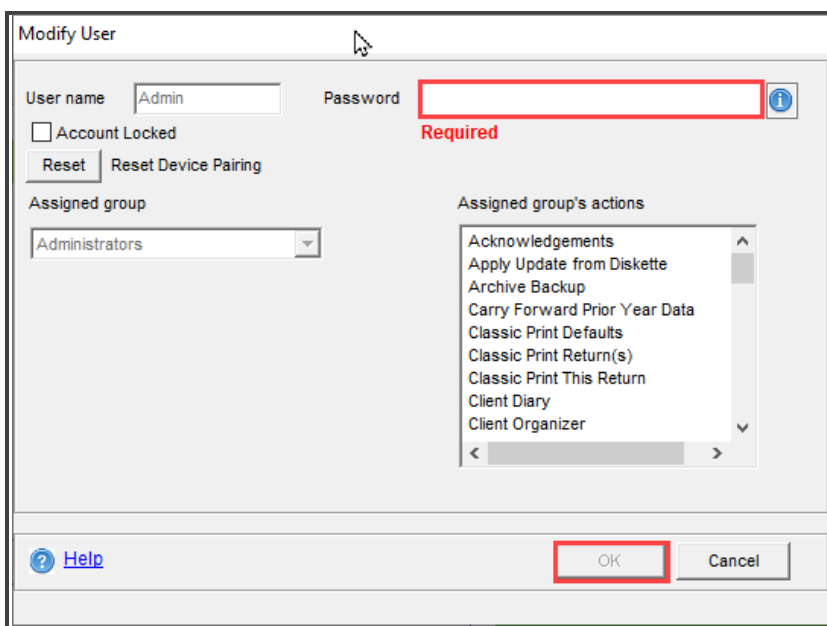
1. Select Admin from the User-Name drop-down menu. Leave the password field blank.
2. Click **Login**.



3. TaxWise displays the Status dialog box, prompting you to create the Admin password. Click **OK**.



4. TaxWise displays the Modify User dialog box. Type your desired password.
5. Click **OK**.



IRS MFA Validation Requirement Changes

The Federal Trade Commission's Safeguards Rules requires companies to implement safeguards, such as multi-factor authentication, for anyone accessing customer information on their systems.

Multi-factor authentication (MFA) adds an extra layer of protection beyond a password. The returning user enters credentials like a username and password. Then, there is another step, such as entering a security code, token or a biometric like a fingerprint.

Wolters Kluwer will be implementing MFA into its applications, in line with the IRS requirements for all Financial Service Companies, ahead of Tax Season 2024. TaxWise Online will see changes to current MFA processes to meet the new standards. This will be covered in a separate training video.

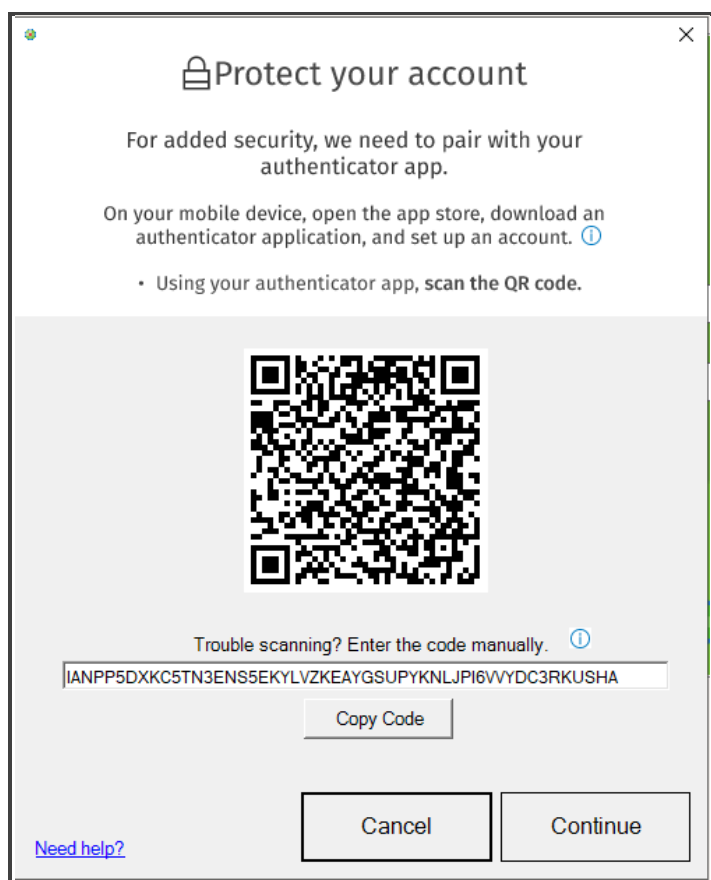
You can read more about the guidance in the following articles: [FTC Safeguarding Rule](#) and [IRS News Release IR-2024-218](#).

For additional information, review the [KB article # 000280637](#).

Pairing Authenticator with TaxWise Desktop 2024

The installation and registration process of TaxWise Desktop will not change. When you log in, you will see a Protect Your Account page. Here you are asked to Pair your authenticator application.

1. If you have not already done so, select and download an authenticator application on your mobile device and setup an account.
2. Using the authenticator app, scan the **QR Code**.

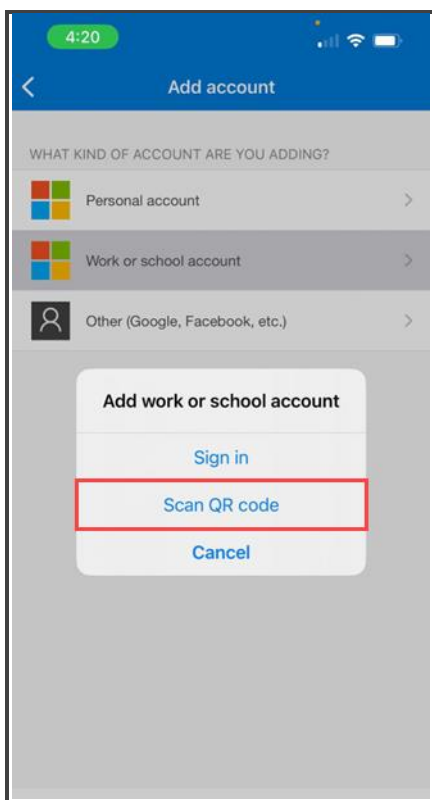


Keep in mind that each authenticator screen may be different, however the general concept and process should be the same.

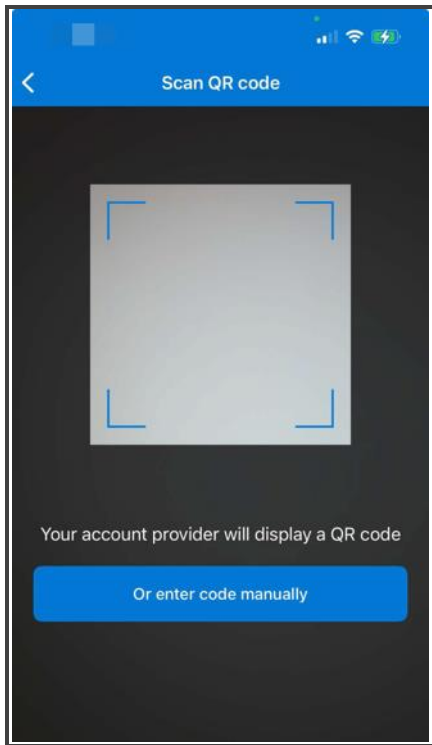
3. To add pair or add my login for this TWD user, you will start by clicking the plus sign in the corner.



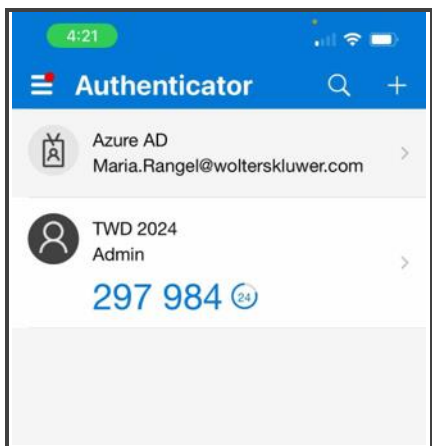
4. Select what type of account you are adding, and then select **Scan QR Code**.



5. Your mobile camera is enabled and is ready to scan the QR Code from your TaxWise Desktop screen.



6. The authenticator will display the code for this user and the application you scanned for the QR Code. Here, my authenticator named my new addition TWD 2024 for the Admin user.
- i Some authenticators will prompt you to create a name to identify the application and users.



The code is only valid for this application and this user, and a new code is generated every 30 seconds.

7. Once your device is paired, return to TaxWise Desktop, and click **Continue**.



 **Protect your account**

For added security, we need to pair with your authenticator app.

On your mobile device, open the app store, download an authenticator application, and set up an account. [i](#)

- Using your authenticator app, scan the QR code.



Trouble scanning? Enter the code manually. [i](#)

IANPP5DXKC5TN3ENS5EKYLVZKEAYGSUPYKNLJPI6VYDC3RKUSHA

Copy Code

[Need help?](#)

Cancel

Continue

8. TaxWise will ask you to enter the 6-digit secure code from your authenticator application. Retrieve the most recent code from your app and enter it into the corresponding field. Remember that the code will refresh every 30 seconds.
9. If you click the **Remember Me** checkbox, you will not have to authenticate for 180 days. Once you have entered the code, click **Verify**.



 **Enter Secure Code**

A 6-digit secure code will be provided by your authenticator app. [i](#)

Secure code

507284

This code will refresh every 30 seconds.

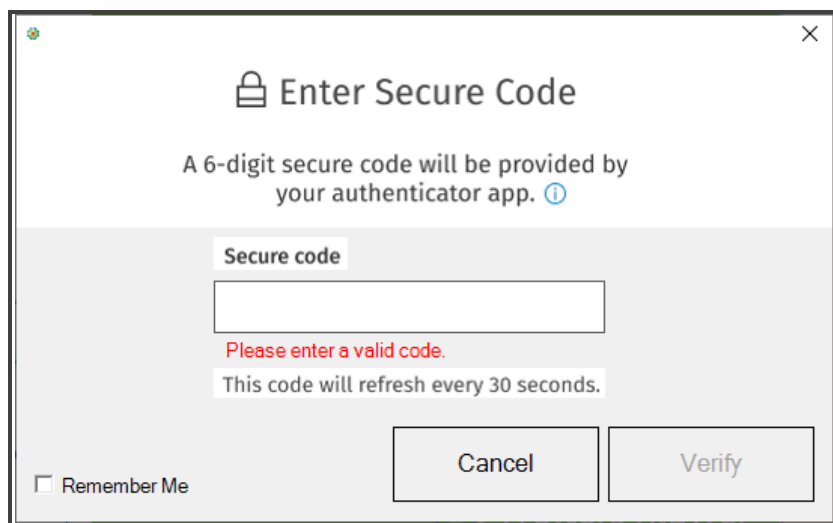
☐ Remember Me

Cancel

Verify

Only after you enter the appropriate code, will the system grant you access to the program.

- i** If you enter the wrong code, or the code has expired, you will see a message asking you to enter a valid code.

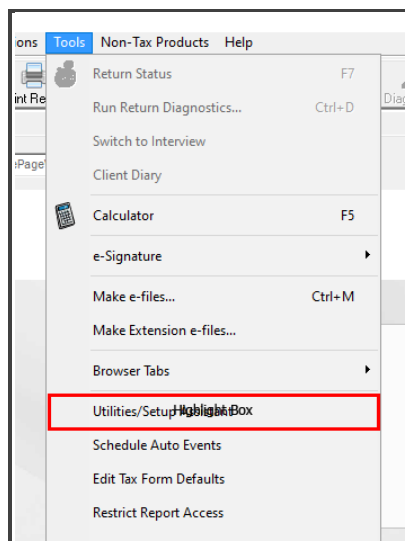


Resetting Pairing

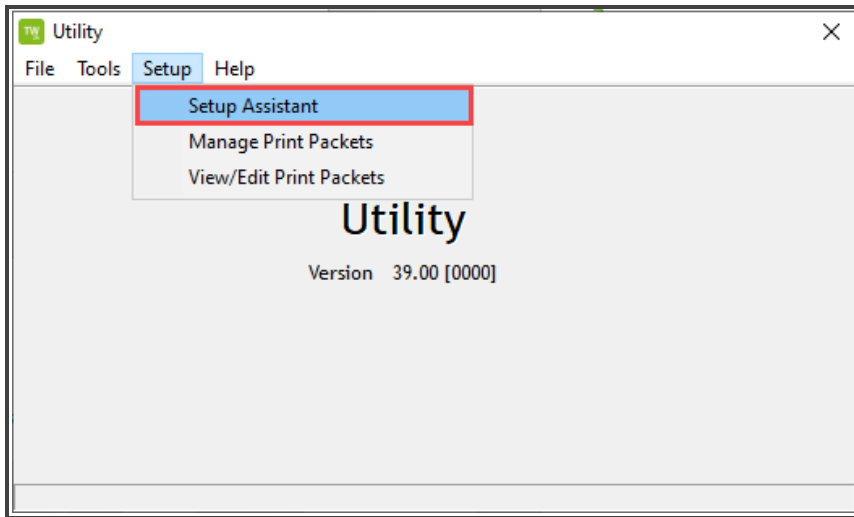
In the even that a user has misplaced their device, the Admin user can reset the pairing. Once this is done, the next time the user logs in, they will be able to re-establish the pairing process.

To do so:

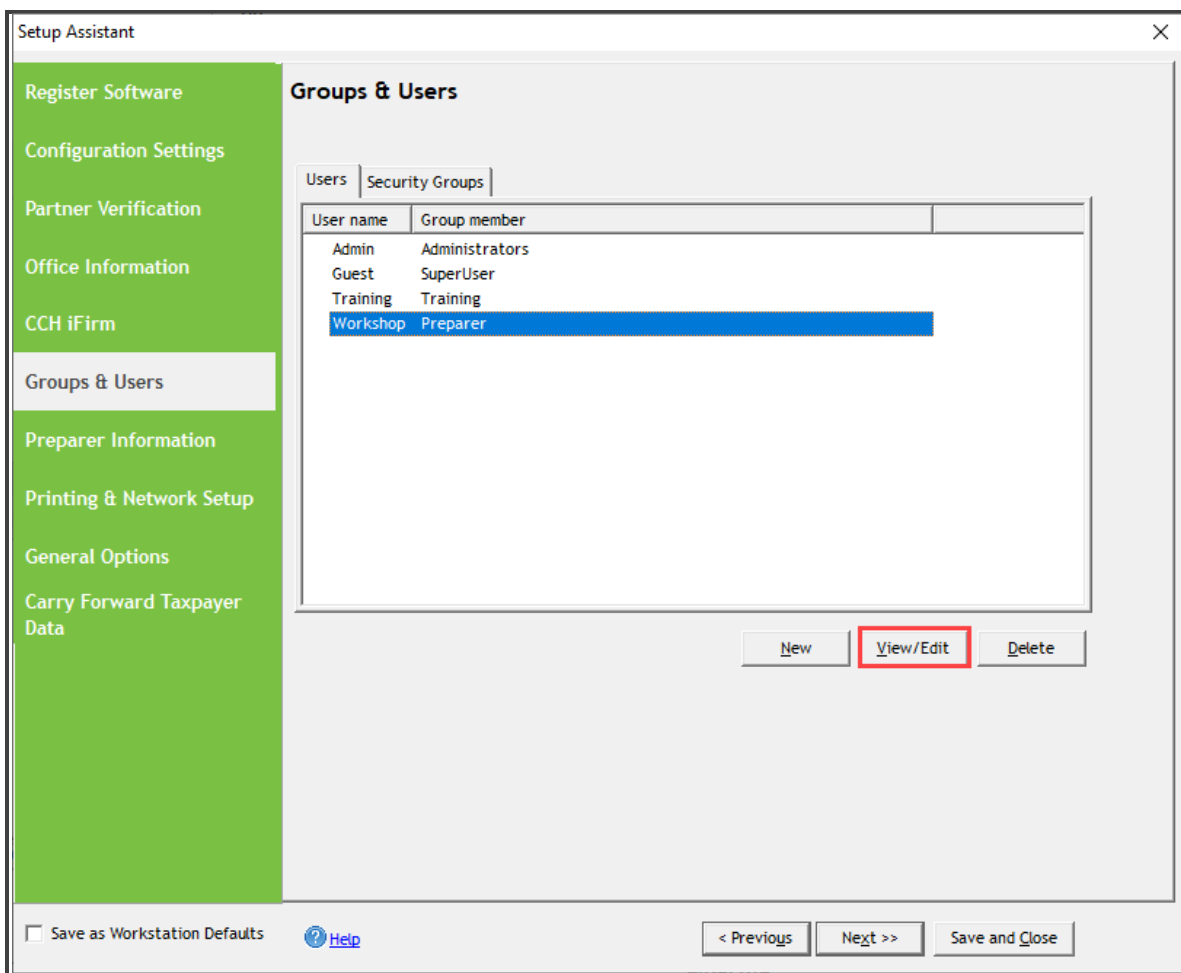
1. Logged in as the Admin user, from the **Tools** menu, select **Utilities/Setup Assistant**.



2. From the Utility dialog box, the user will click the **Setup** menu and select **Setup Assistant**.



3. From the Setup Assistant, select the **Groups & Users** tab.
4. From the Groups & Users page, select the user in question, and click **View/Edit**.



5. TaxWise displays the Modify User dialog box. To unpair the device from TaxWise Desktop, click the **Reset** button.

6. TaxWise displays a Confirm dialog box, reminding you that this will reset the MFA device pairing for the user and display a new QR code on the next Login. If you proceed, prior authentication codes will no longer work. To proceed, click **YES**.

7. Displayed you see a confirmation message that the device pairing has been reset, click **OK**.

8. And then click Cancel to edit the Modify user dialog box.

The next time this user logs in, they will need to go through the process of pairing their device by scanning the QR code with their authenticator app.