

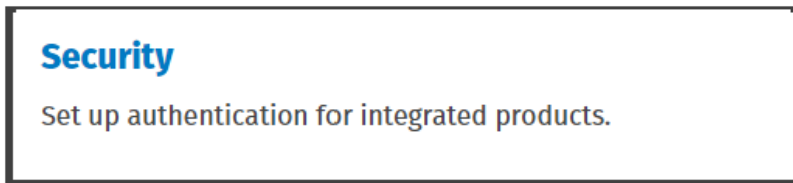
CCH iFirm Learning Portal

Setup Integration with TaxWise Online

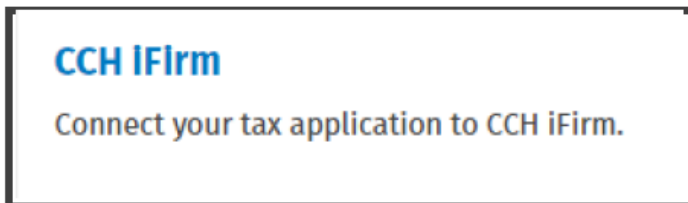
The Security settings module allows you to sync your CCH iFirm account with TaxWise Online. Once these accounts are synced, you can print a client completed return directly from TaxWise Online to the CCH iFirm Client Portal, a secure, online document sharing system.

To integrate TaxWise Online with CCH iFirm:

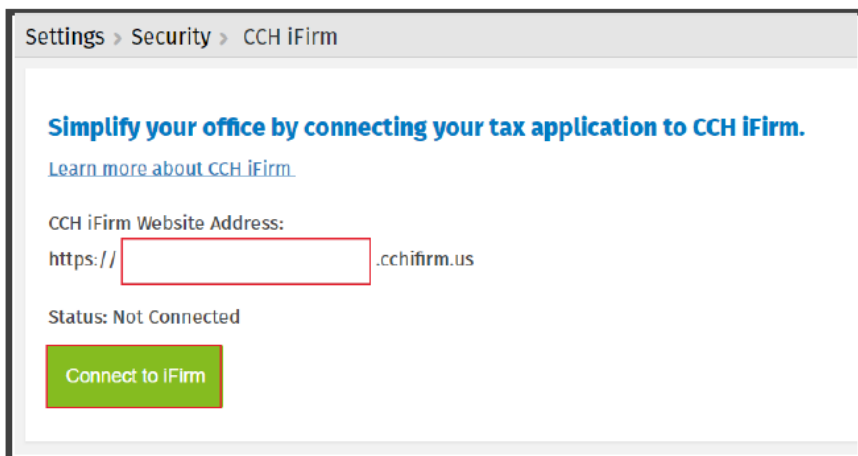
1. From the Settings page, click **Security**.



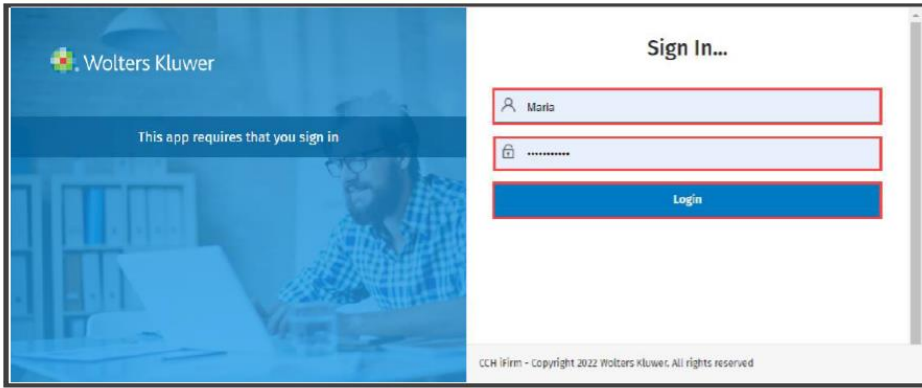
2. Click **CCH iFirm**.



3. Type your CCH iFirm URL in the field provided and click **Connect to iFirm**.

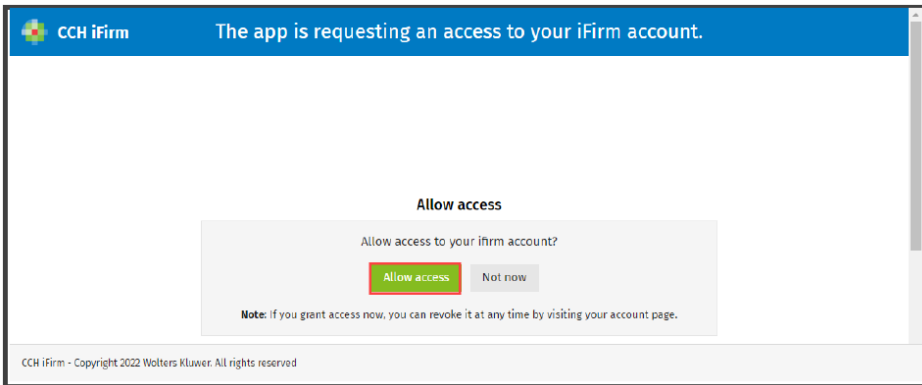


4. Enter your login credentials and click **Login**.

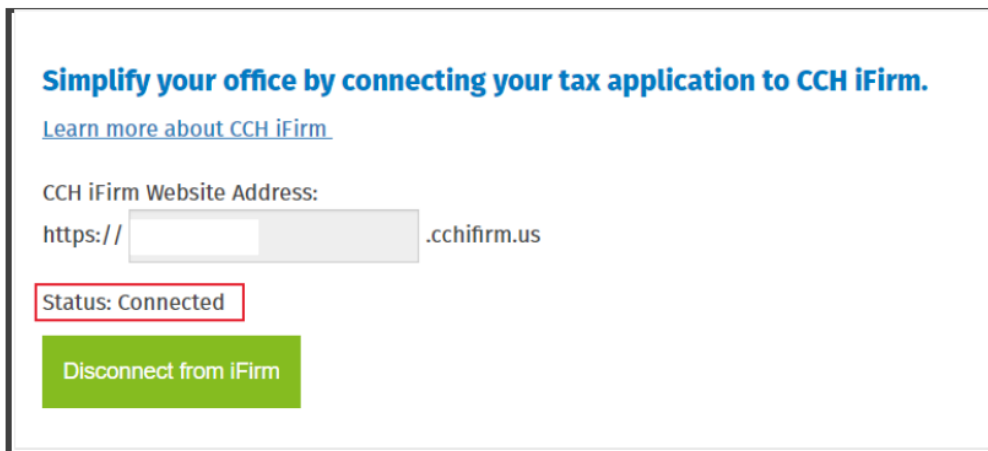


i Use the general user login credentials, not the Admin user credentials.

5. Click **Allow Access** to allow the program to connect.



6. TaxWise Online displays the status as Connected.



Now you can print returns from TaxWise Online to CCH iFirm.

i For information on printing to CCH iFirm, review the corresponding lesson in the Learning Portal.