

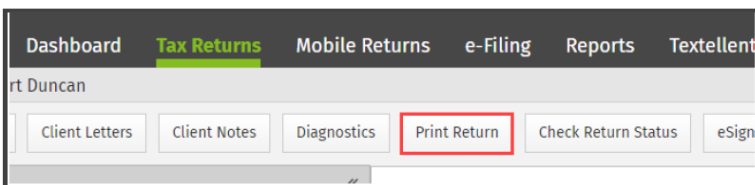
CCH iFirm Learning Portal

Printing to Client Portal from TaxWise® Online

After completing information in the tax forms, you can print copies for your customers, the IRS and for your own back-up and archiving purposes. You can print a single return, or you can print a batch of returns.

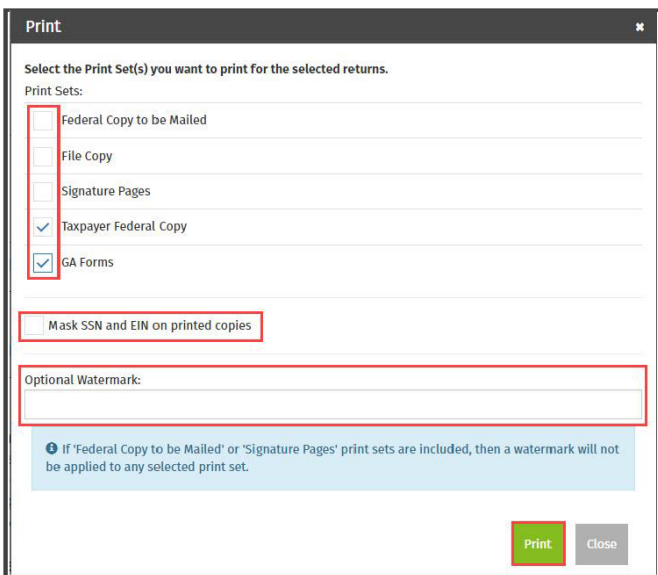
To print a return to Client Portal from TaxWise Online:

1. From an open return, click the **Print Return** button.



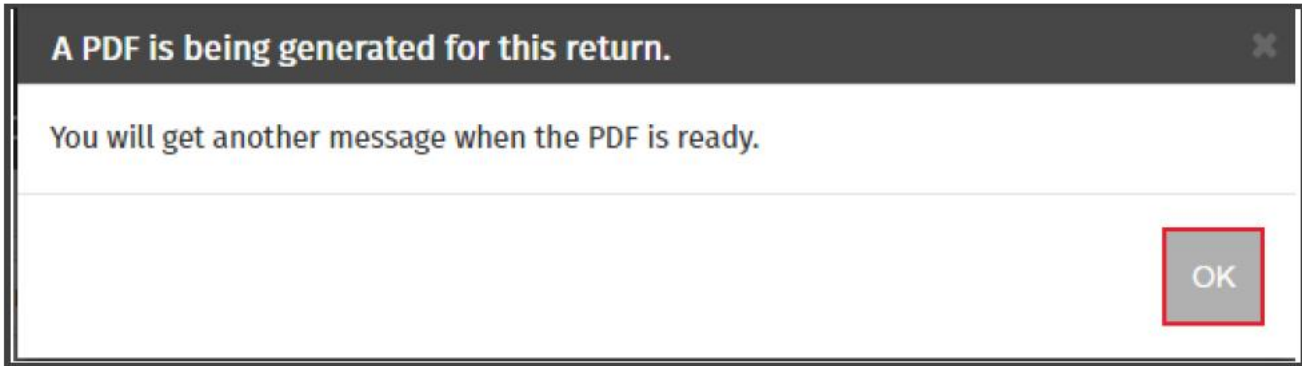
2. TaxWise Online displays the Print dialog box; select the Print Sets you want to print. Select the checkbox if you need to mask the SSN or EIN on the print output.

3. Complete a watermark if necessary and click **Print**.



- i** Note that if the Federal Copy to be Mailed or the Signature Pages are included, a watermark will not be applied to any selected print set.

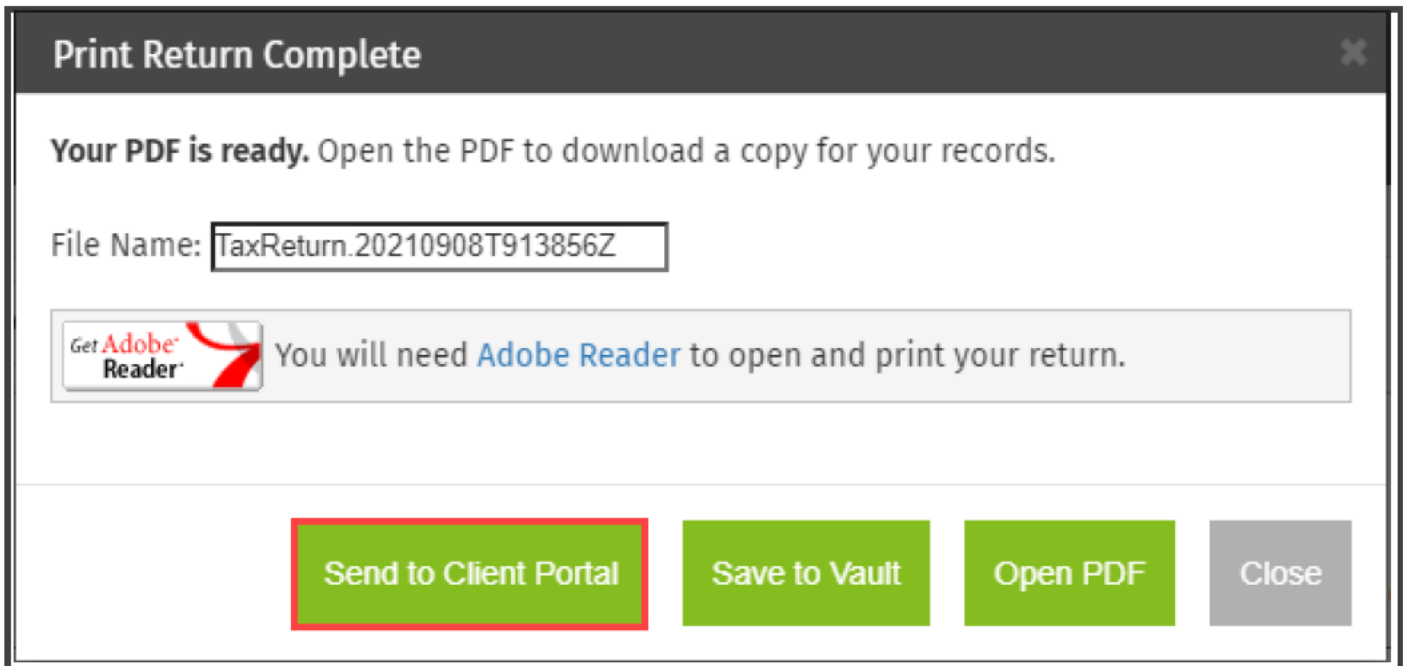
4. TaxWise Online generates a message that the PDF is being generated. Click **OK**.



5. Once the PDF is ready to print, TaxWise Online displays a second message. Do one of the following:

- **Send to Client Portal:** A PDF of the return will be uploaded to the taxpayer’s Client Portal.
- **Save to Vault:** A PDF of the return will be stored in the Loaded Forms section of the return.
- **Open a PDF:** A PDF of the return will display in a new browser window, where you can choose to print or download the return.

6. Click **Send to Client Portal**.



i The File Name field is the name that will be used if you are sending to a return to Client Portal or saving it to the Vault. You can change the file name if applicable.