

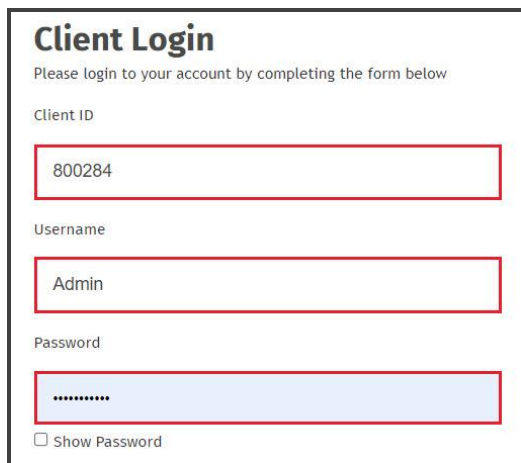
# TaxWise® Online Learning Portal

## Tax & Accounting

# Logging in to TaxWise® Online

TaxWise Online is a web-based tax preparation program that gives you the ability to access your clients' tax returns anywhere you have internet access, on any device.

1. Navigate to <https://twonline.taxwise.com>.
2. Type your **Client ID**, the username Admin, and your software registration code as the password.



**Client Login**  
Please login to your account by completing the form below

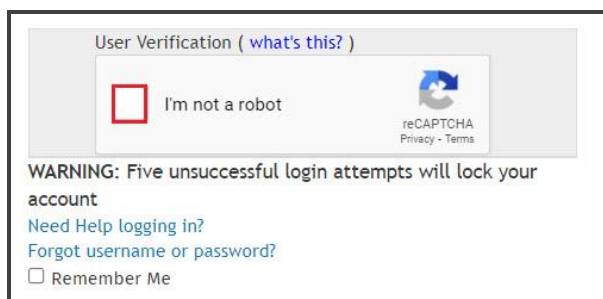
Client ID

Username


Password

Show Password

3. Select the reCAPTCHA check box for user verification.

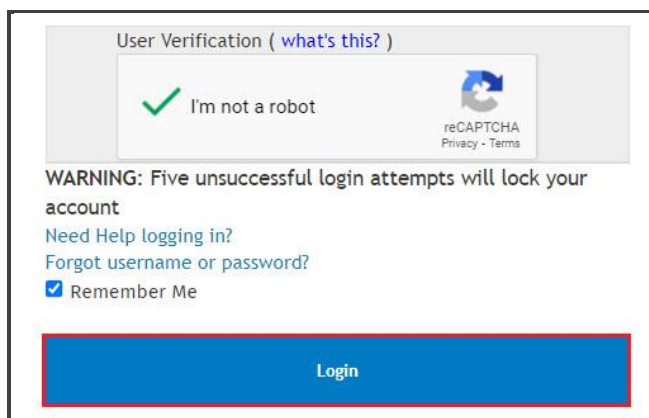


User Verification ( [what's this?](#) )


I'm not a robot   
reCAPTCHA  
Privacy - Terms

**WARNING: Five unsuccessful login attempts will lock your account**  
[Need Help logging in?](#)  
[Forgot username or password?](#)  
 Remember Me

4. Once the verification is complete, click **Login**.



User Verification ( [what's this?](#) )

I'm not a robot   
reCAPTCHA  
Privacy - Terms

**WARNING: Five unsuccessful login attempts will lock your account**  
[Need Help logging in?](#)  
[Forgot username or password?](#)  
 Remember Me

5. Tax Wise Online displays the New Security Enhancements dialog box, describing the new security process. Read over this information. Verify your user name and phone number and click **Continue**.

### New Security Enhancements

As we strive to build long-lasting and sustainable partnerships, we continue to assess and leverage technology that aims to help you provide more security to your customers.

In light of this, IRS has required a more rigorous login process for the 2025 filing season called multi-factor authentication. With this new login process, your account will have an extra layer of security that makes it more difficult for cybercriminals to access your tax practitioner data.

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Here is how this new process works:

- The first step is to enter your client ID, username and password.
- Next, you will need to enter a code that will be sent to a phone number on file for your account. Please confirm the phone number(s) below, and ensure at least one phone number is selected for 2-Step Verification.
  - Updating the below phone number(s) will update the respective phone number(s) listed in your user account.

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After you go through this multi-factor authentication, you will be logged in to your software. At the verification screen, you can select "trust this device" to remember the device you are using so you don't have to enter a new code every time you login.

Please note: If you previously opted out of this extra verification, you will need to complete the updated process for the 2025 Tax Season.

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User Name:  
Admin

Phone Type	Country Code	Phone Number	Use for 2-Step Verification
Home	1		<input type="checkbox"/>
Office	1		<input type="checkbox"/>
Mobile	1	7064499017	<input checked="" type="checkbox"/>

Continue

i If the phone number is not correct, you can update that at this time.

6. TaxWise Online, as all our web applications, uses two-step verification to ensure security. After you log in with your credentials, you will be prompted to have a code sent to your phone. Click **Send the code**.

🔒 **Verify Your Identity**  
 For added security, we need to verify your identity.

**How do you want to confirm your identity?**

Text message to  
*Message and data rates may apply*

1 \*\*\*-\*\*\*-\*\*\*17

Voice message to

Send the code

This code will expire in 5 Minute(s)

7. Retrieve the code from your device. Type the code, then click **Submit**.

**Verify Your Identity**  
For added security, we need to verify your identity. You will receive a one time code or phone call to confirm your identity.

Enter the code

621346

Submit

Didn't get the code? [Resend](#)

Trust this device for 90 days  
Uncheck if this is a public device

8. If this is the first time you are logging in, you will be prompted to create your own password. The requirements for this password are listed to the right of the login screen.

Password Requirements

- Minimum length of 8 characters
- Passwords are case-sensitive. This means that if you create your password with certain letters capitalized, you must always type them that way
- Passwords may periodically expire. You will be prompted to create a new password.

*User names and passwords used on this site are different from user names and passwords used in the desktop tax application. Each must be maintained independently.*

[Need Help?](#)

9. Type and rekey to confirm your new password and click **Change Password**.

What are the password rules?  
New Password

.....

Show Password

Confirm New Password

.....

Show Password

**Change Password**

Cancel

10. TaxWise Online displays message that the Password has been changed, click **Continue** to proceed to the TaxWise Online Dashboard.

Password has been changed

**Continue**

11. TaxWise Online displays the Dashboard.

The screenshot shows the TaxWise Online Dashboard. At the top, there is a navigation bar with the 'TaxWise' logo on the left and user information 'Administrator' on the right. Below the navigation bar, the dashboard is organized into several sections. The 'Getting Started' section contains five buttons: 'New Return', 'Open Return', 'Check Return Status', 'Print Checks', and 'Print Accepted Returns'. The 'Search Knowledgebase' section has a search input field and a 'Search' button. The 'State Tax Sites' section features a dropdown menu with 'Alabama Department of Revenue' selected and a 'Go' button. The 'Tax Help' section displays a message: 'Your tax software includes a CCH subscription for integrated tax help. If you don't know your login, request your tax help registration email to get started.' Below this message is a link: 'Learn more about CCH AnswerConnect'. The 'Additional Resources' section lists 'TaxWise Blog', 'TaxWise Chat', 'TaxWise Hot Topics', and 'TaxWise Education Library'. The 'Security Tips' section is partially visible at the bottom. The footer of the dashboard includes the 'Wolters Kluwer' logo.

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If your package includes access to prior years of TaxWise Online, the Prior year links are:

- TWO 2024 application: <https://twonline-24.taxwise.com/>
- TWO 2023 application: <https://twonline-23.taxwise.com/>
- TWO 2022 application: <https://twonline-22.taxwise.com/>
- TWO 2021 application: <https://twonline-21.taxwise.com/>
- TWO 2020 application: <https://twonline-20.taxwise.com/>
- TWO 2019 application: <https://twonline-19.taxwise.com/>
- TWO 2018 application: <https://twonline-18.taxwise.com/>

Keep in mind that you will use the same log in credentials you are using for the current year.