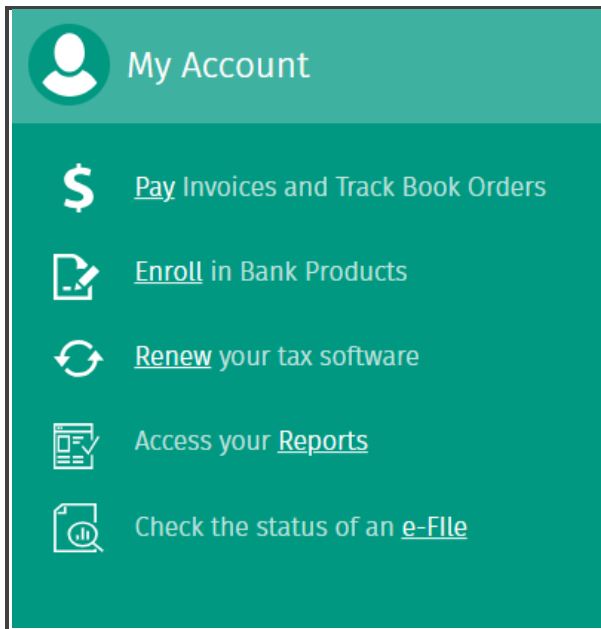


# TaxWise® Online Learning Portal

## Tax & Accounting

# My Account

Use the My Account section to view and pay invoices, apply to offer bank products, renew your software, Access reports, and check the status of an e-File.



**i** All the items in this section require you to log into the Solution Center. For more information on logging in, please review the *Using the Solution Center* lesson.

## Pay Invoices and Track Book Orders

1. Click **Pay Invoices and Track Book Orders** to view invoices for a specified date range and make any payments.
2. Use the navigation tabs on the left to access additional information about your account, including:
  - **Manage Wallet:** allows you to add or edit the credit card or bank account information for your account
  - **Orders:** allows you to review any orders placed within a specified date range
  - **Subscriptions:** allows you to review any subscription-based products purchased in a specified date range
  - **Document Storage:** allows you to search for invoices stored from the previous invoicing system
  - **Addresses and Contact Info:** allows you to review and update your contact information for billing and shipping purposes

Wolters Kluwer | Welcome Administrator! | Estore | FAQ | Log Out

**Invoices** ? Region: United States Type: Preparer/Professional

Note: To view invoices prior to Oct 2nd, 2020, see Document Storage

UTS CS REP - CID: 1088574/4002142963

Date Range: 3 years Doc Category: Invoice TOTAL PAYMENT AMOUNT 0.00 Pay

Account Numb...	Status...	Date ↓	Due Date	Invoice No.	Amount	Unpaid	Pay	Transact... Invoices	PO No.	Order No.	Co
All	Date	Due Date	Invoice No.	Amount	Unpaid				PO No.	Order No.	Conf
+ 4002142963	OPEN	Nov 01, 2021	Nov 03, 2021	5412327119	\$4.00	\$4.00	\$ <input type="text"/>			0006417535	UT:
+ 4002142963	OPEN	Sep 09, 2021	Sep 11, 2021	5412218338	\$4.00	\$4.00	\$ <input type="text"/>			0006289698	UT:
+ 4002142963	OPEN	Apr 01, 2021	Apr 03, 2021	5411755294	\$8.00	\$8.00	\$ <input type="text"/>			0005782959	UT:

## Enroll in Bank Products

1. Click **Enroll in Bank Products** to launch the application you must complete to offer refund settlement solutions through one of our banking partners.

This process is described in more detail in the *Refund Settlement Solutions* lesson.

## Renew your Tax Software

1. Click **Renew your tax software** to submit an order for your program for the upcoming tax year.

## Access Reports

You can access reports on various information for your office(s) from the Solution Center. This tool requires you to log in.

You can access reports from the quick link in the My Account section, or access reports from the My Information menu.

1. From the My Account section, click **Access your Reports**. If you are not logged in, you will be prompted to do so at this time.
2. The Solution Center displays the list of available reports. Click **Generate** next to the report you want to run.

The screenshot shows the TaxWise web interface. At the top, there is a search bar with the text "Enter your search term here" and a magnifying glass icon. To the right, it says "Wolters Kluwer" with links for "Manage Users" and "Logout". Below this is a green navigation bar with menu items: Home, My Information, Support, Downloads, E-File, Training, Tax & Accounting, Business Partners, and I Want to. Underneath the navigation bar, there is a "Tax Year:" dropdown menu and a "Refresh" button. The main content area is a table with the following columns: Name, Status, Last Generated, and Download. The table lists various reports, and the "Generate" button for each row is highlighted with a red box. The "Download" column contains icons for downloading reports, with one icon also highlighted by a red box.

Name	Status	Last Generated	Download
ACA Client List			
Acceptance Summary - Federal			
Acceptance Summary - State			
Awaiting IRS Ack Summary	Completed	11/12/2025 3:38:33 PM	
Awaiting State Ack Summary			
Bank Refund Settlement Summary			
Birthday Report			
Check Print Summary Report			
Client List	Completed	11/12/2025 3:38:36 PM	
Deposited Bank Fee Summary Report			
Discounts Report			
IRS Electronic Filing Summary			
IRS Extension Summary			
IRS Summary Report	New	11/12/2025 3:38:37 PM	
ITIN Renewals			
Management Report			

3. Within a few minutes, the page refreshes to display the updated status and provide a link to download the report.
4. Click the **Download** icon to open the report in Microsoft Excel, where you can filter and sort the information if needed.

## Check e-File Status

The Return Query allows you to search for the current status of an e-filed return. This can be accessed from the My Account Information section or the Quick Links tab.

## My Information

In addition to the tools available in the My Account block, you can also access tools for managing your account from the My Information menu. These options include reviewing your products and fees, uploading your EFIN, and accessing reports.

