TaxWise® Desktop Learning Portal
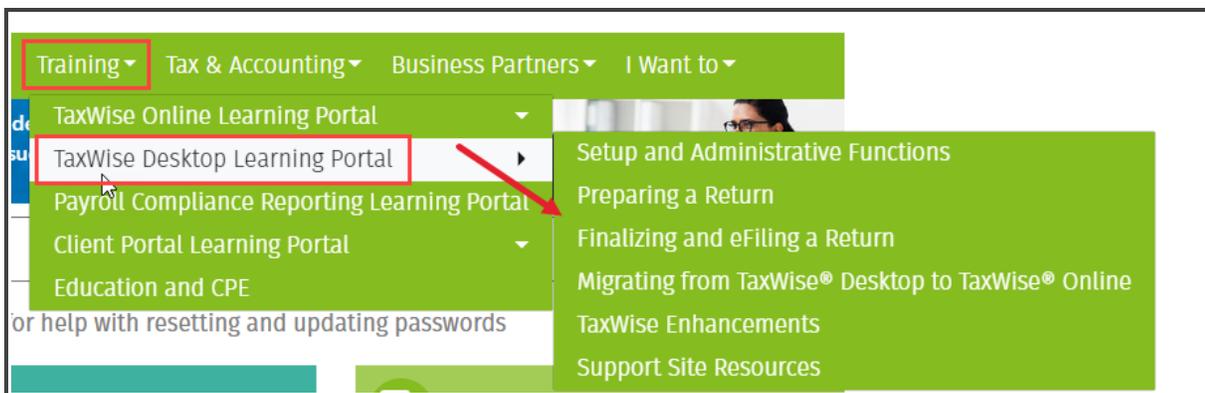
Tax & Accounting

TaxWise Desktop Learning Portal

Wolters Kluwer offers both on-demand training options, as well as live Q&A sessions via webinar to assist you in setting up and using your tax program.
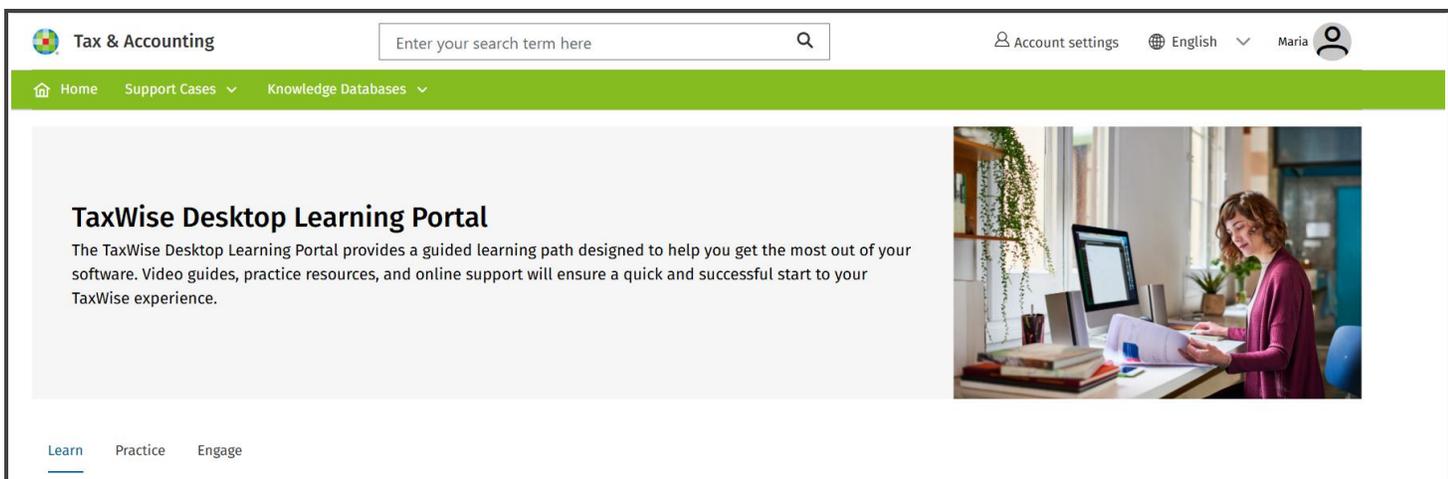
To access these training options:

1. Navigate and Login to **https://support.taxwise.com**.

2. From the Training menu, hover over TaxWise Desktop Learning Portal, and select from the available learning paths.
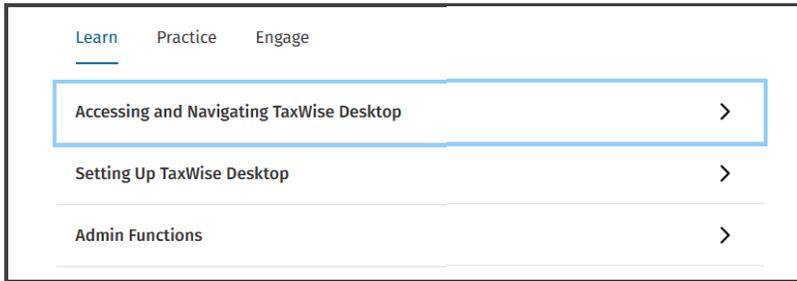

ℹ️ If you have not already logged in to the TaxWise Support Site, you will be prompted to do so for this feature.

3. Login using your Client ID, username Admin, and your password.

The Support Site displays the selected Learning Path. There are three tabs on each page: Learn, Practice, and Engage.

The **Learn** page contains several modules, which you can expand to see links for various videos on setting up and using your tax program.

4. Within each module, click the links to access specific videos, or the **Additional Resources and Documentation** link to view the accompanying PDF documentation.

The **Practice** page contains practice return scenarios you can download to assist you in becoming more comfortable entering data in returns.

Below you will find practice scenarios for filing federal returns. Click the button for the scenario type you would like to key into TaxWise. Open the downloaded file to access provided scenarios. Key in each scenario into your tax program. Answer keys have been provided so you can check your work.

1040 Practice Scenarios

Beginner scenarios provide a basic understanding of common 1040 form usage and data entry. Intermediate scenarios include topics of, but not limited to, healthcare coverage, childcare expenses, and rental income. Advanced scenarios topics include, but not limited to, estimated payments, AGI adjustment, and other related topics. Click each Scenario to download Practice Return Data. Click here to watch video on completing a return in TaxWise Desktop.

⬚ Beginner   ⬚ Intermediate   ⬚ Advanced   ⬚ Answer Key

1065 Practice Scenarios

Scenarios provided can be entered into the IRS 1065 form. Click the button below to download Practice Return Data.

⬚ 1065   ⬚ Answer Key

1120 & 1120s Practice Scenarios

Scenarios provided can be entered into the IRS 1120 and the 1120s forms. Click the button below to download the Practice Return Data.

⬚ 1120/1120s   ⬚ Answer Key

*Answer keys are periodically updated to match changes in software calculations.

ℹ️ Note, the answer key will be updated periodically to include new calculations as they become available in the software.

5. Click the corresponding **Beginner**, **Intermediate**, and **Advanced** option to download scenarios based on level of difficulty, or the **Answer Key** option to download the answers for each scenario.

6. Click the corresponding **1065**, **1120** & **1120s** options to download the scenarios for business returns or the **Answer Key** option to download the answers for the business return scenarios.

The **Engage** page displays links to register for a live Q&A webinar, where you can ask questions on Administrative features, or preparing returns in your tax program.

Learn   Practice   Engage

Once you have completed the TaxWise on-demand curriculum and you still have questions, you can register for a live question and answer session with a product expert. Use the links provided below to register for each session

TaxWise Desktop Question & Answer Session (English)

TaxWise Online and TaxWise Desktop Question & Answer Session (Spanish)

For more information on how to register for these sessions, refer to: How do I register for TaxWise or TaxWise Online product training?

To request assistance or to contact our support team, please visit Support Site to access additional product information or to open a support case.

7. When you click one of the links to register for a Q&A session, you will be directed to the registration page for that event.

Wolters Kluwer
When you have to be right

TaxWise Desktop Question & Answer Session (English)

This webinar is offered several times. Select the date and time that works best for you.

| Tue, Apr 22, 2025 11:00 AM - 12:00 PM EDT | ⌄ |

Show in My Time Zone

The live, Q&A session will focus on the tax return preparer roles and functions within TaxWise software. Please complete the TaxWise on-demand curriculum before registering for this session.

*Required field

First Name*   Last Name*

Email Address*

Company Name

Client ID #*

By clicking this button, you submit your information to the webinar organizer, who will use it to communicate with you regarding this event and their other services.

Register

ℹ Please complete the on-demand training on the Learn page prior to registering for a Q&A session.