

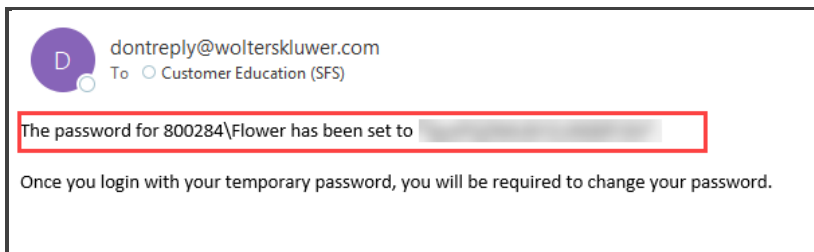
TaxWise® Online 2020

Log in as New Preparer

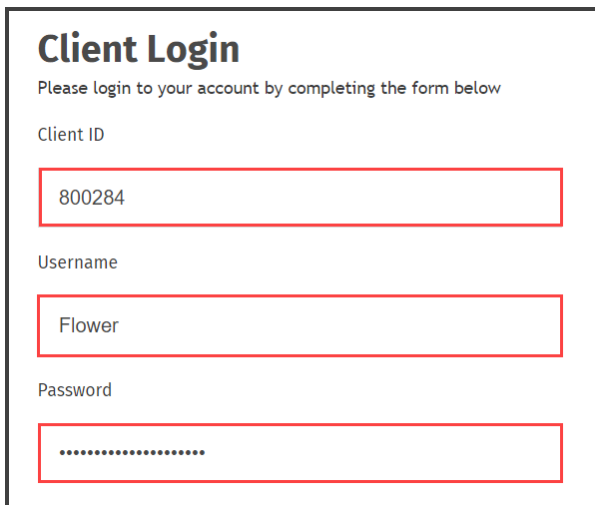
TaxWise Online is a web-based tax preparation program that gives you the ability to access your clients' tax returns anywhere you have internet access.

To access TaxWise Online as a new preparer:

1. Once the Admin user creates the preparer as a user, they will receive an email with the Client ID, Username and temporary password.





2. Navigate to <https://twonline.taxwise.com>.
3. Type your **Client ID**, the username, and the temporary password they received in the email.

A screenshot of the 'Client Login' form. The title is 'Client Login' and the instruction is 'Please login to your account by completing the form below'. There are three input fields: 'Client ID' with the value '800284', 'Username' with the value 'Flower', and 'Password' with a masked password represented by dots. Each input field is highlighted with a red border.

4. Select the reCAPTCHA check box for user verification and follow onscreen instructions and click **Login**.

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

 I'm not a robot


reCAPTCHA
Privacy - Terms

WARNING: Three unsuccessful login attempts will lock your account

[Need Help logging in?](#)

[Forgot username or password?](#)

Remember Me

Login

5. Tax Wise Online displays the New Security Enhancements page, describing the new security process. Read over this information. Verify your user name and email address, 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, a more rigorous login process was implemented for the 2018 filing season called two-step verification. 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.

Here is how this new process works:

- 1) The first step is to enter your client ID, username and password.
- 2) Next, you will need to enter a code that will be sent to the e-mail address on file for your account, which is displayed in the box below.
 - If you'd like to have the code sent to a different e-mail, enter the updated e-mail in the box below. Note that this will change the e-mail listed on your account as well.

After you go through these two steps, you will be logged in to your software. At the verification screen, you can select "trust this device" to have your computer and browser remember the code for 90 days so you don't have to enter it every time you login.

User Name:
Flower

Email Address:

Continue

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 email address. Click **Send the code**.

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.

How do you want to confirm your identity?

E-mail to

sfs*****@wo*****.***

Send the code

This code will expire in 10 Minute(s)

7. Retrieve the code from your email. 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

- Must be at least 8 characters in length
- Must not exceed 100 characters
- Must contain at least one number
- Must contain at least one special character(#?!@#\$%^&*~)
- Must contain at least one upper case character
- Must contain at least one lower case character
- Case-sensitive
- Cannot contain the user name
- Cannot reuse any of your last 10 passwords
- Passwords expire every 90 days

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

What are the password rules?
New Password

Confirm New 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