

## **TaxWise Online Training**

To access **TaxWise Online Training**, open Internet Explorer and enter [twonline.taxwise.com/training](http://twonline.taxwise.com/training) in the address bar

TaxWise Online Training displays the following login screen:



**TaxWise**<sup>®</sup>

 If you need assistance, you may click on the 'Need Help' link below.

Client ID:

User Name:

Password:

[Need Help?](#)

Remember Me

1. Enter your Client ID in the **Client ID** box and press the **Tab** key.
2. Enter ADMIN in the **User Name** box and press the **Tab** key
3. Enter the registration code in the **Password** box. (The first time you login, or after your admin password has been reset, the password is your Registration code)
4. Click the **Log In** button.

## **License Agreement**

The first time you login with the ADMIN user and the registration code you will be prompted to review and agree to the license agreement. Once you have reviewed the license agreement, check the box, "**I Agree**" and then click the **OK** button.

## Admin Password

For security purposes, TaxWise Online Training requires you to assign a new password. The password you create must be unique across your Client ID and cannot be a previously used password. TaxWise Online Training displays the following page:



Use the following steps to continue to change your password:

1. Click **Change Password**.

The password must be a minimum of 8 alpha-numeric characters. You will be prompted to change the password every 90 days.

2. Type your new password in the **New Password** box and press the **Tab** key.
3. Re-enter your new password in the **Confirm New Password** box and press the **Tab** key.
4. Click the **Change Password** button.

TaxWise Online Training displays a message indicating the Password has been changed.

5. Click the **Continue** button.

TaxWise Online Training displays the **Secret Question/Answer** page:

1. Select a Secret Question from the drop-down list.
2. Type the answer to the security question in the **Secret Answer** box.
3. Click the **OK** button.

For more information on the Administrator setting in TaxWise Online users can access the 2010 TaxWise Training located on the Practice Lab.

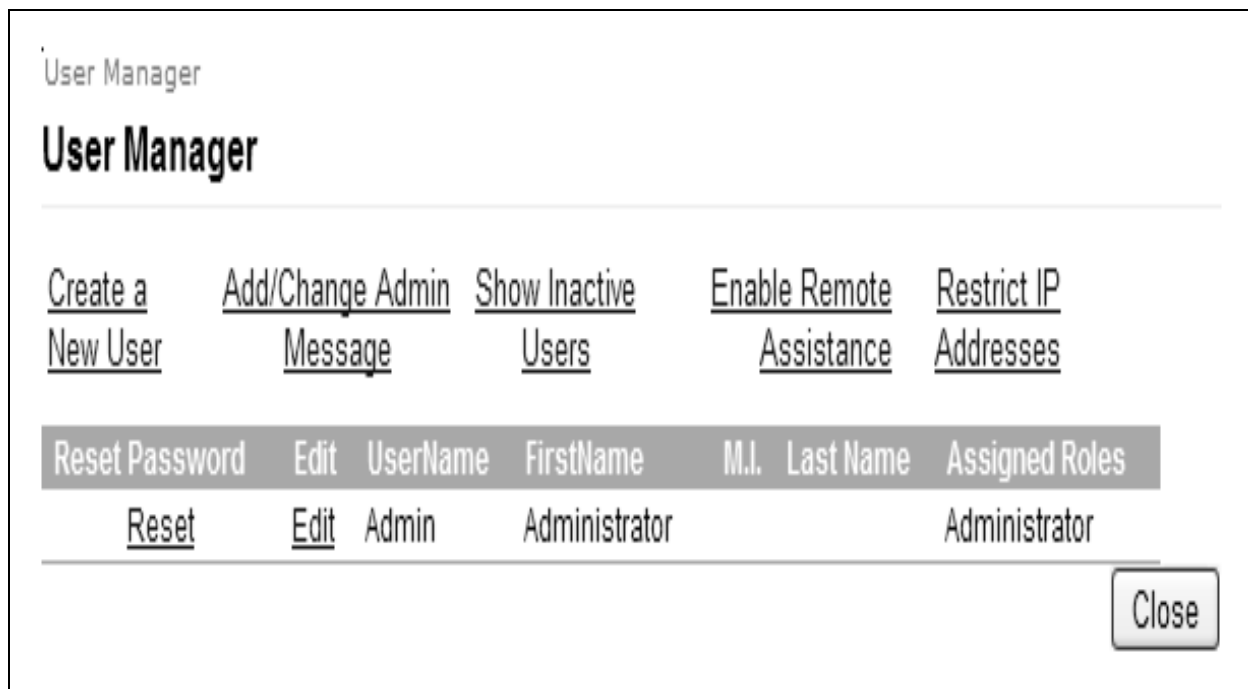
To get to the Practice Lab log into [www.irs.gov](http://www.irs.gov) and go to Link and Learn. Open any lesson and click on the Practice Lab Starburst. The password is LEARNTWO.

The lessons are broken down per user types – Admin and Preparer.

### Add New Users to TaxWise Online Training

To add a new user to TaxWise Online Training, use the following steps:

1. Log in as the Admin User, or a user with the Administrator role.
2. Click the **Manage Users** button located on the toolbar. TaxWise Online displays the **User Manager** window:



3. Click the **Create a New User** link.

**TaxWise Online Training displays the Create User page:**

User Manager : Create User

### Create User

User Name:

Real Name:

Email Address:

Is Active User:

Assign Roles

Possible Roles

- Interviewer
- SuperUser
- TemplateManager
- Administrator

Assigned Roles

- ReturnPreparer

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Save Cancel

Type a new user name in the **User Name** field and press the **Tab** key.

All preparers should have their own unique user name.

4. Type the user's first name in the first box of the **Real Name** fields and press the **Tab** key.
5. Type the user's middle initial, if applicable, and press the **Tab** key.
6. Type the user's last name, and press the **Tab** key
7. Type the user's e-mail address.
8. Click the **Save** button.

If the user does not have an e-mail address, enter the e-mail address of the Administrator. An e-mail address is required to reset a created user's password.

By default, the **Is Active User** check box is selected, and the assigned role is Return Preparer.

**Assign Roles**

To assign a different role to the new user, select the role in the **Possible Roles** list, and then click the right double-arrow button (>>) to move the role into the **Assigned Roles** list.

To assign more than one role to the new user, select the first role, hold down the **Ctrl** key and select each additional role. Click the double-arrow button to move all selected roles to the **Assigned Roles** list.

To remove a role, click the role in the **Assigned Roles** list, and then click the left single-arrow button (<) to move the role to the **Possible Roles** list.

| Role                    | Description  |
|-------------------------|--|
| <b>Administrator</b>    | The ADMIN user or any user that has the Administrator role assigned has access to all commands and actions except <b>Start a New Return</b> .  |
| <b>SuperUser</b>        | Has access to management tools such as <b>Move Returns, Submit E-files, View Acks, TWO Reports, &amp; Report Server</b> , and all functions related to creating and editing a tax return. Any user assigned the SuperUser role has the ability to edit returns created by all users. This role does not have access to Advanced Settings, Delete Returns or Manage Users.                |
| <b>Reviewer</b>         | Allows access to all SuperUser role functions except Submit e-files. By default, any user assigned the Reviewer role does not have the ability to override entries.  |
| <b>ReturnPreparer</b>   | Allows access to all functions associated with creating and editing a tax return. Any user assigned this role can mark the return <b>Ready to File</b> from Diagnostics but they cannot submit the e-file. They cannot delete or move returns, access acknowledgements or reports. By default, any user assigned the Return Preparer role does not have the ability to override entries. |
| <b>Interviewer</b>      | Allows access to all <b>ReturnPreparer</b> role functions, but is <i>required</i> to start new returns by selecting <b>Go to Interview</b> . By default, any user assigned the Interviewer role does not have the ability to override entries.   |
| <b>Template Manager</b> | Can create new return templates, edit existing templates, assign, and unassign users to templates.   |
| <b>E-file Manager</b>   | Allows the user to submit e-files. This role is designed to be used with other roles, such as reviewer, to allow more flexibility in assigning roles.  |
| <b>All Roles</b>        | All users have access to <b>User Settings</b> and <b>TaxWise University</b> .  |

The following table describes the roles that you can assign to a user:

*For more information on other functionality available in the Manager Users settings login to the 2010 TaxWise Training located on the Practice Lab. The Manage Users section is located under TWO ADMIN.*