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Mary Girsch-Bock • Jun. 18, 2020



Wolters Kluwer

## TaxWise Online – Wolters Kluwer

<https://taxna.wolterskluwer.com/professional-tax-software/taxwise>

From the [2020 reviews of professional tax preparation systems](#).

TaxWise Online from Wolters Kluwer is a scalable cloud-based tax compliance application well-suited for small to mid-sized firms that process federal and state individual forms for clients. For firms that process both individual and business returns, TaxWise offers an on-premise application that can be installed on a local workstation or network.

## What's New

One of the biggest additions to TaxWise Online is the TaxWise Mobile Interface, which integrates seamlessly with TaxWise Online. The mobile app is designed to

make it easier for clients to complete the entire tax preparation process without

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## **Product Features**

The TaxWise Online interface is clean and uncluttered, with options at the top of the screen for the user dashboard, tax returns, e-filing, and reports. In the tax return screen, users can access various forms or the interview option, and there is an option to toggle back and forth between the two. The menu bar includes a series of tabs that provide access to Client Letters, Client Notes, Diagnostics, Print Return, Check Return Status, Send Email, Text Messages, and Message. To the left of the screen is a menu that allows users to skip to a particular area in the return. A running total of any refund amount is also displayed in the menu to the left.

TaxWise Online carries prior year totals over for existing clients, and the uncomplicated user interface makes it easy to add a new client at any time.

The interview process in TaxWise Online helps those new to TaxWise, or form preparation, by guiding them through the entire form entry process, helping to ensure that all necessary information is entered properly. TaxWise Online uses the Easy Interview feature that guides users through each form to ensure that no field is overlooked, making it easy for office staff to collect information from clients. The product also includes a 'What if' feature, that allows users to easily test a variety of tax scenarios for their clients prior to completing the return, and users are able to save scenarios for future usage if desired.

TaxWise Online supports all federal and state individual income tax forms, as well as local forms when applicable. An e-file option is available for all federal forms as well as state and local forms where e-filing is offered, and users are able to track e-filing status and view e-file errors displayed in red on the diagnostic report. Line-by-line help options are available in the application, with integrated tax help built in to the application. TaxWise Online also includes numerous bilingual features including more than 60 forms and instructions in Spanish.

TaxWise Online Pro and TaxWise Online Enterprise Mobile both integrate with the

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TaxWise Online also integrates with numerous banks, allowing firms to offer various refund options to their clients.

TaxWise Online includes numerous help and support options, including access to TaxWise Online Education Video Library that includes a variety of short instructional videos for key features of the application. Users also have password protected access to user guides, and an onboarding guide, with all product updates available for uploading from the support page. A searchable knowledgebase is available for browsing, and the Support Video Library is designed to offer assistance with common product issues. TaxWise Online offers both telephone and chat support options, with extended support available during tax season. All support is included in the cost of the application.

TaxWise Online offers solid tax compliance capability for firms processing individual tax returns for clients. TaxWise Online offers four plans: TaxWise Online Essentials, which is designed for a single user, and currently runs \$299\* per year; TaxWise Online Pro, which is a 3-user system and currently runs \$1,219\* per year; TaxWise Online Pro Mobile, which runs \$1,729\* per year, and is also a 3-user system; and TaxWise Online Mobile Enterprise, which is a 10-user system, with pricing available upon request. TaxWise On-Premise (not reviewed in this issue) is the better option for firms that process both individual and business returns. (\*Note that e-filing fees are assessed in addition to the annual software fee.)

**2020 Rating: 4.75 Stars**

### **Strengths:**

- Intuitive user interface
- Excellent help and support resources

- Offers a mobile plan

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