

TWO-20 First Time Login Procedure

0. Do you have everything you need?

The first time you log in to TaxWise Online (TWO) (or if your password has been reset) you will need to follow the following procedure exactly. Before you start be sure you have the following TWO login information from your Training Coordinator:

Client Id:

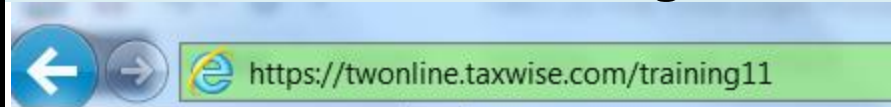
User Name:

Note: There may sometimes be a long delay (10+ seconds) between steps – be patient.

1. Start Internet Explorer

Note: TWO will only work properly with IE version 7 or later running under Windows. (i.e. not Chrome, Firefox, Safari, Opera, etc.)

2. Go to the TWO Training website



Address Bar: Type <http://twonline.taxwise.com/training11>

Click Go or hit enter key

Note: No “www.” and all lower case

3. Login Screen

A screenshot of the TaxWise Online login screen. On the left, there are three input fields labeled "Client ID:", "User Name:", and "Password:". Below these fields is a warning message: "Warning: Three unsuccessful login attempts will lock your account." with "Reset Password" and "Log In" buttons. At the bottom left is a checkbox labeled "Remember my ClientID and UserName." On the right, there is a photograph of a modern building with large windows. Below the photo is a section titled "What are the password rules?" with a bulleted list of requirements: "Must be at least 8 characters in length.", "Must not exceed 100 characters.", "Must contain at least one number.", "Are case-sensitive. If you create the password with certain letters capitalized, you must always type them that way.", "Cannot contain the user name.", "Cannot be any of the 10 previous passwords.", "Must be unique to the Client ID. So, no two users associated with your office can have the same password.", and "Expire every 90 days. You will be prompted to create a new password." A "Need Help?" link is at the bottom of this section.

Client ID: As provided by your Training Coordinator

User Name: As provided by your Training Coordinator

Password: Same as provided User Name (including upper/lower case)

Then click **Log In** button.

Note: If you check “Remember my ClientID and UserName”, then you will not need to type them again on this computer.

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4. You must change your password...

You must change your password to continue.
Your new password cannot be any previous passwords.

[Change Password](#)

Click **Change Password** button.

5. New Password Screen

[What are the password rules?](#)

New Password:

Confirm New Password:

[Change Password](#)

Cancel

New Password: Make up a new password following rules

Confirm New Password Type new password again

Then click **Change Password** button

Note: Please remember your password!

Password Rules:

What are the password rules?

- Must be at least 8 characters in length.
- Must not exceed 100 characters.
- Must contain at least one number.
- Are case-sensitive. If you create the password with certain letters capitalized, you must always type them that way.
- Cannot contain the user name.
- Cannot be any of the 10 previous passwords.
- Must be unique to the Client ID. So, no two users associated with your office can have the same password.
- Expire every 90 days. You will be prompted to create a new password.

6. Password has been changed

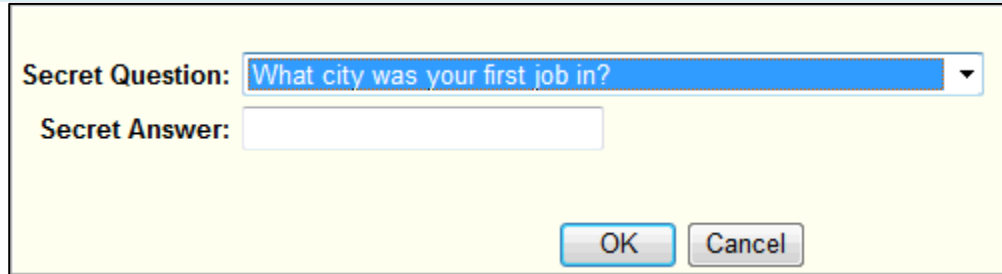
Password has been changed

[Continue](#)

Click Continue

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7. Secret Question / Answer Screen



Secret Question: What city was your first job in?

Secret Answer:

OK Cancel

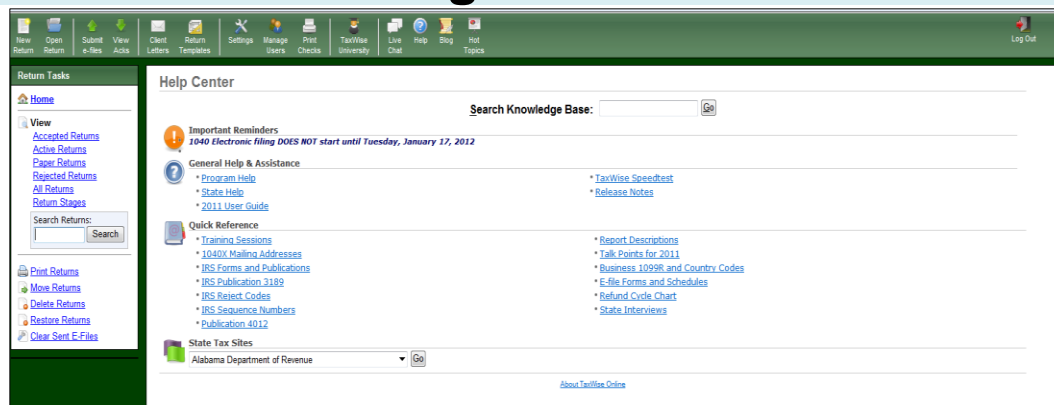
Secret Question: Pick a question from the list

Secret Answer: Type your personal answer

Then click **OK** button

Note: Unlike passwords (which cannot be re-used), you can use the same Secret Question / Secret Answer every time.

8. TWO Home Page



Return Tasks

Home

View

- Accepted Returns
- Active Returns
- Page Returns
- Rejected Returns
- All Returns
- Return Stages

Search Returns: Search

Print Returns

Move Returns

Delete Returns

Restore Returns

Clear Sent E-Files

Help Center

Search Knowledge Base: Go

Important Reminders

1040 Electronic filing DOES NOT start until Tuesday, January 17, 2012

General Help & Assistance

- Program Help
- State Help
- 2011 User Guide
- TaxWise Speedtest
- Release Notes

Quick Reference

- Training Sessions
- 1040X Mailing Addresses
- IRS Forms and Publications
- IRS Publication 3189
- IRS Reject Codes
- IRS Sequence Numbers
- Publication 4012
- Report Descriptions
- Talk Points for 2011
- Business 1099s and Country Codes
- E-file Forms and Schedules
- Refund Cycle Chart
- State Interviews

State Tax Sites

Alabama Department of Revenue

About TaxWise Online

No action required – you're done.

9. Celebrate – Success!