

# First Time Login Procedure

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 you Training Coordinator:

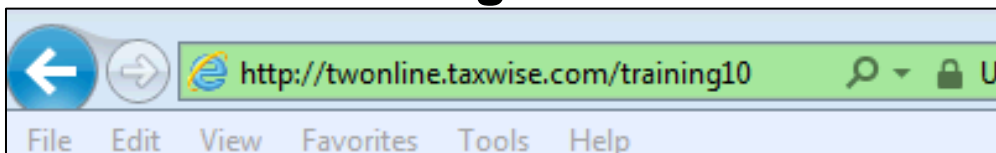
1. **Client Id**
2. **User Name**

Note: There may sometimes be a long delay (10+ seconds) to get to the next step – 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 TWO Training website



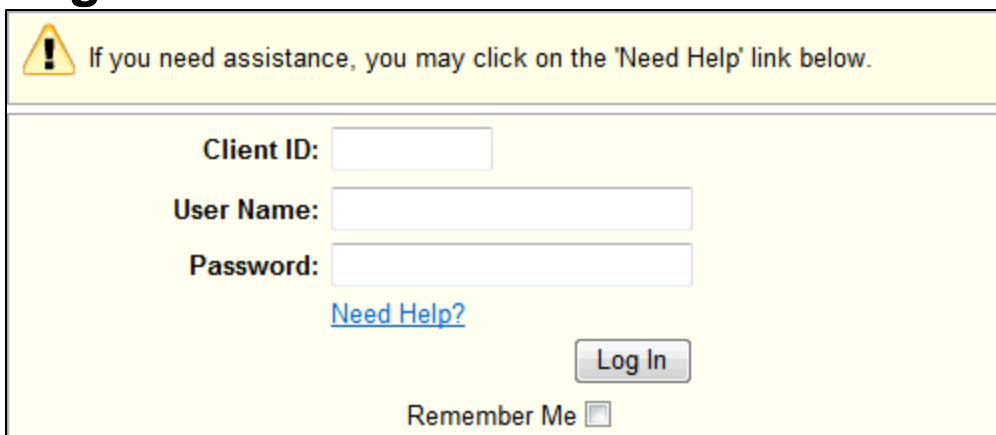
Address Bar: Type <http://twonline.taxwise.com/training10>

Click Go or hit enter key

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Note: No "www." and all lower case

## 3. Login Screen

A screenshot of a login screen with a yellow background. At the top, there is a warning icon and the text "If you need assistance, you may click on the 'Need Help' link below." Below this are three input fields labeled "Client ID:", "User Name:", and "Password:". Under the "Password:" field is a blue link that says "Need Help?". To the right of the "Password:" field is a grey "Log In" button. At the bottom center, there is a "Remember Me" label followed by an unchecked checkbox.

**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.

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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.

Click **Change Password** button.

## 5. New Password Screen

[What are the password rules?](#)

New Password:

Confirm New Password:

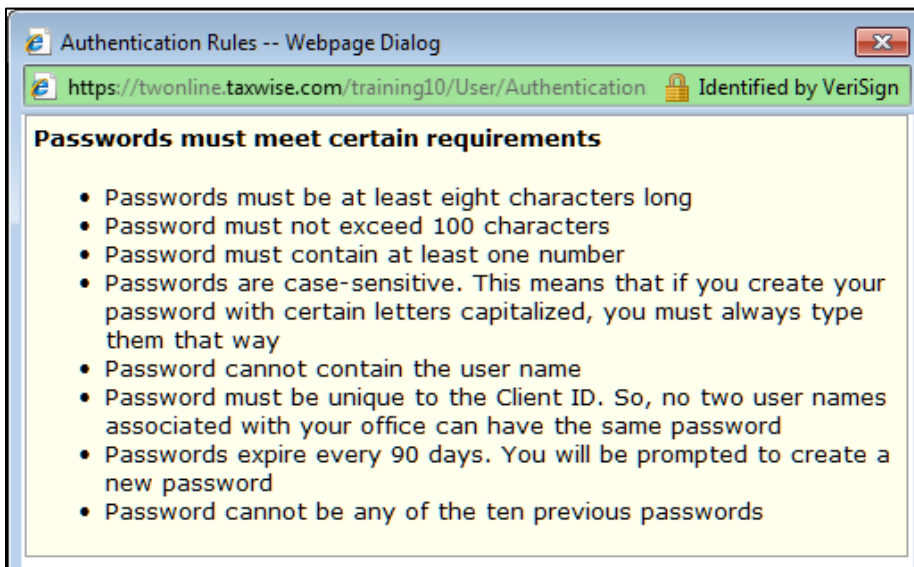
**New Password:** Make up a new password following rules

**Confirm New Password** Type new password again

Then click **Change Password** button

Note: Please remember your password!

Password Rules:



Authentication Rules -- Webpage Dialog

https://twonline.taxwise.com/training10/User/Authentication Identified by VeriSign

**Passwords must meet certain requirements**

- Passwords must be at least eight characters long
- Password must not exceed 100 characters
- Password must contain at least one number
- Passwords are case-sensitive. This means that if you create your password with certain letters capitalized, you must always type them that way
- Password cannot contain the user name
- Password must be unique to the Client ID. So, no two user names associated with your office can have the same password
- Passwords expire every 90 days. You will be prompted to create a new password
- Password cannot be any of the ten previous passwords

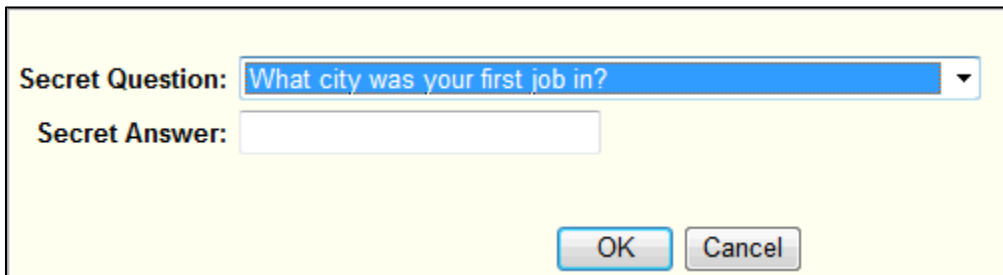
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## 6. Password has been changed



Click Continue

## 7. Secret Question / Answer Screen

A yellow rectangular form with a thin black border. At the top left, it says "Secret Question:" followed by a blue dropdown menu containing the text "What city was your first job in?". Below this is a white text input field labeled "Secret Answer:". At the bottom right, there are two buttons: "OK" and "Cancel".

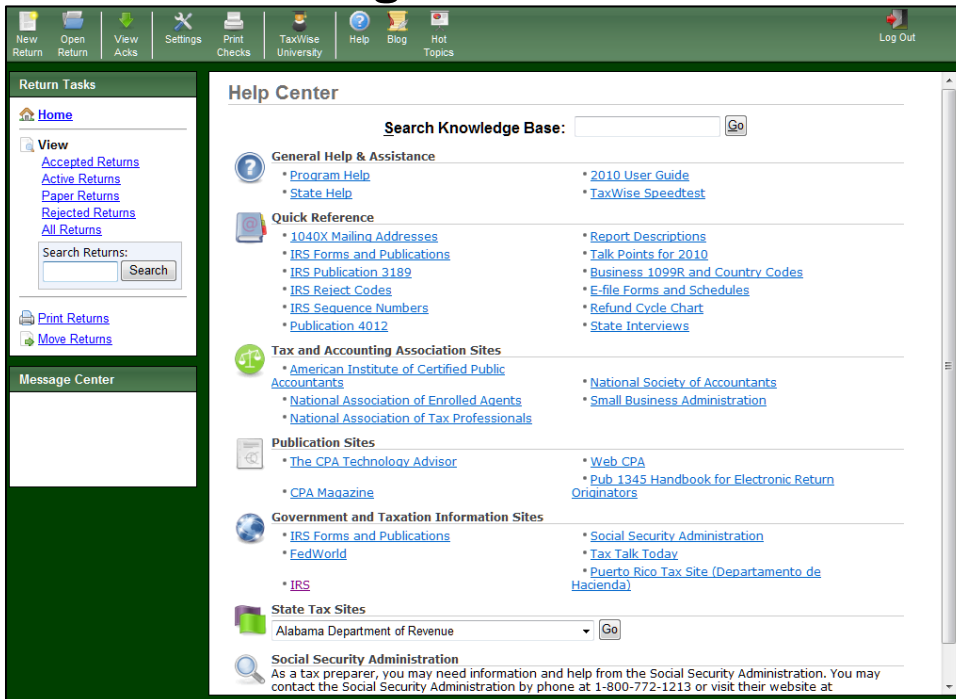
**Secret Question:** Pick a question from the list

**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



No action required – you're done.

## 9. Celebrate – Success!