

## **Support: Help During the Tax Season**

This document has been created to help you access the correct hardware and technical support from TaxWise and the IRS during the tax season. It also includes an escalation process to use if you do not receive a satisfactory response to your issue or problem.

### **Contacting TaxWise Support**

#### **Before contacting TaxWise:**

- Know your EFIN and Client ID.
- Be at your computer.
- Write down the exact error message.
- Describe the exact function you were performing when you received the error.
- Know the SSN of the primary taxpayer, when checking the status of a return.
  - Helpful hint: “Return Status” information can be accessed from the Solutions Center once you are logged in. This is the same information viewed by customer service reps

### **Ways to contact TaxWise**

- **Email:** [customer.support@cchsfs.com](mailto:customer.support@cchsfs.com)
- **Phone:** 1-800-411-6391
- **Online Chat:** Chat with the TaxWise IRS Support Team. They cannot discuss specific taxpayer information, but can help with software related questions. Chat hours are extended during tax season opening at 8:00 a.m. and closing at 10:00 p.m. EST Monday-Friday and 8:00 a.m. – 8:00 p.m. Saturday and Sunday. You can access “CHAT” from the TaxWise Solution Center by clicking the link titled “Chat with Support” or from your TWO Toolbar by using the “Live Chat” button. “CHAT” will time out after 7 minutes of inactivity and a slow internet connection speed can affect the ability to stay connected to your “CHAT” session. Check your connection at [speedtest.taxwise.com](http://speedtest.taxwise.com).

**Blog:** TaxWise Online users can access the Blog by clicking the Blog toolbar button in TaxWise Online. TaxWise Desktop users can select the TaxWise Blog browser tab in the desktop software or from the TaxWise Solution Center.

**TaxWise Solution Center:** <https://support.taxwise.com>

#### **Volunteer News Page:**

*Volunteer News is accessed by logging into the Solution Center. Any information specific to sites under the Volunteer Income Tax Assistance program will be placed here such as Quality Alerts.*

*\*\*\*Latest News will display on the TaxWise Desktop home page for quick access to important information*

#### **TaxWise Knowledgebase:**

Accessible from the TaxWise Solution Center or from the TaxWise Online Help Center. The TaxWise Desktop includes a browser tab for easy accessibility.

## Who Do I Contact?

### Hardware Problem

Contact the Enterprise Service Desk (Help Desk) at 1-866-743-5748 if you need assistance with IRS-loaned equipment.

Submit a OneSupport ticket if you need assistance with AARP Foundation Tax-Aide equipment. Use the **Form:** Technology Hardware and **SubTopic:** Other Hardware

### Software Problem

Contact the Enterprise Service Desk (Help Desk) at 1-866-743-5748 if you need assistance with operating system software on IRS-loaned equipment,

Submit a OneSupport ticket if you need assistance with operating system software on AARP Foundation Tax-Aide owned computers. Use the **Form:** Technology Software and **SubTopic:** non TaxWise Software.

Contact TaxWise Volunteer Support at 1-800-411-6391 if you need assistance with TaxWise software.

### Rejects:

*TaxWise Customer Service representatives cannot assist with correcting a rejected return. The representative can only read the existing reject to the volunteer. If it is a reject that was received due to software issue information will be placed on the Blogs, Volunteer News Page and Latest News.*

### If unsure how to fix:

Contact IRS *e-file* Help Desk for Federal rejects at 1-866-255-0654

Contact State *e-file* Help Desk for State rejects.

If additional training needed, contact IRS SPEC Territory office.

**Note:** Many of the most common rejects involve the taxpayer(s) and their dependents Social Security Number (SSN) and the Employer Identification Number (EIN) that appears on the Forms W2 and Forms 1099. The IRS performs a name match on these numbers that can cause a return to be rejected. Typographical and other errors can often be easily resolved. The Taxpayer may need to be contacted to determine the correct EIN or SSN numbers. Neither the IRS nor TaxWise can resolve these rejects.

**Escalation** (only escalate if you do not receive a satisfactory response to your issue/problem)

Send a request/ticket through OneSupport; use the **Form:** *TaxWise* and **Subtopic:** *TaxWise Incidents*, please title the message “*TaxWise Escalation*” in the subject field. In the body of the email please describe what happened in detail and explain why you believe the response to be unsatisfactory. Include Incident number and Client ID. If you are sending the message for someone else include their full name and contact information. Every effort will be made to get a resolution to your problem.

**Please note:** enhancements to the software will not be addressed by TaxWise during the tax season unless it is a tax calculation error which must be resolved. All other suggested enhancements will be retained and tabulated by the National Technology Committee (NTC), and presented to the IRS and TaxWise at the end of the tax season.

### Other Quick Reference Numbers

#### Internal Revenue Service (IRS)

- **VITA/TCE Hotline** (for volunteer use only): 1-800-829-8482 (800-TAX-VITA)
- **IRS e-file Help Desk:** 1-866-255-0654
- **Enterprise Service Desk** (Help Desk): 1-866-7HELP4U (1-866-743-5748)
- **IRS Tax-Help:** 1-800-829-1040
- **IRS Forms and Publications:** 1-800-829-3676
- **IRS Taxpayer Advocate:** 1-877-777-4778
- **IRS Tax-Help for Deaf (TDD):** 1-800-829-4059
- **Social Security Administration:** 1-800-772-1213
- **Where’s My Refund Website:** [www.irs.gov](http://www.irs.gov)