

TaxWise® Online Learning Portal

TaxWise Desktop to TaxWise Online Migration Utility

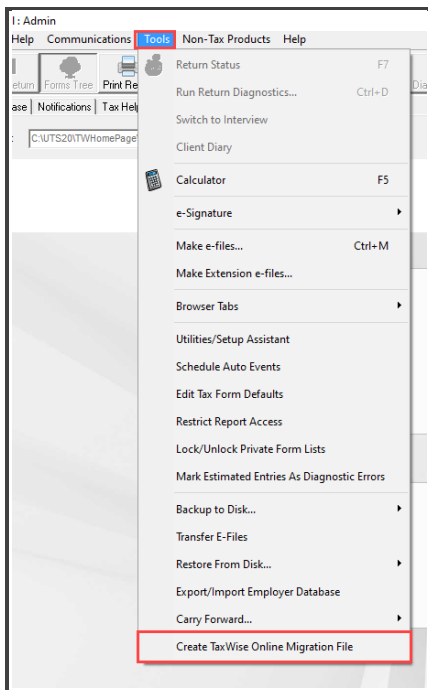
New to 2021 Tax Season, Wolters Kluwer has created an Export Utility to help reduce the setup required by TaxWise Desktop Users moving to Tax Wise Online. This utility will allow you to export :

- Preparer Information
- User Login Information
- Tax Form Defaults (Return Templates)
- Print Packets (Print Sets)
- EIN Database

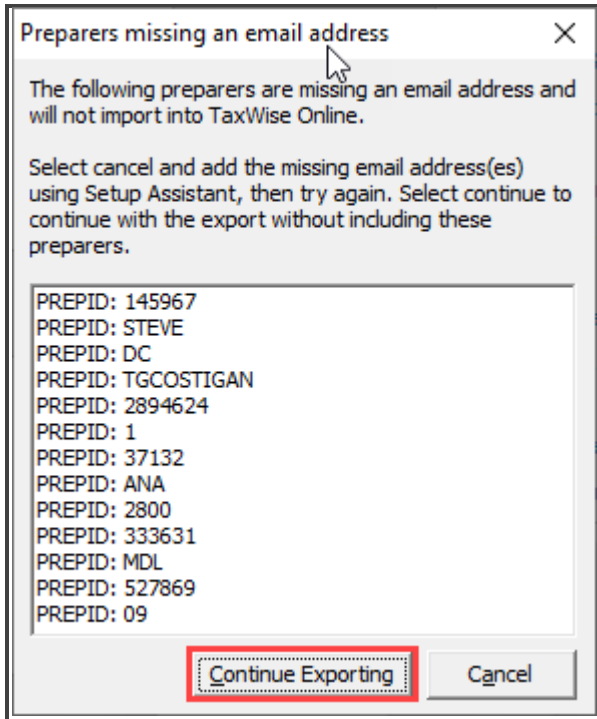
Export from TaxWise Desktop

To create the export file:

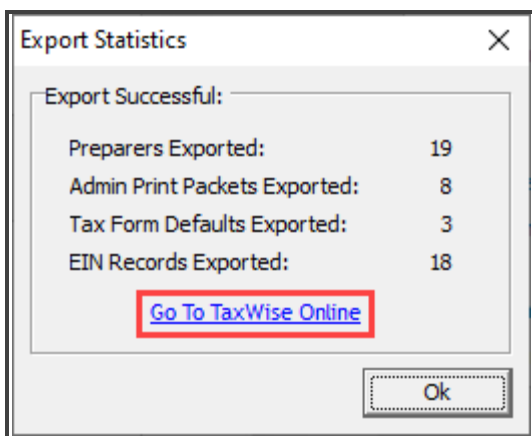
1. Log in to TaxWise Desktop as the Admin user.
2. Make sure that your TaxWise Desktop program is at version 35.05, which is the season end release.
3. From the **Tools** menu, select **Create TaxWise Online Migration File**.



4. As part of the export process TaxWise validates that it has the appropriate information. In this case TaxWise is telling me that the following preparers will not be included in the export file because they are missing an email address. Select cancel and add the missing email address(es) using Setup Assistant, then try again. You can select continue to continue with the export without including these preparers. For the purpose of this lesson, click **Continue Exporting**.



5. TaxWise displays an Export Statistics dialog box with a summary of what was included in the export. You can click the link to go directly to TaxWise Online or click **OK**. For the purpose of this lesson, click the **Go To TaxWise Online** link.



6. Displayed you will see the TaxWise Online log in screen. Enter your Admin log in credentials to TaxWise Online and click **Login**.

Client Login


Please login to your account by completing the form below

Client ID

Username

Password

Show Password

User Verification ([what's this?](#))
 I'm not a robot  reCAPTCHA
[Privacy](#) - [Terms](#)

WARNING: Five unsuccessful login attempts will lock your account
[Need Help logging in?](#)
[Forgot username or password?](#)
 Remember Me

7. TaxWise Online displays the TaxWise Desktop Data Import page. Step one shows you the path of where the file should be stored. The default directory is XX:\UTS20\Users\Admin. In step two, navigate to that location based on the drive you have your program installed on.
8. Once you have located the DataExport.zip file, click **Import**.

TaxWise Desktop Data Import

The following items are included for importing to TaxWise Online:

- Preparer Logins
- Preparer Details
- Return Templates
- Print Sets
- Employer ID Numbers

To Import

1. Locate the following folder on the drive where TaxWise Desktop is installed, and copy its path.
 [Drive]:\UTS20\Users\Admin
2. Click Browse and paste the path copied above. Select the DataExport.zip file from the folder.

DataExport.zip

9. Once the import is complete, TaxWise Online displays the Summary of Data Import dialog box listing the results. Review the Summary data, then click **Close** to exit.

Summary of Data Import ✖

The data was successfully imported into TaxWise Online.

| Data Item | Total | Created | Skipped | Failed |
|---------------------|-------|---------|---------|--------|
| Preparer Logins | 16 | 1 | 15 | 0 |
| Preparer Details | 16 | 1 | 15 | 0 |
| Employer ID Numbers | 18 | 14 | 4 | 0 |
| Return Templates | 3 | 3 | 0 | 0 |
| Print Sets | 8 | 8 | 0 | 0 |

[Close](#)

TaxWise Online returns to the TaxWise Desktop Data Import screen, click the Dashboard tab and verify that the information you have imported is correct.

Preparer Logins

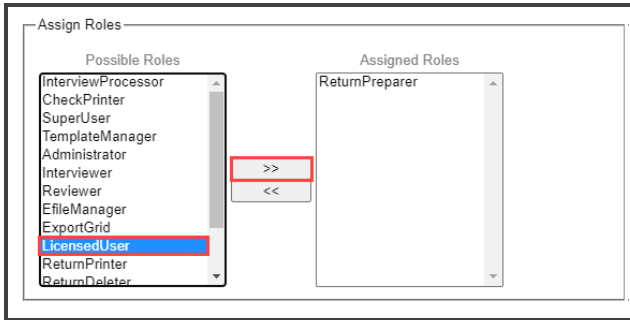
The Admin user will need to assign the License User Role to the Preparers.

To do so:

1. From the Admin user drop down menu, select **Settings**.
2. From the Settings page, select **Manage Users**.
3. On the User Manager page you will see the user(s) that were imported. To add the License User, click the **Edit** link to the left of the username.

| Reset Password | Edit | UserName | FirstName | M.I. | Last Name | Assigned Roles |
|-----------------------|----------------------|----------------------|---------------|------|-----------|---|
| Reset | Edit | Admin | Administrator | | (Admin) | Administrator, ReturnPrinter |
| Reset | Edit | karen | karen | | daves | eSignature, Support, LicensedUser, Administrator, SuperUser |
| Reset | Edit | Maria | Maria | | Rangel | LicensedUser, eSignature, SuperUser |
| Reset | Edit | PREPARERNAMEXXXXXXXX | | | | ReturnPreparer |

4. From the list of Possible Roles, select the LicensedUser security role, and click the arrow to move the security role to the Assigned Roles column.



5. While you are here verify that the user information is current and update it if needed. Once the changes have been made, click **Save**.

Edit User

Purchased Licenses: 103
Assigned Licenses: 4
Unassigned Licenses: 99

User Name: Maria
Real Name: Maria Rangel
Email Address: maria.rangel@wolterskluwer.com
Is Active User:

| Phone Type | Country Code | Phone Number | Use for 2-Step Verification | Use as Preferred Number |
|------------|--------------|--------------|-------------------------------------|-------------------------------------|
| Mobile | 1 | 7708571234 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Home | 1 | | <input type="checkbox"/> | <input type="checkbox"/> |
| Office | 1 | | <input type="checkbox"/> | <input type="checkbox"/> |

Assign Roles

Possible Roles: ExportGrid, InterviewProcessor, ReturnPrinter, Support, PasswordMaintenance, eSignature, Interviewer, ReturnPreparer, TemplateManager, Administrator, Reviewer, EfileManager

Assigned Roles: SuperUser, LicensedUser

Save **Cancel**

6. TaxWise Online returns to the User Manager dialog box. You will have to click the Reset link next the users that were imported, so that they receive their temporary password to access TaxWise Online as a user. For now, click **Close** to exit.

User Manager

[Create a New User](#) [Add/Change Admin Message](#) [Show Inactive Users](#)
[Manage Sub-Office Admin Passwords](#) [Enable Remote Assistance](#) [Restrict IP Addresses](#)
[Logged In Users](#) [Mark all users active](#) [Mark all users inactive](#)
[Manage 2-Step Verification](#) [Help](#) [Update Profile](#)

| Reset Password | Edit | UserName | FirstName | M.I. | Last Name | Assigned Roles |
|-----------------------|----------------------|--------------------|---------------|---------|-----------|---|
| Reset | Edit | Admin | Administrator | (Admin) | | Administrator, ReturnPrinter |
| Reset | Edit | karen | karen | daves | | eSignature, Support, LicensedUser, Administrator, SuperUser |
| Reset | Edit | Maria | Maria | Rangel | | LicensedUser, eSignature, SuperUser |
| Reset | Edit | PREPARERNAMEXXXXXX | | | | ReturnPreparer, LicensedUser |

Close

Preparer Details

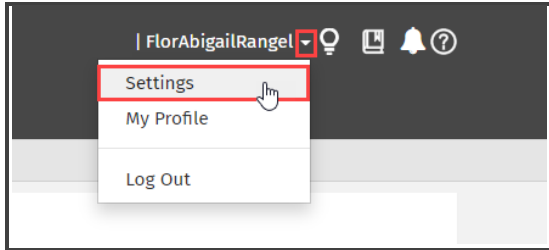
Next let's look at the preparer details that were imported.

To do so:

1. Log in as the one of the users you imported.

i For additional information on logging in as a new preparer, review the corresponding [lesson](#).

2. From the User drop-down menu, select **Settings**.



3. From the Settings page, select **General Settings**.

4. TaxWise Online displays the General Settings dialog box. Displayed you will see the Tax Preparer tab listing the preparer information imported from TaxWise Desktop.

i Note that if the Preparer was also the ERO in TaxWise Desktop, that information will be displayed in the ERO section.

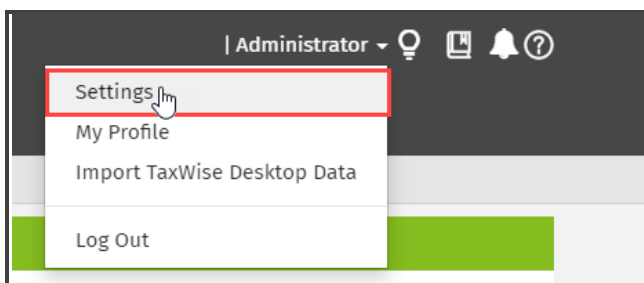
5. If you need to update any of the information that was brought over you can do so on this screen. To override the default Return Template values with these, select the check box. For the purpose of this lesson, click **Save and Close**.

Tax Form Defaults (Return Templates)

In TaxWise Desktop you used tax form defaults to default information and forms for all new returns. In TaxWise Online these are called Return Templates.

To access return templates:

1. Logged in as the Admin user, select the user drop-down menu and select **Settings**.



2. From the Settings page, select **Return Templates**.

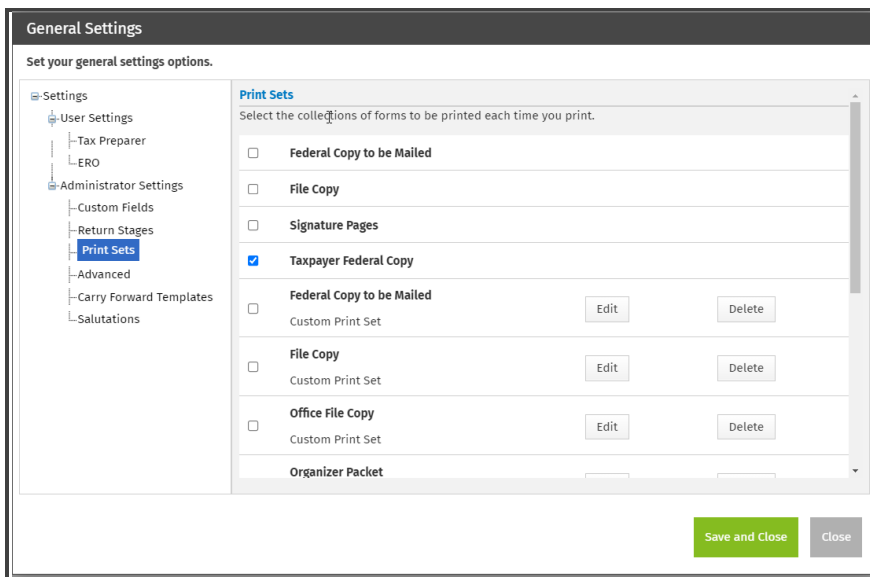
3. TaxWise Online displays the return templates that were imported from TaxWise desktop and any others that you may have already created. If you have user specific return templates, you can Assign them to the user from here.

Print Packets (Print Sets)

TaxWise Desktops allows you to print returns, reports and labels, either to paper or to PDF. Forms are organized in various print packets so that you have the flexibility to print a customer copy as well as your filing copy at that the same time. TaxWise Desktop allow you to edit Print Packets as needed. In TaxWise Online, these form groups are called Print Sets. The admin user can create default print sets to determine which forms to print with each return.

To access Print Sets:

1. Logged in as the Admin user, select the user drop-down menu and select **Settings**.
2. From the Settings page, select **General Settings** and from the General Settings dialog box, click **Print Sets**.
3. Here we see the four default print sets. These include: Federal Copy to be Mailed, File Copy, Signature Pages, and Taxpayer Federal Copy. Below those, we see the print sets that were imported from TaxWise Desktop.



4. From here you can select the collection of forms to be printed each time you print by checking the checkbox in front of the print set(s) you want..

i If needed, you can create additional custom print sets from this page.

EIN Database

The last item that comes over from TaxWise Desktop to TaxWise Online is the EIN Database. So, when you are working in a return, and you key an EIN, that was in the TaxWise Desktop Database, TaxWise Online will enter the information that came over.

- Check to take calculations off of line 16, state wages.
- The taxpayer / spouse ID number listed on the Main Information Sheet is an ITIN. Enter the ID number (SSN or ITIN) as it is shown on the actual W-2

a Control number: _____ Corrected W2 (W-2C):

b Employer ID: 71-1003566
 Name code: SIMP

1 Wages, tips, etc.
 _____ 0

2 Federal tax withheld
 _____ 0

c Employer's name
 Simpson Allergy Clinic
 Employer's U.S. address
 2 Field Place
 Employer's Zip code, city, and state
 30165 ROME GA

3 Social security wages
 _____ 0

4 Social security tax withheld
 _____ 0

5 Medicare wages
 _____ 0

6 Medicare tax withheld
 _____ 0

Employer's foreign address

7 Social security tips
 _____ 0

8 Allocated tips
 _____ 0