

TaxWise® Online Learning Portal

Conversions

With TaxWise Online, conversions save you time by transferring your data from your previous software to the TaxWise Online format. After converting, you can take advantage of the carryforward process, which brings data from the prior year into the current tax year, allowing you to be even more efficient.

TaxWise offers conversions from other tax programs, including:

Conversion Tools Are Available for Most Tax Software Products		
Product	Individual	Business
ProSeries	✓	✓
Lacerte	✓	✓
UltraTax	✓	✓
Drake	✓	✓
Crosslink (TaxWise Only)	✓	
ProSystems fx	✓	✓
TaxAct	✓	
TaxSlayer Classic (TaxWise Only)	✓	
TaxWise	✓	✓
ATX	✓	✓

To download the conversion utility:

1. Go to <https://support.taxwise.com/>
2. From the Preparer Solution section, click **Conversions**.

The screenshot shows a navigation menu with three tabs: 'Preparer Solutions', 'Quick Links', and 'Business Partners'. A 'DOWNLOADS' button is located in the top right corner. Under the 'Preparer Solutions' tab, there are four columns of links. The 'Conversions' link in the second column is highlighted with a red box.

Preparer Solutions	Quick Links	Business Partners	DOWNLOADS
<ul style="list-style-type: none">• Getting Started with TaxWise• Product Updates• Payroll Compliance Reporting Learning Portal	<ul style="list-style-type: none">• User Guides• Reports	<ul style="list-style-type: none">• Conversions• System Requirements	<ul style="list-style-type: none">• TaxWise Blog• Join the TaxWise Insiders Community

3. Enter your login credentials to the support site 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?](#)

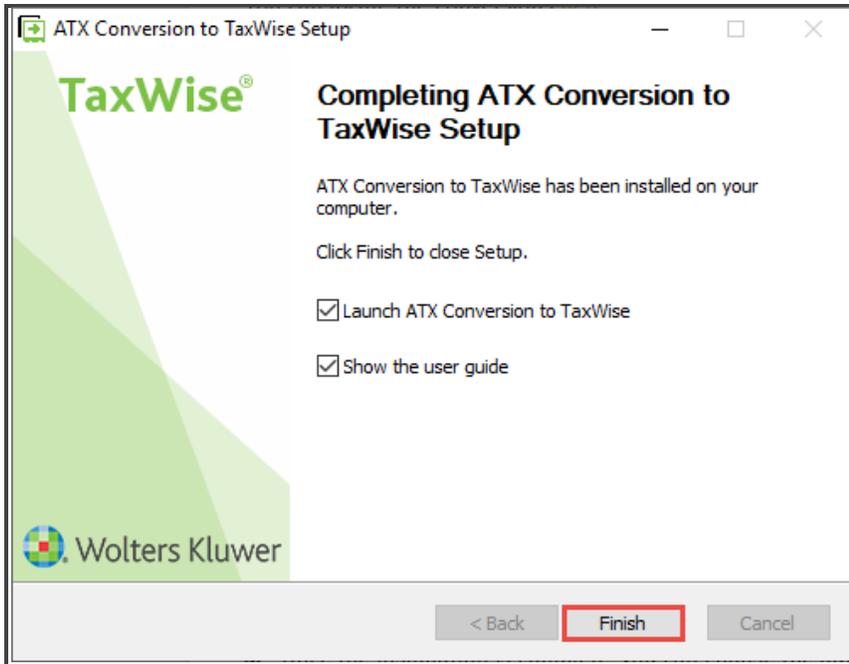
Remember Me

- i Remember that your login credentials to the Support site are the same as your login credentials to access TaxWise Online as the Admin user.
- 4. The Support Site displays the TaxWise Conversion Utilities. Each program has its own conversion and user guide you can review.
- i The TaxWise Desktop and the TaxWise Online conversion utilities are combined into one utility.
- 5. Once located, click the download icon for the utility you need.

ATX Conversion (6/4/2024 12:00:00 AM)	↓	↗
Crosslink 1040-Lite Conversion (6/4/2024 12:00:00 AM)	↓	↗
Crosslink Conversion (6/4/2024 12:00:00 AM)	↓	↗
Drake Conversion (7/8/2024 12:00:00 AM)	↓	↗
Proseries Conversion (6/28/2024 12:00:00 AM)	↓	↗
TaxAct Conversion (6/4/2024 12:00:00 AM)	↓	↗
TaxSlayer Conversion (6/4/2024 12:00:00 AM)	↓	↗

- i Download and read through the User Guide  for your conversion. The guide provides instructions and sets the expectations for items that may not convert.

6. Install the utility by clicking the download once it is complete.
7. Once the installation is complete, you can choose to automatically launch the utility and to open the instruction guide. Click **Finish**.



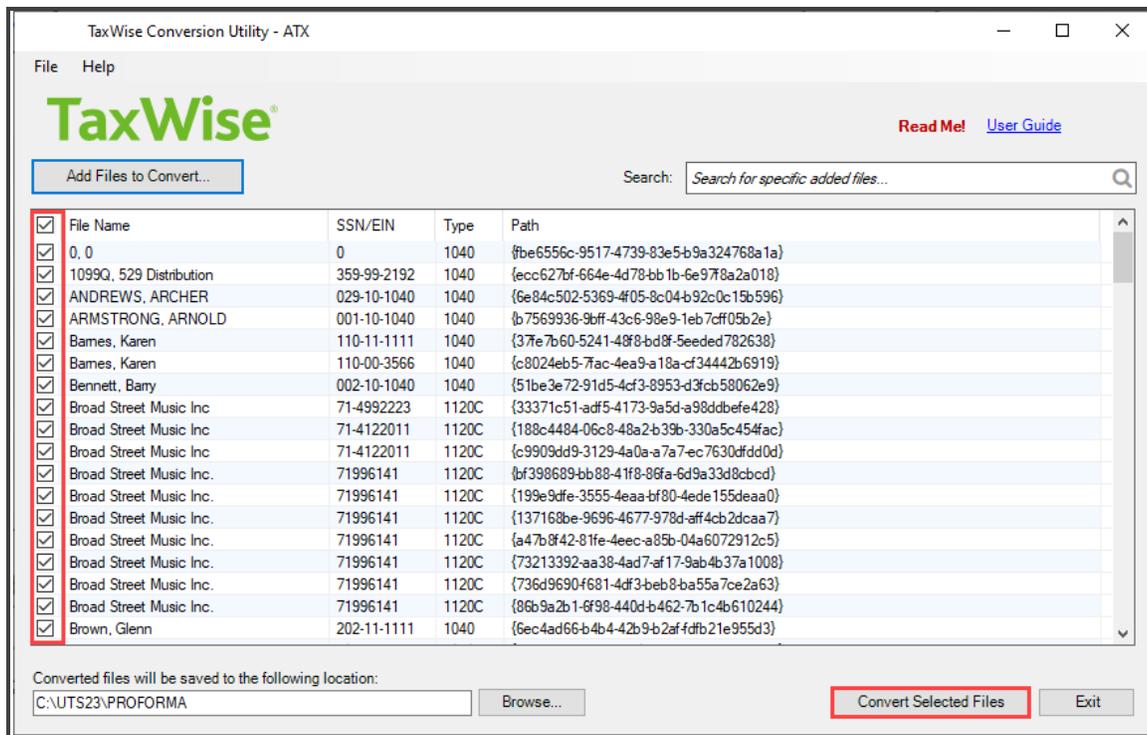
i In this example, we are converting ATX returns into the TaxWise program.

8. The TaxWise Conversion utility opens. Click **Add Files to Convert**, and then choose your return data from your prior year software.

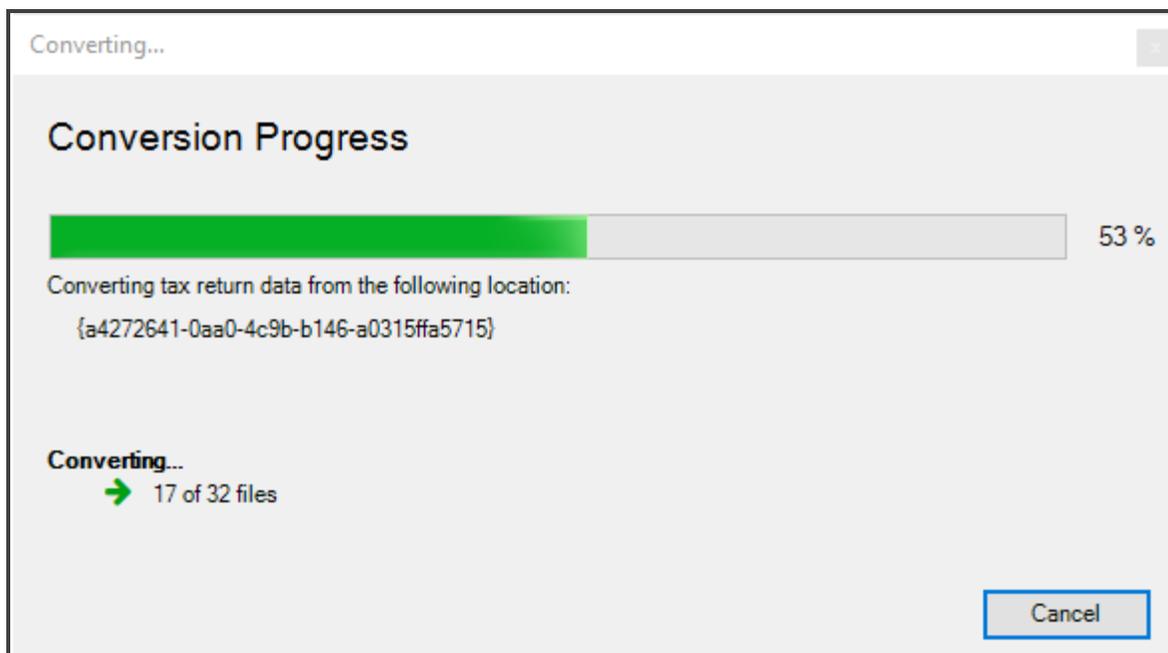


i If you have not read the User Guide, please do that now.

9. The utility displays the returns it located. De-select any returns you do not want to convert, and then click **Convert Selected Files**.

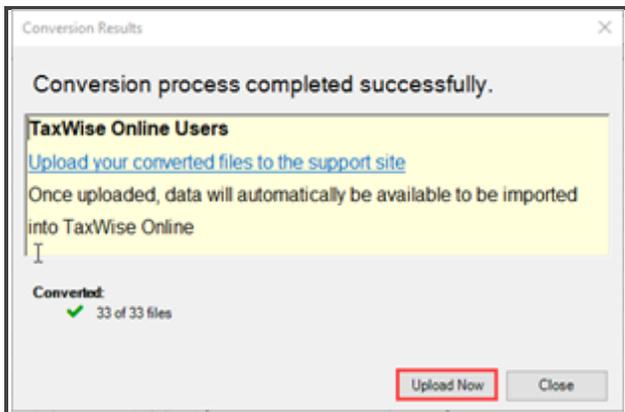


10. The utility displays the conversion progress.



i The conversion time depends on the number of returns, as well as your computer specifications. In some cases, when you convert a large number of returns, the process could take 30 minutes or longer. It may not appear that the program is still progressing, even though it is.

11. When the conversion finishes processing, you receive a *Conversion process completed successfully* message. TaxWise Online Users need to upload the converted files to the support site. Click **Upload Now**.



- i** The result of a successful conversion will be your tax data contained in a zip file that can be upload to the support site so that TaxWise online will be able to access the file.
12. You are directed to the Solution Center log in screen. Type your **Client ID**, the username *Admin*, and password. This should be the same as your Admin log in credentials for TaxWise Online.

13. Select the reCAPTCHA check box for user verification and click **Login**.

14. From the **Downloads** menu, click **Conversions**.
15. In the Upload Converted Files to TaxWise Online section, click **Choose File**.

Upload Converted Files to TaxWise Online

Switch to Client ID:
My Office

Choose the .zip archive created by the conversion utility in the TaxWise conversion folder inside your
 No file chosen

16. Navigate to Documents and select the TaxWise Conversions folder. From here select the zip file. In this case choose the 20XX-ATX.zip file and click Open.
17. This returns you to the Upload Converted Files to TaxWise section where we see the zip file attached, click **Upload Files**.

Upload Converted Files to TaxWise Online

Switch to Client ID:
My Office

Choose the .zip archive created by the conversion utility in the TaxWise conversion folder inside your
 2023-ATX.zip

18. When the upload is complete, you will see information in the Upload History section. This includes the date of the upload, the file name, and who the file was uploaded by.

Upload History

Date	FileName	Message	Uploaded By
7/30/2024	2023-Atx_0.Zip	File Received	Admin

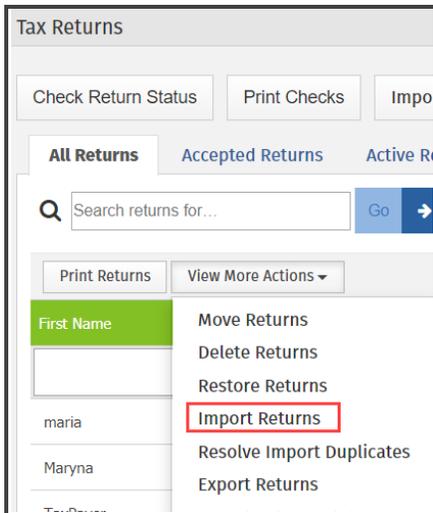
19. You can now log into TaxWise Online for the converted year and import the returns.

Import Converted Returns

Once the returns are converted and upload to the Solution Center, you will need to import the returns into TaxWise online.

To do this:

1. Log in as the admin user or a user with the administrator role.
2. Click **Tax Returns**.
3. From the **View More Actions** list, click **Import Returns**.



4. To see the uploaded returns.

Loading Converted Returns (Carry Forward)

Use prior year carry forward to bring information from the prior year federal tax return into the current year federal return. You can carry forward returns you transmitted through the Wolters Kluwer Electronic Filing Center, as well as paper returns created before your final transmission.

To carry forward return information from the prior year into TaxWise Online:

1. Start a new return.
2. Enter the Social Security Number and then enter again to confirm.
3. Click **Go to Tax Forms** or **Go to Interview**.

 A screenshot of the 'Create New Return' form. The title is 'Create New Return'. Below the title is the instruction 'Select the type of return you wish to create'. There are two radio button options: 'Start a New Return' (which is selected) and 'Apply for ITIN'. Under 'Start a New Return', there are two input fields: 'Social Security Number:' and 'Confirm Social Security Number:'. At the bottom of the form, there are three buttons: 'Go to Tax Forms' (highlighted in green), 'Go to Interview' (highlighted in green), and 'Close' (grey).

4. TaxWise Online prompts you to carry forward prior year information if the return existed for the Client ID last year. Click **Use Carry Forward**.

Create New Return

Select the type of return you wish to create

The TIN 400-00-0004 has Prior Year data available. Would you like to Carry Forward the data from the Prior Tax Year or Create a new return?

Use Carry Forward

Create New Return

Close