

TaxWise® Online 2020

Import Returns

You can import returns to TaxWise Online for a number of reasons. These can include:

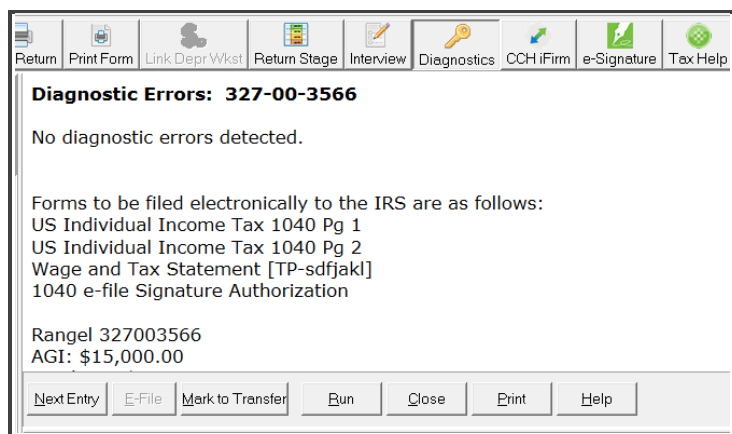
- Returns prepared in TaxWise Desktop Alternative Preparation Solution (APS)
- Returns were converted from another tax program

Import Returns from TaxWise Desktop

TaxWise Online allows you to import returns from TaxWise Desktop. If you use TaxWise Online, you also have access to TaxWise desktop software, referred to as the Alternative Preparation Solution or APS. This ensures that even if you have a disruption in your internet connection, you can continue preparing returns. Prepare returns in the desktop software, and then transfer them to your TaxWise Online account to transmit.

To do this:

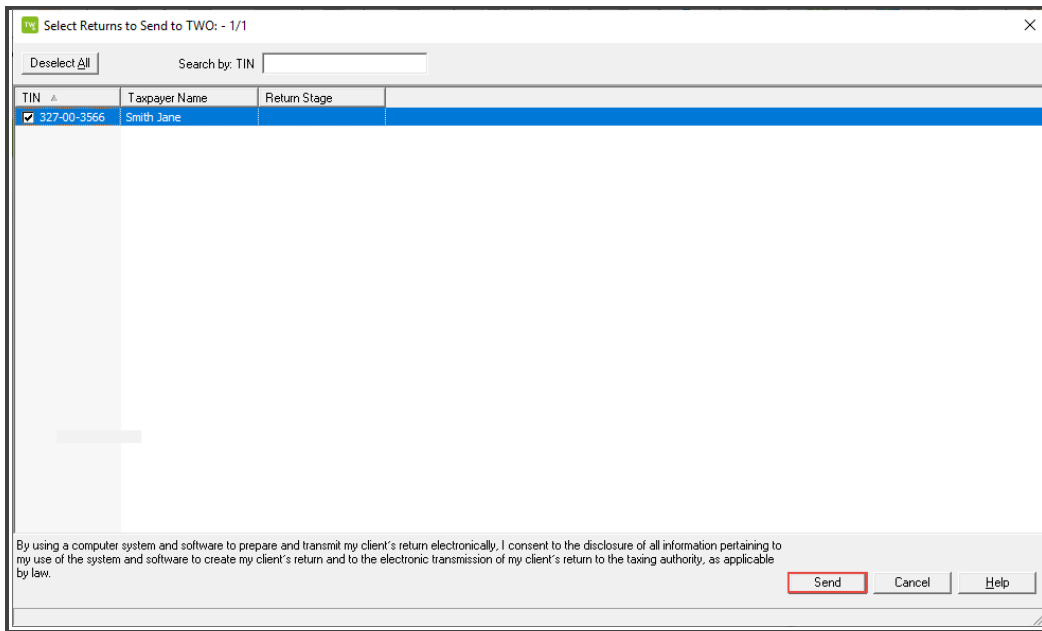
1. From within the return in TaxWise Desktop, click **Diagnostics**.
2. From the Diagnostic dialog box, click **Mark to Transfer**.



3. TaxWise displays confirmation that the return has been marked. Click **OK**.
4. Close the return and change the user to Admin.
5. Go to **Communications** and click **Transfer to TaxWise Online**.



6. Select the return(s) you want to send to TaxWise Online, and click **Send**.



7. TaxWise displays the Electronic Filing Center box. In the session Information section, you will see confirmation stating that the return package has been successfully uploaded and is ready for retrieval in TaxWise Online.
8. Click **Close**.

TaxWise Online allows you to import returns that were created and uploaded by TaxWise Desktop to a username under your Client ID. TaxWise Desktop and TaxWise Online must be registered with the same EFIN.

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**.

Tax Returns

Check Return Status Print Checks Impo

All Returns Accepted Returns Active R

Q Search returns for... Go →

Print Returns View More Actions ▾

First Name	
	Move Returns
	Delete Returns
	Restore Returns
maria	Import Returns
Maryna	Resolve Import Duplicates
Terence	Export Returns

- From the **Assign to User** drop-down list, select the user where you want the returns(s) imported.

Import Returns

Select returns to be imported and assigned to a user

Some returns already exist and are not available for Import. Please select the Resolve Import Duplicates link to review the returns.

Select All Unselect All Assign to User: ▾

TIN	Last Name	First Name	User

- Select the check box(es) beside the return(s) to be imported.
- Click **Import**.

Import Returns

Select returns to be imported and assigned to a user

Some returns already exist and are not available for Import. Please select the Resolve Import Duplicates link to review the returns.

Select All Unselect All Assign to User: ▾

TIN	Last Name	First Name	User
	twentyfourtwo	safetynetmb	GUEST
<input type="checkbox"/>	twentyfourthree	safetynetmb	GUEST
<input type="checkbox"/>	twentyfourthree	safetynetmb	GUEST
<input type="checkbox"/>	twentyfourfour	safetynetmb	GUEST
	twentyfiveone	safetynetmb	GUEST

Import Close

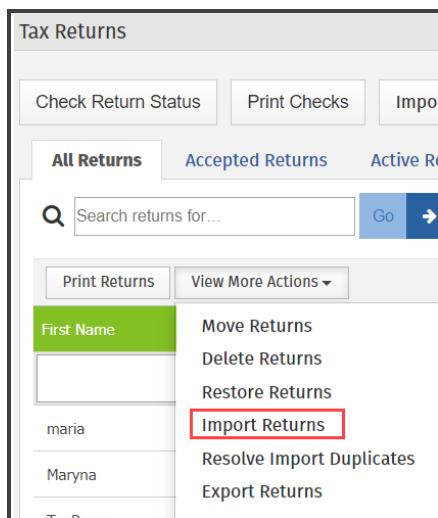
7. Click **OK** to confirm the import, and click **Close** on the dialog box displaying the status of the import.

Import Converted Returns

New users can download the tax conversion utility from the Solution Center to convert your prior year returns to use in TaxWise Online. 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**.



The import process is the same as described in the previous section.

- i** For additional information on the conversion process, review the *Conversion* lessons in the *Registration and Set up* course.

Resolve Import Duplicates

If a return already exists in TaxWise Online, you will not be able to import a return with the same Social Security number, this results in what we call an import duplicate. You will need to resolve the import duplicates.

To do this:

1. From the **View More Actions** list, click **Resolve Import Duplicates**.

2. Click one of the following:

- **Existing:** This allows you to keep the existing return in TaxWise Online, but deletes the attempted import from TaxWise Desktop
- **Imported:** This deletes the existing return in TaxWise Online and imports the return from TaxWise Desktop.

3. Click **Close**.

Resolve Import Duplicates

Returns with the following TINs already exist.

Do you want to use the existing return or replace it with the imported file?

TIN	Name	Username	Select which Return to Use	
	twentyfourtwo, safetynetmb	karen	Existing	Imported
	twentyfiveone, safetynetmb	karen	Existing	Imported

Close