

# TaxWise® Online 2020

## Import Returns

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

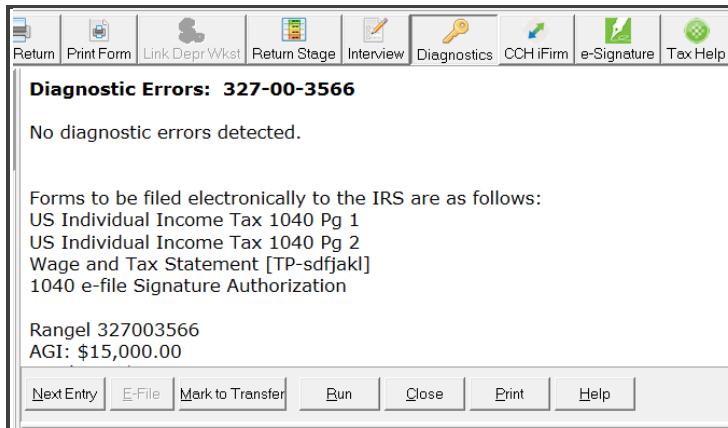
- Returns prepared in TaxWise Desktop Alternative Preparation Solution (APS)
- Returns were converted from another tax program

### Import Returns from TaxWise Desktop

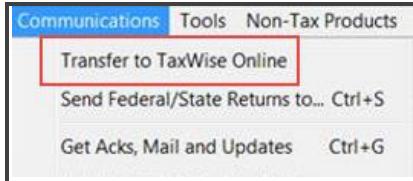
TaxWise Online allows you to import returns from TaxWise Desktop. If you use TaxWise Online, you also have access to TaxWise desktop software, referred to as the Alternative Preparation Solution or APS. This ensures that even if you have a disruption in your internet connection, you can continue preparing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

To do this:

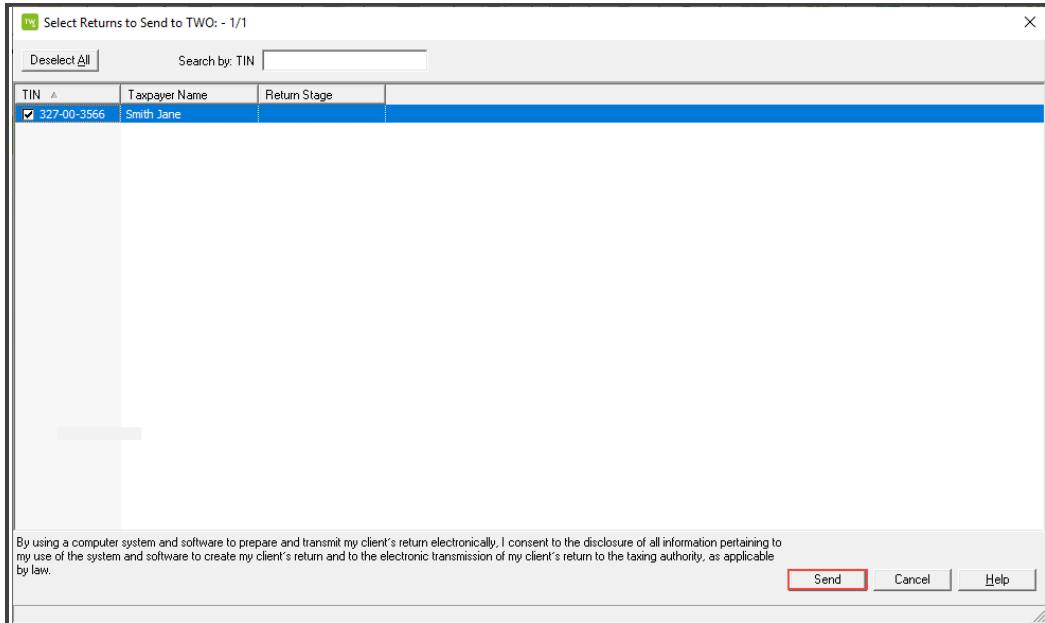
1. From within the return in TaxWise Desktop, click **Diagnostics**.
2. From the Diagnostic dialog box, click **Mark to Transfer**.



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**.



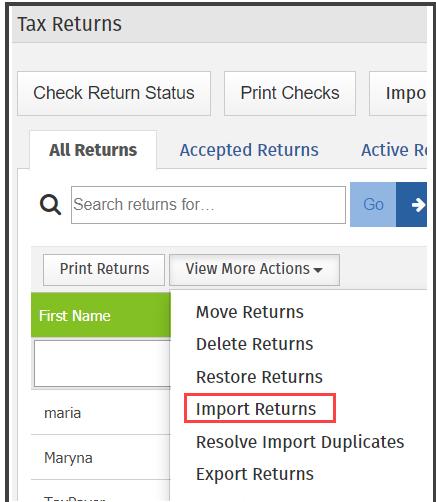
7. TaxWise displays the Electronic Filing Center box. In the session Information section, you will see confirmation stating that the return package has been successfully uploaded and is ready for retrieval in TaxWise Online.

8. Click **Close**.

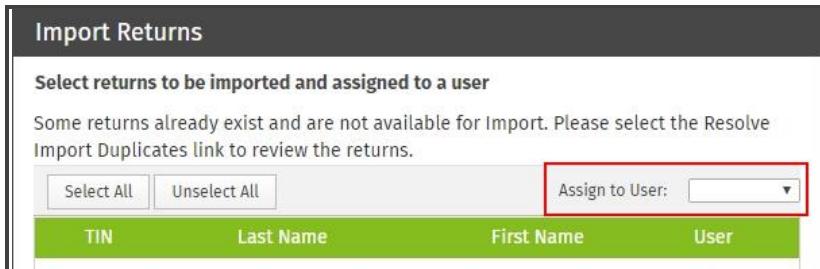
TaxWise Online allows you to import returns that were created and uploaded by TaxWise Desktop to a username under your Client ID. TaxWise Desktop and TaxWise Online must be registered with the same EFIN.

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**.

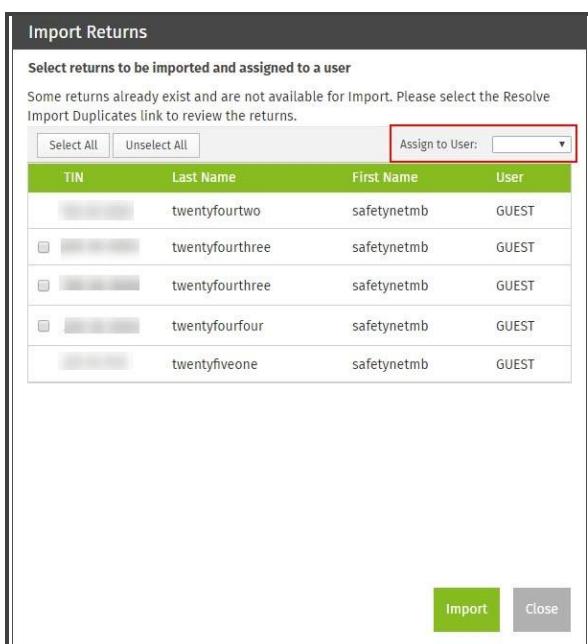


4. From the **Assign to User** drop-down list, select the user where you want the returns(s) imported.



5. Select the check box(es) besides the return(s) to be imported.

6. Click **Import**.



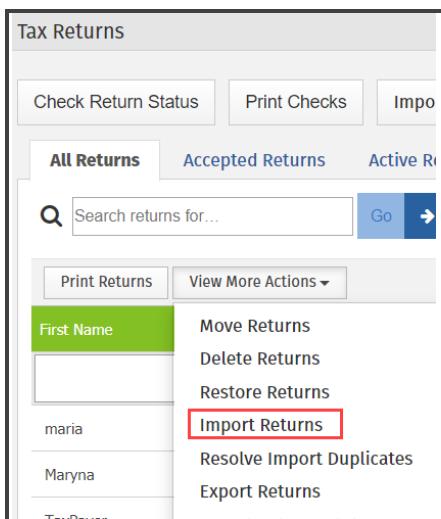
7. Click **OK** to confirm the import, and click **Close** on the dialog box displaying the status of the import.

## 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**.

