

Data Conversion Instructions for Desktop



For Online (ProWeb) TaxSlayer Pro Product Conversions, see instructions in your Account Hub

Please note, you do not need to use this utility to load returns from one year of TaxSlayer Pro desktop software into the current version of the same software.

The table below indicates what software packages can be converted. Please note, this utility can only convert data completed in a desktop version of a software package. It cannot convert returns completed in a cloud-based product.

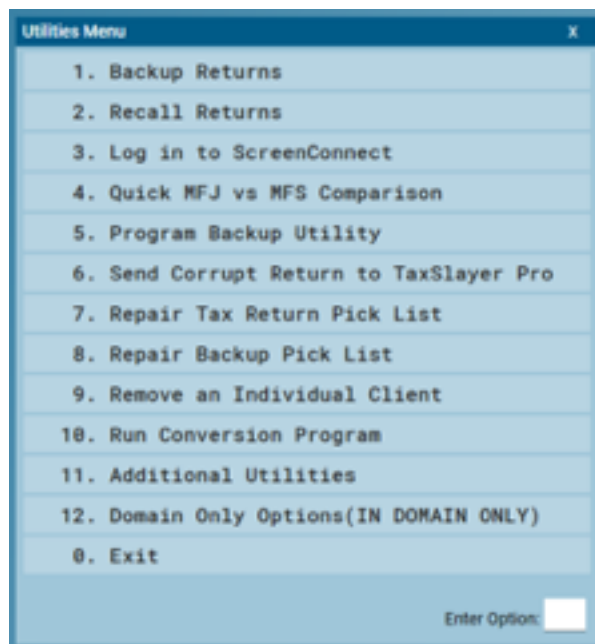
STEP 1: Ensure that all returns needing to be converted have been consolidated into an operational version of your current software on the computer that will be used as the "File Server" by TaxSlayer Pro.

Software Package	Individual	Business
ATX	Y	Y
TaxWise	Y	Y
Drake	Y	Y
ProSeries	Y	Y
Crosslink	Y	N
LaCerte	N	N
OLT	Y	N
TaxAct	Y	N

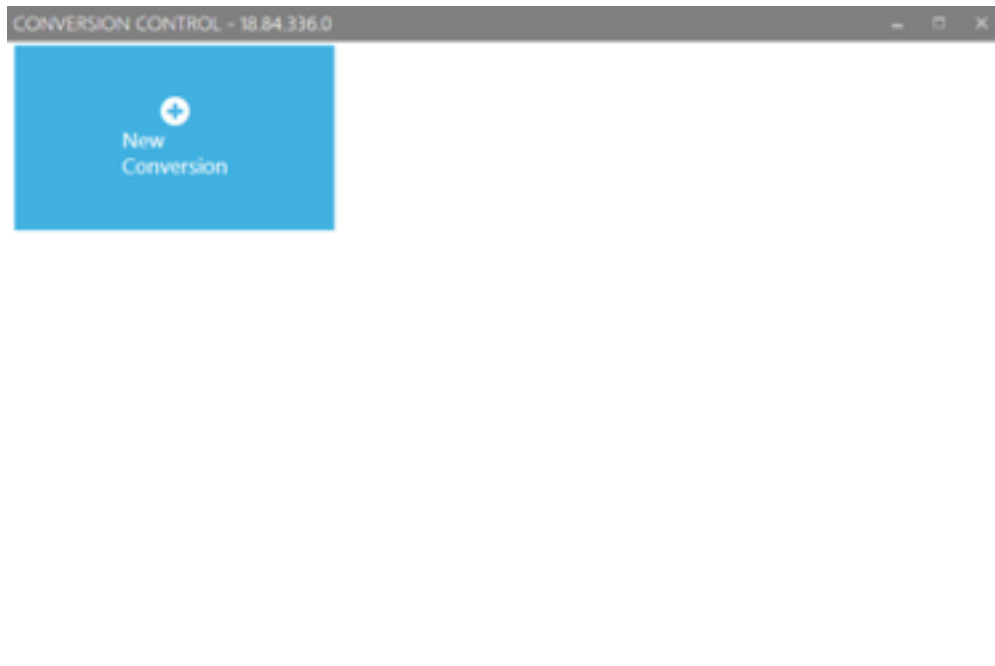
STEP 2: Open the 2019 version of TaxSlayer Desktop with your Admin or Superuser Preparer login information. Select **Utilities** from the **Main Menu**.



STEP 3: Select **Run Conversion Program**.



STEP 4: Click on **New Conversion**.

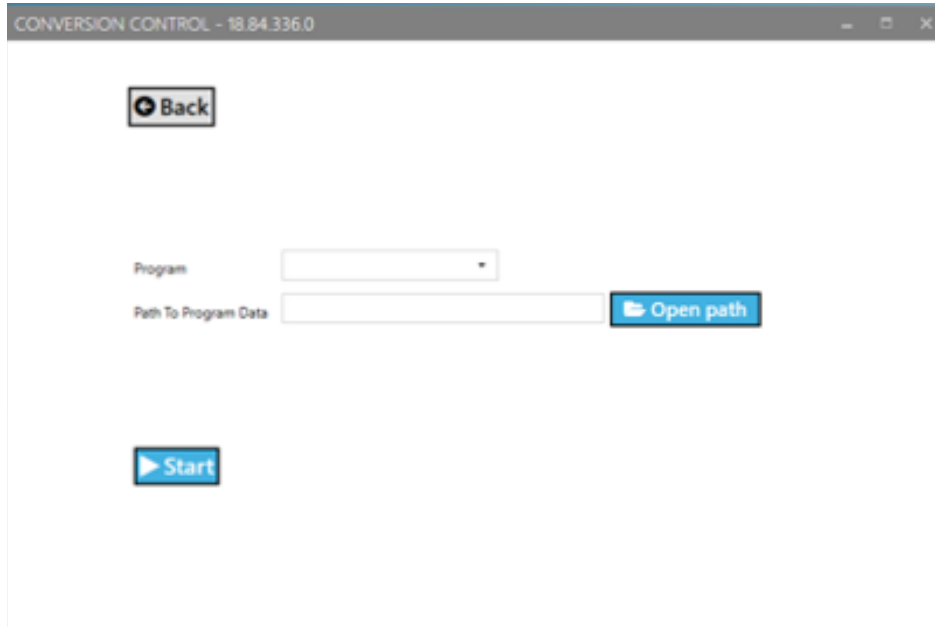


STEP 5: Choose **Desktop** and click **Submit**.

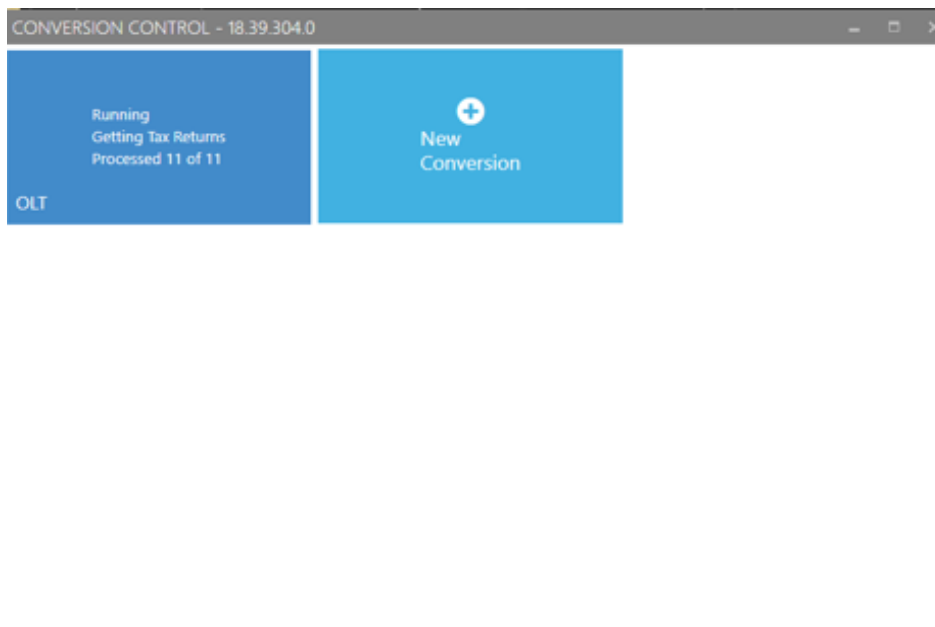


STEP 6: Choose the **Program** you would like to convert. Once the **Program** is selected, the standard data path for the program will appear next to **Path to Program Data**. You may select another data folder for this program if needed.

Click on **Start** to begin the conversion.

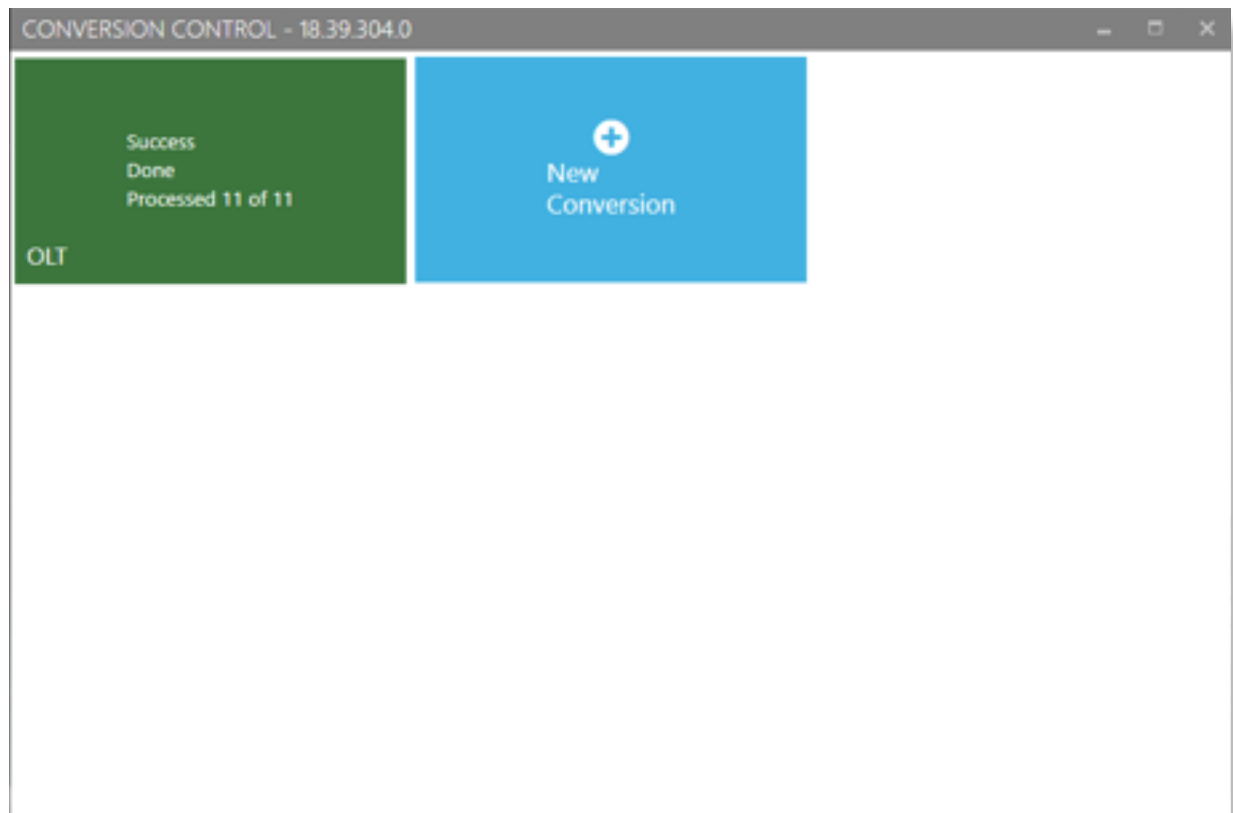


The conversion utility will begin processing returns.



The length of time it takes to complete the conversion will vary depending on the speed of your computer, the number of returns to convert and your current software package.

The green box shown below and **Done** indicate your conversion is complete and your data is ready to be pulled forward. When you enter an SSN or EIN to start a return that has already been converted, you will be asked if you would like to start the return using prior year data. Select **Yes**.



Please Note:

- Returns with passwords or other security restrictions cannot be read and will not be converted. All passwords and security restrictions should be removed prior to attempting to convert returns. Restore these security features in your current package after the conversion is complete.
- Some returns or portions of some returns may not be convertible. In those situations, you will need to manually reenter the data in the 2019 return within TaxSlayer Pro.