
2023 POST-CONVERSION GUIDE

Lacerte 1040 to GoSystem Tax

Thank you for using the GoSystem® Tax Data Conversion Service. This document provides information about the data that you converted from Lacerte® and describes how to use the data in GoSystem Tax.

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What to expect from the data conversion

The overall objective of the GoSystem Tax data conversion is to produce accurate client data for the processing of 2023 tax returns. Data conversions are from the prior year (2022) to the current year (2023). Where applicable, 2022 amounts will generally appear as prior-year amounts in the 2023 return.

We have made every effort to consistently and accurately convert the data listed in this document. However, due to inherent differences in the way Lacerte and GoSystem Tax store and display values, inconsistencies do exist in isolated instances. In some instances, GoSystem Tax requires an entry in a field that does not exist or was blank in Lacerte. In those isolated instances, a period (".") was placed in the required GoSystem Tax field. To ensure that the 2023 data is accurate and complete, you should conduct a careful review of your converted data and make additions or modifications in GoSystem Tax as necessary.

Detailed information on items converted and not converted

Items transferred during conversion

The following table lists all fields we convert. For additional information, review the detailed information following the table.

Note: The detail provided in the following pages is subject to change without notice.

Federal

Form name	Field
General Information	
	Taxpayer / spouse first and last name
	Taxpayer / spouse Social Security number
	Address, apt, city, state and zip
	Taxpayer home and business telephone number
	Fax number
	Email address
	Filing status
	MFS filing status and entry to indicate taxpayer has not lived with spouse
	HOH qualifying child's name and SSN
	Taxpayer / spouse claimed as dependent
	Taxpayer / spouse occupation
	Taxpayer / spouse date of birth
	Taxpayer / spouse blind exemption
	Taxpayer / spouse date of death
	Taxpayer / spouse presidential election
	Entry to force standard or itemized deductions
	Dependent ownership code: TS
	Dependent's date of birth
	Dependent's first and last name
	Dependent's relationship
	Dependent's Social Security number
	Dependent qualifies for dependent child care
	Dependent's qualified expenses
	Third party designee
	Direct deposit routing number
	Account number for direct deposit

Form name	Field
	Savings or Checking designation
Nonresident Alien	
	Type of entry visa / current nonimmigrant status and date of change
	Country of citizenship / nationality if not a U.S. citizen
	Country of residence
	Address for refund check
	Filing status
	Number of days present in U.S. prior two years
Wages	
	Ownership code: TS
	Employer's identification number
	Employer's address, city, state, and zip
	Employer's name
Two-Year Comparison	
	Wages, salaries, tips, etc.
	Taxable interest
	Ordinary dividends
	Alimony received
	Business income or (loss)
	Capital gain or (loss)
	Other gains or (losses)
	IRA distribution, pensions, and annuities
	Partnership and S Corp income
	Estate and trust income
	Farm income or (loss)
	Taxable social security and unemployment
	Taxable refunds
	Other income
	IRA deduction
	Educator expenses
	Moving expenses
	One-half of self-employment tax
	SE health insurance deduction

Form name	Field
	SE SEP, SIMPLE, and qualified plans
	Alimony paid
	Itemized deductions: Medical and dental
	Itemized deductions: Taxes
	Itemized deductions: Interest
	Itemized deductions: Contributions
	Itemized deductions: Casualty or theft losses
	Itemized deductions: Miscellaneous deductions
	Gross income tax
	Total credits
	Personal exemption
	Withholding
	Estimated tax and other payments
	Penalties and interest
	Tuition and Fees deductions
Schedule A	
	Medical and dental expenses amounts and descriptions
	Investment interest description and notation amount
	Home mortgage interest paid amount and description
	Cash contribution type, description
	Non-cash contribution type, description
	Contribution carryovers for 5 prior years for 20, 30, 30 cg, and 50 percent
	2022 Charitable Contributions carryover for QCC 50 and 100 percent
Note: Current-year carryover amounts have been defaulted to Joint for MFJ returns and Taxpayer for all others. Additional data entry may be required.	
	Real estate taxes description and amount
	Other state taxes amount
	Other taxes description and amount
	Taxpayer / Spouse long term care premiums
	Medical Miles
	Misc. Itemized deductions subj. to 2% descriptions

Form name	Field
	Misc. Itemized deductions not subj. to 2% descriptions
Schedule B	
	Ownership code: TSJ
	Payer name for Interest, Dividends, Seller financed mortgage
	Seller financed mortgage Social Security number
	Interest Income and US bond income
	Qualified and Ordinary Dividends
	Early withdrawal penalty
	Federal tax withheld
Schedule C	
	Ownership code: TSJ
	Business Name
	Business address, city, and zip
	Business code
	Employer identification number
	Accounting method
	Other accounting method description
	Inventory method
	Change in determining inventories
	Closing inventory valuation code
	Passive code
	Disposal checkbox
	Not SE Income checkbox
	Gross receipts
	Returns and allowances
	Beginning inventory
	Purchases, less cost of items withdrawn for personal use
	Cost of labor
	Material and supplies
	Other costs description and amount
	Ending inventory
	Other income description and amount

Form name	Field
	Advertising
	Commissions and fees
	Contract labor
	Employee benefit programs
	Insurance (non-health)
	Mortgage interest
	Other interest expense
	Legal and professional fees
	Office expenses
	Pension / profit sharing plan
	Machinery and equipment rent
	Other rents
	Repairs and maintenance
	Supplies
	Taxes and licenses
	Travel
	Meals and entertainment
	Checkbox if taxpayer was subject to Department of Transportation hours of service limits
	Utilities
	Gross wages
	Other expenses description and amount
Schedule E	
	Ownership code: TSJ
	Rental activity description – kind of property
	Location of property
	Activity type
	Disposal checkbox
	Rental real estate type
	Advertising
	Cleaning and maintenance
	Commissions
	Insurance
	Legal and professional fees
	Management fees

Form name	Field
	Non-investment int. exp
	Repairs
	Supplies
	Taxes
	Other expense description and amount
	Allocation ratio
Schedule E Other	
	Owner
	Property name
	Property code
	Location
	Business use percent
	Kind of property
	Number of days rented / used for personal
	Disposed
	Cleaning direct expense
	Commissions direct expense
	Insurance direct expense
	Legal direct expense
	Management fee direct expense
	Other direct expenses amounts and descriptions
	Supplies direct expense
	Taxes direct expense
Schedule F and Farm Rental	
	Ownership code: TSJ
	Farm / Farm rental name
	Agricultural activity code
	Principal product
	Employer identification number
	Accounting method
	Passive activity code
	Form 4835 designation
	Not subject to SE tax
	Fully disposed

Form name	Field
Cash Basis Income	Sales of livestock, produce, grains, and other products raised
	Cost or other basis of livestock and other items bought for resale
	Custom hire (machine work)
	Total cooperatives distributions
	Taxable cooperative distributions
	Total agricultural program payments
	Taxable agricultural program payments
	Crop insurance – current year
	Crop insurance – taxable portion
	Other income amount and description
Cash and Accrual Expenses	Chemicals
	Conservation expenses
	Custom hire machine work
	Employee benefits programs
	Feed purchased
	Fertilizers and lime
	Freight and trucking
	Gasoline, fuel, oil ...
	Insurance (other than health)
	Mortgage interest paid to financial institutions
	Other interest
	Labor hired
	Pension and profit sharing plans
	Machinery / equipment rental or lease
	Other rental
	Repairs and maintenance
	Seeds and plans purchased
	Storage and warehousing
	Supplies purchased
	Taxes
	Utilities
	Veterinary: breeding and medicine
	Pre-productive period expenses

Form name	Field
	Other expenses description and amount
Accrual Basis Income	Sales of livestock, produce, grains, and other items
	Total cooperatives distributions amount
	Total agricultural program payments
	CCC loans forfeited
	Crop insurance proceeds
	Custom hire machine work income
	Other income description and amount
	Beginning inventory
	Cost of livestock, produce, grains, and other products
	Ending inventory
Schedule H	
	Ownership code: TS
	Employer ID number
	FUTA Multiple State Information: State Experience Rate Period Beginning Date
	FUTA Multiple State Information: State Experience Rate Period Ending Date
	FUTA Multiple State Information: Name of State
Note: Joint Schedules H in Lacerte have been split into two separate Taxpayer / Spouse specific units in GoSystem Tax.	
Schedule J	
	First-year prior year tax amount
	First-year prior year federal taxable income
	Two-year prior year tax amount
	Two-year prior year federal taxable income
	Three-year prior year federal taxable income
	Three-year prior year tax amount
Schedule K-1	
	Ownership code: TSJ
	Type of K-1
	Name of K-1
	Tax shelter registration number
	Employer identification number

Form name	Field
	Passive code
	Type of rental real estate
	Disposed
Schedule K-1 PTP	
	Ownership code: TSJ
	Name of PTP
	Name of the K-1
	Employer identification number
	Disposed
Schedule R	
	Date of disability – Taxpayer and Spouse
	Annuity or disability benefit – Taxpayer and Spouse
Form 1099-R	
	Ownership code: TSJ
	Name of payer
	Payer address, city, state, zip
	Payer ID number
	Account number
	Box 1 – Gross distribution
	Taxable amount not determined
	Box 5 – Employee contributions
	Box 7 – Distribution code
	IRA / SIMPLE / SEP checkbox
	Box 9B – Total employee contributions
Form 1099-Misc	
	Ownership code: TSJ
	Name of payer
	Payer address, city, zip
	Payer ID number
Form 1099-NEC	
	Ownership code: TSJ
	Name of payer
	Payer address, city, state, zip
	Payer ID number

Form name	Field
Form 1099-Q	
	Ownership code: TSJ
	Payer name
Form 1116	
	Income type
	Name of foreign country
Form 2106	
	Ownership code: TSJ
	Activity name
Form 2441	
	Provider name
	Provider address
	Provider ID number
Form 2555	
	Ownership code: TSJ
	Employee foreign address, country, city, state, postal code
	Employer's name
	Employer's U.S. address, city, state, zip
	Employer's foreign address, city, state or province, postal code
	Employer type: Foreign Entity, Foreign Affiliate, U.S. Company, Self, Other
	Employer type other - description
	Last year Form 2555 was filed
Bona fide residence test	Bona fide residence begin date
	Type of living quarters in foreign country: House, Employer Provided, Rented Apt, Rented Room
	Type of visa under which taxpayer entered foreign country
	Contractual terms or conditions relating to length of employment abroad
	Explanation of visa if visa limits length of stay or employment in foreign country
	Address of home, names and relationships of occupants

Form name	Field
Physical presence test	Principal country of employment for physical presence test
Form 4562	
	Asset description
	Date placed in service
	Depreciation cost / basis
	Depreciation method
	Depreciation life
	Accumulated depreciation
	AMT cost / basis
	AMT life
	Accumulated AMT
	Bonus depreciation code
	Bonus depreciation amount
	Section 179 code
	Section 179 amount
	Business Use Percentage
	Salvage value
	Designation of Amortization
	Designation of Macrs ADS SL
	Designation of Indian Property
	Designation of Mid Quarter convention
	Property type: listed, SUV, truck, etc.
Notes:	
<ul style="list-style-type: none"> Asset detail will be converted to the property level. Bonus code was converted based on date in service. 	
Form 5329	
	IRA – earlier year excess contributions not previously eliminated
	Roth – earlier year excess contributions not previously eliminated
	Coverdell ESA – earlier year excess contributions not previously eliminated
	MSA – earlier year excess contributions not previously eliminated
Form 6252	

Form name	Field
Form 6252 Oth CY	Ownership code: TSJ
	Description and location of property
	Type of sale code
	Date of acquisition
	Date sold
	Gross sales price
	Mortgage assumed
	Original cost
	Depreciation
	Commission and other expenses of sale
	Payments received during year do not include interest whether stated or unstated
	Section 1245 depreciation subject to recapture
Form 6252 Oth PY	Ownership code: TSJ
	Description and location of property
	Type of Sale: short-term, long-term, 1231, 1245, 1250, ordinary, 1254, 1255 property, 1252
	Date of acquisition
	Date sold
	Gross sales price
	Mortgage assumed
	Original cost
	Commission and expense of sale
	Depreciation to date not including Sec 179
	Collections
	Section 1245 depreciation subject to recapture
Form 8396	
	Address, State, Zip
	One year prior carryforward not used and carried to next year
	Two years' prior carryforward not used and carried to next year
	Third year prior carryforward not used and carried to next year
Form 8801	
	Form 1040 tax from 2021 reported in 2021

Form name	Field
	AMT tax from prior year 2021
Form 114	
	Number of accounts
	TP/SP ID type
	TP/SP other ID description
	TP/SP passport number
	TP/SP passport country
	Account owner
	Account owner address
	Account owner country
	Account owner tax ID
	Account type: Bank, securities, other
	Other account type description
	Account number
	Number of joint owners
	Maximum value of account
	Financial institution name
	Financial institution address
	Financial institution country
Miscellaneous / Adjustments	
	Other misc income ownership code: TSJ
	Other misc income – description and amount
Carryovers (Amounts need to be reviewed in the 2023 application)	
	AGI
	Total Income
	PY Overpayment
	PY four estimate payments
	Allowable Standard Deductions
	Allowable Itemized Deductions
	NOL Carryover (Regular and AMT)
	Schedule D Short term and Long term Carryover (Regular and AMT)
Note: Carryover amounts will be converted to the first prior-year field in 2023.	

Items not converted

Due to differences between GoSystem Tax and Lacerte application or data structures, or the item does not rollover to 2023, the following items are not converted.

- Historical carryover amounts other than amounts listed in the section items converted, such as NOL and Non-recaptured Section 1231 for amounts prior to 2022
- Credits not otherwise specified, such as the General Business Credit
- State information
- Underpayment Penalty
- Schedule K-1 partner and shareholder basis information
- Form 6198 Regular and AMT at-risk amounts for Schedules C, E, F, and K-1 and Form 4835
- Section 179 carryover
- General business credit carryover
- Form 1116 information other than amounts listed in the section items converted
- Form 8801 fields other than amounts listed in the section items converted
- General information footnotes, letters, elections, and invoices
- Form 1040 X Amended return information
- Form 1040-ES Estimate options
- Oil and gas information
- Data from fields in which entries were overridden in Lacerte

After accessing your converted data, enter the applicable items at your convenience.

Conversion notes and exceptions

The following section contains additional details to assist in reviewing the information that has been converted.

Federal

Dependents

If the *Relationship* field is blank or contains an entry that is not available in GoSystem Tax, the information is converted as Child.

Two-Year Comparison

2022 Lacerte federal two-year comparison amounts convert to prior-year amounts on 2023 Organizer screens as prior-year amounts.

Schedule A

- Non-cash items, regardless of amount, will convert to non-cash items less than \$500.

Depreciation

Asset descriptions are limited to 20 characters.

Getting help

If you have any questions about accessing your converted data, please call Customer Service at 800.327.8829, and follow the prompts. Our professional staff will be glad to assist you.