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# 2023 POST-CONVERSION GUIDE

## ProSystem fx 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 ProSystem fx® 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.

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**Note:** 1040 returns are converted to returns of the same year. For example, 2022 returns will be converted to 2022 returns and then rolled to 2023.

1041, 1065, 1120, and 990 returns are converted to returns for the next year. For example, 2022 returns will be converted to 2023 returns.

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We have made every effort to consistently and accurately convert the data listed in this document. However, due to inherent differences in the way ProSystem fx 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 ProSystem fx. In those isolated instances, a period (".") was placed in the required GoSystem Tax field. To ensure that the 2022 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 tables list all fields we convert. For additional information, review the detailed information following the tables.

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

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### **Federal**

Form name	Field
<b>General Information</b>	
	Taxpayer / spouse first and last name
	Taxpayer / spouse Social Security number
	Address, apt, city, state and zip
	Taxpayer home and business telephone number
	Email address
	Filing status
	HOH qualifying child's name and SSN
	Taxpayer claimed as dependent
	Taxpayer / spouse occupation
	Taxpayer / spouse date of birth
	Taxpayer / spouse blind exemption
	Taxpayer / spouse date of death
	Taxpayer / spouse presidential election
	Taxpayer / spouse driver's license number
	Taxpayer / spouse driver's license exp date
	Taxpayer / spouse driver's license state
	Taxpayer / spouse state issued ID checkbox
	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

Form name	Field
	Direct deposit routing numbers
	Account numbers for direct deposit
	Savings or Checking designations
<b>Nonresident Alien</b>	
	Country of citizenship / nationality if not a U.S. citizen
	Country where you are a citizen or national
	Filing status
	Number of days present in U.S. prior two years
<b>Wages</b>	
	Ownership code: TS
	Employer's identification number
	Employer's address, city, state, and zip
	Employer's name
<b>Paid Preparer Information</b>	
	Self-employed
	Telephone number
	Preparer email address
	Preparer tax identification number
<b>Note:</b> Due to differences in how ProSystem fx stores data, Paid Preparer information assigned from the Office Manager could not be converted.	
<b>Two-Year Comparison</b>	
	Wages, salaries, tips, etc.
	Taxable interest
	Ordinary dividends
	Taxable refunds, credits, or offsets
	Alimony received
	Business income or (loss)
	Capital gain or (loss)
	Other gains or (losses)
	IRA distribution, pensions, and annuities
	Rent and royalty income
	Partnership and S Corp income
	Estate and trust income
	Farm income or (loss)

Form name	Field
	Taxable social security and unemployment
	Other income
	IRA deduction
	Educator expenses
	Certain business expenses
	Health savings account deduction
	Moving expenses
	One-half of self-employment tax
	SE health insurance deduction
	SE SEP, SIMPLE, and qualified plans
	Alimony paid
	Student loan interest deduction
	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
	Other taxes
	Other Adjustments
	Standard Deduction
	Withholding
	Estimated tax and other payments
	Penalties and interest
<b>Schedule A</b>	
	Medical and dental expenses ownership, amounts and descriptions
	Investment interest ownership, description, and amount
	Home mortgage interest paid ownership, amount, and description
	Cash contribution type, ownership, and description

Form name	Field
	Non-cash contribution type, ownership, and description
	Contribution carryovers for 5 prior years for 20, 30, 30 cg, 50, 60, and 50 QCC percent (regular and AMT)
	Contribution carryover for 2 prior year for 100% QCC (regular and AMT)
	Contribution carryover for 3 prior years for 60% (regular)
<b>Note:</b> 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 ownership, description, and amount
	Other state taxes ownership and amount
	Other taxes description and amount
	Taxpayer / Spouse long term care premiums
	Medical Miles (both rates)
<b>Schedule B</b>	
	Ownership code: TSJ
	Payer name for Interest, Dividends, Seller financed mortgage
	Seller financed SSN
	Qualified and Ordinary Dividends
	Interest Income and US bond income
	Early withdrawal penalty
	Federal tax withheld
<b>Schedule C</b>	
	Ownership code: TSJ
	Business Name
	Business address, city, state, and zip
	Business code
	Employer identification number
	Accounting method
	Other accounting method description
	Inventory method
	Change in determining inventories
	Other inventory method explanation

Form name	Field
	Closing inventory valuation code
	Passive code
	Disposal checkbox
	Not SE Income checkbox
	Self-employed health insurance premium
	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
	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

Form name	Field
	Gross wages
	Other expenses description and amount
	Prior year suspended losses Operating (Regular / AMT).
	Prior year suspended losses Sch D long term (Regular / AMT).
	Prior year suspended losses Sch D short term (Regular / AMT).
	Prior year suspended losses Form 4797 Ordinary (Regular / AMT).
	Prior year suspended losses Section 1231 (Regular / AMT).
<b>Schedule E</b>	
	Ownership code: TSJ
	Rental activity description - kind of property
	Activity type
	Disposal checkbox
	Type of property
	Advertising
	Cleaning and maintenance
	Commissions
	Insurance
	Legal and professional fees
	Management fees
	Mortgage interest paid to financial institutions
	Mortgage interest paid to individual
	Other Interest
	Non investment interest exp
	Repairs
	Supplies
	Taxes
	Other expense description and amount
	Allocation ratio
	Prior year suspended losses Operating (Regular / AMT).
	Prior year suspended losses Sch D long term (Regular / AMT).

Form name	Field
	Prior year suspended losses Sch D short term (Regular / AMT).
	Prior year suspended losses Form 4797 Ordinary (Regular/AMT).
	Prior year suspended losses Section 1231 (Regular).
<b>Schedule F and Farm Rental</b>	
	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
Cash Basis Income	Sales of livestock, produce, grains, and other products raised
	Cost or other basis of livestock and other items bought for resale
	Total cooperatives distributions
	Taxable cooperative distributions
	Total agricultural program payments
	Taxable agricultural program payments
	Crop insurance - current year
	Crop insurance - taxable portion
	Crop insurance - deferred
	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

Form name	Field
	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
	Other expenses description and amount
Accrual Basis Income	Sales of livestock, produce, grains, and other items
	CCC loans reported
	CCC loans forfeited
	Crop insurance proceeds
	Other income description and amount
	Beginning inventory
	Cost of livestock, produce, grains, and other products
	Ending inventory
	Prior year suspended losses Operating (Regular / AMT).
	Prior year suspended losses Sch D long term (Regular / AMT).
	Prior year suspended losses Sch D short term (Regular / AMT).
	Prior year suspended losses Form 4797 Ordinary (Regular).
	Prior year suspended losses Section 1231 (Regular).

Form name	Field
<b>Schedule H</b>	
	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
<b>Notes</b>	
▪	Due to differences between ProSystem fx and GoSystem Tax, only two total Schedules H can be converted: one for the taxpayer and one for the spouse.
▪	A joint Schedule H in ProSystem fx will be split and convert as two separate Taxpayer / Spouse specific units in GoSystem Tax.
<b>Schedule J</b>	
	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
<b>Schedule K-1</b>	
	Ownership code: TSJ
	Type of K-1
	Name of K-1
	Employer identification number
	Tax shelter registration number
	Activity type
	Disposed
	Prior year suspended losses Operating (Regular / AMT).
	Prior year suspended losses Sch D long term (Regular / AMT).
	Prior year suspended losses Sch D short term (Regular / AMT).
	Prior year suspended losses Form 4797 Ordinary (Regular / AMT).

Form name	Field
	Prior year suspended losses Section 1231 (Regular / AMT).
<b>Schedule K-1 PTP</b>	
	Ownership code: TSJ
	Name of PTP
	Name of the K-1
	Employer identification number
	Tax shelter registration number
	Disposed
	Prior year suspended losses Operating (Regular / AMT).
	Prior year suspended losses Sch D long term (Regular / AMT).
	Prior year suspended losses Sch D short term (Regular / AMT).
	Prior year suspended losses Form 4797 Ordinary (Regular / AMT).
	Prior year suspended losses Section 1231 (Regular / AMT).
<b>Schedule R</b>	
	Date of disability - Taxpayer and Spouse
	Nontaxable annuity or disability benefit - Taxpayer and Spouse
	Taxable disability payments - Taxpayer and Spouse
<b>Form 1099-R</b>	
	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 name	Field
<b>Form 1099-Q</b>	
	Ownership code: TSJ
	Payer name
	Payer address
	Payer city
	Payer state
	Payer zip
	Payer ID number
<b>Form 1116</b>	
	Income type
	Name of foreign country
<b>Form 2441</b>	
	Provider name
	Provider address
	Provider city
	Provider state
	Provider zip
	Provider ID number
	Provider ID number and exempt designation
<b>Form 2555</b>	
	Ownership code: TSJ
	Employee foreign address, city, province, country, postal code
	Employer's name
	Employer's U.S. address, city, state, zip
	Employer's foreign address, city, province, country, postal code
	Employer type: Foreign Entity, Foreign Affiliate, U.S. Company, Self, Other
	Employer type other - description
	Last year Form 2555 was filed
	Country of citizenship / nationality if not a U.S. citizen
Bona fide residence test	Bona fide residence begin date

Form name	Field
	Type of living quarters in foreign country: House, Employer Provided, Rented Apt, Rented Room
	Type of visa under which taxpayer entered foreign country
	Explanation of visa if visa limits length of stay or employment in foreign country
	Address of home, names, and relationships of occupants
Physical presence test	Principal country of employment for physical presence test
<b>Form 3520</b>	
General Information	Initial return
	Specified foreign financial assets checkbox
	US transferor who transferred money checkbox
	US owner of a foreign trust checkbox
	US person who received a distribution checkbox
	US person who received certain gifts checkbox
	US person name
	MFJ but MFS for Form 3520
	Extension requested
	Form number of tax return
Foreign Trust U.S. Agent	Foreign trust name
	Foreign trust ID type
	Foreign trust ID
	Foreign trust reference ID
	Foreign trust US address
	Foreign trust US city
	Foreign trust US state
	Foreign trust US zip
	Foreign trust foreign address
	Foreign trust city
	Foreign trust foreign province
	Foreign trust foreign country
	Foreign trust foreign postal code
	US agent name
	US agent ID type

Form name	Field
	US agent ID
	US agent US address
	US agent US city
	US agent US state
	US agent US zip
	US agent foreign address
	US agent foreign city
	US agent foreign province
	US agent foreign country
	US agent foreign postal code
Trust Creator	Trust creator name
	Trust creator ID type
	Trust creator ID
	Trust creator US address
	Trust creator US city
	Trust creator US state
	Trust creator US zip
	Trust creator foreign address
	Trust creator foreign city
	Trust creator foreign province
	Trust creator foreign country
	Trust creator foreign postal code
	Country code where trust was created
	Country code whose law governs
	Date trust was created
Other Foreign Trust Owner	Other foreign trust name
	Other foreign trust address
	Other foreign country of residence
	Other foreign trust ID
Beneficiary	Name of beneficiary
	Address of beneficiary
	US beneficiary
	Beneficiary ID number
Trustee	Name of trustee

Form name	Field
	Address of trustee
	Trustee ID number
Person with Trust Powers	Name of other person with trust
	Address of other person with trust
	Description of powers
	Other person with trust ID

**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
	Designation of Amortization
	Designation of Macrs ADS SL
	Designation of Indian Property
	Designation of Mid Quarter convention
	Property type: listed, SUV, truck, etc.

**Note:** Asset detail will be converted to the property level.

**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 name	Field
<b>Form 6252</b>	
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
	Section 179 Amount
	Depreciation
	AMT accumulated 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
	Post-69, Pre-76 excess depreciation subject to recapture
	Related party name and address
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
	AMT accumulated depreciation
	Section 179
	Collections
	Total ordinary gain to be recaptured if 1245 - 1255 property <Override>
	Section 1245 depreciation subject to recapture

Form name	Field
	Post-69, Pre-76 excess depreciation subject to recapture
	Related party name and address
<b>Form 8396</b>	
	Ownership code: TS
	Address, City, State, Zip
	First year prior carryforward not used and carried to next year
	Second year prior carryforward not used and carried to next year
	Third year prior carryforward not used and carried to next year
<b>Form 8606</b>	
	Taxpayer and spouse traditional IRA basis on 12/31/2021
<b>Form 8621</b>	
General	Ownership
	Shareholder US address
	Shareholder US city
	Shareholder US state
	Shareholder US zip
	Shareholder foreign address
	Shareholder foreign city
	Shareholder foreign country
	Shareholder foreign postal code
	Shareholder foreign province
	PFIC or QEF name
	PFIC or QEF ID type
	PFIC or QEF employer ID number
	PFIC or QEF Reference ID
	PFIC or QEF US address
	PFIC or QEF US city
	PFIC or QEF US state
	PFIC or QEF US zip
	PFIC or QEF foreign address
	PFIC or QEF foreign city

Form name	Field
	PFIC or QEF foreign province
	PFIC or QEF foreign country
	PFIC or QEF foreign postal code
	Description of class of shares
	Election to treat PFIC as QEF
	Election to extend time for payment
	Election to mark-to-market
	Deemed dividend election
	Deemed sale election
	Election to recognize gain
<b>Form 8801</b>	
	Force or Suppress print (2022)
	2021 Earned income for child under 18
	Lines 1 and 2e Form 6251
	Line 18 of prior year (2021) Form 8801
	Line 20 of prior year (2021) Form 8801
	Form 8801 Credit Carryforward to 2023
	Amount from prior year (2021) Schedule D, line 19
	Form 1040 2021 tax (minus foreign tax credit) reported in 2022
	AMT tax from prior 2021
	You reported capital gain distributions directly on Form 1040; you reported qualified dividends on Form 1040; or you had a gain on both line 15 and 16 of Schedule D, Form 1040 for prior year (2021)
	Amount from prior year Schedule D, Qualified Dividends and Capital Gain Tax WKS, line 6 or line 13, Schedule D Tax Worksheet (2021)
	Amount from prior year Schedule D (Form 1040), Line 10, Tax Worksheet (2021)
<b>Form 114</b>	
	Number of accounts
	TP / SP ID type
	TP / SP other ID description
	TP / SP ID Number
	TP / SP ID country of issue

Form name	Field
	Account owner name
	Account owner address
	Account owner tax ID
	Other account type description
	Account number
	Number of joint owners
	Maximum value of account
	Financial institution name
	Financial institution address
	Financial institution country
<b>Miscellaneous / Adjustments</b>	
	Other misc income ownership code: TSJ
	Other misc income - description and amount
<b>Carryovers</b>	
<b>Note:</b> Amounts need to be reviewed in the 2023 application.	
	AGI
	Form 6251 line 10
	Form 6251 line 11
	Tax Liability
	Taxable Income
	PY Overpayment
	PY four estimate payments
	Allowable Standard Deductions
	Allowable Itemized Deductions
	Traditional IRA Basis on 12/31/2022 for Taxpayer and Spouse
	Section 1231 Carryover (Regular and AMT)
	NOL Carryover (Regular and AMT)
	Schedule D Short term and Long term Carryover (Regular and AMT)
	Investment Interest Carryover (Regular and AMT)
<b>Note:</b> Carryover amounts will be converted to the first prior-year field in 2023.	

## States

Form name	Field
<b>Alabama</b>	
Basic Info	Residency status
	Electronic filing option
Payments / Penalties	Application of overpayment option
	Estimate option
Adjustments / Credits	Capital Credit: Project number 1
	Capital Credit: Project entity name 1
	Capital Credit: Project number 2
	Capital Credit: Project entity name 2
	Capital Credit: Project number 3
	Capital Credit: Project entity name 3
	Basic Skill Education Credit: Enter Department of Education Certification Number
	Basic Skill Education Credit: Enter Location of Education Program
	Basic Skill Education Credit: Enter Name of Approved Provider of Education Program
	Basic Skill Education Credit: Enter Name of Employer / Firm Sponsoring Education Program
	Capital Credit: Enter Name of Project Entity Entitled to Capital Credit
	Capital Credit: Enter Project Number
	Election Fund
	Rural Physician Credit: Name of Community Where Hospital Provides Care
<b>Arizona</b>	
Basic Info	Residency status
	Electronic filing option
	Checkbox to indicate taxpayer is a farmer
	Taxpayer last name if different
Payments / Penalties	Estimate option
	Application of overpayment option
	Underpayment option
Adjustments / Credits	Other Additions description
	Other Subtractions description

Form name	Field
	Name of public school in the district
	School district
	Tuition school address
	Tuition school address line 2
	Tuition school name
	Entry to indicate Title 16 funds (Form 140PTC)
	First name of taxpayer who claimed you on another tax return (Form 140PTC)
	Last name of taxpayer who claimed you on another tax return (Form 140PTC)
	Street address of taxpayer who claimed you on another tax return (Form 140PTC)
<b>Arkansas</b>	
Basic Info	Residency status
	Electronic filing option
	Filing status optimization
Payments / Penalties	Estimate option
	Application of overpayment option
	Underpayment option
<b>California</b>	
Basic Info	Residency status
	Electronic filing option
	Executor / Guardian Name
	Checkbox if the taxpayer owned a home / property in California
Payments / Penalties	Underpayment option
	Farmer or fisherman
Adjustments / Credits	Adjustment description for CA
<b>Colorado</b>	
Basic Info	Residency status
Payments / Penalties	Application of overpayment option
<b>Connecticut</b>	
Basic Info	Residency status
	Electronic filing option
Payments / Penalties	Estimate option
	Application of overpayment option

Form name	Field
Adjustments / Credits	TIER 1 Railroad Retirement
	Gain on sale of CT bonds
	Descriptions of additions to federal AGI
	Descriptions of subtractions to federal AGI
PY / NR Info	Current year alimony received
	Current year IRA distributions
	Current year pensions or annuities
	Current year taxable social security
<b>Delaware</b>	
Basic Info	Residency status
Payments / Penalties	Estimate option
Adjustments / Credits	Descriptions of additions to federal AGI
	Descriptions of subtractions to federal AGI
<b>District of Columbia</b>	
Basic Info	Residency status
Payments / Penalties	Estimate option
	Application of overpayment option
UBT Info	Employer identification number
	Filing status
	Number of places of business inside / outside DC
	Business name
	Contribution description
	Taxes description
	Inventory valuation method
	Schedule E - Description of interest expense(s)
	Schedule G - Other Deductions descriptions
	Schedule H - Income not reported (claimed Nontaxable)
	Accounting method
	Other accounting method description
	Business Name if Multiple Business Income Sources
	Enter name of business if income from more than one business conducted by the taxpayer not included in this return
	Ownership type if not sole proprietor

Form name	Field
	Affiliation explanation if unitary with a partnership or another corporation
<b>Florida Tangible</b>	
Basic Info	Residency Status
<b>Georgia</b>	
Basic Info	Residency Status
<b>Hawaii</b>	
Basic Info	Residency Status
<b>Idaho</b>	
Basic Info	Residency status
Payments / Penalties	Application of overpayment option
<b>Illinois</b>	
Basic Info	Residency status
	Electronic filing option
Payments / Penalties	Application of overpayment option
	Taxpayer is a farmer or fisherman
Adjustments / Credits	Other additions description
	Other additions total amount
<b>Indiana</b>	
Basic Info	Residency status
	County of residence Tp / Sp
	Principal work activity Tp / Sp
Adjustments / Credits	Homeowner's address
	Landlord's name
	Landlord's street address
	Indiana other credit description
<b>Iowa</b>	
Basic Info	Residency status
Payments / Penalties	Estimate option
	Underpayment option
	Taxpayer is a farmer or fisherman
	Application of overpayment option
<b>Kansas</b>	
Basic Info	Residency status
	Two letter county code

Form name	Field
	School district number
Adjustments / Credits	Description of other additions
<b>Kentucky</b>	
Basic Info	Residency Status
<b>Louisiana</b>	
Basic Info	Residency status
<b>Maine</b>	
Basic Info	Residency status
Payments / Penalties	Estimate option
	Application of overpayment option
	Underpayment option
	Taxpayer is a farmer or fisherman
<b>Maryland</b>	
Basic Info	Residency status
	Electronic filing option
Payments / Penalties	Estimate option
	Application of overpayment option
	Underpayment option
	Taxpayer is a farmer or fisherman
Adjustments / Credits	Donation to Chesapeake Bay / Endangered Species Fund
	Fair Campaign Financing Fund
<b>Massachusetts</b>	
Basic Info	Residency status
	Electronic filing option
	Taxpayer is the noncustodial parent
Payments / Penalties	Application of overpayment option
	Estimate option
	Underpayment option
	Taxpayer is a farmer or fisherman
Adjustments / Credits	The name of the first landlord for use when taxpayer is claiming a rental deduction
<b>Michigan</b>	
Basic Info	Residency status
	Donate to state campaign fund taxpayer / spouse

Form name	Field
	School district
Payments / Penalties	Estimate option
	Application of overpayment option
	Underpayment option
Adjustments / Credits	Other additions description and amount
	Other subtractions description and amount
	Type of care facility in which taxpayer lives
	Taxpayer or spouse receives supplemental security income
	Taxpayer wants to be referred to govt. agencies
	Landlord name
	Landlord address
	Street address of rented homestead
	Child support
	Workers' compensation, veterans disability compensation, and pension benefits
<b>Minnesota</b>	
Basic Info	Electronic filing option
	Residency code
	Taxpayer beginning residency period
Payments / Penalties	Estimate option
	Application of overpayment option
Adjustments / Credits	Interest from bonds of another state
	AMT PY exclusion
	AMT PY M1 tax
	Nursing home
	Renter
<b>Missouri</b>	
Basic Info	Residency status
	Electronic filing option
Payments / Penalties	Estimate option
	Application of overpayment option
	Underpayment option
	Taxpayer is a farmer
	Option to compute interest on balance due

Form name	Field
	Option to compute late filing penalty
Adjustments / Credits	Landlord name
	Related to the landlord designation
	Relation to landlord
	Landlord home address
	Number of people residing at the address
	Rental address
	Taxpayer is a veteran
	Other additions description
<b>Mississippi</b>	
Basic Info	Residency Status
<b>Montana</b>	
Basic Info	Residency Status
<b>Nebraska</b>	
Basic Info	Residency status
	Electronic filing option
	Principal source of income is from farming, ranching, or fishing
	Taxpayer or spouse is dependent of another
Payments / Penalties	Estimate option
<b>New Hampshire</b>	
Basic Info	Residency Status
<b>New Jersey</b>	
Basic Info	Residency status
	Electronic filing option
Payments / Penalties	Taxpayer is a farmer or fisherman
Adjustments / Credits	Contribution to Battleship Fund
	Contribution to Children's Trust Fund
	Contribution to Endangered Wildlife Fund
	Contribution to Breast Cancer Fund
	Contribution to Veterans Memorial Fund
	Taxpayer / spouse contribution to election fund
	Contribution to other funds
	Other income description and amount

Form name	Field
	Number of dependents attending college and meeting requirements for additional credit
PY / NR info	Wages
	Dividend income
	Alimony
	Distributive share of partnership income
	Net gains or income from rents, royalties, patents, and copyrights
	Net gambling winnings
	Net profits from business
	Pro rata share of S Corporation income
	Other income
Homeowners' worksheet	Share of property owned
	Share of property used as principal residence
	Address
<b>New Mexico</b>	
Basic Info	Residency Status
<b>New York</b>	
Basic Info	Residency status
	NYC / Yonkers residency status
	Permanent address
	School district
	Force itemized or standard deduction
Payments / Penalties	Application of overpayment option
	Underpayment option
Adjustments / Credits	Other additions description
	Add-back of farmers' school tax credit on converted property
UBT Payments / Penalties	Application of overpayment option
	Estimate option
	Underpayment option
<b>North Carolina</b>	
Basic Info	Residency status
Payments / Penalties	Application of overpayment option
	Taxpayer is a farmer or fisherman

Form name	Field
Adjustments / Credits	Pass-through EIN
	Pass-through name
	Pass-through type of entity
	Contribution to Non-game and Endangered Wildlife
<b>North Dakota</b>	
Basic Info	Residency status
	Electronic filing option
Payments / Penalties	Estimate option
	Application of overpayment option
<b>Ohio</b>	
Basic Info	Residency status
	Resident county
Payments / Penalties	Application of overpayment option
	Prior year tax liability
	Underpayment option
School District	Public school district number
School District Payments / Penalties	Estimate option
	Application of overpayment option
<b>Oklahoma</b>	
Basic Info	Residency Status
<b>Oregon</b>	
Basic Info	Disabled taxpayer and spouse
	Residency status
Payments / Penalties	Application of overpayment option
<b>Pennsylvania</b>	
Basic Info	Residency status
	Electronic filing option
	School district code
Payments / Penalties	Estimate option
	Underpayment option
	Application of overpayment option
Adjustments / Credits	Adjustment to partnership and S-Corp income description
	Partnership and S-Corp income EIN
	Ownership code for partnerships and S-Corps

Form name	Field
<b>Rhode Island</b>	
Basic Info	Residency code
<b>Utah</b>	
Basic Info	Residency status
<b>Virginia</b>	
Basic Info	State residency status
	Electronic filing option
	Tax optimization MFJ or MF combined
Payments / Penalties	Estimate option
	Application of overpayment option
	Underpayment option
	Taxpayer is a farmer or fisherman
<b>South Carolina</b>	
Basic Info	Residency Status
<b>Tennessee</b>	
Basic Info	Residency Status
<b>Vermont</b>	
Basic Info	Residency Status
<b>Wisconsin</b>	
Basic Info	Residency status
	Electronic filing option
	School district code
Payments / Penalties	Taxpayer is a farmer or fisherman
Homestead Credit	Number of acres of land rounded
	Percentage of home used solely for personal purposes if not 100 percent
Property Tax Bill/Sale of Home	Property Type Owner
	Tax bill other owner type
	Tax bill adjoining number of acres 2 through 6
Rent Certificate	Heat was included in the rent
	Rental property is subject to property tax
	Rent certificate is for rental of mobile home site
	Checkbox if this rent certificate is for rental mobile home
	Name of property owner

Form name	Field
	Landlord's phone number
	Other Occupant 1
	Other Occupant 2
<b>West Virginia</b>	
Basic Info	Residency Status

### ***Items not converted***

Due to differences between GoSystem Tax and ProSystem fx software 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
- Qualified business (loss) carryovers
- State information not otherwise specified
- State refund amount
- State overpayment
- State depreciation
- 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
- 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
- ROTH basis
- Data from fields in which entries were overridden in ProSystem fx
- Default return options entered in Office Manager
- “Automatic Sale” information for assets
- 100% contribution carryovers

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

## Conversion notes and exceptions

The following section contains additional detail to assist in review of the information that has been converted.

### **Federal**

#### **Dates**

If only the year was entered in a ProSystem fx date field, the date converted to GoSystem Tax as July 1 of that year. If only the month and year were entered in ProSystem fx, the date converted to GoSystem Tax as the first of the month.

#### **Dependents**

- Dependents marked as inactive were converted.
- If the *Dependent 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 ProSystem fx federal two-year comparison amounts convert to prior-year amounts on 2023 Organizer screens.

#### **Schedule A**

- Carryovers of Disallowed Investment Interest Expense convert like-kind descriptions to Investment Interest Expense in Itemized Deductions in the Organizer tab. You will need to enter carryover amounts in the Organizer > Itemized Deductions > Taxes and Interest > Investment Interest Expense > Investment Int. Exp. - Other Information folder.
- 2022 Contribution Carryovers will convert to Joint for married filing joint returns and will convert as Taxpayer for all other filing statuses. 2021 and prior-year amounts will convert as assigned in ProSystem fx.
- Non-cash items, regardless of amount, will convert to non-cash items less than \$500.

#### **Schedule B**

Descriptions for ProSystem fx special interest codes 1 through 6 (used with Interest Income) will convert as regular Interest Income.

#### **Estimates**

Review prior-year estimated tax payments and overpayments applied.

#### **Schedule K-1 Activities**

- Assets entered in the Depreciation and Amortization folders will not convert.
- For 1065 and 1120 Schedules K-1, a Partnership name and Corporation name must be entered. Otherwise, the activity will convert with a period (".") as the description name.

#### **Depreciation**

- Asset descriptions are limited to 20 characters.
- Retired assets were not converted.
- Business use percentage was converted only when percent excluded was used in ProSystem fx.
- Review the AMT accumulated depreciation associated with assets on rental real estate activities where depreciation expense was allocated to others.

## **Depletion**

Depletion information does not convert.

## **State**

### **State Depreciation**

State-specific depreciation amounts do not convert.

### **State Overpayment, Estimate, and Underpayment options**

- The following Overpayment options were converted, if applicable.
  - Apply to successive
  - Apply entire
  - Refund
- The following Estimate options were converted if applicable.
  - Suppress compute and print
  - Estimate with alphabetic information only
- The option to suppress current-year underpayment penalties converted, if applicable.

## **Getting help**

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