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# 2023 POST-CONVERSION GUIDE

## ProSeries 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 ProSeries® 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 ProSeries 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 left blank in ProSeries. 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, please 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
<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
	Taxpayer Fax Number
	Spouse business telephone 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: TSJ
	Dependent's date of birth
	Dependent's first and last name
	Dependent's relationship
	Dependent's Social Security number
	Dependent's qualified expenses
	Third party designee
	Direct deposit routing number

Form Name	Field
	Account number for direct deposit
	Client Code
<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>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)
	Taxable social security and unemployment
	Other income
	IRA deduction
	Educator expenses
	Certain business expenses
	Health savings account deduction
	Tuition and Fees Deduction
	Moving expenses

Form Name	Field
	One-half of self-employment tax
	SE health insurance deduction
	SE, SEP, SIMPLE, and qualified plans
	Early withdrawal penalty
	Alimony paid
	Other adjustments
	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
	Withholding
	Estimated tax and other payments
	Penalties and interest

#### Schedule A

	Medical and dental expenses amounts and descriptions
	Long term care insurance premiums
	Medical Miles (18 cents)
	Medical Miles (22 cents)
	Home mortgage interest paid, TSJ, amount and description
	Cash contribution TSJ, description, and limitation
	Non-cash contribution TSJ and description
	Contribution carryovers for 5 prior years for 20, 30, 30 cg, and 50 percent. 3 prior years for 60 percent.

**Note:** Current-year carryover amounts have been defaulted to Joint for MFJ returns.

	Real estate taxes TSJ and amount
	Other taxes description and amount

#### Schedule B

	Ownership code: TSJ
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Form Name	Field
	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, state and zip
	Business code
	Employer identification number
	Accounting method
	Other accounting method description
	Inventory method
	Change in determining inventories
	Other inventory method explanation
	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
	Car and Truck expense
	Commissions and fees

Form Name	Field
	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
	Department of Transportation designation checkbox
	Utilities
	Wages
	Other expenses description and amount
	Current year suspended losses Operating (Regular / AMT).
	Current year suspended losses Sch D long term (Regular / AMT).
	Current year suspended losses Sch D short term (Regular / AMT).
	Current year suspended losses Form 4797 Ordinary (Regular / AMT).
	Current year suspended losses Section 1231 (Regular / AMT).

#### Schedule E

	Ownership code: TSJ
	Rental name
	Location of property
	Activity type
	Disposal checkbox
	Rental real estate type

Form Name	Field
	Advertising
	Auto and travel
	Cleaning and maintenance
	Commissions
	Insurance
	Legal and professional fees
	Management fees
	Mortgage interest paid to financial institutions
	Other Interest
	Repairs
	Supplies
	Taxes
	Other expense description and amount
	Allocation ratio
	Current year suspended losses Operating (Regular / AMT).
	Current year suspended losses Sch D long term (Regular / AMT).
	Current year suspended losses Sch D short term (Regular / AMT).
	Current year suspended losses Form 4797 Ordinary (Regular / AMT).
	Current year suspended losses Section 1231 (Regular / AMT).

#### Schedule F and Farm Rental

	Ownership code: TSJ
	Farm / Farm rental name
Schedule F (Only)	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	Cost or other basis of livestock and other items bought for resale

Form Name	Field
	Total cooperatives distributions
	Taxable cooperative distributions
	Total agricultural program payments
	Taxable agricultural program payments
	Commodity credit loans reported under election description and amount
	Commodity credit loans fortified
	Crop insurance - current year
	Crop insurance - taxable portion
	Crop insurance - deferred
	Other income amount and description
Cash and Accrual Expenses	Car and truck expense
	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
	Other expenses description and amount

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

#### Schedule H

	Ownership code: TS
	Employer ID number
	FUTA Multiple State Information: Name of State
	FUTA Multiple State Information: State Experience Rate Period Beginning Date
	FUTA Multiple State Information: State Experience Rate Period Ending Date

#### Schedule K-1

	Ownership code: TSJ
	Type of K-1
	Name of K-1
	Employer identification number
	Passive code
	Type of rental real estate
	Disposed

Form Name	Field
	Current year suspended losses Operating (Regular).
	Current year suspended losses Form 4797 Ordinary (Regular).
	Current year suspended losses Section 1231 (Regular).
<b>Schedule K-1 PTP</b>	
	Ownership code: TSJ
	Name of PTP
	Name of the K-1
	Employer identification number
	Current year suspended losses Operating (Regular).
	Current year suspended losses Form 4797 Ordinary (Regular).
	Current year suspended losses Section 1231 (Regular).
<b>Schedule R</b>	
	Date of disability - Taxpayer and Spouse
	Nontaxable pension, annuity, or disability benefit - Taxpayer and Spouse
	Taxable disability payments from an employer financed plan - Taxpayer and Spouse
<b>Form 1099-R</b>	
	Ownership code: TS
	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
<b>Form 1099-Q</b>	
	Ownership code: TS

Form Name	Field
	Payer name
	Payer address, city, state, zip
	Payer ID number
<b>Form 1116</b>	
	Country Name
	Income type
<b>Form 2106</b>	
	Ownership code: TSJ
	Activity name
<b>Form 2441</b>	
	Provider name
	Provider address
	Provider ID number
<b>Form 4562</b>	
	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
	Retired asset designation
	Property type: listed, SUV, truck, etc.

Form Name	Field
<b>Note:</b> Asset detail will be converted to the property level.	
<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
	Depreciation
	Commission and other expenses of sale
	Payments received during year do not include interest whether stated or unstated
	Related party name and address
Form 6252 Oth PY	Ownership code: TSJ
	Description and location of property
	Type of sale code
	Date of acquisition
	Date sold
	Gross sales price
	Mortgage assumed
	Original cost
	Commission and expense of sale
	Depreciation
	Collections
	Related party name and address
<b>Form 8396</b>	
	Address, City, 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 Name	Field
<b>Form 8606</b>	Taxpayer and spouse traditional IRA basis on 12/31/2021
<b>Form 8801</b>	Regular tax before credits minus foreign tax credit on line 34 of prior year Form 6251
	Amount from line 35 of prior year Form 6251
<b>Miscellaneous / Adjustments</b>	
	Other misc income ownership code: TSJ
	Other misc income - description and amount
<b>Carryovers (Amounts need to be reviewed in the 2023 application)</b>	
	AGI
	Form 6251 line 34
	Form 6251 line 35
	Tax Liability
	Taxable Income
	Total Income
	PY Overpayment
	PY four estimate payments
	Schedule A sum of 4,15, 20 and Gambling Losses
	Total Itemized Deductions
	Traditional IRA Basis on 12/31/2022 for Taxpayer and Spouse
	Roth IRA Contribution Basis on 12/31/2022 for Taxpayer and Spouse
	Roth IRA Conversion Basis on 12/31/2022 for Taxpayer and Spouse
	Section 1231 Carryover (Regular and AMT)
	Schedule D Short term and Long term Carryover (Regular and AMT)
	Investment Interest Carryover (Regular and AMT)
	Passive activity carryovers listed above.
<b>Note:</b>	Carryover amounts will be converted to first prior-year field in 2023. Other prior-year's historical carryover amounts will not be converted.

### **Items not converted**

Due to differences between GoSystem Tax and ProSeries software or data structures, or the item does not rollover to 2023, the following items are not converted. This list is not all inclusive.

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

- Historical carryover amount other than amounts listed in the “Items transferred during conversion” section, 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
- Form 6198 Regular and AMT at-risk amounts for Schedules C, E, F, and K-1 and Form 4835
- Passive activity loss amounts for Schedules C, E, F, and K-1 and Form 4835
- General business credit carryover
- 1116 information other than amounts listed in the section items converted
- Form 8801 fields other than amounts listed in the section items converted
- Depletion

### **Conversion notes and exceptions**

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

#### **Dates**

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

#### **Two-Year Comparison**

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

#### **Schedule A**

- Prior-year Schedule A descriptions.
- Non-cash items, regardless of amount, convert to non-cash items less than \$500.

#### **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, you must enter a Partnership name and a Corporation. Otherwise, the activity will convert with a period (".") as the description name.
- Descriptions of "Other income" and "Other deductions" items do not convert.

### **Depreciation**

- Assets convert for Schedule C, Schedule E, Schedule F, and Form 2106.
- Section 179 carryovers do not convert.
- Asset descriptions are limited to 20 characters.
- Please add vehicle use information to the tax return data for 2023. Indicate if luxury auto limits are applicable.
- The method MACRS 150%, when the Indian property designation is present, could not be converted. Additional data entry will be required.
- Tax preference code "P" for amortization of certified pollution control facilities was not converted.
- By default, book treatment information is converted using the federal values and requires modification. Please review all book treatment values, including accumulated depreciation, for accuracy.

### **Schedule E**

Vacation Home and/or Personal Property data entry in ProSeries will automatically create a Rental Property in GoSystem Tax. Vacation Homes and Personal Properties are not converted to the like-kind activities in GoSystem Tax.

### **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.