

CHECKLIST FOR REVIEWING CONVERTED TAX RETURNS

Current year into current year GoSystem Tax RS®

For all items that do not convert, please refer to the post-conversion guide for your competitor, which is attached to your conversion confirmation email.

After you roll over your converted data from the current converted year in GoSystem Tax RS®, you should confirm that the client information is correct. The tables below list steps you can take to review your client information.

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Client Name: _____

Locator: _____

Person Reviewing: _____

Review the following items in GoSystem Tax RS® after the rollover.

Helpful Trick: Use Organizer > **QuickTrack** & **QuickForm** to find common areas

Information to check	Navigation in GoSystemTax RS®	Verified / Entered?
1. Does the locator match the control list?	Review Locator in Gosystem Tax RS with Excel report in confirmation email	
2. Is the preparer of the return selected?	Organizer > General Information > Paid Preparer/ERO Information	
3. Add all states from prior year	Organizer > States > Add/Delete State	
4. State specific information that does not carry forward.		
a) Add State ID# for each state filed.	Organizer > States > [State] > General Information	
b) NOLs	Organizer > States > Common State > State NOL Tracking	

Review the prior year worksheet & competitive conversion screen

Information to check	Navigation in GoSystemTax RS®	Verified / Entered?
1. Compare the prior-year carryforward worksheet in the competitor's software to the Competitive Conversion screen in GoSystem Tax RS® for the same year the client was converted from. Review the following items in GoSystem Tax RS® after the rollover.	Organizer > Reconciliation > Competitive Conversion	
a) Net Operating Loss	Organizer > Form 990-T > Pt I - Total Unrelated BTI > Pre-2018 NOL	
b) Form 3800 General Business Credits	Organizer > Form 990-T > Credits > General Business Credit	
2. Review estimate options and select the appropriate	Organizer > Estimates > Estimated Tax/Overpayment	
3. Review Depreciation reports	Organizer > General Depreciation > [Entity Name] > Asset Detail	
4. Review Bonus Depreciation & Section 179 settings and reports.	Organizer > General Depreciation > Asset Detail	

5. Review the PY information in the Prior Year Comparative Information	Organizer > Reconciliation > PriorYear Comparative Information	
6. Briefly scan the CY return, then make notes / comments for the preparer to double check.	Enter notes here.	

Getting help
If you have any questions about your converted data, access Live Chat at <http://CS.ThomsonReuters.com/MyAccount> or call CS Support at 800.968.0600 and follow the prompts. Normal weekday support is from 9:00 a.m. to 8:00 p.m. eastern time.