GoSystem Tax RS

CS Professional Suite
GoSystem Tax RS

**Fundamental to your firm’s success**

Used by the top 100 firms, including 8 of the top 10 accounting firms in the country, GoSystem Tax RS is the most sophisticated tax compliance system serving the professional market today.

**A scalable solution**

Created with the unique complexities and concerns of your business in mind, GoSystem Tax RS standardizes and protects your tax preparation work in a secure online environment that can be scaled according to your business needs. Because all the work is handled online, maintenance costs and storage problems are minimized, and business continuance is assured in any situation.

To ensure your firm experiences all the features GoSystem Tax RS has to offer, you’ll receive personalized service from our user team, who will walk you through the implementation process from start to finish. Our consultants can also advise your staff on procedures, operations, and training approaches that will maximize your investment.

**Remote access to all your resources – all the time**

Thanks to our proven web-hosted technology, GoSystem Tax RS enables you to store, access, and share all of your data and tax applications from anywhere you have an internet connection — including your office, a client’s site, or your home.

GoSystem Tax RS is perfect for multi-office firms, offering 24/7 real-time data sharing and a seamless interface with other software packages from all of your firm locations.

The coordinated workflow between GoSystem Tax RS and the CS Professional Suite, Checkpoint®, and PPC Deskbooks will provide your firm with the most comprehensive tax preparation software available today.
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**Advanced technology**

**Powered to meet your needs today**
Sophisticated enough to handle the entire range of tax returns, from simple to complex, and powerful enough to do so with incredible speed and accuracy, GoSystem Tax RS provides a secure online location where you can access multiple tax years and all return types.

There are no limits to the number of users or the number or type of returns that can be processed. In fact, multiple users can work on the same return simultaneously without worrying about overwriting data — even when working in different locations. You can also open and work in several returns at the same time, making it quick and easy to conduct on-the-spot comparisons.

**Updated automatically**
Stored on redundant, high-capacity servers in our data centers, GoSystem Tax RS updates are performed automatically, with minimal desktop installation needed. You can rest easy knowing that the application you’re using is always the most current version available.

**Disaster protection offers peace of mind**
GoSystem Tax RS processes the most demanding and performance-intensive computations and data management outside your local office systems, which decreases your firm’s need for expensive, high-powered equipment to use the application. In addition, there’s no need to back up your data or maintain disk space to store your tax return data because our data centers continually back it up for you. If your system or computer shuts down while you’re working in a return, the application server automatically saves and closes the return so you never lose your work. With GoSystem Tax RS, you can be confident of business continuance in any situation.

**Iron-clad security keeps your data safe**
GoSystem Tax RS provides multiple layers of security, including network security, up-to-the-minute virus protection, application security, and encryption schemes for all transmitted data. Each of these systems and processes are maintained and managed by experienced, professional information technology staff. Multiple secure layers prevent unauthorized access to our data centers and application servers, guaranteeing the security of your clients’ data.
Integration with other products

Shared data saves valuable time

By itself, GoSystem Tax RS is a powerful tax compliance system. But when its data is shared with other software programs, its power increases.

With timesaving links available in GoSystem Tax RS, you can instantly access Checkpoint content and PPC Deskbooks simply by clicking on the icon in the GoSystem Tax RS toolbar.

The integration doesn’t stop there. Also included in GoSystem Tax RS is the ability to integrate data with the products in the CS Professional Suite and Enterprise Suite, as well as EMC Documentum®, SurePrep®, Copanion, BNA, and Intacct.

Audit Management Software

• **AdvanceFlow** — A cloud-based audit management application made to work with GoSystem Tax RS. Engagements, workpapers, and colleagues are available in real time with just a click, whether you’re in the office, in the field, or anywhere else.

CS Professional Suite Accounting

• **Accounting CS and Workpapers CS** — Take advantage of the GoSystem Tax RS integration with Accounting CS and Workpapers CS, for seamless transfer of balances and adjustments.

• **Trial Balance CS and Write-Up CS** — General ledger account balances can be transferred from Write-Up CS or Trial Balance CS into GoSystem Tax RS. When you add, delete, or change journal entries, assign tax codes, or add new accounts in the Adjusting Journal Entry Integration mode, the information can be imported back into the GoSystem Tax RS client with just a few clicks.

Document Management

• **FileCabinet CS** — Use GoSystem Tax to route PDF copies of your returns directly to FileCabinet CS, which recognizes the client, application, document type, and time period of what you’re working on, then indexes and files it appropriately.

• **GoFileRoom** — Tax returns created in GoSystem Tax RS can be stored in GoFileRoom.

Practice Management

• **Practice CS** — Launch GoSystem Tax RS from any Practice CS dashboard, then use the Practice CS timer to track the amount of time you spend on each return.

Tax

• **Fixed Assets CS** — Integration with GoSystem Tax RS ensures that asset information is always available, so you never have to re-enter data.

• **Planner CS** — Expedite the planning process by pre-populating much of the prior year’s 1040 tax return information with the easy-to-use integration features.
Streamlined processing

Streamline workflow with integration
Important workflow features in GoSystem Tax RS include the ability to:

• Integrate with QuickBooks®.
• Import asset information from Fixed Assets CS, our advanced fixed asset management software.
• Select tax default options from a comprehensive list, which completes much of your work before the data entry even begins.
• Use Partner Bridge to create Data Interchange Format (DIF) files automatically when you import and export partner information and special allocations with Microsoft® Excel®, including partner name and address, entity type, profit/loss ratios, capital account data, and answers to K-1 questions.
• Transfer general ledger balances from Trial Balance CS.
• Take advantage of fast, integrated OCR processing when you own software from one of our preferred partners like SurePrep or Copanion.

Expansive import and export capabilities
GoSystem Tax RS features a variety of ways to transfer information in and out of tax returns, greatly minimizing the return preparation process from beginning to end. Take advantage of a range of options from per-client imports on specific business activities to completely automated utilities that pull information into and from returns without requiring staff intervention. You’ll find these capabilities invaluable when preparing returns for clients that have large volumes of information — data that your staff would otherwise have to rekey.

Improve workflow with GoTracker
Available as an add-on module, GoTracker allows administrators to log time, monitor due dates, and set customizable milestones and tasks — improving overall workflow.
Intuitive navigation

Intuitive navigation increases efficiency

Thanks to the intuitive navigation of GoSystem Tax RS, it’s easy to accelerate your firm’s productivity levels. Familiar navigation allows for multiple views and helps create a flexible work style. When you need to complete a particular form, you simply select it from a convenient list, and a facsimile of the form appears. Just right-click on any field in the form to instantly access the Organizer input field, where you can enter the client’s data. And let GoSystem Tax RS do the rest.

Experience easier navigation with QuickTrack and QuickForm

- **QuickTrack** — Easily navigate to the most frequently used organizer screens. With the click of a button, you gain quick access to a variety of organizers, including general information, source documents for income, other income, expenses, estimated tax payments, tax reconciliation, and more.
- **QuickForm** — When you don’t know where to enter data, but you know where it should end up, use QuickForm. This feature lists all major tax forms on one screen and directs you to the corresponding organizer screen.
GoSystem® Tax RS quickly and easily processes complicated and simple individual, corporate, and partnership tax returns with timesaving features such as the Allocation and Apportionment module. These tools allow you to complete essential tasks with little or no data entry, resulting in greater accuracy and speed.

**Easily serve your firm’s most complex needs**

Ready to serve you and your most sophisticated domestic and international clients, GoSystem Tax RS provides remote access to all the client information you need to produce any type of return — from simple to complex — any time, day or night, from any location with an internet connection.

GoSystem Tax RS lets you get your work done quickly and efficiently 24/7. Whether you need to complete a multinational advanced tax equalization calculation that serves expatriates or 1120 and 1065 consolidation engines for a tiered consolidation return, you’ll be ending the day with less stress and more time to get other things done.

**Custom tax equalization module handles complicated expatriate calculations**

Put an end to the countless hours spent updating and manipulating cumbersome spreadsheets and other information required to recalculate returns for equalization. The GoSystem Tax RS Custom Tax Equalization module lets you quickly gain control of even the most complicated expatriate calculations with:

- 20+ templates, including 7 standard equalization letter templates.
- 11 equalization statement formats.
- 57 options per template.
- Tax equalization gross-up calculations for AZ, CA, CO, CT, DC, DE, GA, IL, IN, KY, LA, MA, MD, MI, MN, NC, NJ, NM, NY, OH, OK, PA, and SC.

**In addition to saving processing time, this module will:**

- Lower maintenance costs.
- Automate the equalization process.
- Recalculate returns based on options at both federal and state levels.
- Create clear, concise summaries that can be easily explained to your clients.
Efficient review

Increase review efficiency across multiple offices

When your firm uses GoSystem Tax RS, staff members at multiple offices have instant and simultaneous access to the same forms and data, which increases the productivity and efficiency of sharing and reviewing documents.

GoSystem Tax RS offers review tools that allow you to:

- Click on any line in the tax form and see a complete, easy-to-follow audit trail for the calculated amount.
- Use diagnostic messages to identify inconsistencies, errors, or omissions found when you calculate a return. You can print the messages or view them on-screen. You can also click the diagnostic message to access the field in question.
- Easily switch between related form and data entry screens using hyperlink connections.
- Use the Auto Compute feature to review results as you enter data.
Consolidated Return Review

Even the most complicated consolidated return is easy to review. Comprehensive return tools accessed in consolidating entity allow you to track calculated amounts to each member of your consolidation.
**Efficient review, cont.**

**Validate returns before filing electronically**
GoSystem Tax RS compares a return against IRS requirements before the return is sent to the IRS. Any data in the e-file that does not meet the IRS requirements is flagged so the errors can be fixed prior to e-filing, reducing the chances that the IRS will reject the return.

**1040 Tax Review**
The 1040 Tax Review feature enables you to prepare an electronic tax file folder for each taxpayer, as well as create custom checklists for firm defaults to ensure compliance with your firm’s review and preparation standards. It also provides Regular Tax, Alternative Minimum Tax, and K-1 reconciliation automatically.

**Review tools increase your productivity**
- Use online tax return conferencing for private review sessions.
- Track and review the return with convenient preparer and reviewer note categories.
- Identify reviewed fields and fields containing notes from preparers and reviewers using the built-in tickmarks and symbols.
Productivity tools

RS To-Go travels anywhere—no internet connection necessary

GoSystem Tax RS is not only powerful, it’s portable. For those times when you don’t have access to an Internet connection, the RS To-Go application allows you to enter client data into tax returns offline and upload it later when you have Internet access again. It’s another reason why GoSystem Tax RS makes your firm more flexible and more cost-effective than you ever thought possible.

E-Form® RS offers immediate access to forms and schedules

E-Form RS offers you maximum convenience, with everything you need in one location — no more searching the web or accessing multiple tools to retrieve important forms. You’ll find nearly every federal, state and local form for 1040, 1041, 1042, 1042S, 1065, 1120, 990, 706/709, Payroll, U.S. Territories, Canadian, Pension, and Election Statements. And updates are issued daily during tax season.

Be ready for next tax season

Prepare for the upcoming tax season with GoSystem Tax RS Preseason Services. Start by rolling over prior-year data to eliminate redundant data entry. Then take advantage of our exclusive tax organizer kits to make your next tax season a success.

Customized tax organizer kits

Designed to enhance the presentation of your clients’ documents, this kit elevates your company’s image with a complete set of coordinated items, including a tax organizer with coordinating envelope, personalized transmittal letters, and a return envelope pre-printed with your firm’s address.

E-Form RS

Find the forms you need fast. Simplified navigation makes it easy for you to access important forms.
Productivity tools, cont.

Customizable letters and filing instructions

The powerful letters and filing instructions function for 1040, 1065, and 1120 makes it easy to create template letters and filing instructions that can be shared across the firm. You can even include custom logo and graphics; create optional paragraphs to be inserted anywhere in the template; and make templates available to, but not editable by, others in the firm.

Enhanced print interface

An enhanced print interface includes support for multiple monitors, the ability to refresh print preview in the organizer, and even enables you to insert external Adobe Acrobat documents to be printed with a return.

FormsSource increases income possibilities with access to centralized client data

FormsSource is a data mining tool designed to give your firm the power to quickly gather specific information about your clients. Unlike other query tools, FormsSource doesn’t limit you to predefined templates. Instead, you can customize it to meet your specific needs. You can search every field in every tax return — including organizers, tax forms and workpapers — to identify returns that match criteria you specify.

The information gathering capability allows you to build a comprehensive profile of your clients, which helps you identify new consulting and tax planning opportunities. And because the data is centralized and available through remote server technology, you can data mine the returns on a firm-wide basis, so there’s no need to query each site and then merge and manipulate data.

Allocation & Apportionment (A&A) module: a key part of the GoSystem Tax RS application

Easily manage allocation and apportionment data with the ability to:

- Enter allocated or non-business income, payroll, property, and sales amounts.
- Calculate the apportionment ratio in accordance with individual state laws.
- Review and verify all the information on the computed A&A detail state tax forms and make any adjustments, which will flow to the state returns.

To further streamline your processes, you can bridge in your A&A information from a .DIF file, transferring income, payroll, property, and sales amounts from the spreadsheet directly to the return in a convenient and efficient fashion.
Comprehensive training and consulting options

Make the most of your software investment and maximize firm productivity

The CS Professional Suite offers an extensive selection of services that can help you get more out of your software investment, including:

Standard training
Our standard training is a great way to bring new staff up to speed, let experienced staff revisit specific topics, and/or supplement custom training or consulting. Standard training options include On-Demand, Web, Classroom, and Seasonal training.

Custom training
We offer affordable custom training services that can be tailored to your firm’s specific needs. Custom training is taught by our professional instructors, and can be delivered either via web training or onsite in a classroom setting.

Consulting services
Our trained consulting professionals can analyze your firm’s workflow processes, provide best practices and help you develop a successful implementation and rollout strategy for your CS Professional Suite software.

Professional services
Put the expertise of our software application consultants and IT experts to work for your firm. Our team can customize applications and data to do exactly what you need, create customized reports, migrate and convert data, and even build utilities and tools that can assist your firm with application integration and other technology needs.

Annual SYNERGY conference
At our SYNERGY Conference, we offer training at all levels of expertise in a variety of formats, including hands-on, lecture-style, and informative roundtable discussions. For more details, visit our website: Tax.ThomsonReuters.com/CS-SYNERGY. Professional accreditation is available.

For more information on training and consulting or to register for courses, visit Tax.ThomsonReuters.com/CSTrainingConsulting, email us at CS.Sales@ThomsonReuters.com or call +1 800 968 8900.

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- Accounting CS Client Access
- Accounting CS Payroll
- myPay Solutions®

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- AdvanceFlow
- Workpapers CS

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- Fixed Assets CS
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