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*From the April/May 2007* *Review*
*of Professional Tax Preparation Systems*

Used by eight of the top ten U.S. accounting firms, GoSystem Tax RS may no longer be the only online professional tax preparation system in this annual review of tax products, but it is still at the top of the list when it comes to offering an exhaustingly comprehensive collection of compliance and integrated tax research functionality. As with other high-end tax programs, GoSystem Tax RS has support for all entities with year-end compliance at both the state and federal level, and also supports virtually all municipalities in the United States, with the added advantage of being a hosted solution, which frees firms from the IT requirements associated with installation, data backup, updates and maintenance, and enables secure remote and multi-location access.

The system is offered in various bundles or each of the specific modules can be purchased separately. Pricing for GoSystem can vary widely depending upon the exact needs of a firm, with full bundles that include 1040, 1041, 1065, 1120, 1120S, 706, 709, 990 and 5500 filing for large practices costing in excess of $10,000. However, many smaller firms without that breadth of filing needs are able to take advantage of GoSystem Tax RS through the use of various individual components of the system, keeping costs more amenable to their practice. Thomson Tax and Accounting, which has owned RIA for several years, has decided to drop the name RIA from this program. However, the system is the same, and its research integration will still be with RIA-branded research products.

**Learning Curve — 4.5 Stars**
As previously noted, GoSystem Tax RS is a web-based tax system that users access through their regular browser. After logging in to the secure system, the initial

a form view or in the Organizer interview-based mode, with a subwindow opening into two panels that provide the work area or form, along with a menu of available forms or data-entry tasks on the left. Additionally, an icon bar across the top offers the ability to quickly jump to common tasks including compute functions, a return summary page, printing options and a link to the CheckPoint research platform. Users can also easily jump between the form and interview modes by double-clicking within a form or selecting the form from the navigation panel. Data entry is generally intuitive and includes linking to subordinate and related forms, worksheets and schedules, but the system does not include auto-fill entries or smart lists, and if the Auto Compute function is not enabled, the system does not transfer or calculate any data between forms until the Compute function is used. The integration with CheckPoint for research is easily accessed either from the top icon bar or on a line-specific basis. Although general navigation within the program should be easy for most users to adapt to, training is recommended
in order to take advantage of the advanced tools within the system.

**Use/Workflow & Productivity Tools — 5 Stars**
GoSystem Tax RS houses an impressive array of processing and management features designed to maximize the efficiency of firms with formal workflow and review processes. In addition to the generally universal ability to add tick marks and notes to form lines for attention later in a review, the system allows the attachment of documents to returns and the ability to create links from any location in a client return to web-based resources or another location in the return. It also includes milestone setting functions, preparer/reviewer checklists and an audit trail/history, along with a time log, advanced diagnostics, data mining functions and firm-wide defaults and security controls. The system's online tax return conferencing also enables private collaboration sessions. A review summary screen also provides a quick overview of a return, while all

data fields in the summary, on forms and in the Client Organizer include drilldown

capabilities are exceptional, with support for handling consolidated corporations, partner bridging, special allocations and ExPat returns.

The system also includes online client organizers that integrate with the system and, since GoSystem Tax RS is a web-based system, it provides users with the benefit of being able to work or access client information while away from the office. It also translates to fewer IT requirements and the security of the data not being vulnerable to a fire, theft or natural disaster at the office.

### Integration/Import & Export — 5 Stars

GoSystem Tax RS shares data seamlessly across its various modules and can import client financial data from virtually any accounting package. It includes two-way integration with Engagement CS and Fixed Assets CS, while integration with leading document management systems is also included. Returns and other documents can be output into PDF format with bookmarks. Through the document attachment feature,
Word and Excel files can be linked directly from a client return. Integration with the CheckPoint research platform provides quick access to related tax information
and analysis, including TaxAlerts, which automatically identifies and notifies the professional of clients that may be affected by pending or recently enacted legislation.

### Support/Training & Help System — 5 Stars

GoSystem Tax RS provides a good array of assistive features, including line-by-line access to Help, instructions and research, as well as case studies, tutorials, user guides and interactive options. The company offers live and web-based training as well as seminars throughout the country.

**Relative Value — 4.5 Stars**

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**2007 Overall Rating — 5 Stars**