GOSYSTEM TAX™

GOTRACKER GUIDE

FOR TAX YEAR 2021

Last Updated: October 15, 2021

THOMSON REUTERS®

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CHAPTER 1: GOTRACKER

The GoTracker™ add-on for RS Browser provides due date tracking, setting milestones, tasks, time logging, and invoicing. GoTracker allows firms to set up tasks for monitoring and tracking the workflow of tax returns to completion.

GoTracker is comprised of three modules:

- The **Tasks** feature first categorizes how time is spent while completing the return. Then tasks are compiled into time logs and may be printed in detail or summary to assist with time-tracking needs. Tasks can be set up on a firm-wide basis or by location by using default tasks or firm-designed tasks.

  > Some tasks are marked with *. These system (or firm) designated tasks cannot be changed and are listed only for reference.

- **Milestones** show the current status of returns, such as Preparation, Review, or Signature. If necessary, you can create a customized return status. You can sort returns by milestones to assist in project management.

  > Some milestones are marked with *. These system (or firm) designated milestones cannot be changed and are listed only for reference.

- Time logs feed the **Tax Invoicing** system, which creates taxpayer invoices by flat rate, form/schedule, number of pages, time, or any combination of these.

GOTRACKER FEATURES

- Tasks
  - [Adding a Task (page 3)]
  - [Modifying a Task (page 5)]
  - [Deleting a Task (page 7)]

- Milestones

- Time Tracking

CHAPTER 2: TASKS

ADDING A TASK

1. Select **Admin > Tasks**.

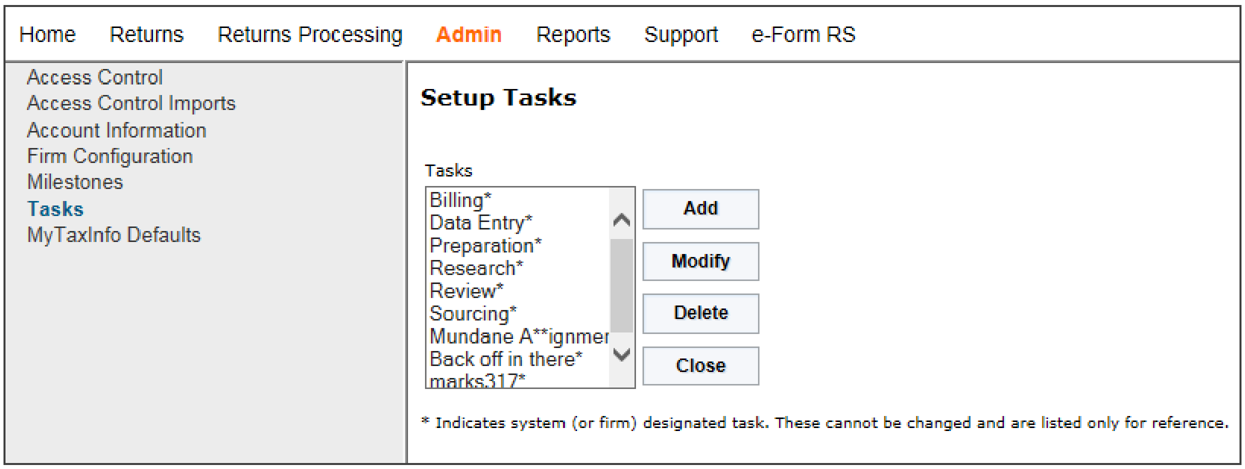

Figure 2:1

2. Click **Add** to the right of the task list.

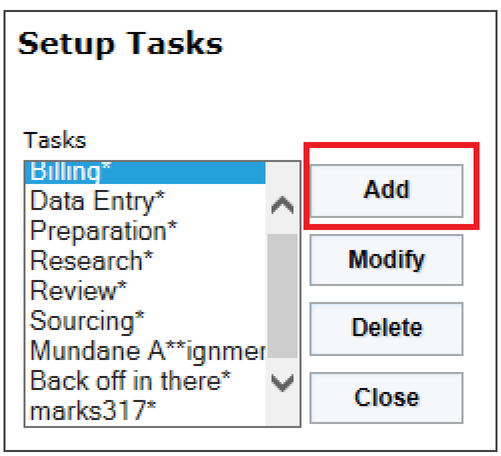

Figure 2:2

3. A new dialog box appears in the middle of the screen. Add the task, and click **OK** to add it.

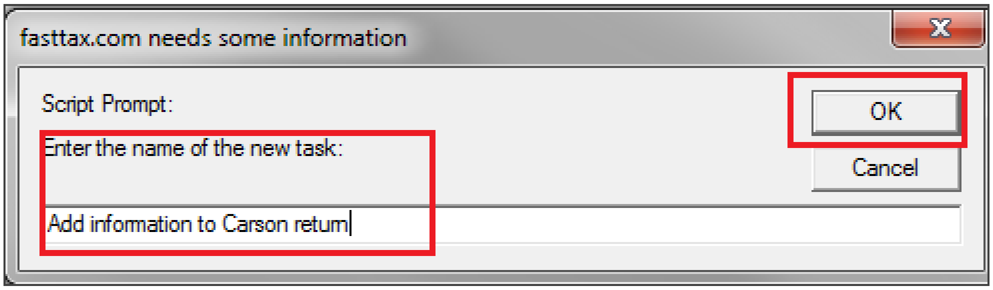

Figure 2:3

4. The task now appears in the list of tasks.

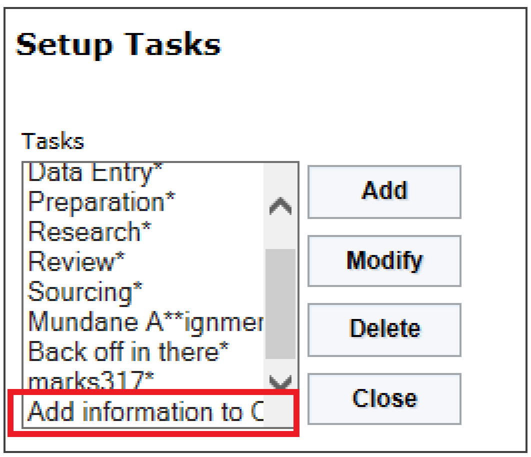

Figure 2:4

MODIFYING A TASK

1. Select **Admin > Tasks**.

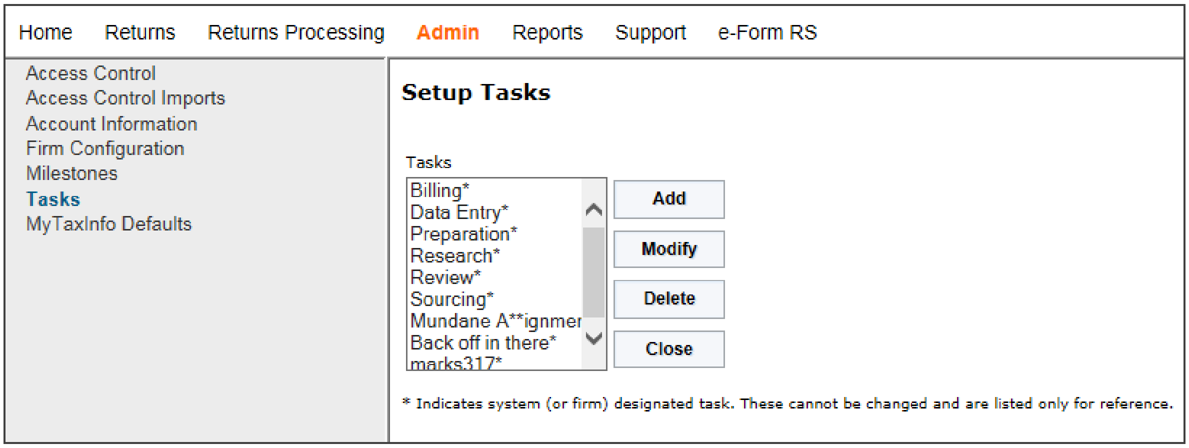

Figure 2:5

2. Select the task to be modified from the task list.

3. Click **Modify** on the right of the task list.

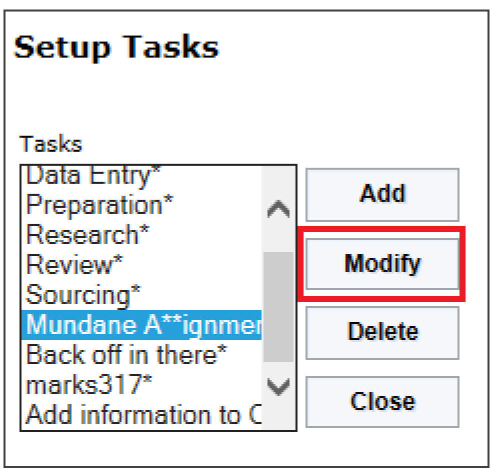

Figure 2:6

4. A new dialog box appears in the middle of the screen. Enter the modification for the task, and click **OK**.

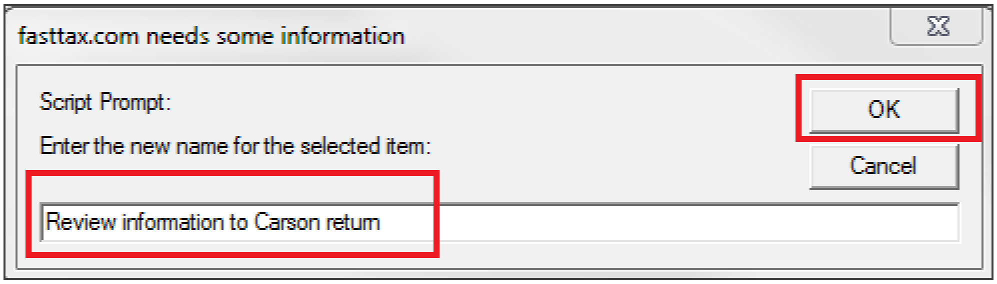

Figure 2:7

5. The modified task now appears in the list of tasks.

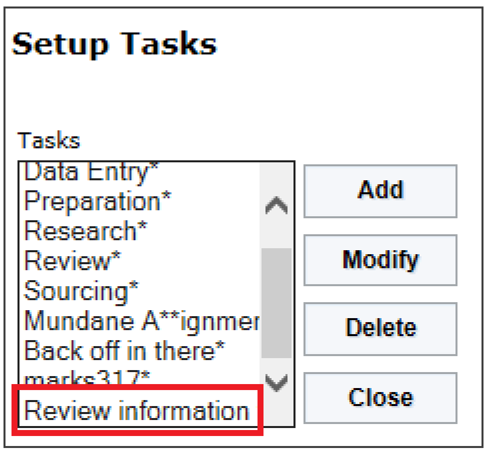

Figure 2:8

DELETING A TASK

1. Select **Admin > Tasks**.

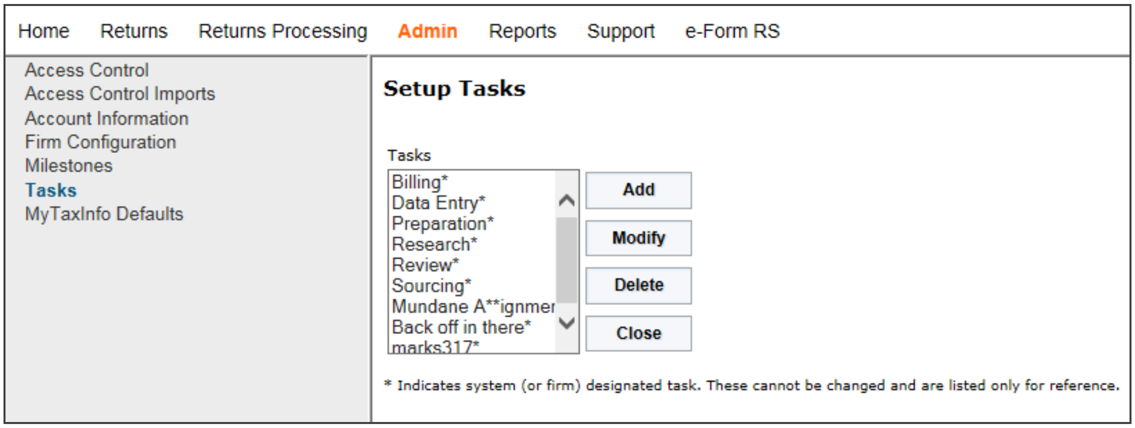

Figure 2:9

2. Select the task to be deleted from the task list.

3. Click **Delete** on the right of the task list.

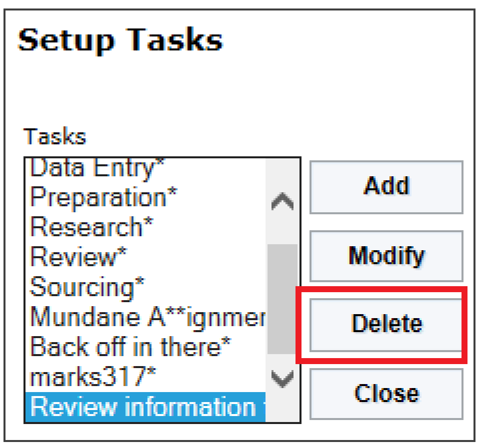

Figure 2:10

4. A new dialog box appears in the middle of the screen. Click **OK** to delete the task.

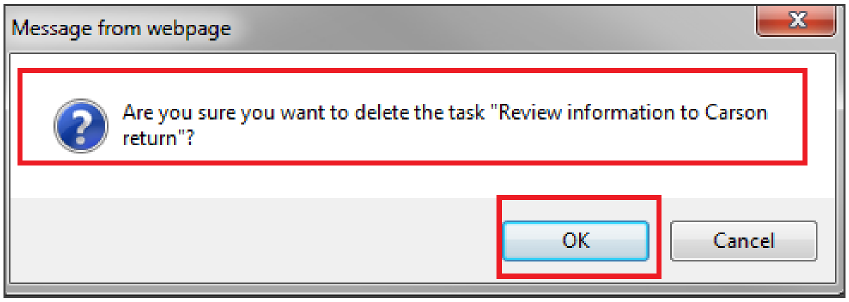

Figure 2:11

5. The deleted task no longer appears in the list of tasks.

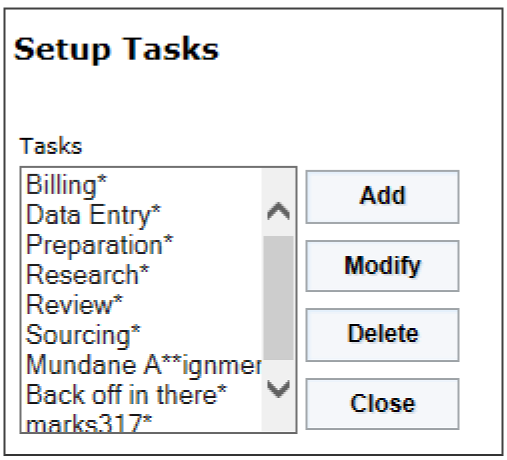

Figure 2:12

CHAPTER 3: MILESTONES

ADDING A MILESTONE

1. Select **Admin > Milestones**.

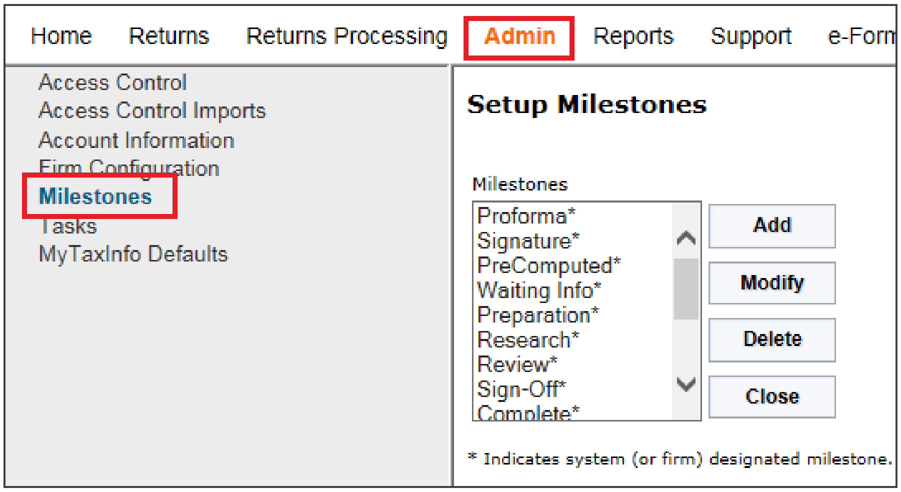

Figure 3:1

2. Click **Add** to the right of the milestone list.

Figure 3:2

3. A new dialog box appears in the middle of the screen. Add the milestone, and click **OK** to add it.

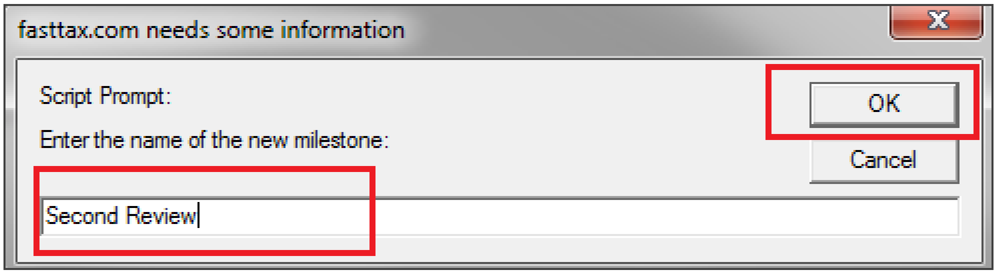

Figure 3:3

4. The milestone now appears in the list of milestones.

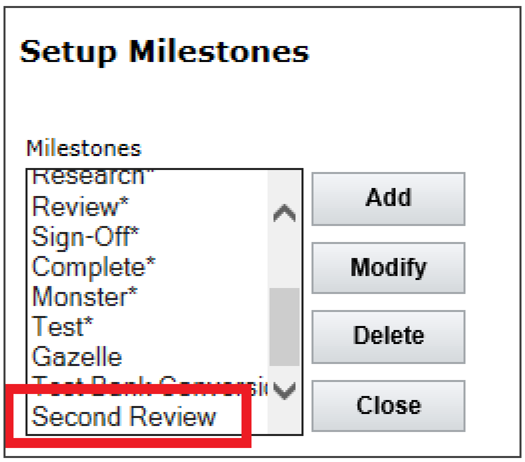

Figure 3:4

ASSIGNING A MILESTONE

1. On the **Returns** list, select the return(s) you want to assign the **Milestone** by placing a checkmark next to the return.

2. Select the **More > Assign Milestone** function.

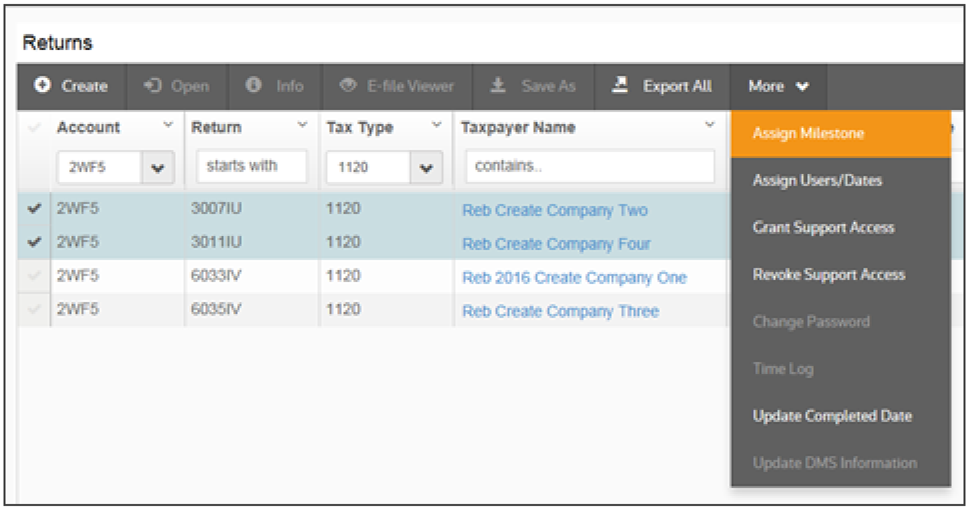

Figure 3:5

3. Select the applicable **Milestone** from the drop-down menu.

4. Enter the **Date** for the **Milestone**.

5. Select **Update** or **Save** to update the return with the new milestone.

MODIFYING A MILESTONE

1. Select **Admin > Milestones**.

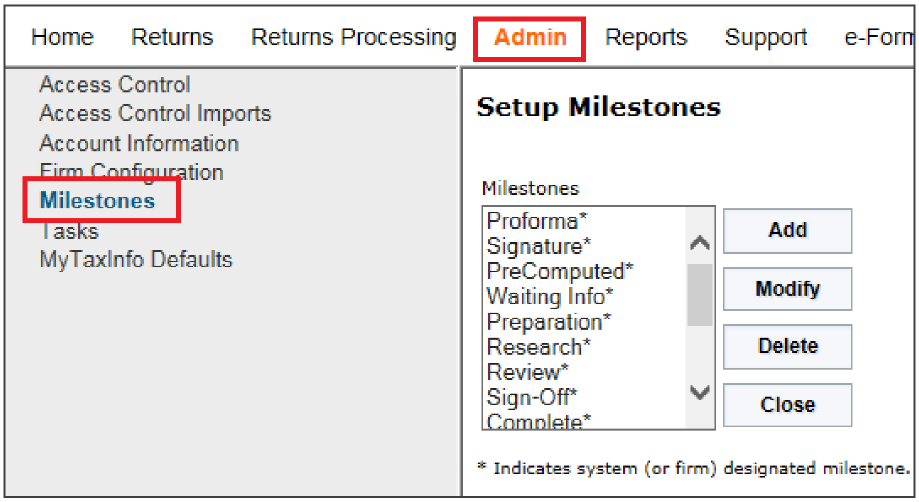

Figure 3:6

2. Select the entity for which you are modifying a milestone: *Firm* or *Location*. If you select *Location*, a drop-down list appears. Select the appropriate location from that list.

3. Select the milestone to be modified from the milestone list.

4. Click **Modify** on the right of the milestone list.

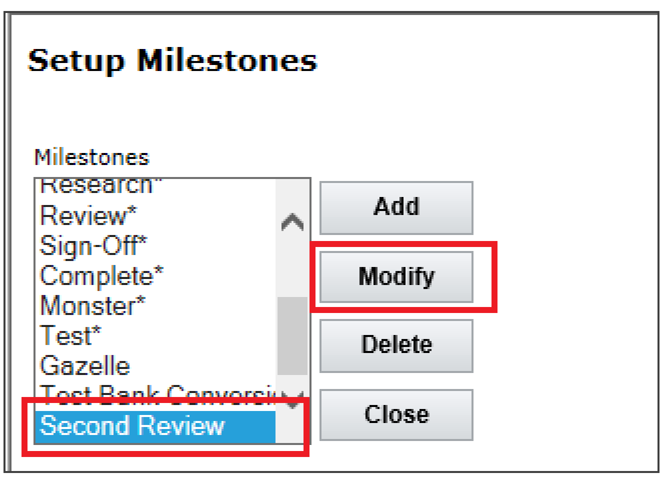

Figure 3:7

5. A new dialog box appears in the middle of the screen. Enter the modification for the milestone, and click **OK**.

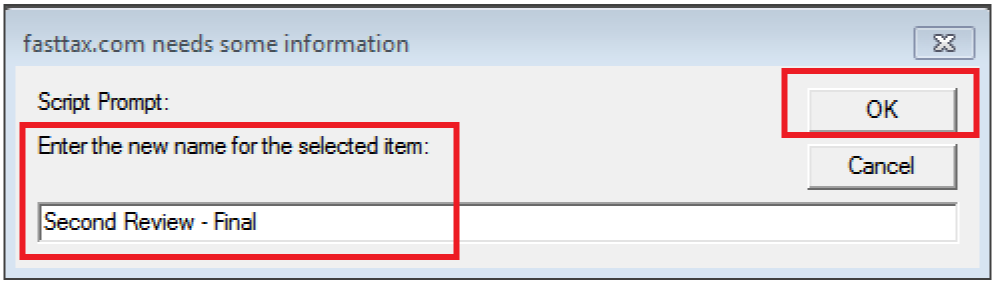

Figure 3:8

6. The modified milestone now appears in the list of milestones.

Figure 3:9

DELETING A MILESTONE

1. Select **Admin > Milestones**.

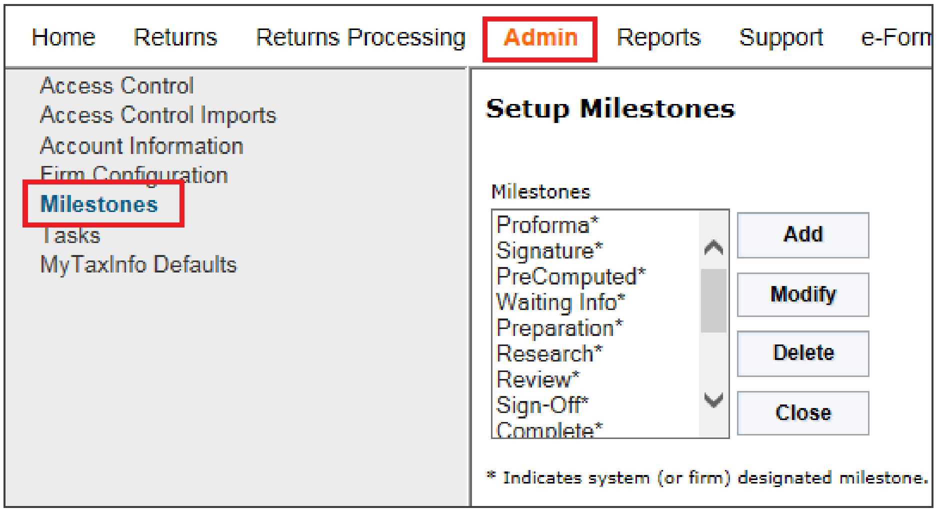

Figure 3:10

2. Select the entity for which you are deleting a milestone: *Firm* or *Location*. If you select *Location*, a drop-down list appears. Select the appropriate location from that list.

3. Select the milestone to be deleted from the milestone list.

4. Click **Delete** on the right of the milestone list.

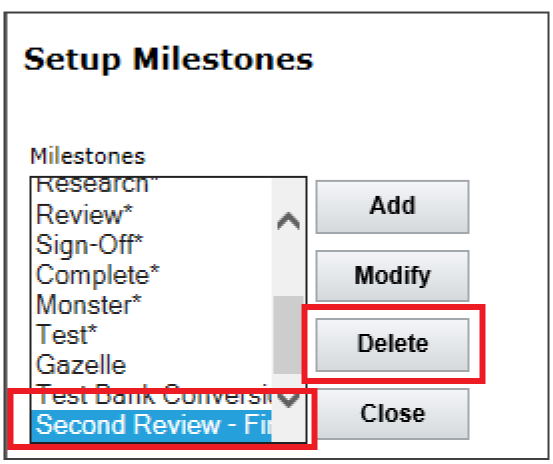

Figure 3:11

5. A new dialog box appears in the middle of the screen. Answer **OK** to delete the milestone.

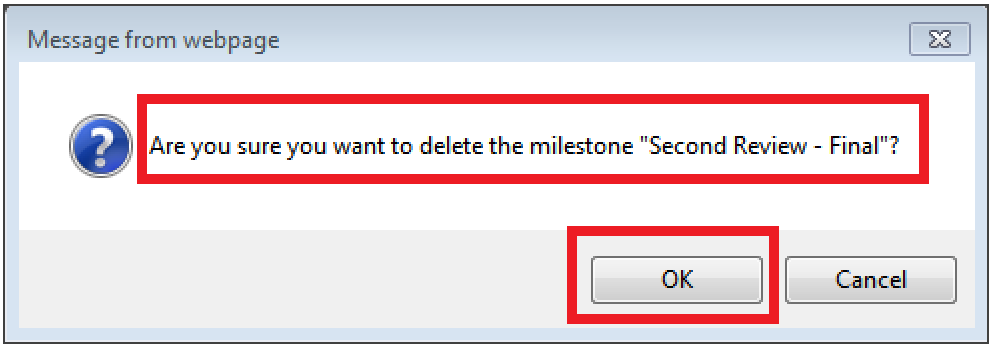

Figure 3:12

6. The deleted milestone no longer appears in the list of milestones.

CHAPTER 4: TIME TRACKING

ENABLING TIME TRACKING

1. Select **Admin > Access Control**.
2. On the **Users** tab, select the user for whom time tracking is to be enabled.
3. Click the **Edit** button.
4. On the **User** tab, select the option to *Enable Time Tracking*.

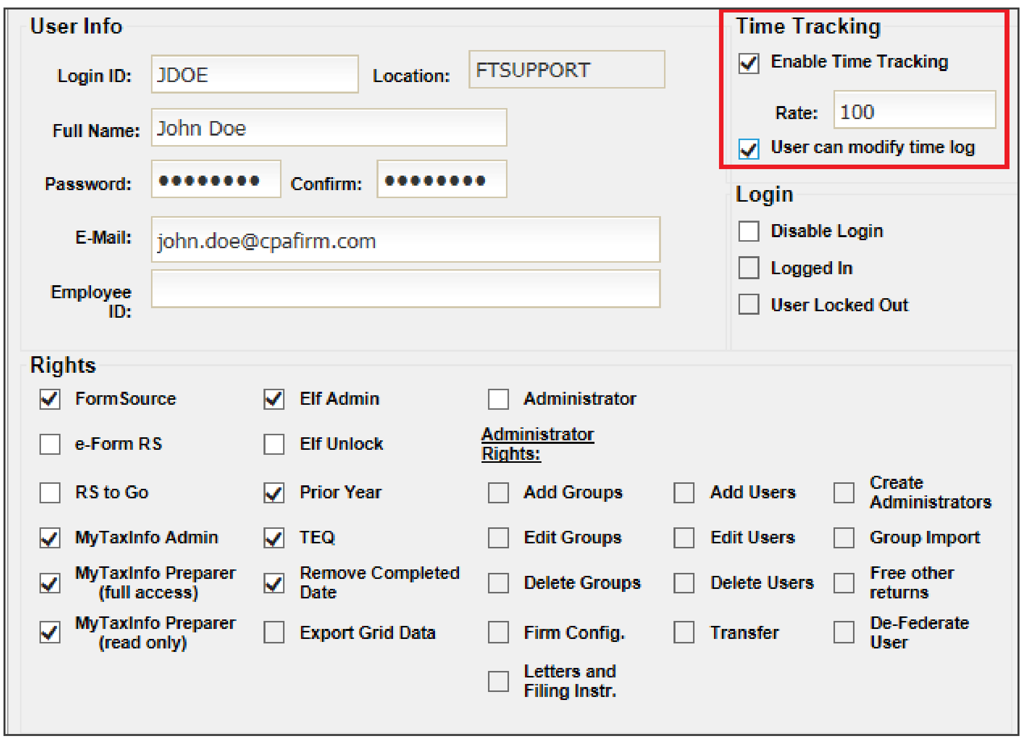

Figure 4:1

5. Enter the user's billing rate per hour.
6. If desired, select the option to allow the user to modify the time logs.
7. Click the **Update** button at the bottom of the page.

REVIEWING TIME TRACKING ON RETURNS

On returns assigned to a user with Time Tracking enabled, the time the assigned Time Tracking user spends working in the return will display on the submenu item called **Time Log**.

1. From **Returns**, enter your criteria, such as return ID number, client cost, taxpayer name, etc.
2. Find the return assigned to the user with Time Tracking enabled, and place a check mark next to the return.
3. Click **More > Time Log**.

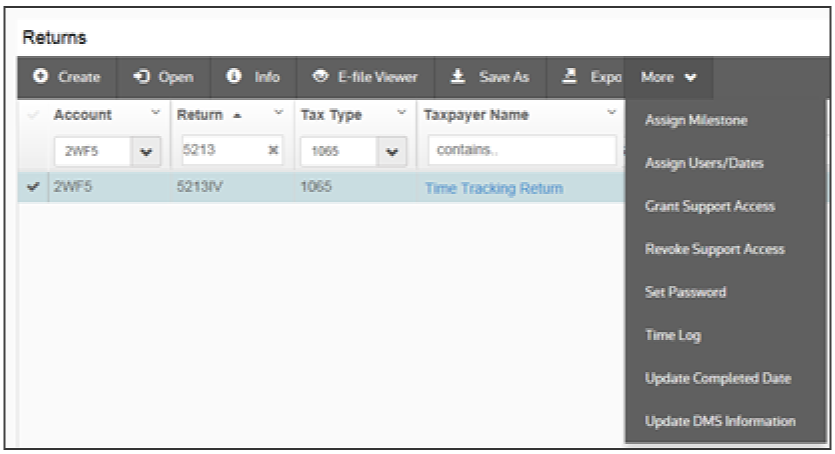

Figure 4:2

4. Open the **Time Log**, and review the data.

CREATING A TIME LOG REPORT BY ACCOUNT

The Time Log report shows log entries for selected locators for a specific account, year, and tax type.

1. Select **Reports > Time Log Report**.
2. Under **Time Report by Account**, select the account, tax year, and tax type.

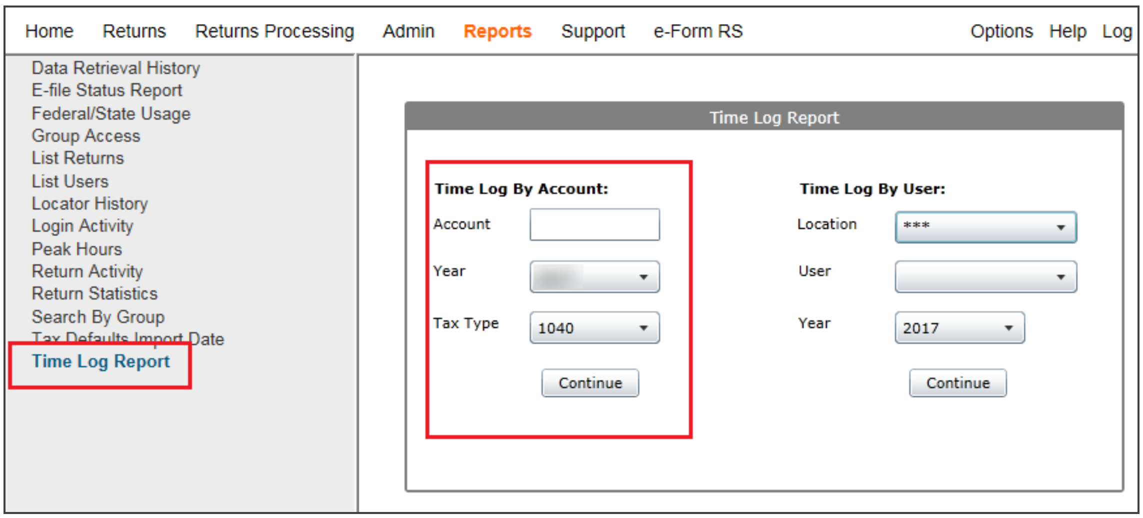

Figure 4:3

3. Click **Continue**.

CREATING A TIME LOG REPORT BY USER

The Time Log report shows log entries for a specific user, year, and tax type.

1. Select **Reports > Time Log Report**.
2. Under **Time Report by User**, select the user, tax year, and tax type.

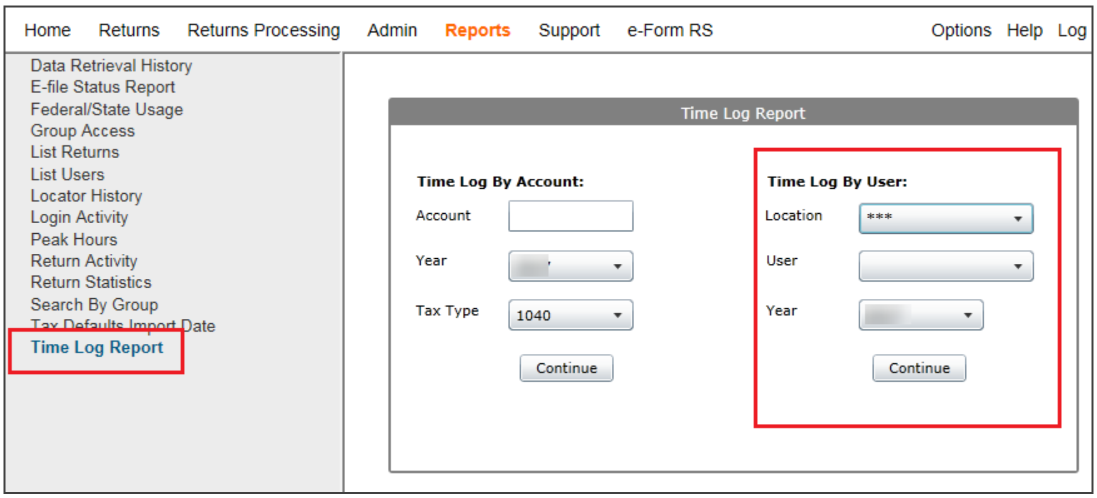

Figure 4:4

3. Click **Continue**.

DISABLING TIME TRACKING AND MILESTONES FOR CERTAIN USERS

To remove the **Time Tracking** and **Milestones** for users who do not need their time recorded, in **Admin > Firm Configuration > Security Options**, place a check mark in the check box as shown below. This check mark prevents users who do not need their time tracked from seeing the **Milestone** and **Time Tracking** pop-up window when they close returns.

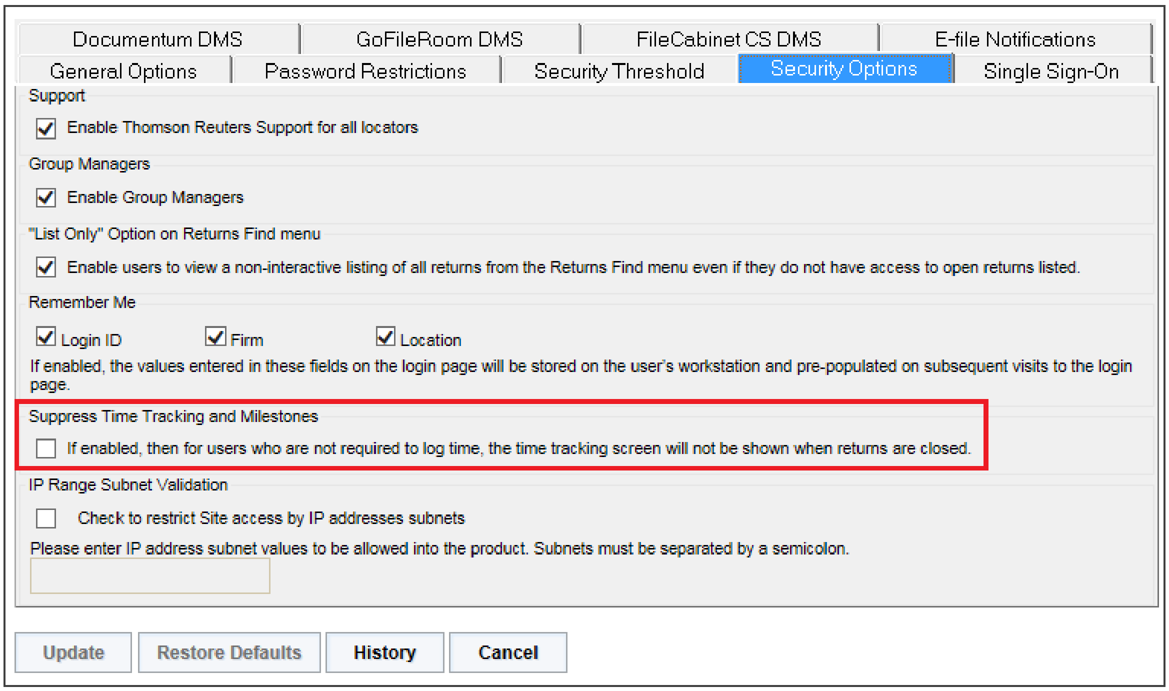

Figure 4:5