

GOSYSTEM TAX™

GOTRACKER GUIDE

FOR TAX YEAR 2021

Last Updated: October 15, 2021

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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

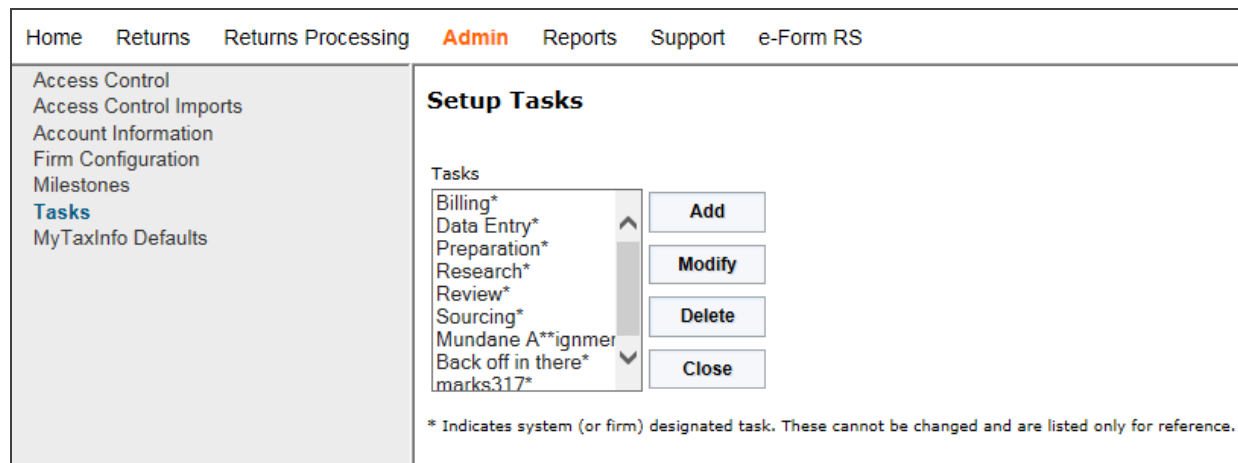
- Tasks
 - [Adding a Task \(page 3\)](#)
 - [Modifying a Task \(page 5\)](#)
 - [Deleting a Task \(page 7\)](#)

- Milestones
 - [Adding a Milestone \(page 9\)](#)
 - [Assigning a Milestone \(page 10\)](#)
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 - [Deleting a Milestone \(page 14\)](#)
- Time Tracking
 - [Enabling Time Tracking \(page 1\)](#)
 - [Reviewing Time Tracking on Returns \(page 2\)](#)
 - [Creating a Time Log Report by Account \(page 3\)](#)
 - [Creating a Time Log Report by User \(page 4\)](#)
 - [Disabling Time Tracking and Milestones for Certain Users \(page 5\)](#)

CHAPTER 2: TASKS

ADDING A TASK

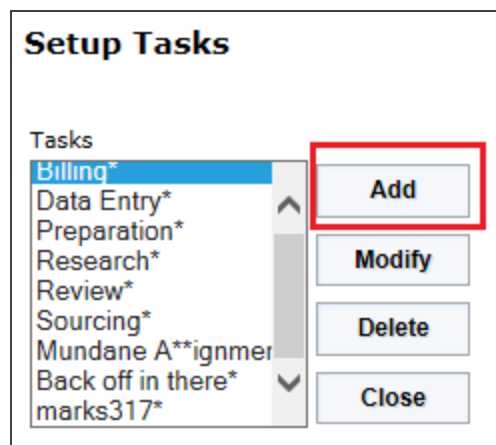
1. Select **Admin > Tasks**.



The screenshot shows the 'Admin' menu selected in the top navigation bar. The left sidebar lists various administrative options, with 'Tasks' highlighted. The main content area is titled 'Setup Tasks' and contains a list of tasks: Billing*, Data Entry*, Preparation*, Research*, Review*, Sourcing*, Mundane A**ignmer, Back off in there*, and marks317*. To the right of this list are four buttons: 'Add', 'Modify', 'Delete', and 'Close'. A footnote at the bottom states: '* Indicates system (or firm) designated task. These cannot be changed and are listed only for reference.'

Figure 2:1

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



This close-up view of the 'Setup Tasks' page shows the 'Billing*' task selected in the list. The 'Add' button, located to the right of the task list, is highlighted with a red rectangular box.

Figure 2:2

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

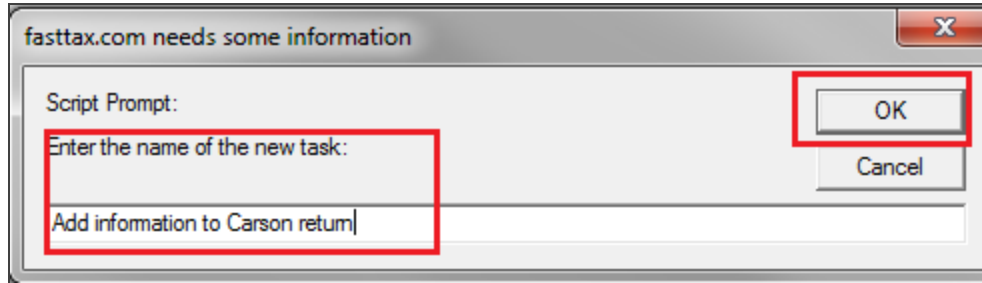


Figure 2:3

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

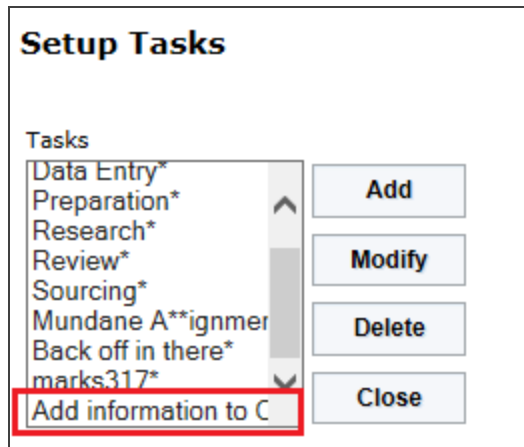


Figure 2:4

MODIFYING A TASK

1. Select **Admin > Tasks**.

The screenshot shows the 'Setup Tasks' page. At the top, there is a navigation bar with links: Home, Returns, Returns Processing, Admin (highlighted in orange), Reports, Support, and e-Form RS. On the left side, there is a sidebar menu with the following items: Access Control, Access Control Imports, Account Information, Firm Configuration, Milestones, Tasks (highlighted in blue), and MyTaxInfo Defaults. The main content area is titled 'Setup Tasks'. It contains a list of tasks in a scrollable box: Billing*, Data Entry*, Preparation*, Research*, Review*, Sourcing*, Mundane A**ignmer, Back off in there*, and marks317*. To the right of this list are four buttons: Add, Modify, Delete, and Close. Below the task list, there is a note: '* Indicates system (or firm) designated task. These cannot be changed and are listed only for reference.'

Figure 2:5

2. Select the task to be modified from the task list.
3. Click **Modify** on the right of the task list.

This is a close-up screenshot of the 'Setup Tasks' page. The task list on the left is visible, with 'Mundane A**ignmer' selected and highlighted in blue. To the right of the task list, the 'Modify' button is highlighted with a red rectangular box. The other buttons (Add, Delete, Close) are also visible.

Figure 2:6

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

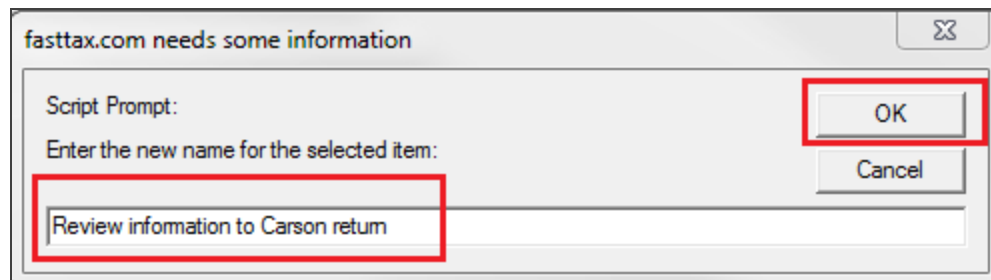


Figure 2:7

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

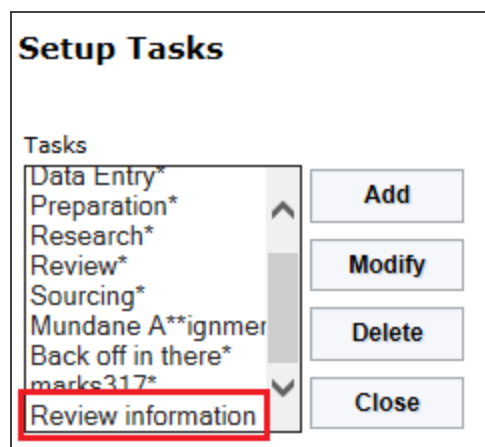


Figure 2:8

DELETING A TASK

1. Select **Admin > Tasks**.

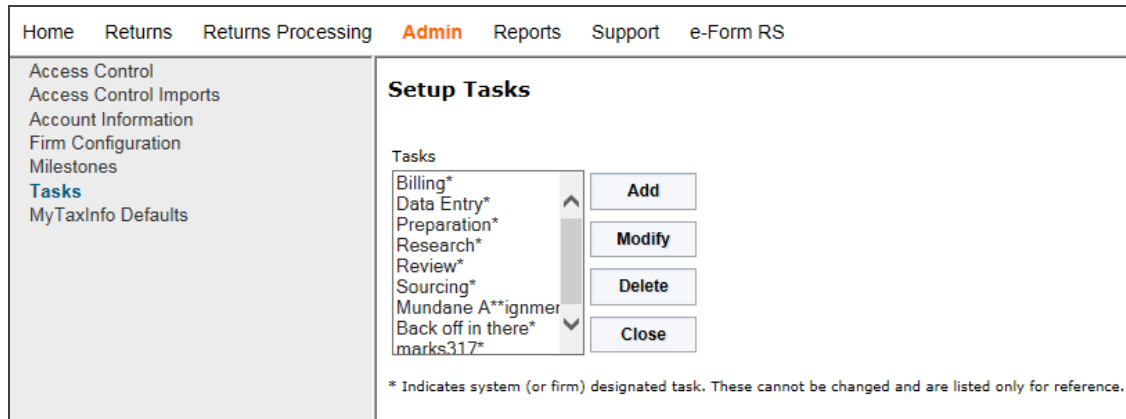


Figure 2:9

2. Select the task to be deleted from the task list.
3. Click **Delete** on the right of the task list.

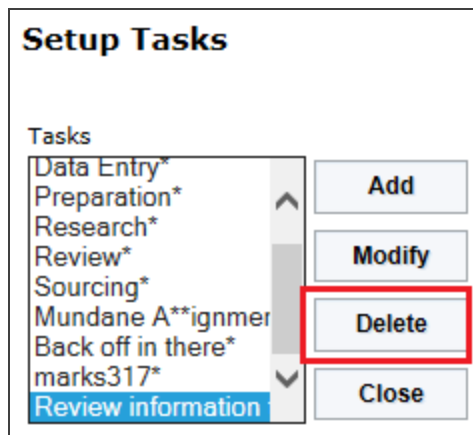


Figure 2:10

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

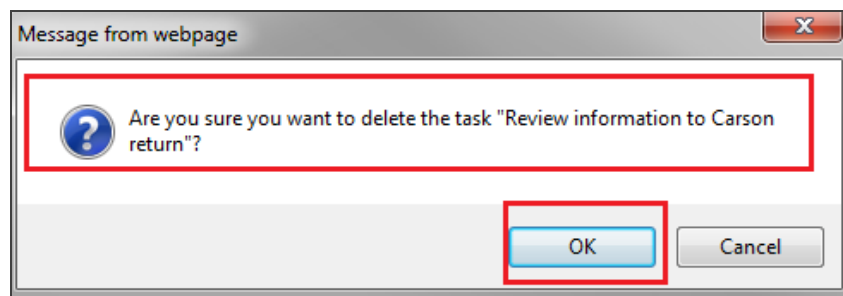


Figure 2:11

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

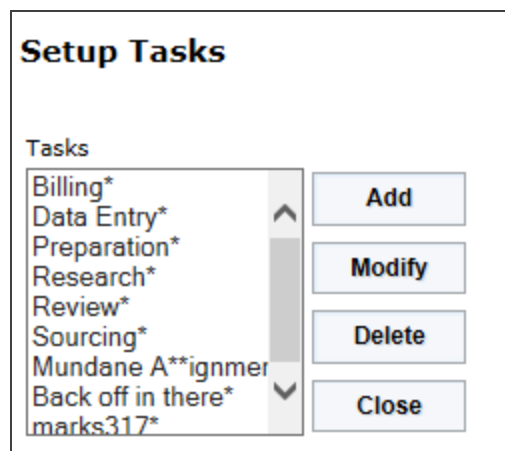


Figure 2:12

CHAPTER 3: MILESTONES

ADDING A MILESTONE

1. Select **Admin > Milestones**.

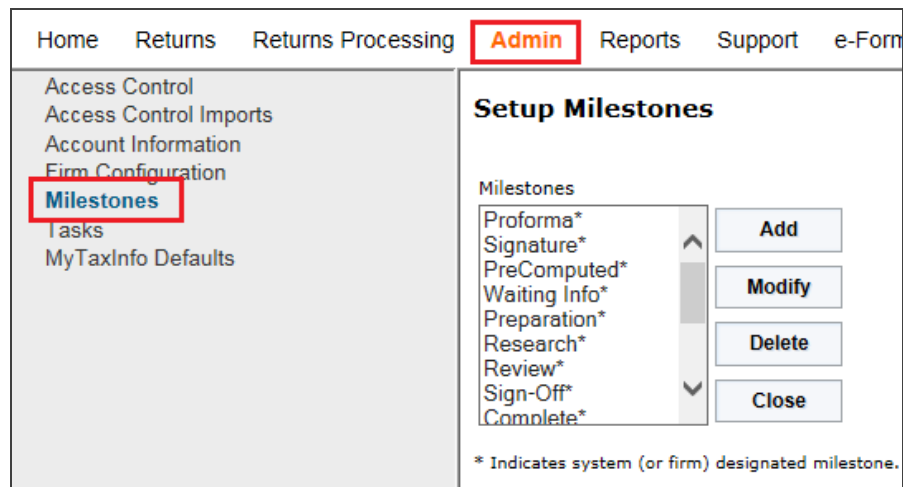


Figure 3:1

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

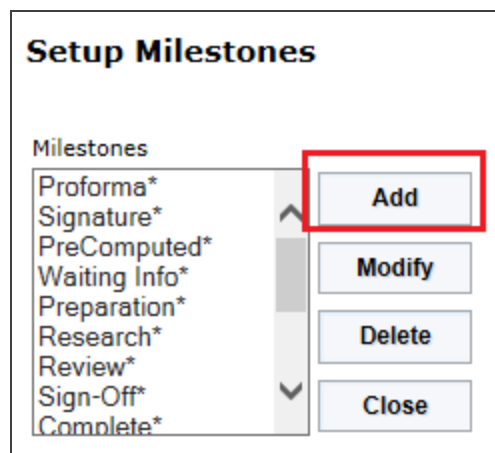


Figure 3:2

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

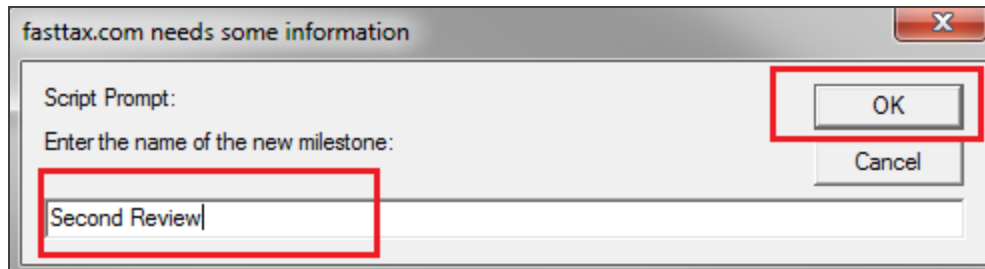


Figure 3:3

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

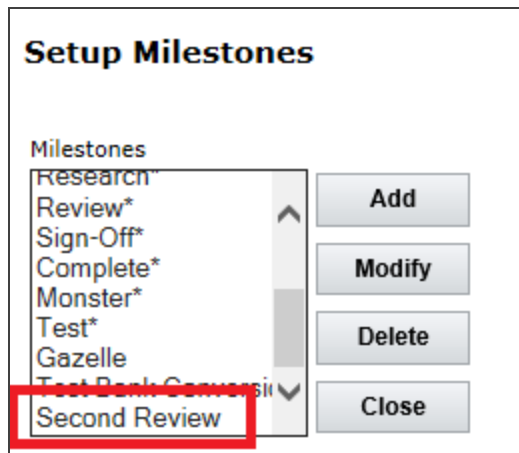


Figure 3:4

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.

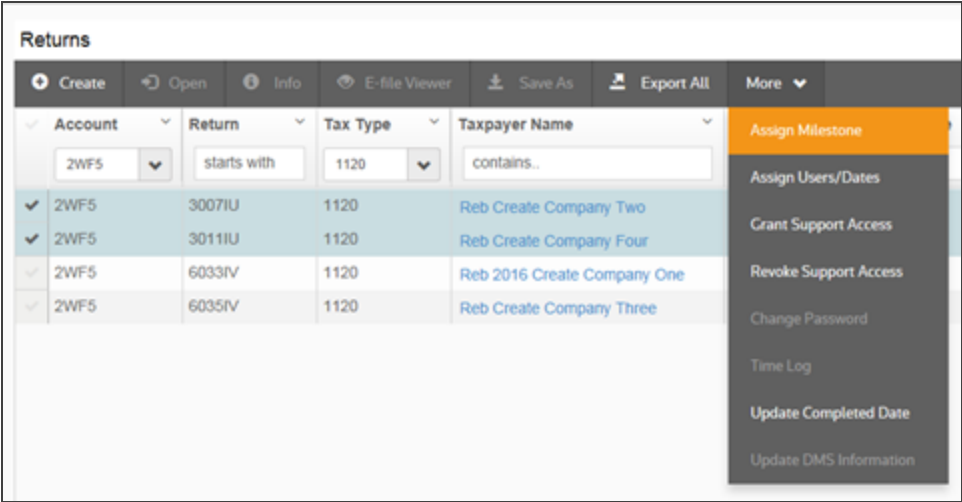


Figure 3:5

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**.

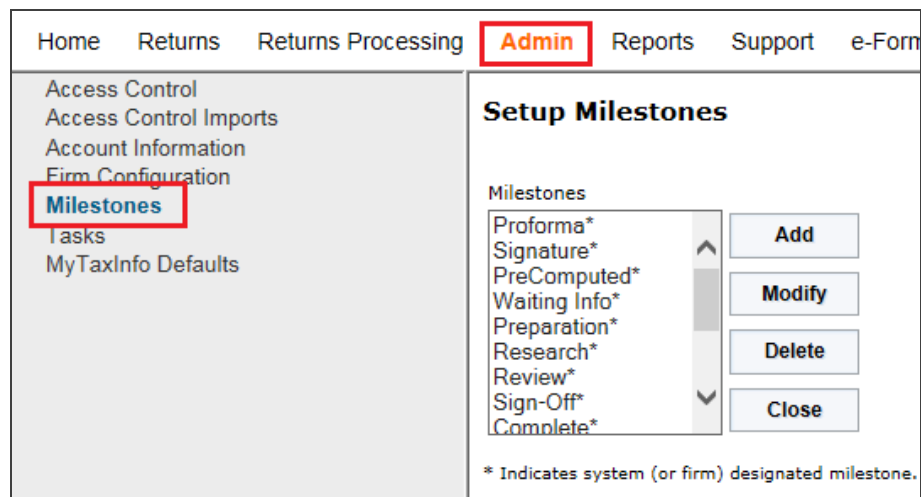


Figure 3:6

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.

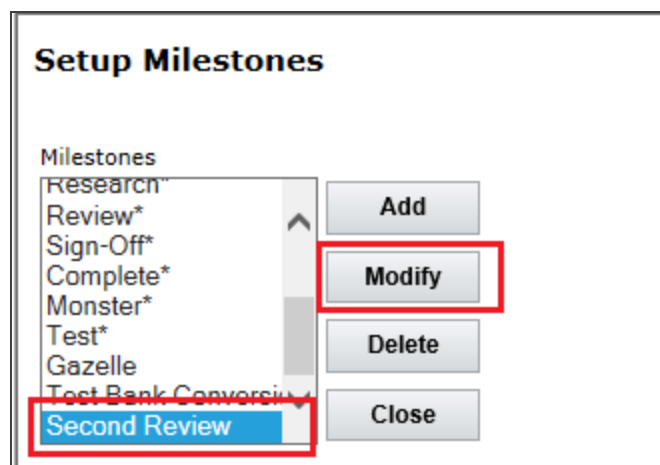


Figure 3:7

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

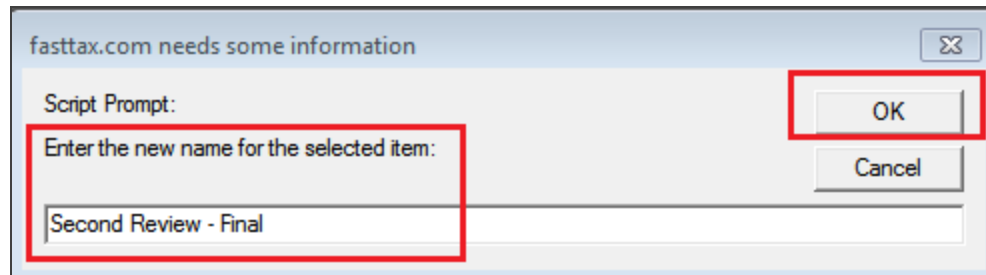


Figure 3:8

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

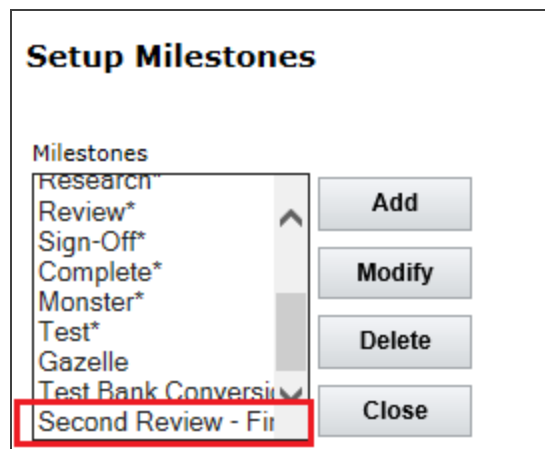


Figure 3:9

DELETING A MILESTONE

1. Select **Admin > Milestones**.

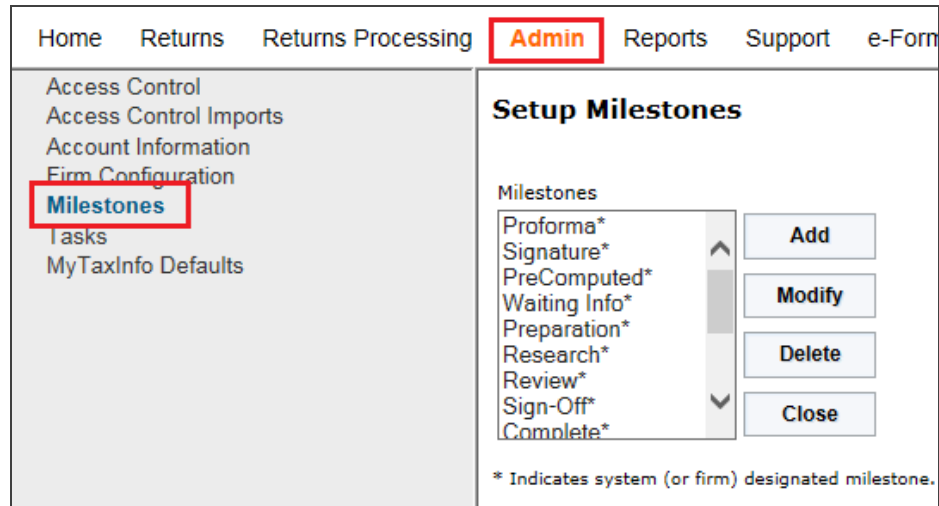


Figure 3:10

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.

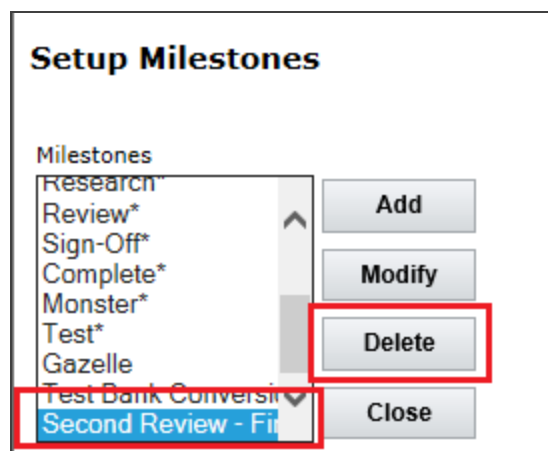


Figure 3:11

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

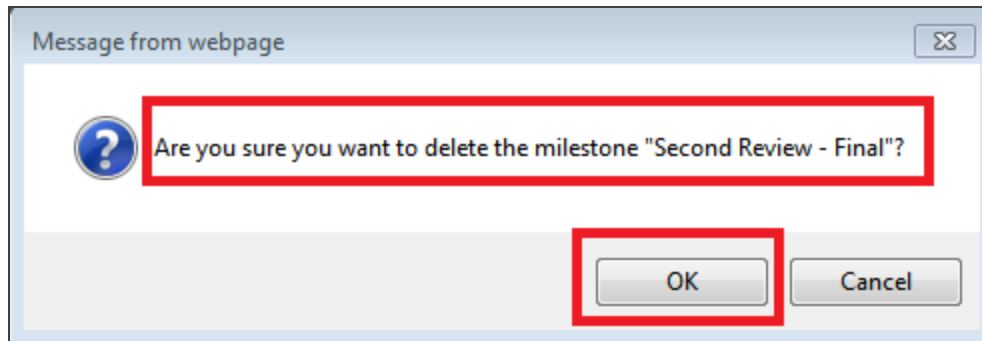


Figure 3:12

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*.

The screenshot shows a web interface for user management. The 'User Info' section on the left contains fields for Login ID (JDOE), Location (FTSUPPORT), Full Name (John Doe), Password, Confirm, E-Mail (john.doe@cpafirm.com), and Employee ID. The 'Time Tracking' section on the right is highlighted with a red box and contains the following options:

- ☒ Enable Time Tracking
- Rate: 100
- ☒ User can modify time log

Below the Time Tracking section is a 'Login' section with three checkboxes: ☐ Disable Login, ☐ Logged In, and ☐ User Locked Out. At the bottom is a 'Rights' section with a grid of checkboxes for various permissions, including FormSource, Elf Admin, Administrator, e-Form RS, Elf Unlock, Prior Year, TEQ, Remove Completed Date, Export Grid Data, Add Groups, Add Users, Create Administrators, Edit Groups, Edit Users, Group Import, Delete Groups, Delete Users, Free other returns, Firm Config., Transfer, De-Federate User, and Letters and Filing Instr.

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**.

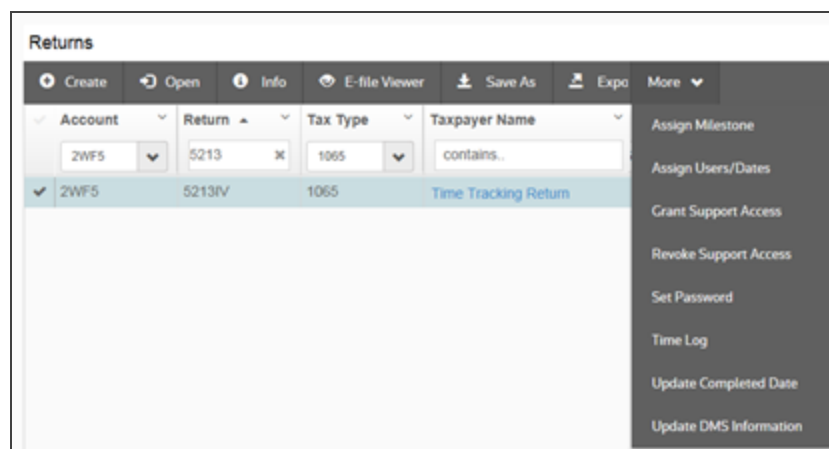


Figure 4:2

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.

The screenshot shows a web application interface with a top navigation bar containing links: Home, Returns, Returns Processing, Admin, Reports (highlighted in orange), Support, e-Form RS, Options, Help, and Log. A left sidebar lists various report categories, with 'Time Log Report' highlighted in blue and enclosed in a red box. The main content area displays the 'Time Log Report' form, which is also titled 'Time Log Report'. This form is divided into two sections: 'Time Log By Account:' and 'Time Log By User:'. The 'Time Log By Account:' section, which is highlighted with a red box, includes fields for 'Account' (text input), 'Year' (dropdown menu), and 'Tax Type' (dropdown menu with '1040' selected), followed by a 'Continue' button. The 'Time Log By User:' section includes fields for 'Location' (dropdown menu with '***' selected), 'User' (text input), 'Year' (dropdown menu with '2017' selected), and a 'Continue' button.

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.

The screenshot displays the 'Time Log Report' interface. On the left is a navigation menu with various options, including 'Time Log Report' which is highlighted with a red box. The main content area is titled 'Time Log Report' and contains two sections: 'Time Log By Account' and 'Time Log By User'. The 'Time Log By User' section is highlighted with a red box and includes fields for 'Location' (a dropdown menu showing '***'), 'User' (a dropdown menu), and 'Year' (a dropdown menu). Below these fields is a 'Continue' button. The 'Time Log By Account' section includes fields for 'Account' (a text input), 'Year' (a dropdown menu), and 'Tax Type' (a dropdown menu showing '1040'), with a 'Continue' button below it.

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.

The screenshot shows the 'Security Options' tab in the 'Firm Configuration' section. The 'Suppress Time Tracking and Milestones' checkbox is highlighted with a red box. The checkbox is currently unchecked. The text next to the checkbox reads: 'If enabled, then for users who are not required to log time, the time tracking screen will not be shown when returns are closed.'

Documentum DMS | GoFileRoom DMS | FileCabinet CS DMS | E-file Notifications

General Options | Password Restrictions | Security Threshold | **Security Options** | Single Sign-On

Support

☒ Enable Thomson Reuters Support for all locators

Group Managers

☒ Enable Group Managers

"List Only" Option on Returns Find menu

☒ Enable users to view a non-interactive listing of all returns from the Returns Find menu even if they do not have access to open returns listed.

Remember Me

☒ Login ID ☒ Firm ☒ Location

If enabled, the values entered in these fields on the login page will be stored on the user's workstation and pre-populated on subsequent visits to the login page.

Suppress Time Tracking and Milestones

☐ If enabled, then for users who are not required to log time, the time tracking screen will not be shown when returns are closed.

IP Range Subnet Validation

☐ Check to restrict Site access by IP addresses subnets

Please enter IP address subnet values to be allowed into the product. Subnets must be separated by a semicolon.

Update | Restore Defaults | History | Cancel

Figure 4:5