GOSYSTEM TAX™

LOCATOR TRANSFER GUIDE

FOR TAX YEAR 2021

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BEFORE TRANSFERRING A CONSOLIDATION LOCATOR

Before transferring any consolidated locator between accounts, be sure to delete the consolidation first. Transferring a consolidated locator can cause errors in subsequent consolidations.

1. Open the top consolidation locator and document the locators in the consolidation.

2. Remove all locator information from the consolidation and click the **Subsidiary List Complete** button. Then close the locator. This removes all returns from the consolidation.

3. Transfer the locators. Give the transfer process some time to complete.

4. Open the top consolidation locator in the new account.

5. Enter the lower members' locator numbers (and accounts, if necessary) on the consolidation locator list. Click the **Subsidiary List Complete** button.

6. Perform a compute and close the top consolidation.

INTERNAL LOCATOR TRANSFER

INTERNAL LOCATOR TRANSFER ACCOUNT SETUP

If you do not have the transfer rights, your RS Administrator can grant you permission as follows:

1. Log in to GoSystem® Tax.

2. Navigate to **Admin > Access Control > Users** tab.

3. Select the desired user.

4. Click the **Edit** button.

5. Mark the **Administrator** check box that assigns all administrative rights, such as Transfer. Clear the check marks for any rights that are not necessary.

6. Click the **Update** button.

> The new admin user may need to log back into his or her account.

INTERNAL LOCATOR TRANSFER

To transfer a locator from one GoSystem Tax account to another account within the same organization, simply follow the steps below:

1. Log in to GoSystem Tax.

2. Navigate to **Returns Processing > Transfer > Select Returns**.

3. Select the Account where the locators reside, and click **Next**.

4. Select the locators, and click **Next**.

5. Select one of the following options:

   - **Copy** (make a copy of the locators - a new locator number will be generated for each locator copied)

   - **Move** (send the locators without making a copy)

6. Click **Next**.

7. Select the **Internal Account** option and click the drop-down list to select the internal destination account. Then click **Done**.

> Performing a transfer will affect ALL years associated with the specified locator number. To transfer a specific year, you must create a copy of the locator by using the **Save As** function in the **Returns** locator list and then transfer that copied locator.

EXTERNAL LOCATOR TRANSFER

EXTERNAL LOCATOR TRANSFER ACCOUNT SETUP

If you do not have the transfer rights, your RS Administrator can grant you permission as follows:

1. Log in to GoSystem® Tax.

2. Navigate to **Admin > Access Control > Users** tab.

3. Select the desired user.

4. Click the **Edit** button.

5. Mark the **Administrator** check box that assigns all administrative rights, such as **Transfer**. Clear the check marks for any rights that are not necessary. Both **Transfer** and **External Transfer** are required to transfer locators to an external account.

6. Click the **Update** button.

> The new admin user may need to log back into his or her account.

EXTERNAL LOCATOR TRANSFER

> ⚠ *These steps must be performed by the administrators at the firm and in this order specified.*

In this example, a locator is being transferred from the Source account to the Destination account.

Destination Account

1. Select **Returns Processing > Transfer**.

2. Select **Create Request Token**.

3. Select the Destination's account.

4. Select **Generate**.

5. Copy the token and send or email the token to the Source account within 72 hours.

Source Account

1. The Source account receives the token.

2. Select **Returns Processing > Transfer > Select Returns**.

3. Select the Account where the locators reside, and click **Next**.

4. Select the locators to send, and click **Next**.

5. Select the option to **Copy** (make a copy of the locators) or **Move** (send the locators without making a copy),

6. Click **Next**.

7. Select **External Firm**, and copy the Token from the Destination account above.

8. Select **Done**.

9. Enter **Confirm**.

10. Select **Transfer**.

Destination Account

1. Select **Returns Processing > Transfer**.

2. Select **Pending External Transfer**.

3. Select **Accept**.