2008 OVERALL RATING
★★★★★

TAX COMPLIANCE SUITES

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Thomson Reuters — GoSystem Tax ES™

800-726-1040
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GoSystem Tax ES is widely viewed as the premier tax compliance system and is used by all of the Big 4 firms and most of the top 10. Although it originated as a CD-based product two decades ago, it evolved as an online program, which gives the benefit of automated updates and no maintenance. The program is geared toward larger

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practices and offers extensive formal review and multi-preparer functions, essential features for firms that provide compliance services to corporate clients and high net worth individuals with very complex tax situations. One of the core features that sets the system apart from many of the others is its tight integration with Checkpoint research platform and the other content available from Thomson Reuters. All federal and state entity types are available as modules within GoSystem Tax ES, including 1040, 1120, 1120S, 1065, 1041, 706, 709, 990 and 5500, along with most municipal, country and special jurisdiction reporting requirements. Pricing varies depending on the specific entities, states and users. First year federal 1040 price starts at $2,500 and includes 706, 709, 1040, 1041, 1065, 1120/1120S, 5500, and 990). States are priced separately. Most firms are able to utilize GoSystem Tax ES for an affordable rate when selecting only the modules needed. In addition to GoSystem Tax ES, Thomson Reuters offers UltraTax CS, which is reviewed on page 24 of this issue.

▶ GENERAL OPERATIONS/EASE-OF-USE

The program can be used from any location where the professional has access to a high-speed connection, and opens through the web browser. The default interface provides a simplified search-and-filter function for finding client returns, with options for limiting by type of entity, completed returns and tax year. Also available is the ability to sort lists by name, client code and locator, as well as by the first few characters of a column. When the selected search is displayed, users only see and have access to those clients for whom they have access rights. Menus across the top and left side of the window also offer text-based links for starting a new return, performing setup tasks, reviewing case studies and weekly Hot Topics, or accessing the Help utility. When viewing the

return search results, the left-hand menu changes to provide additional options, including assignment of preparers, milestone creation and monitoring, time logs, document management information, and access to utilities and support.

When a return is selected and opened, the program launches a subwindow that appears very much like a traditional Windows-based program, providing icons and pull-down menus across the top, while a two-tabbed menu on the left gives access to a Client Organizer or a full list of Tax Forms available for that type of entity. GoSystem Tax ES offers both interview and form-based modes of data entry. Calculations can be set to automatically process as data is entered, with information automatically transferred between forms and schedules as necessary, including between associated forms and entities such as K-1 pass-throughs and parent/child returns.

All fields with calculated or transferred data provide drilldown access to supporting worksheets or schedules. Users can access a return summary or view a replica of the form (in addition to the form-based data-entry mode). They can also attach documents to client returns or add edit and review marks to any field. Access to various management functions is restricted to authorized users. GoSystem Tax ES is powerful but maintains an efficient and generally user-friendly atmosphere that is best utilized with some form of training. ★★★★⯪

▶ WORKFLOW & PRODUCTIVITY TOOLS

As previously mentioned, GoSystem Tax ES offers an extensive feature set that is focused on firms with very complex client returns that require multiple professionals to work on each. It provides exhaustive review-focused tools, including excellent collaboration tools that allow multiple preparers/reviewers to access the return simultaneously, along with due-diligence checklists and the ability to set notes, tickmarks and other comments to any line, or to lock out specific lines from allowing future changes (subject to administrative override, of course). Individual users can also be engaged with multiple returns at the same time. Smart entry functions during data entry speed the process, and all data flows throughout the various modules of the system as necessary, with all transferred data in the program providing drilldown capabilities for easy access to source documents and related schedules/worksheets.

The web-based program also has powerful diagnostics and security features, including a full-time audit trail and return history function that monitors all return activity. Since the program is hosted by Thomson Reuters, the company is also able to provide professional users with advanced datamining capabilities that enable detailed searches and filtering across all returns and datasets. Additionally, GoSystem Tax ES's web-based nature gives professionals

GoSystem Tax ES

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the ability to hold virtual meetings with clients, who can access online data organizers, which then feed data directly into the compliance system. The system's integration with Checkpoint and TaxAlerts for research functions is very valuable for managing complex clients and for keeping abreast of tax legislation and code that may affect them.

In addition to not having to perform program updates or maintain large IT infrastructure for the program, which lessens the burden on the IT department, the online system's anywhere/anytime accessibility can also help ensure business continuance in the case of a disaster or other interruption. ★★★★★

▶ INTEGRATION/ IMPORT & EXPORT

Thomson Reuters' Enterprise Suite™ and CS Professional Suite® of accounting products (asset management, trial balance and engagement), GoFileRoom ES™ for document management, and Checkpoint for research, GoSystem Tax ES fits well within a high-end workflow environment. The program can export returns and other documents directly to bookmarked PDFs, and users can attach Word and Excel files to client returns. It can also import from various third-party programs, including trial balance and asset management™ systems. ★★★★★

▶ SUPPORT/TRAINING & HELP SYSTEM

Although users can familiarize themselves with the basics of the program in a short time, formal training is a must in order to take full advantage of the true collaboration and workflow features GoSystem Tax ES offers. Both live and web-based training options are offered, along with classes at Thomson Reuters' annual user conference. The system includes good right-click menu options and a fairly traditional Help utility, and the company offers a good online support center with tutorials, user guides and other options. Phone support is included in pricing. ★★★★★

▶ RELATIVE VALUE

As client returns grow more complex and require more eyes on them both during preparation and review processes, advanced review and collaboration tools become a must, and those offered within the web-based GoSystem Tax ES are the most powerful available, providing strong security, due-diligence checklists, a myriad of review marks and notes, and final approval processes prior to filing. The system is exquisite in design and function, and is a brute when it comes to capabilities. And it is priced as such, making it best-suited to larger practices or others who process very complex client returns. ★★★★⯪

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CATEGORIES ▶ COMPANY/PRODUCT ▼	General Options/ Ease of Use	Workflow & Productivity Tools	Integration/ Import & Export	Support/Training & Help System	Relative Value	2008 Overall Rating
BNA Software 706 Preparer /709 Preparer	4.5	5	4.5	5	5	5
CCH, a Wolters Kluwer business ProSystem *fx* Tax	4	5	5	5	5	5
CCH Small Firm Services ATX	5	4	4	4.5	5	4.5
CCH Small Firm Services TaxWise	5	5	4	5	4.5	4.5
Drake Software Drake Tax	4	4	4	5	4.5	4.5
Intuit Lacerte Tax Software	4.5	5	4.5	4.5	5	4.5
Intuit ProSeries	5	5	4.5	5	5	5
Orrtax Software IntelliTax	5	3.5	3	4	4	4
Orange Door, Inc. Orange Door Tax Suite Pro	4.5	4	3	4	4	4
RedGear Technologies TaxWorks	4.5	4.5	4	4.5	4.5	4.5
RCS TaxSlayer Pro	4.5	4	3	4	4	4
Thomson Reuters GoSystem Tax ES	4.5	5	5	5	4.5	5
Thomson Reuters UltraTax CS	4.5	5	5	5	5	5

TAX COMPLIANCE SUITES

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