THOMSON REUTERS

TIPS, TRENDS, AND CONNECTIONS FOR USERS OF THOMSON REUTERS SOFTWARE

ISSUE 2 | 2009

SOLUTIONS

GROW YOUR BUSINESS

Learn how one user is applying online technology to develop her firm

[+ why you should hire a learning coordinator]

DIRECT TO YOUR DESKTOP
This tax season, be the first to get timesaving shortcuts.

HOW PAM PLANS
A Q&A with the woman behind our annual Users' Conference.

THERE'S A CLASS FOR THAT
Learn Practice CS essentials at our 2009 Users' Conference.

THOMSON REUTERS

SOLUTIONS

ISSUE 2 | 2009

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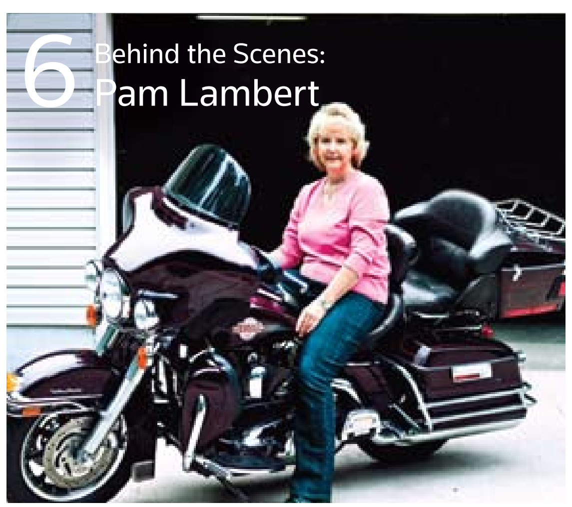

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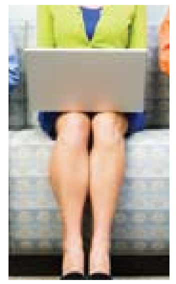

Questions or feedback? Email your thoughts to **Solutions@ThomsonReuters.com**.

Join our online users' forum, at **CS.ThomsonReuters.com/Community**.

Find more on the web, at **CS.ThomsonReuters.com.**

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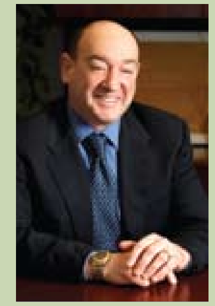
VIEW POINT

New Technology Makes Training Essential—And Easy



Those of us who work with information and data now have the power to be more productive than anyone would have thought possible just a few years ago. Why? Because technologies like online research, software provided in a SaaS (hosted Software as a Service) model, and personal client portals have made it feasible to do just about anything, from anywhere, for clients in any location and at any time. It's become so commonplace that we already take it for granted, but it really is one of the most exciting developments ever to hit the business world.

Of course, the flip side is that clients now expect more value, delivered faster, at a lower cost. And, if you can't provide what they need, someone else will. Technology can't fulfill its promise unless it's used to its full potential. This has turned professional training and development into an essential survival tool, a major driver of growth that no business can afford to be without. Now, the same technology that's raising expectations is also making it easier to meet them.

With that in mind, we've devoted this issue of *Solutions* to helping you find and take advantage of the newest and most beneficial training opportunities. One industry expert who has helped CPAs all over the country do just that is Gary Boomer, CEO of Boomer Consulting, Inc. His article on the ROI that can be realized by investing in training is a great start.

This issue also offers information about our Annual Users' Conference, to be held this year in Orlando, November 4–7. It's one of the most efficient ways I know of to learn about technology, business developments, and software training, and to network with other tax and accounting professionals—all in just a few days.

But like so many things these days, training doesn't have to be tied to a specific time or place. You can now train, learn about best practices, and get implementation consulting anytime, anywhere, through automated online training. You can even get training from a live instructor delivered over the Internet, or build your own online curriculum and make it available to your entire staff. We've invested much over the years in building a set of training and consulting options that suit nearly any need, that help our customers become more proficient in our software, and that help them gain as much return on their investment as possible.

No matter how you choose to implement training, a continuous learning culture is something no one can afford to be without. So it's my hope that this issue of *Solutions* will inspire you to imagine what it could do for your business.

Jonathan A. Baron
President, Professional Software & Services
Tax & Accounting Business of Thomson Reuters

Baron gives us a sneak preview of the upcoming Users' Conference in his latest podcast at CS.ThomsonReuters.com/Solutions.

CS Professional Suite® & Enterprise Suite™

ACCOUNTING
- Client Bookkeeping Solution®
- Engagement CS®
- Financial Analysis CS®
- Trial Balance CS™
- Write-Up CS®

DOCUMENT MANAGEMENT
- FileCabinet CS™
- GoFileRoom®

PAYROLL
- myPay Solutions®
- Payroll CS®
- Service Bureau Payroll CS™

PRACTICE MANAGEMENT
- Practice CS®

TAX
- Fixed Assets CS®
- GoSystem® Tax RS
- Planner CS®
- ToolBox CS®
- UltraTax CS™

WEB SERVICES
- NetClient CS®
- Virtual Office CS™
- Web Builder CS®

SHARE DATA, NOT PAPER

Thomson Reuters surpassed 100,000 portals for 2008 tax season.

UltraTax CS customers preparing 2008 tax returns created more than 100,000 portals that allowed their clients to access, complete, and submit web-based client organizers, as well as receive final tax returns from their preparers.

For more than eight years, NetClient CS portal technology has enabled accountants and clients to share volumes of data across a secure connection, making it easy for accounting firms to provide 24/7 online access to software, payroll data entry, aggregated financial data, and other online services to their clients. By taking advantage of the easy connectivity of the Internet and industry-standard data encryption protocols, portals allow firms to serve clients in any geographic location, providing users with significant business growth opportunities.

TO LEARN MORE about our portal offerings, visit us online at **CS.ThomsonReuters.com/portals/**.

News and Information Delivered to Your Desktop

It's easy to stay updated on the latest product news and information with the free CS.ThomsonReuters.com email subscriptions service. Email subscribers are the first to receive:

- **Notifications of software updates and download availability**
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- **Timesaving shortcuts during tax season**
- **Promotions and special discount offers**

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→ **If you don't have a CS.ThomsonReuters.com web account yet, visit CS.ThomsonReuters.com/Email, have your firm ID handy, and select the Create an Account link to set up your free account and register for your email subscriptions. Thomson Reuters values your privacy and will never share or exchange your email address.**

BILL.COM NOW INTEGRATES WITH WRITE-UP CS!

If you're a Write-Up CS user, month-end processing just got simpler. New integration between Write-Up CS and Bill.com, the paperless online bill management service, makes write-up faster and easier.

→ To learn more, go to **Bill.com/ThomsonReuters**.

Bring Your Entourage on the Road

Virtual Office CS Syncs with iPhone, Windows Mobile

Virtual Office CS now offers Microsoft Exchange synchronization with additional handheld devices, thanks to ActiveSync® technology that allows NetStaff CS users 24/7 wireless access to their Microsoft® Outlook® (Exchange) data. Once a user activates his or her handheld device, he or she will have access to the following personal information from Virtual Office CS:

- **iPhone:** calendar, contacts, and email
- **Personal handheld device running Windows Mobile®:** calendar, contacts, email, and tasks

If a firm is licensed for Virtual Office CS Microsoft Exchange, and a NetStaff CS user has a compatible iPhone or personal handheld device, the firm can enable this technology for the user.

Compatible handheld devices are:

- **iPhone** devices running operating system 2.0 or higher
- **Personal handheld devices running Windows Mobile** version 5.0 or higher

The contract with the service provider must include a data plan that supports synchronization with a Microsoft Exchange server.

Get More from Your Software with Help from Xcentric and Thomson Reuters

Xcentric, an IT consulting firm that specializes in assisting accounting firms implement new software with networking, system configuration, hardware, and environmental recommendations, has partnered with Thomson Reuters to bring their expertise to CS Professional Suite software users.

While Xcentric's current focus is primarily assisting users of Engagement CS and Practice CS to implement software, they also have considerable experience with UltraTax CS and the other programs of the CS Professional and Enterprise Suites. Firms that use Xcentric during implementations find that it's an excellent way to help ensure that sufficient resources exist to exploit the power of their software. Xcentric can also help them build a familiarity with the products, plan the best hardware environment, and define network permissions for greatest security and efficiency from the software.

Thomson Reuters and Xcentric also recently partnered to implement a web session on technology best practices for both Engagement CS and Practice CS projects for Thomson Reuters' consulting program.

FIND OUT MORE about Xcentric's implementation services. Visit Xcentric.com.

NEW TOOLS

To help you communicate the benefits of Client Bookkeeping Solution (CBS) and NetClient CS to your clients, we recently updated some marketing tools with a new look and enhanced content. Materials can be customized with your firm name and contact information. Updated marketing tools include:

- CBS Marketing Handbook
  This comprehensive guide provides tips on using, pricing, and marketing CBS to your clients.
- CBS Client Brochure and Client Flyer These informative materials detail the benefits of CBS for your clients and are available in two formats—one that's perfect for including with statements and another that you can use in your office.
- NetClient CS Statement Insert and Client Brochure
  These marketing pieces give you two attractive options for educating your clients on the benefits of online client portals.

Check out all the downloadable marketing tools and order forms for these programs at **CS.ThomsonReuters.com/Support**.

BEHIND THE SCENES AT THOMSON REUTERS:

PAM LAMBERT Gets Everyone on the Same Page

If you've attended one of our annual Users' Conferences, then you know what complex events they are. Ever wondered who's behind the scenes, ensuring every conference is a raving success?

MEET PAM LAMBERT, *manager of Meeting and Event Planning at Thomson Reuters in Dexter, Mich. Lambert began working at the company in 1993 as executive assistant to the president and is currently coordinating her 17th annual Users' Conference. She also coordinates the company's trade show participation, organizes Partner Summits, and manages internal company events as part of her responsibilities at Thomson Reuters. But the Users' Conference occupies most of her time year-round. In her spare moments, she puts her organizational skills to use by hosting scrapbooking workshops.*

***Solutions:* It's unusual today for an employee to stay at a company for so many years—let alone work on the same project for that long.**

Pam Lambert: From year to year the conference changes, so there are new things that go into the planning of it and new challenges. For example, this will be the first year that we've included workshops geared to Enterprise Suite users. Plus, the technology has changed so much, so the way things are done is different from 15, 10, or even 8 years ago. We have a lot of repeat attendees, so it's been nice getting to know people and developing relationships.

Where can we find you when you're not at the office? Spending time with my husband and family. We have two children and three grandsons, with a fourth grandson due in October. Our lives are filled with baseball right now.

What else do you enjoy? Scrapbooking. When my first grandson was born, scrapbooking was a great way to organize pictures so they'd be looked at instead of just left in boxes. Now I have a business selling scrapbooking supplies. Maybe it's the planner in me, but twice a year I host workshops for 60 to 70 ladies who scrapbook. I admit it's easier organizing those workshops than it is coordinating a Users' Conference for hundreds of people!

SNAPSHOT OF PAM

PERSONAL ORGANIZATIONAL OBJECTIVE: "Trying to get all my pictures in scrapbooks. There's never enough time!"

A SURPRISING HOBBY FOR A GRANDMOTHER: "My husband and I ride Harleys with a group of friends. We've ridden across Michigan, out west to Sturgis, through most of the southern states, and all the way to Florida. It's a lot of fun and a great way to meet new friends."

Tech TUTORING

Learning more is a good thing. It's even better when the education is tailored to your needs. Need proof?

Jean Rakich, director of Training and Consulting Services, and Priyanka Sara John, lead, Professional Services, share four ways custom training and professional services from Thomson Reuters can benefit your firm.

1 Maximize your investment. Even the best-designed software won't deliver 100 percent if the people using it don't know about 100 percent of its functionality. "If you're going to spend money on a product to make your business more efficient, you need to understand everything that product can do so it's being leveraged to the fullest," Rakich explains. Custom training shows users how a product can be applied to meet their firm's exact requirements and gives users an in-depth understanding of a product's capabilities.

2 Customize and integrate your solutions. Implementing new software shouldn't mean old programs get tossed. Professional Services consultants work with users to integrate Thomson Reuters' products with those already in place. Specifically, products can be set up to create customized reports with a firm's exact specifications. Data can also be migrated from an old system to a new one. Custom development fills in the gaps even more. "We don't change our product, but we build around its fringes to create a bridge between a user's existing application and the new product," John says. "This integration makes firms more efficient."

3 Enhance operations without missing a beat. There's no sense in improving technological efficiency if it slows down other areas of your business. Thomson Reuters' training and professional services specialists use best practices and industry recommendations that can help clients avoid having to reinvent the wheel. "Firms don't want to reinvent the wheel. They want us to help them figure out how to keep what works while adding our products to their business," Rakich says. "Business goes on as usual, even while you're implementing a new product."

4 Make technology work for you. Even the brightest users working with robust technology solutions benefit from personal attention. "We look carefully at the internal processes of each firm, and tailor the training to exactly how users will be working with the product," John explains. "At the end of the day, it's all about fulfilling each firm's requirements and optimizing workflow to be as efficient and profitable as possible."

GET SMART(ER): Thomson Reuters offers professional services and custom training under the umbrella of consulting services. For more information about personalized consulting, call **800.968.8900** or email **CS.Sales@ThomsonReuters.com**.

JEAN RAKICH is the director of Training and Consulting Services for the Tax and Accounting business of Thomson Reuters.

PRIYANKA SARA JOHN is a lead in Professional Services at Thomson Reuters.

BLAZING A TRAIL

How Ursula Serluca is using technology to lead her clients to fiscal understanding.

STARTING A NEW FIRM PROVIDED THE IDEAL OPPORTUNITY FOR THIS USER TO ENHANCE HER SERVICES WITH THE HELP OF WEB-BASED SOLUTIONS.

Ursula Serluca doesn't consider herself just an accountant, though she's been working as a CPA for nearly two decades. Instead, she would prefer to be known as a financial trainer: someone who helps her clients get their finances in shape, no matter what may be going on in their lives.

"I compare myself to a physical trainer: People often need a trainer to stay on track, and the same thing is true when it comes to their finances," she explains. "Money is very emotional for people, so accountants do a lot of hand-holding. We are like therapists sometimes, trying to help clients through whatever situation they're in at the moment."

Serluca knows what she's talking about, having made it through a separation from the partner she had run a tax and accounting firm with for 18 years. She saw an opportunity to create the kind of firm she's always envisioned, one that put her on a path she'd always wanted to follow.

In 2009, Serluca founded Serluca Group in Rye Brook, N.Y. At the top of her list of objectives when she opened her new firm: Provide a complete array of financial services for businesses and individuals in a manner that capitalizes on technological solutions available. "I'd been wanting to use a web-based approach because I love technology so much and I think it can help us provide better service," Serluca says.

Practical and Personable

Serluca's approach to serving her clients shatters the illusion many people have that a web-based firm is more focused on technology than on personal interactions. In fact, Serluca views technology as a means to getting closer to her clients.

"Accountants can get so overburdened and overworked with the little details that there's not much time left to have a personality," she explains. "So if we let the technology take care of the little stuff, we can be more engaged with our clients and make them feel good about working with us. They get a chance to see we're not made of cardboard."

Serluca Group's web-based model leverages Thomson Reuters' CS Professional Suite, which

[SERLUCA GROUP **FIRM FACTS**]

SERVICES The firm offers a complete range of financial services such as business tax planning, accounting, and payroll tax returns. The firm also provides personal financial planning, tax and accounting services, as well as investment and insurance services.

WEBSITE Visit **serlucagroup.com**, where clients can access a wealth of self-service tools, find helpful resources, and read Serluca's blog.

SOFTWARE Serluca's firm currently uses the following Thomson Reuters products:

- Practice CS
- FileCabinet CS
- Fixed Assets CS
- Write-Up CS
- UltraTax CS
- NetClient CS
- myPay Solutions






"My goal is to organize data for my clients in a more visual way, so they can really understand what's going on."

Serluca praises for its superior integration. "It streamlines client management considerably, which saves time," she says.

Having all of her clients' data on a single platform is particularly appealing to Serluca. For instance, she explains, if you change a piece of information about a client, it's automatically updated across all of the integrated solutions for maximum efficiency and accuracy. Plus, there's no need to go digging through paper files to find a document or make a copy to send to a client, because everything is stored online.

In addition to CS Professional Suite, Serluca uses myPay Solutions, which lets accounting firms provide full payroll services to their clients with ease and efficiency.

"If you want all of the elements of your practice to be integrated, you need to commit to one vendor," she says. "Thomson Reuters provides that integration, and they definitely address the needs of the accountant."

HEAR HOW SHE DID IT

Listen to Ursula's advice for launching a client-focused website, at **CS.ThomsonReuters.com/Solutions.**

Fiscal Fitness, Made Friendly

Maximizing the value of a web-based business model, Serluca created a website dedicated to helping her clients in a way that's both extensive and convenient.

The site, serlucagroup.com, is divided into three major sections: Business Services, Personal Services, and Investments & Insurance. It's designed to provide clients access to their financial records as well as a bevy of self-service tools and detailed tax information.

"Dealing with finances can be overwhelming for many people. They may not know where to start and get disorganized with paper flooding in from all directions," Serluca says. "My goal is to organize data for my clients in a more visual way, so they can really understand what's going on."

The Business Services section, for example, features secure portals to NetClient CS, so business clients can look up their financial information, including tax returns. They can also manage payroll processing on a schedule that works best for them, with myPay Solutions.

The site's Personal Services section is geared to the needs of individuals. It contains resources and tools that help people organize, manage, and better understand their finances.

Throughout the site, the tone is approachable, friendly, and sometimes even humorous. "Ursula makes technology available to people in a very comfortable way," says Michael Carlesimo, Serluca's myPay Solutions account representative. "People still feel a personal connection with her and her staff, but they can also get the immediate response to information they want and need."

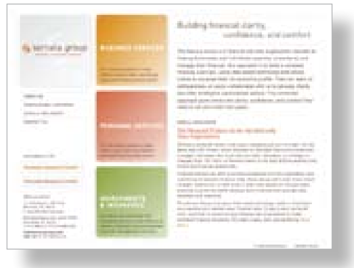
Carlesimo adds that Serluca gets the most out of the Thomson Reuters software solutions she's using, a fact that he thinks contributes to her success. Better still, she knows how to leverage the technology to the advantage of her clients.

"Ursula is incorporating the technology and using portals to help better serve her clients," Carlesimo says. "She doesn't like to see people struggle, so it's part of her nature to reach out and help them along." With boundless enthusiasm for educating clients and offering the personalized support they need to manage their finances, Serluca is making life easier for her clients.

"I believe our web-based approach will completely enhance my client base and my business," Serluca says. "And I think it's going to pay off for me in terms of time-savings and efficiency."

ONLINE, ANYTIME: SERLUCAGROUP.COM

The firm's website features distinct sections for each client group, as well as plenty of self-service tools and industry information.



A **Savvy** Solution

With myPay Solutions, tax and accounting firms of any size can offer their clients a convenient payroll service that's user-friendly for all involved.

Through a secure web portal, clients enter payroll data and receive ready-to-print payroll checks. They can also access payroll-related reports, such as a Tips Analysis, Depository Totals Report, and Condensed Payroll Journal.

Accounting firms that refer their clients to myPay Solutions receive integrated, detailed payroll journal entries that flow directly into their Write-Up CS software. Firms also receive a 10 percent revenue share for every client that uses myPay Solutions.

Best of all, firms can provide their customers a top-notch payroll processing service without any administrative burden—or competition. Thomson Reuters acts as the service bureau provider, but pledges never to interfere with a firm's client relationships.

To learn more, call 800.968.8900 or email Sales@myPaySolutions.com.

An outsourced payroll solution can improve how you serve clients. See a demonstration of myPay Solutions at the Users' Conference. Learn more at **CS.ThomsonReuters.com/UC**.

"Ursula takes a straightforward approach to finding out what each client's goals are," says Carlesimo, the myPay Solutions representative for Serluca's firm.

BEYOND BASIC TRAINING

L. Gary Boomer discusses how a learning ladder will position your staff and business for growth.

POP QUIZ: In addition to a competitive salary and benefits package, what can your company offer to make you an employer of choice? If you answered, "Giving employees the chance to learn and grow and become more skilled at the work they do," you move to the head of the class.

L. Gary Boomer, CPA, CITP, president and founder of Boomer Consulting, Inc., recommends employers make knowledge a priority, creating what he calls a "training/learning environment."

Boomer further explains, "This type of culture is developed as a two-way street. Partners can train and partners can learn, and in a healthy training/learning environment, this exchange is happening all the time."

Training should begin early on, with an orientation program that encourages new employees to learn about the company's history and your vision for its future. Staff should understand company standards, policies, and procedures. Teaching soft skills, such as organization, efficiency, and client development, reinforces a commitment to service and profitability.

Learning shouldn't stop after orientation. All staff, including partners, should have the opportunity and incentive to continue growing professionally. "Employers must commit to developing a training/learning culture, where people can advance in their career—and I don't mean just CPE training," says Boomer.

Tally Your Returns

Especially in a tight economy, it's tempting to eliminate the cost and time required for staff education. Boomer emphatically cautions against this. "Yes, it's an ongoing expenditure, but the return is ongoing, too. You retain the best and brightest people, and the entire firm gets smarter and improves its capabilities."

According to Boomer, production at most firms can increase by at least 2 percent, and as much as 5 percent, just through ongoing education.

Maximize this return on investment with thoughtfully developed and delivered training. Boomer recommends hiring a dedicated learning coordinator, even if your firm is bringing in third-party trainers. Appointing an individual with a background in adult education to work solely on your company's learning program is ideal, but Boomer admits that staffing like this often isn't possible until the firm reaches a size of 30 to 40 employees. As an alternative, Boomer recommends "sharing" a training coordinator who works part time at your company and part time at another.

Cultivate Growth

With a training coordinator in place, craft an educational plan that makes sense for your firm and its staff members. Boomer suggests each employee receive a personalized training curriculum that's tied to performance reviews.

"The firms that seem to do the best are those that set expectations up front, using what's known as a learning ladder," he explains. "It should be made clear what each employee is expected to know after one year, two years, three years and so on, in order to advance in his or her career."

Boomer adds that a well-developed culture of learning can entice younger employees. Relevant training opportunities will help even smaller firms recruit against large competitors.

"There's no question that it takes a lot of effort to put together a training/learning culture," Boomer says. "But I don't know of a firm that's done it that hasn't said it's exactly the right thing to do—and a big differentiator."

> **"The firms that seem to do the best are those that set expectations up front, using what's known as a learning ladder."**

L. GARY BOOMER, CPA, CITP, is president and founder of Boomer Consulting, Inc., in Manhattan, Kan. His company serves leading CPA firms nationwide and specializes in practice management, training and learning, and human capital. Learn more at www.boomer.com/?garyboomer.

BOOMER SPEAKS

Get more tips for hiring the right learning coordinator for your firm at CS.ThomsonReuters.com/Solutions.

[According to the Gartner Group, training investments net **FIVE HOURS** of increased capacity for every hour spent in training.]

GET IN THE KNOW

Our software experts can help you fill in the missing pieces.

WRITE-UP CS

Q: Is there a way to quickly determine the year-to-date net income amount without running a full financial statement?

A: Yes, by choosing **Tasks / Transaction Entry** and then choosing **Calculate YTD Income / Loss** from the F3 context menu. Using this command is also useful for troubleshooting if you think that the net income/loss shown on an income statement is incorrect.

CLIENT BOOKKEEPING SOLUTION

Q: If I'm entering multiple transactions at once for the same vendor and/or customer, is there an easy way to recall the same vendor or customer on a new transaction?

A: In the **Utilities / Options** window, there's an option called **Enter Defaults Previous Record**. If this option is marked, you can press **Enter** in the ID field in the data entry window to automatically choose the last vendor/customer for whom you entered a transaction.

PAYROLL CS

Q: How can I override the federal withholding rate for non-periodic bonus checks?

A: Assuming that the bonus pay item has been set up with the non-periodic pay frequency, there are two ways to handle a rate override.

- If the same tax rate applies to all employees, choose **Setup / Calculation Profiles** and edit the profile used for bonus checks. Enter the override percentage on the **Deduction and Withholding Overrides** tab.
- If the bonus pay item is subject to different withholding rates across employees, you would need to specify the override percentages on an employee-by-employee basis. **Choose Setup / Employees**, double-click the employee name in the list pane, choose **Edit / Non-Periodic Tax Rates**, and enter the relevant override percentage in the dialog that opens. The program uses this rate for the selected employee rather than the rate specified in the Calculation Profile.

TRIAL BALANCE CS

Q: I'm hoping to convert client data from ProSystem fx® Engagement to Engagement CS. Is there a way to bring over the engagement's trial balance?

A: Yes. Starting with version 2009.1.1, Engagement CS can convert the engagement's trial balance automatically. Please refer to the PDF guide called *Conversion Guide: Trial Balance Data from ProSystem fx Engagement to Trial Balance CS*, which is accessible from the help topics.

ENGAGEMENT CS

Q: Is there an easy way to clear Warning 2 from the treeview?

A: Yes. Starting with version 2009.1.1 of Engagement CS, choose **Edit / Clear Warning 2** or **Clear All Warning 2**.

FINANCIAL ANALYSIS CS

Q: I'm just getting familiar with the Financial Analysis CS program and wonder what kinds of features it has?

A: One feature you may not know about is that, for a location/department client in Write-Up CS or Trial Balance CS, you can transfer over each location or department as a separate client in Financial Analysis CS. When the transfer is complete, you'll have a client for each location/department as well as a client with the combined totals.

- To use this feature, open the location/department client in your CS Professional Suite Accounting (CSA) product, choose **Utilities / Transfer Data to Financial Analysis CS,** and mark the **Transfer each location as a separate client** checkbox.

ULTRATAX CS

Q: Can I include late filing interest and penalties in the balance due on my client's return?

A: Yes. UltraTax CS calculates late filing interest, failure to pay, failure to file, and estimated tax penalties (Form 2210) based on the date the return will be filed. The program also includes calculated penalties on the Late Filing Interest and Penalty Worksheets, which you can access by switching to **Form view** (CTRL+F) and clicking the **Late** folder.

- Calculated penalties are also included in the balance due on the client's printed filing instructions, and are printed across the bottom of Form 1040, page 2. UltraTax CS prints Form 2210 when the filing requirements are met. Per Form 1040 instructions, only estimated tax penalties may be included in the balance due on Form 1040; all other penalties must be calculated separately.
- To calculate penalties, click the **Payments folder**, open **Screen Pen**, and enter the appropriate date in the **Date 2008 return filed** field. Screen Pen also provides fields for prior-year tax and AGI, which are used to calculate Form 2210 penalties.
- **TIP:** Screen Pen also includes **Suppress penalties on Form 1040** fields. To ensure that UltraTax CS calculates penalties as expected, verify that none of these fields are marked.

GOSYSTEM TAX RS

Q: How do I check the status of my electronically filed returns?

A: To check the status of electronically filed returns in GoSystem Tax RS:

- **1.** In the GoSystem Tax RS browser, navigate to **Returns / Process / Electronic Filing / Status Report**.

  2. Enter information to focus the report on the specific set of desired clients, such as return type, e-file type, and federal status. To see all of the transmitted federal electronic files (whether they are pending acknowledgement, accepted, or rejected), choose **All Statuses (excluding Ready to Send)** from the **Federal Status** field.

  3. Click **Continue** to generate the report.

GOFILEROOM

Q: How do I identify and enable disabled GoFileRoom add-ins in Microsoft Office® 2007?

A: Follow these steps:

- **1.** In Microsoft Word® or Excel®, click the **Office** button and then click the **Word Options** or **Excel Options** button.

  Note: In Outlook, choose **Help / Disabled Items** and skip to step 4 below.

  2. In the Word Options or Excel Options dialog, click **Add-ins** in the list on the left.

  3. From the **Manage** field at the bottom of the dialog, select **Disabled Items** and click the **Go** button.

  4. Select any **GoFileRoom add-ins** that appear in the Disabled Items dialog and click the **Enable** button.

MORE ON THE WEB

Got another question? No problem. More Tips & Tactics are waiting for you at **CS.ThomsonReuters.com/Tips**.

featured solutions in this issue

ACCOUNTING

- Client Bookkeeping Solution
- Engagement CS
- Financial Analysis CS
- Trial Balance CS
- Write-Up CS

DOCUMENT MANAGEMENT

- GoFileRoom

PAYROLL

- Payroll CS

TAX

- GoSystem Tax RS
- UltraTax CS

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SUN-DRENCHED WARMTH AND WONDER AWAIT YOU IN ORLANDO

Registration is Open!

Join us in the Sunshine State for the 29th Annual Thomson Reuters Users' Conference for Professional Tax & Accounting Firms, taking place November 4–7 at the Gaylord Palms Resort & Convention Center in Orlando, Fla.

This year's conference offers more than 70 workshops—including CS Professional Suite and Enterprise Suite training, and a variety of practice management and technology sessions, as well as keynote addresses by nationally recognized speakers. The valuable information, entertaining events, and rich networking opportunities will help make your conference experience productive and fulfilling.

Visit **CS.ThomsonReuters.com/UC** to register or for more information. You can also register and request a printed program by calling a Customer Service Representative at **800.968.0600** and pressing 1, then 5.

SAVINGS & DISCOUNTS

The registration fee is $1,095 for the first person registered from your firm. And even though the early registration period has ended, you can still save up to $150 with these discounts:

- Additional Firm Attendees—SAVE $100
- Previous Attendee Discount—SAVE $50 (if you attended our 2008 Users' Conference)

BOOK YOUR ROOM TODAY

Reservation requests must be received by October 8, 2009, to qualify for the special conference room rate and to ensure room availability. Discounts are based on availability. The Gaylord Palms is also extending the special group rate for three days before and three days after the main program dates of November 4–7, 2009.

Make your reservation by calling the Gaylord Palms Resort & Convention Center at **407.586.2000** and asking for the Thomson Reuters Users' Conference group rate. You can also visit us online at **CS.ThomsonReuters.com/UC**, then click the **Travel** link.