



# GOSYSTEM<sup>®</sup> TAX RS

## 2015 LOCATOR TRANSFER GUIDE

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**Note:** Please note that all screen images are valid as of May 17, 2016 and are subject to change at Thomson Reuters' discretion.

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# RS BROWSER LOCATOR TRANSFER

## 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 returns (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 RS.
2. Navigate to **Administrative Functions | Access Control**.
3. Click the **Users** tab and 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.

FIGURE 1

6. Click the **Update** button.

*Note: You may need to log into your account again.*

## INTERNAL LOCATOR TRANSFER

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

1. Log in to GoSystem Tax RS.
2. Navigate to **Returns Processing | Transfer | Select Returns**.

The source account indicates where the locator currently resides. The destination is where the return will be transferred to.

The transfer is done by tax type. You have the option to enter a locator number, or leave the field blank to generate a list of locators.

FIGURE 2

3. Click **Continue**.

4. Then select the locator(s) to be transferred, and click **Continue**.
5. To confirm transfers, go to **Returns Processing | Transfer | Batch Status**.

FIGURE 3

6. Confirm the login ID, as this defaults to the user currently logged in. Choose the **From:** and **To:** dates to expand your search (default is the current date), and click **Continue**. The following screen appears.

Date/Time	Tax Year	Tax Type	Items	Batch ID
6/30/2015 1:27:34 PM		1040	1	<a href="#">256802</a>

FIGURE 4

7. Click the hyperlink of the selected Batch ID.
8. If the transfer is *queued*, the following status screen appears:

Source Account/Returns	Year	Destination Account/Return	Transfer Status
2WFS/4734CY	2012		Queued to GoCenter
2WFS/4734CY	2013		Queued to GoCenter
2WFS/4734CY	2014		Queued to GoCenter
2WFS/4734CY	2015		Queued to GoCenter

FIGURE 5

9. If the transfer is finished, from the transfer confirmation screen (**Transfer Status for Batch ID XXXXXXXX**), ensure that all locator numbers are correct and that the transfer status reads *Transfer Succeeded*.

<b>Transfer Status for Batch ID 287687:</b>			
<b>Source Account/Returns</b>	<b>Year</b>	<b>Destination Account/Return</b>	<b>Transfer Status</b>
2WFS/4734CY	2012	2WF6/4734CY	Transfer Succeeded
2WFS/4734CY	2013	2WF6/4734CY	Transfer Succeeded
2WFS/4734CY	2014	2WF6/4734CY	Transfer Succeeded
2WFS/4734CY	2015	2WF6/4734CY	Locator transferred in GoSystem

**4 records returned.**

Refresh Cancel

FIGURE 6

*Note: 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 return by using the **Save As** function in the **Return | Find Return** locator list and then transfer that copied locator.*

## EXTERNAL LOCATOR TRANSFERS

To transfer or copy a GoSystem Tax RS locator to an account at a different organization, you will need to:

1. Prepare a locator transfer request authorization page (this must be on source account company letterhead).
2. List the source account name, city, and account number.
3. List the destination account name, city, and account number.
4. List each locator with the taxpayer name and tax type.
5. Indicate whether the locators should be transferred or copied.<sup>1</sup>
6. Indicate the destination contact name and email address.
7. A Microsoft® Excel® document with locator number, taxpayer name, and tax types must be attached if the locator transfer request exceeds seven locators. For a copy of the template Excel document:

**A.**Please visit our Product Assistance website.

**1. Locators:** Can either be transferred or copied. When a locator is transferred, the source account gives up full possession of the locator (unless you have a backup copy saved to an independent site). When a locator is copied, the source account maintains the original locator information, and the destination account receives the same information with the new locator number.

**B.** Click **Search**, type *Locator transfer* into the **Key word(s)** field, and press **Enter**.

**C.** Under the list of attachments, select **Locator\_Transfer\_Example\_Request\_Forms.xls**.

8. The RS Administrator must sign the request on the Client Information Form (CIF).
9. Submit this request to [TTA.TransferDesk@Thomson.com](mailto:TTA.TransferDesk@Thomson.com) to be completed. ONESOURCE Firm Edition accounts should submit requests to [ONESOURCETransferDesk@ThomsonReuters.com](mailto:ONESOURCETransferDesk@ThomsonReuters.com).