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Dec. 22, 2007

*From the Jan./Mar. 2008 [Review of Tax Research Systems](#)*

The Checkpoint system is one of the most comprehensive online research programs on the market, providing access to virtually all of the tomes of tax and legal research materials produced by the Thomson Corporation's various entities, including RIA, PPC and WG&L; third-party content from providers such as BNA, AICPA, GASB, FASB, PCAOB, IBFD; as well as libraries of source documents from the IRS, SSA, court rulings and international treaties.

Along with these resources, Checkpoint provides authoritative guidance and practical

advice on individual and corporate taxation and other areas. Other features available through the Checkpoint system include tax and accounting news updates, various calculators, interactive checklists, client letter templates, sales tax rate lookups, practice development tools and CPE-eligible training sessions. Checkpoint is very modular, with practices selecting the specific libraries and feature sets they need. Pricing starts around \$1,000 per year. (The vendor noted that because the system is so customizable and modular, actual pricing may start well below \$1,000 or begin at a higher range, depending on content subscribed to and number of users.)

#### **EASE-OF-USE/SEARCH ROUTINE — 5 Stars**

Opening into the totally customizable My Checkpoint home screen, the online tax and accounting research system lets users perform basic searches, set up quick links to selected titles, view breaking tax and accounting-related headlines, or access training options. Several tabs across the top of the screen provide access to a more comprehensive Newsstand, Tools, Practice Development and CPE

options, while the Research tab obviously houses the system's primary

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navigation functions are available in a vertical menu that offers Keyword Searching, Find by Citation, Date Ranges, Legislation searches and access to the WG&L Tax Dictionary. Checkpoint also provides a Thesaurus/Query Tool to help find related subject matter. Search results are displayed as links divided by the library in which the information exists, with quick access to the documents. When viewing the documents, the system highlights all instances of the search term, making it easy to find the pertinent materials, while an array of tools allows users to easily print, export, save or e-mail their findings. Checkpoint's Bill Tracker feature also allows users to quickly determine if there is pending federal legislation related to their search topic The Bill Tracker is also available for state and local legislation. Users can save searches or schedule them to recur automatically, and the system maintains a History log of search events.

### **CONTENT — 5 Stars**

Whether looking for primary source materials on federal, state, local or international accounting and taxation, or searching for guidance and explanation of tax law, Checkpoint offers virtually everything. In addition to IRS publications and Rulings, IR Code, Tax Treaties, Treasury Regs and Committee Reports, the system also offers federal tax cases, current and pending legislation, BNA Daily Tax Reports, Weekly Alert newsletters, and dozens of publications from RIA and PPC. This includes the Federal Tax Coordinator, WG&L Journals, Federal Tax Compliance Library, Tax Desk, WG&L Treatises, BNA Income Portfolios, PPC's Five-Minute Tax Briefing, RIA's Tax Watch and many others.

### **CUSTOMIZATION — 5 Stars**

Checkpoint offers excellent customization options that allow users to quickly and easily set up their My Checkpoint home page based on the practice areas they serve, in addition to tailoring searches and setting up queries to run

automatically or saving searches for future reuse. Additional customization

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keep the user on top of legislation or other factors that could affect a client. Checkpoint provides excellent output options, including export to Word, simple text copying and pasting, and direct e-mailing of contents from within the system. The program also includes a basic time tracking feature that can log time spent by staff while performing research, and then can export the data into time management systems or to other file formats.

#### **SUPPORT & UPDATES — 5 Stars**

The online program is generally intuitive and has easy-to-use customization features, while also providing a good built-in Help system that offers good overviews of all program features, as well as search options and other functions. Thomson automatically updates the online system.

**2008 Overall Rating: 5 Stars**

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