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Steven M. Phelan • Nov. 03, 2011

Today's tax, accounting and legal professionals are under a constant stream of knowledge exchanges. Clients call, email and text their respective professionals with a variety of scenarios and demand quick answers. The professionals are then left to work out the details and are often left scratching their heads on where to turn next. Finding answers to these scenarios is not only important, but needs to be done in a

prompt and accurate manner. This is where tax research software becomes

tax research offering. Most of the vendors are offering products as wholly internet-based solutions. Others have pushed the web-based research into tight integration within their respective tax preparation solutions. While both methods have their pros and cons, today's tax research solutions are much simpler to use and navigate.

In nearly every case, the backbone of tax research solutions relies on search. Current offerings often perform their searches in ways similar to most internet search engines. Search results are then displayed in much the same way. This type of search feature set is less intimidating since most professionals are comfortable with internet search methods. This methodology also fares well for new staff because they don't get bogged down with what search terms to use.

Search is the most popular way of navigating through the tax research software, but vendors also include folder trees for navigation. Folder trees allow users to navigate directly to specific categories of research content. The advantages of folders trees are generally seen in more senior staff or those that have specific practice and interest areas.

Regardless of whether search or folder tree browsing is preferred, all provided content is usually hyperlinked together. This makes navigation easy and provides multiple ways for users to ultimately get to the same answer. It also allows users to easily switch between technical code and explanations.

Content provided by the tax research vendors is largely similar. Nearly all vendors offer some level of access to the Internal Revenue Code and Regulations. The biggest differentiator is the explanatory content. The vendors are split on execution here. Some rely solely on staff editors to convert Code to practical application and explanation. Others rely on respected practitioners and educators to deliver the content and examples.

One additional technology that all vendors have embraced is mobility. All tax

complement that platform or user research preference.

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