

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

their customers and tax and accounting professionals change. Many tax professionals find themselves moving from the role of tax return preparer to year-round consultant.

Taija Sparkman • Nov. 26, 2012



From the December 2012 issue.

As changes are made to tax laws and technology, the business owners interact with their customers and tax and accounting professionals change. Many tax professionals find themselves moving from the role of tax return preparer to year-round consultant. Their clients have tax questions both during the busy season and “off season” and professionals need to be able to deliver the answers their clients

need when they need them. Many tax professionals turn to tax research software to

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

To aid in providing anywhere, anytime access to their solutions, many vendors have created mobile versions of their websites and/or mobile apps, allowing professionals to gain access from their phones and tablets. Most of the mobile sites contain access to the same information as the full site, including search history and saved folders. However, the website has been formatted for a cleaner look and feel on the smaller device.

Some mobile sites even offer the option to view the full site on the mobile device. While the mobile apps may have a different user interface or limited capabilities compared to the full version of the solutions, they are designed to complement the software and provide access when professionals are away from the office or a computer. As businesses continue to focus on mobility, the mobile apps are expected to gain even more functionality over time.

The tax research solutions give users access to analyses and explanations provided by experts and educators in the profession, as well as the vendor's editors. Other content that may be available includes access to the Internal Revenue Code and Regulations, federal, state and international cases and tax laws.

Users generally have several methods available to them for searching content. The most common two methods are keyword search and a browse tree. The keyword search works similar to most search engines – users type in a word and search results are generated. Most times, the keyword search comes with an “AutoComplete” feature that “guesses” the word or phrase users are looking up. This is useful for new staff who may not be as familiar with the terminology or a specific area of practice.

The browse tree works similar to an index, with topics grouped under certain categories and practice areas. Users click on a topic to expand it and display its subtopics. Users continue until they find the topic they were looking for. This

method is generally used by senior staff or professionals who know exactly where to

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Firm Management • Taxes • Technology

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved