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Tax Research Applications

CFS Tax Software offers online and CD-based research programs for federal tax, audit and collections, and a California-specific reference library. The primary offering, CFS Tax Research, is available both online and in a traditional format, providing users with access to IRS announcements, the Internal Revenue Code, court opinions, handbooks, rulings, SSA publications, treaties and other primary source documents relating to taxation. Both versions of the program cost \$149 per year, with quarterly updates included for the CD version. The online version is updated by CFS staff as required by changing events. A combo online and CD version is \$199. Annual renewals are \$10 less.

EASE-OF-USE/SEARCH ROUTINE – 5 Stars

Since the online version of Tax Research is a relatively new addition to CFS' offerings, this review focuses on this system. However, since it was modeled after the CD-based version of Tax Research, it is virtually identical. After logon through the user's web browser, the system offers the research home page, which includes a main menu on the left for directly accessing the various research libraries for the purpose of browsing specific documents, the Internal Revenue Code, rulings or other materials. When opened, the documents are presented within the main window.

The system provides multiple search methods, starting with a selectable list of libraries on the default home page that can be searched by simple keyword or phrase. Users can also select a Simple Search or Expert Search option, which provides additional methods of filtering and syntax. Libraries can be searched individually, as a whole, or specific multiple libraries can be selected by the user. CFS also allows users to save

searches for further re-use, or users can bookmark specific documents to return

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collection, one from the Letter Rulings and TAMs, section, and two from the MSSP Audit Techniques library. Users can scroll between documents using an assortment

of buttons on a toolbar along the top of the screen, which includes options for saving and printing the results.

Overall, the online CFS Tax Research system provides simplified navigation through its research materials. The multiple panels that comprise the screen, along with a combination of browser navigation functions and links to primary features makes utilizing the system intuitive, with little or no training required.

CONTENT – 4 Stars

The CFS Tax Research system is focused on primary source materials such as codes and regulations, the IRS Penalty Handbook, court rulings, tax treaties, audit guidelines, and other IRS and SSA publications. The separate California research program offers a collection focused on state laws and codes, as well as court cases and BOE and state controller's office documents. CFS does not offer analysis of the materials nor does it provide a periodic tax news source. As a supplement to the program, a linked list of the web sites for taxing authorities for all states is included.

CUSTOMIZATION – 4 Stars

The online system offers customization functions similar to the CD-based program, with options for resizing window panels and modifying toolbars and the display method of search results, as well as the ability to bookmark documents and save and reprocess searches. The program does not allow setup of automatic searches.

INTEGRATION/OUTPUT – 3 Stars

CFS Tax Research does not integrate with any outside programs or tax systems, but does offer export into word processing formats (Word and WordPerfect), as

well as to plain text. Additionally, content can be copied and pasted, or can

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CFS is an inexpensive solution, ideally suited for practitioners who require only the primary source documents and are comfortable making their own analysis. For such users, CFS Tax Research may be exactly what they need. The system offers a comprehensive collection of federal materials, but state support for only California (through a separate system).

2006 Overall Rating – 4 Stars

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