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well as access to online versions of PPC's Deskbooks and other third-party providers. The system also offers ongoing coverage of tax and finance-related news, legislation and rulings. Checkpoint starts at under \$1,000.

### **EASE OF USE – 5 Stars**

After logging in through RIA's web site, Checkpoint's interface opens to a simplified web page that provides four primary tabs for system functions, with the default screen providing search utilities. The other tabbed screens are for the Newsstand, Practice Development (Tax Alerts) and RIA's CPE/Training & Support access. The top of the screen remains static while within Checkpoint, providing access to search History, Options, My Folders and Help. The Research screen provides a left-hand pane for searching various practice areas, including Federal, State & Local, Estate Planning, Pension & Benefits, International Payroll, and Financial Reporting and Management, which are selected using a pull-down selection list. This pane also provides searching function via keyword, citation and searching through legislation. The

primary search components are housed

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providing access to specific laws and Source Materials (Code, Regulations and Committee Reports, etc.), respectively.

The system organizes the search functions into three components: entering keywords, selecting the source documents to search, and then performing the search, thereby providing a logical step-by-step process to research tasks. The Research tabbed screen also provides a Thesaurus/Query tool that assists in advanced searches and finding related topics, as well as links to e-Forms RS, RIA's tax forms library. RIA has added access to MicroMash CPE offerings to Checkpoint, accessible via the CPE/Training & Support tab. The CPE courses can be purchased individually or used through an unlimited 12-month subscription. The CPE/Training & Support window also provides access to training, FAQs and customer support, which is included in the subscription cost.

When performing a search task, Checkpoint provides a linked list of documents

containing the search query, which

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between screen views. Checkpoint has the ability to schedule recurring searches, allowing users to stay aware of the latest information that can affect their practice area. You can schedule searches to run weekly or monthly and receive the latest information via e-mail. In general, research tasks are easily understood, with the system providing moderate guidance in these tasks. As well, Checkpoint includes helpful productivity tools such as calculation tools, a document assembly feature, and the ability to create tables of information through the Create-a-Chart function. As an online system, subscribers can access Checkpoint from virtually any computer with Internet access.

## **CONTENT – 5 Stars**

In addition to primary and analytical research content from RIA and WG&L, including the Federal Tax Coordinator 2nd, US Tax Reporter, Citator 2nd, Treatises, Journals and newsletters, Checkpoint includes optional integrated content from WorldTrade Executive,

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on our services only, including SEC Filings, which integrates access to SEC filings and other company financials. The company also provides editorial analysis and source material and has added the Hogan & Hartson SEC Updates Newsletter. Checkpoint also includes StateNet, which provides the full text of pending and approved state tax legislation, the status of pending legislation and legislative calendars.

### **INTEGRATION – 5 Stars**

Checkpoint offers integration with GoSystem Tax RS and CSI's UltraTax compliance software, allowing direct linking of client returns into research data. The system provides the ability to compare state to federal explanations, in essence an internal integration feature. It allows copy and paste functionality, as well as sample client letters addressing law changes that can be produced in Word.

### **CUSTOMIZATION – 5 Stars**

In addition to saving searches in

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Research can also be customized to focus on a user's specific tax practice area.

#### **UPDATES – 5 Stars**

As a web-based research product, Checkpoint is maintained by RIA, which updates content as needed to reflect changes in tax law and other pertinent issues.

#### **RELATIVE VALUE – 4.5 Stars**

Checkpoint is at the top of the evolutionary rung for online tax research systems, providing integrated access to even many of its competitor's research libraries, and offering extensive customization features that make the research process more efficient, thereby enabling users to spend less time researching changes. The ability to set automatically recurring searches and to narrowly focus Tax Alerts on specific practice areas are particularly useful functions that can save considerable time. The system is not inexpensive but can be tailored to the specific needs of firms through specific

subscription options. While offered

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The products were reviewed based on the following criteria:

- **Ease of Use.** This section explores navigation features, including accessibility of primary search tools and functions. As well, the ability to save common searches or specific results, or copy and paste contents of documents, adds to ease of use. Higher scores in this area reflect a comfortable, easy-to-use interface that provides intuitive access to key functions.
- **Content.** This section points out the research libraries available, including federal and state sources. It also identifies what type of content is available: primary sources such as code and rulings, as well as expert analysis and insight. A higher score here is earned by products with a comprehensive array of federal resources, including the availability of state research products. Research analysis is also considered, although not all professionals will seek such guidance.
- **Integration.** This section observes the ability of the software to work with tax preparation or write-up programs to automatically find areas of potential relevancy within the research, as well as the ability to attach or link saved research results to appropriate client files. Programs receiving better marks in this category make working between tax preparation,

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method: CD, online automatic. Few practitioners enjoy performing software updates. As such, this section identifies the frequency and ease with which product updates are performed, with automatic, schedulable and online update capabilities receiving better marks.

- **Relative Value.** This section offers the reviewer's subjective opinion of the "bang for the buck."

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