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Tax Research Applications

Checkpoint is the online tax research and guidance offering from RIA, with comprehensive libraries of federal, state and local, and international taxation resources, as well as incorporation of material from outside sources such as the AICPA, PPC, BNA, PLI and others. This results in a collection of primary source documents in addition to news coverage, rulings, analysis, case studies and practitioner insight. The system includes a variety of tools geared to enhance research efficiency, such as schedulable automatic searches and saved queries, as well as practice development features like financial calculators, client letter templates, document assembly and other options. Checkpoint is a comprehensive research solution geared toward practices with complex client bases, with pricing starting under \$1,000, and based upon number of users and research options subscribed to.

EASE-OF-USE/SEARCH ROUTINE – 5 Stars

Checkpoint opens within the user's browser to a customizable interface that provides tabs to access the user's Home, Research and Newsstand pages. The Home page is the most directly customizable of the pages, allowing the user to determine the type of research tasks performed most frequently and the libraries most frequently used. Additional tabs are available if the user is subscribed to other content.

Searches can be initiated from the Home page or the Research tab, which opens a keyword entry blank, resource selection list and a thesaurus/query tool. The latter can be especially useful when looking for related terms for performing searches. Searches can be performed using keywords, phrases, wildcards, citations

or other methods. Available research sources are presented in a categorized

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as well as additional search tools. Documents can be viewed full-screen by selecting the Full icon.

CONTENT – 5 Stars

While the user interface is easy to understand and use and search tasks are simple to perform, Checkpoint's content is what really elevates the system to the top of the tax research field. In addition to exhaustive primary source materials for federal and all states, Checkpoint offers voluminous analysis and recommendations from RIA and WG&L tax experts; access to PPC's Deskbooks and Five-Minute Tax Briefing; news coverage of tax and accounting-related legislation, rulings and other events; Tax Watch; the BNA Daily Tax Report; AICPA reports, various journals and newsletters; and additional content.

CUSTOMIZATION – 5 Stars

In addition to the customizable user Home page, Checkpoint offers a variety of customization and user productivity features, including not only the ability to save searches, but the option to set up searches to run automatically on specific days or times. This allows users to run routine searches while away from their workstations and have the results waiting when they return. The system also allows the creation of custom research databases that can be used per project, client, client group or other factor to save and store searches and search results independently. Administrative users can also set security preferences to limit user access to various research databases and components.

The Tax Alerts feature, an add-on feature, is also customizable per user, automatically searching and notifying the professional when legislation or rulings occur in an area of their interest or that could affect that professional's clients.

But far from just reporting that a change has occurred, the system evaluates

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UltraTax CS (both companies are owned by Thomson Tax and Accounting, as is PPC).

Through these two tax systems, research data can be linked to client returns, and the systems can automatically detect and alert professionals to clients that may be affected by newly enacted tax law changes and rulings or other events. Checkpoint also includes a large array of pre-drafted client letters that automatically populate with research data. The system provides copy and paste functionality with Windows software.

SUPPORT & UPDATES – 5 Stars

Checkpoint's Help utility is quite strong for an online program, providing a full range of program use topics, a glossary, tips on saving and printing, FAQs, and links to RIA support options. The web-based system is automatically updated by the vendor as new materials are available.

SUMMARY

Checkpoint is an exceptionally comprehensive tax research solution, providing virtually everything any tax professional might need to support virtually any type of client. For midsize and larger firms, particularly those with large, diverse client bases or those with clients in markets that are frequently affected by tax law changes, the system can provide essential intelligence and guidance, further enhancing the firm's value to its clients. Basic packages are also available for smaller firms.

2006 Overall Rating – 5 Stars

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