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### *of Tax Research Systems*

Checkpoint is the online research offering from RIA, PPC and WG&L, including comprehensive libraries in support of federal, state and local, and international taxation, PPC's Accounting & Auditing Library, as well as the incorporation of subject material from outside sources such as the AICPA, WGL, BNA and others. This collaboration results in a comprehensive collection of primary source documents

in addition to news coverage, rulings, analysis, case studies and expert guidance. Checkpoint includes a variety of tools provided in an effort to enhance research efficiency. Tools such as schedulable automatic searches, saved queries and practice development features such as financial calculators, client letter templates and document assembly, to name a few.

Checkpoint is a comprehensive tax research solution with a range of subscription options suitable for both sophisticated tax practices, as well as those with less sophisticated tax planning needs. With the recent incorporation of PPC's Accounting and Auditing Guidance, Checkpoint offers a solution for virtually any accounting, auditing or tax practice. Pricing will vary widely but can start below \$1,000 for a less complex practice.

### **EASE-OF-USE/SEARCH ROUTINE — 5 Stars**

Accessed via the Windows browser, Checkpoint opens to a customizable user interface

that provides tabbed access to the user's Home, Research, Newsstand, Tools, Practice Development and CPE pages. The Home page is easily customized, allowing users to set up predefined search tasks. Searches can be run from the Home page or Research tab, which opens to a blank search keyword entry box, a resource

selection list and a thesaurus/query tool. The latter tool can be useful, especially

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the (linked) resource in which information was found, which when clicked shows a sub-listing of returned search hits from that particular resource. One additional click provides the user with the actual returned documents, including highlighted keywords and phrases to aid users in locating the search reference. To the left of the main document window, Checkpoint provides additional document viewing options and additional search tools. Documents can be viewed full-screen by selecting the “full” icon.

### **CONTENT — 5 Stars**

Checkpoint's user interface is easy to learn, allowing users to quickly understand how Checkpoint works, and providing users with the ability to quickly perform search tasks. Checkpoint's content is quite extensive. In addition to exhaustive primary source materials for federal and all states, Checkpoint offers voluminous analysis and recommendations from tax experts, access to the PPC Tax Deskbooks and Tax Planning Guides, the 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 other content.

### **CUSTOMIZATION — 5 Stars**

In addition to the customizable Home page, Checkpoint provides users with a wide variety of customization and productivity features, including the ability to save searches and the ability to set up and run searches with results automatically delivered at the beginning of a specified day. Checkpoint also allows users to create and save custom research databases based upon a project, client, client group or other similar factors. Administrative users can also set security preferences to limit user access to various research databases and components. An add-on feature, Tax Alerts, may be customized on a user-by-user basis, automatically

searching and notifying the tax professional when legislation or rulings occur

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Checkpoint's Tax Alerts product integrates with the GoSystem Tax RS online tax preparation application and InSource Express RS. Through these two tax systems, research data can be linked to client returns and can automatically detect and alert professionals to those clients who may be affected by tax law developments and changes. Tax Alerts also work in conjunction with Creative Solutions' UltraTax CS (RIA, PPC and Creative Solutions are all a part of Thomson Tax and Accounting.) Checkpoint provides users with a wide array of customizable client letters that are automatically populated with research data. Checkpoint supports copy and paste functionality into Windows software.

#### **HELP, SUPPORT & UPDATES — 5 Stars**

The Checkpoint Help utility is particularly comprehensive given that Checkpoint is an online program. The Help utility includes a full range of program use topics, glossary, tips on saving and printing searches, FAQs, and links to RIA support options. As an online web-based system, Checkpoint is automatically updated by RIA as new documents and content become available.

**2007 Overall Rating: 5 Stars**

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