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## REVIEWS

# 2009 Review of Tax & Accounting Research Systems

Interpretation is Key to Tax Research

Dec. 01, 2009

*From the Dec. 2009 Issue*

Familiar brand names and interfaces for federal and state tax research have been appearing in new contexts for some time, and this year is no exception. What is important to understand is that the shuffling and combining of content has not affected its underlying quality and breadth. While the presentation of this content, along with new methods for searching and new tools for using the results are improving, the core principles are the same. It is always tough to move out of our comfort zone, but that is the way of the world. And with adaptation comes the opportunity for productivity improvements for the tax practitioner.

Ease of use and search routine have an important effect on the learning curve, efficiency and productivity in day-to-day use of a tax research product. All of the products reviewed here are intuitive to use, with a rational page layouts and workflow. More complex page presentations might take a while to get used to, but they also have the potential to deliver easier navigation. All have unique methods of accessing and presenting content that, except for editorial content, is largely identical.

The content available falls into categories of publicly available documents from taxing authorities and courts, which forms the core of the tax research product. The value-added proposition comes with editorial analysis and commentary, done by experts on the thousands of sometimes arcane topics that may only appear rarely in real life, but which is also the special competency expected by taxpayers with special situations. This is the main variable between the various offerings reviewed here, and there is considerable overlap in the editorial content, with some products offering just their own in-house generated commentary, and others combining content from more than one source. Since all the content is delivered online, updates are available to the user as soon as the content is generated. Daily and weekly discussions in newsletter format are provided in some cases.

The growth in cross-border business activity inevitably leads to consideration of the tax implications for the jurisdictions involved, and some products have added content, such as the text of treaties and third-party analysis of this complex area. Just browsing through the topics will be an enlightening experience, which may spark ideas for new practice areas for the firm. Along this line, some of the services generate draft client letters on hundreds of topics that the user can incorporate into marketing campaigns.

Customization of the homepage layout varies, from little to almost total control. The choice of subscription level determines the look of the content menu and how searches are filtered to include categories of documents. There is at least a choice of how result sets are sorted for listing, with more elaborate systems giving the user ongoing control of tabs, restrictions to subsets of content, font size and more.

Although all the products are well designed and intuitive to use, the user, particularly at first, may be puzzled about navigation or how to form complex queries. The tax research products reviewed here all have Help screens that are just a click away with toll-free support as a backup. The most ambitious feature allows the user to post a question inside a chat window, with responses from other users who happen to be online at the same time. However, anyone with familiarity with web-based searching, combined with an understanding of the various sources for original documents will feel right at home.

Whatever the needs of the tax practitioner, tax research products are available to fit any type of practice, from the simplest to the most complex. Online tax

research is a powerful tool, but it will never replace the experienced and creative professional who can interpret all the results in light of a particular real-life client situation.

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### [BNA Tax and Accounting – BNA Tax and Accounting Center](#)

BNA is a well-known and respected provider of research focused on all tax-related matters. The company has a long history of delivering relevant content and coverage of a wide variety of topics through numerous channels, including supplying content through some of the other tax research products reviewed here.

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### [CCH, a Wolters Kluwer business – IntelliConnect](#)

IntelliConnect is the newest research offering from CCH, and is the successor to the Tax Research NetWork. It combines content on legal, tax, accounting and business topics, but this review will focus on tax research.

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### [Intuit – ProLine Tax Research, powered by BNA](#)

Intuit has enriched the Lacerte and ProSeries tax preparation products by launching ProLine Tax Research this year, which includes the analysis and content library of BNA.

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### [Tax Analysts – The Federal Research Library](#)

Tax Analysts provides a variety of information resources on tax issues for tax and accounting professionals, including daily, weekly, monthly and quarterly publications that focus on news and analysis of tax policies, regulation and legislation.

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## [The Tax & Accounting Business of Thomson Reuters – Checkpoint](#)

The Checkpoint product is a research platform covering a wide range of tax and accounting topics. Tax research is just one of many subject matters addressed in Checkpoint, and that will be the focus of this review.

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## [Additional Tools For Comprehensive Research](#)

Tax and accounting professionals have information needs that span many different categories, from income taxation for individuals and business entities at the federal level and each of the states, along with international taxation issues, plus the need for detailed guidance on GAAP, IFRS and other accounting standards. The information can be so broad and originates from so many government entities, courts, standards boards and professional associations that, even though the Internet has made research much simpler for professionals to find the information they need, it can still be overwhelming.

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## [Free Information & Research Sites Provide Basics & Community-Based Peer Assistance](#)

As tax and accounting professionals have become more and more confident and comfortable with both utilizing resources and providing services over the Internet, they have begun to unlock the wealth of benefits therein. The rising interest in SaaS and cloud computing is just one piece of evidence supporting this shift.

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## 2009 Review of Tax & Accounting Research Systems— Comparison Chart

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