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# CPA Practice Advisor





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### **Basic System Functions – 4.75 Stars**

As a web-based research tool, Checkpoint is accessed through a web browser with a username and password. Checkpoint does not permit multiple logins with the same username, and will provide an option to close the original session if the user is logged in on another machine or browser. After logging in, the user arrives on the landing page of their choice – options include the home, search, table of contents, news, tools or learning screens. The home screen is customizable for each user login ID. Users can manage the home screen views with a predefined view set for each focus area, select individual content panes to be displayed in each view, or create new views with predefined content panes.

The top toolbar remains visible at the top of every screen in Checkpoint with buttons for users to quickly access search/document history, folders, flagged documents, notes, options, time tracking, help, and recently exported documents. Content menus with black buttons provide access to learning options, search, news, tools, and a table of contents, all of which show numerous options when hovered over with the mouse pointer. To the right of these buttons is a search box called the Site Navigator, which may be the quickest way to find sources and documents within Checkpoint.

Users can search Checkpoint either using natural language phrases or specialized terms and connectors. There is a thesaurus/query tool to help users structure effective searches. Similar to autocomplete functions used with Google and other search engines, Checkpoint suggests keywords when the user starts typing in the search box. Users can also check boxes to search within specified primary sources, editorial materials, legislation or news.



One of Checkpoint's newer features is a popup that appears upon login prompting

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regulations, court cases, tax tables and rates, and tax planning libraries. Users may also access proprietary content from RIA, WG&L, PPC, EBIA, Boskage, WorldTrade Executive and BNA.

One of the more recent changes to Checkpoint is that Thomson Reuters News and Insight is now incorporated into the main Checkpoint content, featuring a combination of general business and tax news content which includes pictures and multimedia.

### **Customization – 5 Stars**

The Home screen can be customized and rearranged for each user to display the best content and tools for his or her most frequent research needs. There are also options to change how search results are displayed and adjust delivery of newsletters.

Users can store searches and documents within folders, which can be accessed through the top toolbar. Folders may be helpful for users to group documents related to a topic, a client, or a specific project. Up to 250 folders can be created with a maximum of 1,000 searches and documents. Documents can also be flagged for future reference.

Users can add one or more notes to a document, and can access all notes from the top toolbar. When displaying or printing documents, users have a few options for changing the size and font of the text, as well as showing or hiding notes.

### **Integration / Import / Export – 5 Stars**

Checkpoint integrates with the Thomson Reuters tax preparation products GoSystem RS and UltraTax CS. Users can launch Checkpoint without leaving the tax preparation software and save the login and password. Right-clicking on fields in



the tax preparation software can automatically open the RIA Form/Line Finder

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installing Speedlink, a tool that resides in the desktop system tray and provides quick access to Checkpoint's key features without manually logging in.

### **Help/Support – 5 Stars**

Thomson Reuters has an online Customer Help Center for Checkpoint, which includes many helpful resources such as user guides, reference cards and frequently asked questions. There is a Help shortcut at the top right corner of the Checkpoint website which launches a searchable help site with a table of contents, index and glossary. Small blue and white question mark balloons links launch pop-up windows with help for specific features throughout the program.

Phone support is included in the subscription price. The Checkpoint help website lists phone numbers for support and the hours it is available. Thomson Reuters provides free training for Checkpoint through various delivery methods including recorded webinars, live webinars, and self-study.

### **Summary & Pricing**

Thomson Reuters Checkpoint provides a strong and easily searchable research platform for accounting professionals with highly respected proprietary content and third-party resources. Prices range from \$100 into the thousands depending on the libraries and subscription quantities selected.

**Best Fit:** Tax and accounting professionals needing a research solution with strong search and customization tools, particularly those using Thomson Reuters tax preparation software.

### **Strengths:**



- Among the products reviewed, Checkpoint has some of the more intuitive and

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- Thomson Reuters does not offer mobile apps with the full Checkpoint content, however, mobile versions of the site open on smartphones and tablets.
- Document Assembly is supported on the tablet version of Checkpoint, but not Checkpoint for Smart Phones. The user has the option to go to the full site on the mobile and can use Document Assembly there.

## 2013 Overall Rating: 5 Stars

Accounting • Firm Management • Software • Taxes

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