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## FIRM MANAGEMENT

# Tax Research Systems Offer Strong Customization, Automation Features

2013 Review of Tax Research Software

**Dustin Wheeler** • Nov. 29, 2013

In my early days of practicing accounting, a wise and experienced accountant told me that as my career progressed, I would be essentially practicing law instead of mind-numbing number crunching. It didn't take long for me to understand what he meant.

A five-minute question from a client rarely translated into a five-minute answer. IRS publications and Google searches sometimes proved to be fruitless, while answers fitting a client's facts and circumstances could only be found after hours of digging through treasury regulations and tax court cases.

Technology can automate much of today's accounting data entry, for example, by populating scanned information from W-2s and directly transferring numbers from accounting software into a firm's tax software. Similarly, technology has greatly impacted tax research in the profession, with nearly all of the software being electronic and Internet-based. Compared to going through thick books, today's online tax research services are easily accessible, simple to operate, and updated daily.

View the full reviews of the following programs:

# 2013 Reviews of Professional Tax Research Systems

*CPA Practice Advisor* reviewed three cloud-based tax and accounting research systems. Follow the links below to see how they compared.

- [BNA Tax & Accounting Center](#)
- [CCH – Intelliconnect](#)
- [Intuit Tax Research for Lacerte & ProSeries](#)
- [Thomson Reuters – Checkpoint](#)

Despite our powerful software, tax research remains a challenging value-added activity requiring the fact analysis and judgment that only the human brain can provide. Unlike data entry tasks, tax research can't be automated. Effective tax research goes far beyond proficiency with the tools; tax researchers must know how to identify the issues, understand and evaluate the authority, and finally, communicate the findings. However, knowing the software well certainly speeds up the process.

A solid understanding of search tools may mean the difference between a research project taking two hours or two days. This may require some training and practice for those accountants whose natural instinct is to type a few words into Google and click on “I’m Feeling Lucky.” Perhaps I’ve run out of luck, but often my path to an answer is through search operators/connectors, wildcard characters, or searching within specific sources.

Research software is often used as a “quote book” to simply give clients answers to their questions. However, tax research software vendors are adding features to make them more collaborative and customizable.

For example, some platforms allow organizing documents into folders, highlighting text, annotating documents, and easily sharing research with colleagues or third parties. When users take advantage of these features, research software can become more than just a client answer tool. The software may become an interactive teaching and self-study tool.

Research resources are becoming indispensable for tax professionals among today’s growing mobile workforce. Tax research software vendors have taken note of

mobility trends and are offering mobile apps and scaled-down versions of their websites for smartphone and tablet use.

While the mobile apps and sites may not currently have all the functionality of the full sites, they generally can accomplish the most common tasks of searching libraries and then sharing or e-mailing documents to clients. Today's tax research mobile sites and apps make it easier to quickly research and respond to questions while out of the office than ever before.

When choosing a tax research platform, firm owners and professionals should experiment with trial versions and consider if the content offered is adequate for the firm's needs, keeping in mind that certain specialty libraries may be helpful for a firm establishing an industry niche.

Firms should feel comfortable with a service's search capabilities. Training is another important consideration, as each product's usefulness is limited to extent it is used correctly. Finally, don't forget to evaluate the mobile apps or websites. You or your employees may end up liking and using the mobile platforms more than you may initially think.

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