

Choosing Tax Resolution Software

A Structured Evaluation Checklist for Tax Professionals

PURPOSE

Not all tax resolution software is built the same. Some platforms automate the work that matters; others leave you toggling between IRS portals, spreadsheets, and disconnected tools. This checklist provides a structured, objective framework for evaluating tax resolution software, so your decision is based on capabilities and evidence, not vendor marketing. Use this checklist when shortlisting platforms, attending demos, or comparing proposals side-by-side.

PART 1: Operational Must-Haves

Every platform you seriously consider should meet all of the criteria below. These are non-negotiables for an active tax resolution practice.

✓	Criteria	What to Look For	Notes
<input type="checkbox"/>	All-In-One Case Management	The system manages IRS collection cases from intake to resolution in a single workspace. No toggling between disconnected tools or portals.	
<input type="checkbox"/>	Automated IRS Transcript Retrieval	Transcripts are automatically pulled from IRS systems, eliminating the need for manual downloads. The software parses and organizes them into a usable format.	
<input type="checkbox"/>	Proactive IRS Monitoring & Alerts	The platform automatically monitors IRS activity on client accounts and notifies you before audits, liens, or balance changes occur, not after the fact.	
<input type="checkbox"/>	Resolution Path Analysis	Built-in tools help identify viable resolution strategies (OIC, Installment Agreement, CNC, Abatement, etc.) based on each client's actual IRS data.	
<input type="checkbox"/>	Client Portal & Communication Tools	A secure, branded portal allows clients to onboard, upload documents, review their case status, and sign forms electronically (E-signature supported).	
<input type="checkbox"/>	IRS Form Library — Current & Complete	All commonly used IRS collection and resolution forms are available within the	

		software and updated promptly when the IRS makes changes.	
<input type="checkbox"/>	Multi-User / Firm-Wide Access	The software supports multiple staff roles with appropriate access controls so your entire team can work from the same system.	
<input type="checkbox"/>	Marketing & Practice Growth Tools	The membership or plan includes marketing assets, client-facing materials, or tools to help attract and retain tax resolution clients, not sold separately.	
<input type="checkbox"/>	Continuing Education (CE/CPE) Access	Ongoing CE or CPE resources are included, covering IRS updates, resolution strategy, and software workflows — not an add-on cost.	
<input type="checkbox"/>	Professional Peer Community	Members have access to a moderated community of other tax professionals for peer support, best practice sharing, and case guidance.	
<input type="checkbox"/>	Everything Included in Base Membership	Core features — monitoring, automation, forms, education, and support — are fully included. There are no additional fees to unlock essential functionality.	
<input type="checkbox"/>	Software Training - Free & Multi-Format	Training is available at no additional cost and offered across multiple formats: in-person sessions, in-app guided walkthroughs, on-demand videos, and live training sessions. New members and existing staff can get up to speed without paying for extra onboarding packages.	

PART 2: Technical Needs

Confirm that the platform's technical infrastructure matches the compliance and security requirements of a professional tax practice.

✓	Criteria	What to Look For	Notes
<input type="checkbox"/>	SOC 2® Compliance	The vendor holds a current SOC 2® Type II certification, confirming that its infrastructure, security controls, and data handling meet established standards.	
<input type="checkbox"/>	Encrypted Data Storage	All client tax data — including transcripts, financial records, and PII — is encrypted at rest and in transit.	

<input type="checkbox"/>	Uptime Reliability & Incident Transparency	Vendor publishes an uptime status page and communicates service disruptions or scheduled maintenance within a defined timeframe.	
<input type="checkbox"/>	Software Update Cadence	The platform updates promptly when IRS forms, e-file requirements, or regulatory procedures change — and notifies members proactively.	
<input type="checkbox"/>	Onboarding & Technical Setup Support	Structured technical onboarding is included — not just self-serve documentation. A knowledgeable team assists your firm through the setup process.	

PART 3: Critical Questions for Every Vendor

Ask these questions directly during demos or sales conversations. Request specific, data-backed answers — not just testimonials or marketing claims.

1. Does the Software Actually Automate the Work That Slows You Down?

Ask Vendors:	<i>"Walk me through exactly what happens after my CAF is approved. What does the system do automatically, and what do I still have to do manually?"</i>
My Requirement:	Automation should cover transcript retrieval, parsing, and case analysis — not just data storage. If a vendor describes a process that still requires you to log into IRS portals manually, download files, or re-enter data, the automation is superficial. Look for end-to-end workflow coverage.

2. How Proactive Is the IRS Monitoring — and What Does an Alert Actually Look Like?

Ask Vendors:	<i>"How does your monitoring system work? Can you show me an example of an alert that was triggered before a client received an IRS notice?"</i>
My Requirement:	True proactive monitoring means the software detects IRS activity — new balance assessments, lien filings, and audit indicators — and notifies you before client-facing consequences. Ask whether alerts are customizable per client, how far in advance they typically fire, and whether the system explains what action to take.

3. What Resolution Tools Are Built In vs. Requiring Manual Calculation?

Ask Vendors:	<i>"Can you demonstrate how your system walks through an OIC qualification analysis or an Installment Agreement calculation using actual transcript data?"</i>
My Requirement:	The resolution analysis should pull directly from the client's parsed transcript data — not require you to re-enter figures into a separate calculator. Built-in analysis for OIC, Installment Agreement, CNC, and Abatement qualifications is a strong indicator of

purpose-built software vs. a generic case management tool repurposed for tax resolution.

4. What Security Certifications Does the Platform Hold — and Are They Current?

Ask Vendors: *"Do you hold a current SOC 2® Type II certification? When was it last renewed, and is the report available for review?"*

My Requirement: SOC 2® Type II is the relevant standard for SaaS platforms handling sensitive financial and tax data. A SOC 2® Type I or an outdated certification is not equivalent. If a vendor cannot provide current documentation on request, treat it as a serious data security gap — particularly given your professional obligations when handling client tax records.

5. What Is Included in the Membership vs. What Costs Extra?

Ask Vendors: *"Is there anything related to IRS monitoring, transcript access, CE credits, marketing tools, or onboarding that is not included in the base membership price?"*

My Requirement: Some platforms charge separately for the features that drive the most value — transcript pulls, monitoring alerts, advanced reporting, or continuing education. Understand the full cost before comparing quotes. A lower base price with add-on fees for core functionality is often more expensive than an all-inclusive membership with transparent pricing.

6. How Does the Platform Keep Up With IRS Changes?

Ask Vendors: *"How quickly are form updates, new IRS notices, and procedural changes reflected in the software? Who on your team is responsible for tracking this?"*

My Requirement: The IRS regularly updates forms, collection procedures, and notice types. Software that lags on these updates puts your firm at risk of filing outdated forms or missing procedural requirements. Ask whether they have in-house tax expertise — ideally, former IRS officers or experienced practitioners — who drive content and compliance updates.

7. What Does Ongoing Support and Education Look Like After Onboarding?

Ask Vendors: *"Beyond initial setup, what ongoing training, webinars, and support resources are available? Is there a community of other practitioners I can connect with?"*

My Requirement: Software adoption is only part of the value equation. Look for vendors who invest in member success post-onboarding — through CE credits, regular training on IRS updates, peer communities, and accessible support from people who understand tax resolution, not just the software interface.

This checklist is intended for informational and educational purposes. Requirements will vary by firm size, case volume, and workflow complexity. Update this document as your practice's needs evolve.