RCM: SaaS for the R&D Credit


If you are at all unsure about the answers to these questions, you may need a new approach to the R&D Tax Credit process. CFO Services has developed a unique Research Credit Management (RCM) tool that allows for flexibility and ease of implementation, while also providing the features necessary for gathering data and documentation related to the Research & Development Tax Credit.

Recent Updates to RCM for a Better Client Experience!
1. Easier survey setup and administration
2. Faster database calculations
3. Greater ability to accept more unique data sets

Dashboard
Get a quick snapshot of your research credit benefits and monitor the progress of the project. This page can be customized to provide critical project data, expenses, or people, according to your preferences or needs.

Be Direct
Request specific information, ask specific questions and collect data directly from the people who know it best (Engineers, Researchers, and Company Employees). Our RCM tool allows you to make the information and requests dependent upon employee title, company, type of department, etc., allowing for more accuracy in qualifying activities and keeping your credit accurate and up-to-date.

Easy-to-Use Interface
Since the RCM product is built upon Microsoft SharePoint technologies, it seamlessly integrates with Microsoft Office products, including Outlook, as well as with other systems/databases such as Oracle, SAP, and others. Users can also drag and drop files from a PC or network drive for easy upload of contemporaneous documentation.
Reporting
Quickly and easily design reports to provide the level of detail necessary. Create custom reports on the fly without special coding, extra time, or using your IT department. This allows easy access to analyze information for the research credit or other affected tax areas.

Calculation
Not only does our RCM product calculate the federal credit, but also any state R&D credits available. State credits can easily be added or removed, as can additional business units in the event of a merger or acquisition.

IRS View
One of the problems within audit/exam is maintaining control over documentation while working with the IRS. The RCM tool provides the IRS a view of all projects, necessary documents, and QRE breakouts as you progress through the exam or appeals process. RCM also allows for tracking of login information, page views and downloads, helping both parties to stay on task and create a level of accountability.

Why Use RCM?
In most audits, the majority of time spent involves proving that you have qualified activities with documentation. If you don't have or aren't collecting this documentation, it is very likely that your credit will be disallowed, either in part or in total. Let RCM help you thoroughly substantiate the research credit via documentation.

For a demo or further information on what we do, or any other issues related to R&D credits, please visit us online at www.cfoserv.com, or contact us at (800) 467-4236.