



Managing Your Firm's Access to IntelliConnect®

As the Delegated Administrator for your firm, you are actively involved in providing users at your firm with access to the content and workflow tools your firm subscribes to on IntelliConnect®. This document provides the details on how to provide users with the access they need.

Migrating from Tax Research NetWork™ to the IntelliConnect® Platform

All users will migrate from Tax Research NetWork™ to the IntelliConnect platform. This process is detailed below (you may or may not have already migrated to IntelliConnect):

- When it comes time to migrate to IntelliConnect, users will be prompted *upon logging into Tax Research NetWork* as normal. The user will then click on the notification message to migrate to the IntelliConnect platform.

A screenshot of a notification message from IntelliConnect. The message has a blue header bar that reads "PLEASE READ... Your action required!". Below the header, the text says: "Easy, fast, and more thorough research is headed your way! Congratulations! It's time for you to move your subscription to IntelliConnect, CCH's new state-of-the-art research system. Registration takes about 1 minute and then you'll be up and running. Your new IntelliConnect ID will be your email address and you'll enter a password of your choice. It's easier than ever! Click REGISTER NOW to start! You have (14) days to complete this registration. After (14) days, you will be required to register before you can log in to research." There are two links: "All you need to know about your new research system!" and "Sign up for a free one hour training class on the basics!". At the bottom, there is a red-bordered box that says "14 days left to register!", a "Register Now!" button, and a "Close" button.

- The user will then complete the registration page by entering his/her email address, first and last name, and a password of his/her choice.