Introduction

In this introductory course you will be trained on unique time-saving features, innovative access tools, up-to-the-minute tax news, and customization tools. IntelliConnect combines the authoritative content of CCH with sophisticated Internet technology to provide the most current, customized, and intuitive line of tax research products and tools on the market. It streamlines your workflow, enhances accuracy and increases your productivity.

Objectives

Upon completion of this course, you should be able to:

- Search for documents
- View documents and understand recordkeeping options
- Browse when you know the general topic or code section
- Find a document by its citation
- Track cases and ruling using the Citator
- Set up Tracker News
- Use filters to narrow your results
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Log In

To log in to IntelliConnect from your Web browser:

1. Point your Web browser to http://intelliconnect.cch.com
2. In the Log In box, type your User ID (your email address) and password.
3. Click Log In.
Getting around in *IntelliConnect* is easy through an intuitive interface comprised of various navigation tools. The interface is composed of the following elements:

**The search bar is available on each screen so you can search from anywhere.**

With the search scope box you can select what you are searching: all content, selected practice areas, selected content, search results, the document on screen, or citation.

**Navigation Bar - The links at the top include other important features.**

The Quick bar includes handy links to key *IntelliConnect* functionality.

The My Favorites menu item is expanded by default to show all the content that you have added.

The Browse tree automatically displays providing instant access to your content.

**Easy access to Help, Training and Support**

**Navigation Bar** – Located at the top of the main window, the Navigation Bar is an integral component of the *IntelliConnect* interface. It contains a host of links that allow you to quickly access the document tray, view your research history or Saved Searches.

**Search Bar** – The Search Bar displays at the top of the main window, directly below the Navigation Bar. On the Search Bar, you can type your search expression, select a search scope, view previous search expressions, execute your search by selecting Go and set your Advanced Search options.

**Quick Bar** – Contains a series of key functionality links that enable you to perform your research quickly and efficiently. From the Quick Bar, you can browse for documents, perform a citation search, view your research folders, view Tracker News searches, and open any Practice Tools you have subscribe to.
Subscription Content

The Browse tree displays the menu-tree for your product content on the left pane of your home page. Browsing your product content allows you to quickly drill down through a menu-tree on the left pane. As you expand areas of your product content, more focused areas of the content are displayed, allowing you to see the way the content areas are organized.

The "Information" icon shows you that there is additional information available about that particular content item. Click the Information icon located to the left of the item in the Browse tree.
Practice Areas

Your subscription gives you access to business-specific content areas called *Practice Areas*, such as Tax and Accounting and Legal Professionals. Based on your selection(s) here, the libraries within the *Practice Area* will appear in your Browse tree.

You have the ability to hide or reveal the content (i.e. Practice Areas) in your subscription as necessary for your research needs.

Content associated with an unchecked *Practice Area* will not be available for browsing or keyword searching even if the content is currently saved to your *My Favorites* Folder.
Beginning Your Research

There are several ways to begin your research:

- **Browse**, when you would like to see the contents of a specific area, just like using the table of contents in the front of a book.

- **Keyword Search**, allows you to search your entire subscription or specific content and then filter to the appropriate area.

- **Citation Search**, when you have the specific cite of a document, i.e. Code section, ruling, etc.

- **Topical Index**, browse to the Indexes & Tables, select the publication, and then the appropriate letter of your topic.

- **Titles A-Z**, when you want to view an alphabetized list of your publications by title in your subscription.

The method you choose, whether you begin with a keyword search, a citation, or with a general topic, will depend largely on the information you have at the start of your research.
Introduction to IntelliConnect

**Browse**

All content available in your subscription is displayed in a Table of Contents on the *Browse* tree. You can expand topics and subtopics until you get to a document, which is then displayed in the results window (to the right) in a new tab. You can also run a search from the *Browse* tree with your selections targeted or run a search within the current document displayed in the results window. You can also search the entire subscription right from the *Browse* tree.

Browse to the *Corporate: Net Operating Loss* in the *Tax Research Consultant*. In the *Browse* tree click on the *Federal Taxes* area and then *Federal Editorial Content*. Click on the *Tax Research Consultant* to open and browse to the topic.

![Browse tree](image)

Once you find the document, click the document title to open to the full text on the right side of your screen.

- **Clear All** - Allows you to Clear All selections at once.
- **+** - Allows you to expand one level down.
- **-** - Allows you collapse all of the menu levels.

To widen or narrow the left or right pane while browsing, click the *Splitter Bar* on the pane divider.
Keyword Searching

There are two primary methods to keyword search your content.

You can search by:

- **Selected Content**
  
  Within the *Browse* tree you can select the publication(s) that you would like to search. Just click the check box next to the publications you would like to search in, type in your search term and click *Go*. This will search all of the content selected.

- **All Content/Selected Practice Areas**

  After logging in you can search your entire subscription by entering terms in the *Search box* and clicking *Go*. This will allow you to look at your entire subscription by document, by publication, practice tools, a specific library, or jurisdiction.

**Research Scenario:**

Assume you have a client that needs information on the steps required for the *computation of net operating loss (nol) carryback* for both federal and state tax.

Write down your tax questions and use it as guidance or a source for keywords to use for your search.
Targeting Specific Content to Search

As you browse the practice areas, clicking on the + sign to expand the library, you can then check the box next to each item you want to search, then type your search terms in the Search Box at the top of the screen and click Go. The Search Scope will automatically change to “selected content”.

Let’s search for *not carryback*

![Search Scope]

Expand the reporter to target specific topics or subtopics.

Changing Your Search Scope

You have multiple options to search specific content, your search results, and the document in view, or tax citations.

The following search modes are available from the Search scope:

- *All Content/Selected Practice Areas* – searches all of the content in your subscription (default)
- *Within Results* – searches just the results from the active search tab
- *Selected Content* – searches just the items you have selected (i.e. clicked the checkboxes) within Browse tree
- *This Document* – searches just the active document on the screen
- *Citations* – searches for documents using a complete citation
Relevance/Most Recent

You can select to view the results by Relevance or by Most Recent. This option appears on the search results list in the top right corner. Sort by Relevance is the default sort order; you do not need to click on Relevance unless you have changed to reviewing your results by Most Recent.

**To sort your search results by Relevance:**

- With the search results displayed on your screen, click the Relevance link located in the upper right-hand corner of the search results window pane.

Your search results are sorted according to the relevance of the document in relation to the search term(s) you used as well as the tax synonyms that were searched for utilizing the tax thesaurus. Documents with the most relevance to your search appear at the beginning of the list.

**To sort your search results by Most Recent documents:**

- With search results displayed on your screen, click the Most Recent link located in the upper right-hand corner of the search results window pane.

Your search results are sorted according to the date of the document, with the most recent documents appearing at the beginning of the list.

**To sort your search results by Document Type:**

- With search results displayed on your screen, click in the checkbox next to Sort search results by Document Type.

Your search results are sorted according to the type of each document included in your search results. In other words, IntelliConnect displays your search results categorized by the specific document type of each individual result (i.e. Explanations, News, Laws, Regulations, Cases, etc.).
Thesaurus

The *Thesaurus* is automatically applied and will locate the tax synonyms related to your search term.

Advanced Search

The *Advanced Search* feature includes the *Thesaurus, Search By Date, View Saved Searches* and *Help options*.

Using the Thesaurus

The *Thesaurus* can be applied to your search within Search Options. You can also see which synonyms will be applied for your search terms using the Synonym Lookup box.

Limit Search To

Use the options below to limit the scope of your search to specific Jurisdictions, Courts or a specific date range. Separate dialog boxes will allow you to set specific Courts or Jurisdictions.

Selections made here only apply to a single search unless you select the 'Apply these search limits to future searches until I log out' checkbox.

Search by Date

Search dated documents within a specific date range.

1. Type search terms in the search bar.
2. Click *Advanced Search* on the search bar.
3. Type dates or date ranges in the appropriate boxes. Select the general time frame (Any Day, On, Before, After, From/To) and then add the dates.
4. Click *Search Now* on the search bar to execute your search.
Viewing your saved searches

If you perform a search on IntelliConnect that you would like to rerun at a later date, you can save the search. When you save a search, you save the search terms and the content areas that were targeted, allowing you to easily repeat a search that returned results that were useful to your research.

To save a search, select SAVE – Save Search. Then click the SAVE button. You can access and execute any saved search within Saved Search link in the Navigation Bar.

The Saved Searches dialog box displays containing the name of the search, the Terms used, and Content Searched.

Click the search now button to rerun a saved search.
Search – Within Results

You can further narrow your results on the current tab by adding additional word or words.

For example, adding in *computation steps* will refine our results.

![Search within results](image)

Search Results

Search – Using Filters

The left pane lists the filters you can apply to narrow your results to documents of interest.

When applicable the following filters will appear:

- **Document Type** – Allows you to sort your search results into specific categories by document.
- **Practice Tool** – Allows you to narrow your results to just the practice tools, such as interactive research aids, smart charts and calculators that were located by the search.
- **Library** – Lists your results by publication so that you can see where your results are located within the publications in your subscription.
- **Courts** – Filters your results by tax court.
- **State Tax Type** – Filters your results by state tax topic.
- **Jurisdiction** – Gives you the ability to cross filter by federal, state and international information. This is helpful to further narrow and focus your results on a particular area of interest.
Filters

*IntelliConnect* will remember which filter was last used based on your prior search. For example, if you had selected the *by Library* filter first in your previous search, the *by Library* filter would be the filter opened by default the next time you search.

**Filter - by Document**

Sort your search results into specific categories by document.

*For example*, select *by Document Type*, then *Explanations*.
Filter - by Library

You can list your results by publication so that you can see where your results are located within the publications in your subscription.
**My Favorites**

*My Favorites* saves specific content areas that you *search or browse* frequently. *Browse* to the publication or reporter you would like to add as a favorite and *click on* ✩ beside the desired product.

By default, *My Favorites* will appear “open” allowing immediate access to your most frequently used publications.

Publications are alphabetized within *My Favorites*. Publications can be saved at all levels of the tree; e.g. all Multistate publications can be saved at once.

If you do not have any Favorite publications selected, a message will display to show you how to select Favorites.
Adding Favorites

Click the diamond icon next to the publication of menu you want to add to your My Favorites. These selections will be listed at the top of the Browse window and you can easily browse or search any publication or menu you add.

Click OK. My Favorites will now be listed at the top of the browse tree.

The Tax Research Consultant has now been added to My Favorites.
**Search All Content/Selected Practice Areas**

You can search your entire subscription by entering terms in the Search box and clicking Go. By searching everything in your subscription you have confidence that you will not miss a potentially important document.

Let’s start with our scenario:

Type *nol carryback* in the search box at the top of the screen and click on Go.

Your search results will appear in the right pane. The left pane will reflect the filters you can apply in order to narrow your results to documents of interest.
Introduction to IntelliConnect

Filter – by Library

Filter – by Court

Results – by Library

Results – by Court

Keyword Searching
Filter – by State Tax Type

The filter by Jurisdiction, gives you the ability to cross filter by federal, state and international information. This is helpful to further narrow and focus your results on a particular area of interest across all jurisdictions.
Introduction to IntelliConnect

We will select *Florida*. Click OK. The new filter will be displayed in the left pane.

 ![Jurisdiction Filter](image)

**Jurisdiction Filter**

**Document Type**

Using the filters in the left pane will allow you to browse the different type of documents in your search results. Click on the "+" sign next to *by Document Type* to view your list.

 ![Search Results Screen – Filters](image)

**Search Results Screen – Filters**

The left pane lists the different filters you can use to further narrow your results.
Click on *Explanations* and the right pane will show all of the Explanation documents within your subscription. By clicking through the tree in the left pane you can quickly sort through the other document types that might be of interest.

Let’s select paragraph 10-055.
State Tax Related Information

Related Information is a unique functionality of IntelliConnect. This innovative functionality supports an efficient process for complete research within individual State Tax Reporters and among various state publications. It ties together related documents and related topics.

From your starting point, jump to all related links in the same state, or move from your starting point in one state to the same topic in another state. The Related Information functionality:

- Links to related documents within the state you are searching, providing easy access to related explanations, statutes, regulations, cases and rulings from every document.

- Links documents in a topic area to documents in every state within the subscription that covers the topic.

The Related Information- All States locates documents from other states on the same topic.
This will retrieve the same *Explanation* for All States, within your subscription, in a new tab.

**Cross Filters**

The filters can be used independently of one another but all of the filters can also be used as a cross filter with each other. You can filter your results using as many of the *IntelliConnect* filters as you would like which will help you arrive at your answer even quicker.

To apply more than one filter simply click on each filter located on the left side pane as you normally would. You can select one filter from each filter category.

**Search for *not carryback***

In this example, we have filtered for *Explanations* in the *Tax Research Consultant*. In order to remove filters, just click on the ‘X’ located on the top of the right hand pane on the screen. You can uncheck one or more of the filters and *IntelliConnect* will automatically adjust your results.
**Viewing Documents**

To view a document on your search results list:

1. Click the title of the document.
2. The document will open in its own preview pane at the bottom right of your screen.

*Document review*

**Documents display in split screen view**
Wherever the documents are opened, from a search results list, publication document list, a research folder, etc. documents display in split-screen view with the list on the top and the document text on the bottom. This enables you to scroll through lists to find documents of interest and read multiple documents quickly without having to navigate back and forth between separate screens.

**Document contents**
The document pane, or “preview pane” will contain the menu path to that document within the browse tree, the document’s title, the type of document, the full text of the document, hyperlinks, and *Related Information* buttons. You will also see a number of standard document functions, such as 1st search term and print/save/email available at the top of the window.

**Documents can be compared side-by-side**
You can also open documents in their own windows so you can view and read the document easily and also view multiple documents simultaneously.

**View in new window**
With search results displayed on your screen, click the link of the document you want to view. The document displays in the Preview pane. Click the *View in New Window* button, the document displays in a new browser window.

**Maximize**
To view more of a document without opening it in a new browser window, simply click the *Maximize* button on the preview pane.
Document Review

To set the number of search results displayed per page, scroll down to the bottom of the search results window pane and select the number of items per page to be displayed.

Click the Maximize button to view the document in full screen mode.
Related Information (Federal Example)

*Related Information* allows you to link to other documents relevant to the document you are currently viewing. You can locate related documents by clicking on the *Related Information* buttons at the top of the document.

When you click the *Related Information – CCH Explanations* button, a new search tab will appear listing all of the related documents. From here, you can use the filters to narrow these results.

Click the filters to narrow the related documents just as you would a search results list. You can narrow your results using any of the filters.
Go to Search Term

In cases where the first occurrence of your search term(s) does not appear at the beginning of the document, you can easily go to the first occurrence of your search term in a document. Clicking on Go to Search Term will take you directly to the first keyword in the document. The arrows around the keyword will take you up or down within the document one keyword at a time.

Document Path

The Document Path link will show you the path to where the document resides within your subscription. You can see your document in context and what topic or area of law your document is located and find additional information regarding your document.

The Document Path feature also can be used to jump back to a specific area related to the document.
Viewing Nearby Documents in a Publication

After performing a search or browsing for content in IntelliConnect, you can easily access the documents in a publication that are nearby (i.e. come before and after) the document you have displayed on your screen.

To view nearby documents:

- Once you have a document displayed on your screen, click on the link at the top of the document.

Viewing the Next/Previous Documents from your Search Results List

After performing a search, select a document that you want to view from the search results list.

The document you selected is displayed in the Preview pane.

- Click the up arrow to view the previous document from your search results list.
- Click the down arrow to view the next document from your search results list.
Recordkeeping Options

Research Folders & Document Tray

Research Folders

Use Research Folders to save and store documents you want to keep during your research session for later use. If you are looking at the document that you want to save for later use, click on the Save/Email icon at the top of the document and select Save document to Research Folders. You can create a new folder or add the document to an existing folder.

Save feature

Access your saved documents at any time by clicking Research Folders on the Quick Bar. You can also copy and/or move documents to another Research Folder or the Document Tray, Print, Save, or Delete from the folder entirely. Documents you store in Research Folders will remain indefinitely until you delete them or delete the Research Folder.

If you access a document that has already been added to a Research Folder, the upper left hand corner of the document will display an icon indicating so. If you click on the icon, the Research Folder containing the document will be accessed immediately and automatically.
Document Tray

*IntelliConnect* allows you to send a document you find of interest to the *Document Tray*. The advantage of sending a document to the *Document Tray* is that you can temporarily set it aside for later viewing. Click on the *Send to Tray* icon to place your document in the tray.

Once in the document tray, you can print, save it to a file, or save it to a *Research Folder*.

The documents that you add to the *Document Tray* during a research session are available until you log off. When you click the *Log Out* button a message will display asking if you want to save the documents in your *Document Tray*. 
Printing, Saving, Email

Print

To print a document or document list, click the Print icon at the top of the list or document, select to either print a text version or a PDF version. The PDF version will retain all of the formatting of the document.

Print Selected Text

To print any portion of a document, highlight the area and then click on the Printer icon. You can also select ‘Print selected Text’ within the Print menu. The title of the document will also print with the selected text.

Save

To save any document or document list, click the Save icon at the top of the list or the Save/Email icon at the top of the document, select to Save as PDF, Save as text and Save link to document. The PDF and text version will retain all of the formatting of the document.

Email

To email a document, click on the Save/Email icon at the top of the document, select Email document, and then type in the email address of the recipient.
Viewing multiple searches at once

You can maintain multiple search sessions at one time. Each new search will appear on its own tab. IntelliConnect will allow up to ten tabs open at one time which can include various system functions like Browse, Citations or Research Folders. These tabs allow you to conduct multiple research tasks at the same time.

For example, let’s say you are in the middle of researching one tax issue when you are asked to research another.

Let’s search for the new term – charitable contribution.

Because the results from the first research question are stored on a tab, you can simply research the second issue (automatically storing your results on a second tab.) You can easily switch back and forth between tabs just by clicking on them.

Each time you search, a new tab opens with the results for that search displayed. This increases your efficiency and productivity to quickly get back to your previous search results.

To close all tabs at once click the ∑ in the right corner.
Citations

The quickest way to locate a document is to search for it using the citation of the document if you know its exact citation format.

Find a document using Citation Templates

You can use the following steps to retrieve a document by citation number:

1. Click on the Citations link in the Quick Bar.
2. On the left side of your screen, select the library for the type of document you want to retrieve. Continue to click on the categories on the left until you have located the document type you are looking for; we will retrieve Code section 172.
3. When you select a category on the left, the templates for that category appear on the right.
4. Scroll through the templates on the right to find the correct template for your cite.
5. Type the document number or citation in the template boxes.
6. Click Go.

For example, search for code section 172.

At the top of each set of citation templates, you will see a “free form” citation box. If you know the entire citation format for the document you can type the complete citation in the box to retrieve the document.
Keyword Searching for Citations

You can also use the following steps to retrieve a document by citation number:

1. Select the pull down in the search scope then select citations.
2. Type your citation in the search box.
3. Click Go.


Results screen

You can also search all content or selected practice areas by typing your complete citation to retrieve the full text of the document.

For example, search for rev rul 94-24 using the all content or selected practice areas search.

Results screen

Combination citation search - the first document on the list will be the full text of the citation. Below it you will find documents citing with other references following.
Topical Indexes

When you know the topic you would like to search, browse to the *Topical Indexes*, select the publication and then the appropriate letter of your topic.

We will look for *net operating loss* within the *Tax Research Consultant*. First select *Federal Taxes*, select *Federal Tax Editorial Content*, select *Topical Indexes*, select *Tax Research Consultant Topical Index*, and click on the letter of your topic. We will use the letter “N” for *net operating loss*. Scroll to the topic in the right pane which will allow you to browse to the area you would like. Just click on the document link to open the document.
Titles A-Z

You can use the Titles A-Z command to look up titles in your subscription contents using an alphabetical index or conduct a search for terms within a title.

Grayed out titles indicate publications outside of your selected practice areas.

You can search for a specific publication by name. You can then select a title to quickly view the expanded contents of the title within the Browse tree.
Citator

The Citator will help you to determine whether a case or ruling is still current, whether there are any other cases or rulings on the same point of law that should be considered, and whether the ruling in the case is still good. The Citator also lists court cases and rulings that significantly comment on a cited case or ruling. It shows all paragraphs where a cited case or ruling is annotated. It also provides citations to cases and rulings that have been superseded by or may supersede your case or ruling.

Let’s retrieve Rev Rul 55-10.

With the document displayed click on Citator, this will give you the history information for that document.
If you know the citation of the case or ruling and just want the cited information of the document, following these steps:

1. Click the *Citator* link on the *Quick Bar*. The system displays all citatory templates available in your subscription.
2. Scroll down the list to find the template you wish to use, or narrow the list of templates displayed. To narrow the list, click a library in the left navigation pane and then click on its publications.
3. With the template you selected displayed in the window pane, enter the requested information in the template boxes (e.g., paragraph, section number, etc.) and click *Go*.

If you know the *case name*, type it in the *Enter a case name* field at the top of the right pane.

Click on *Citator* from the *Quick Bar*. In the right pane, key in your case name. In this scenario we will use *purina*, then click *Go*. 
Practice Tools

*Practice Tools*, such as Smart Charts, calculators, tables, and toolkits, are now easier than ever to access.

**From the Quick Bar:**
1. Click *Practice Tools* on the *Quick Bar*.
2. Click on the “+” icons on the tree to expand the categories until you locate a *Practice Tools* you want to open.
3. Click on the *Practice Tool* and the tool will open in a new window.

**From Browse:**
1. Click *Practice Tools from the Browse tree*.
2. Click on the “+” icon next to the library where the Practice Tool resides.
3. Continue expanding items until you locate the Practice Tool you want to open.
4. Click on the practice tool and the tool will open in a new window.

Practice Tools accessed via the Browse Tree and from the Practice Tools selection from the Quick Bar are exactly the same. Accessing the Practice Tools from the Browse Tree will allow you to add a specific tool to *My Favorites*. 
Tracker News

Tracker News helps you keep on top of all the tax news you need to know. New searches specific to your areas of interest can be setup and you can opt for those results to be delivered on a daily basis. Your Tracker News can be delivered to you via email, RSS feed, and/or right within IntelliConnect. News tracker delivery options can be customized and the tracker search can be narrowed to a specific document type or other editorially-defined criteria within a subject area. Tracker emails can contain brief excerpts of stories (along with the story headlines) and links to the full-text versions of the stories.

Creating new Tracker Searches:

1. Click on Tracker News in the Quick Bar.
2. Click on Click here at the top of the left pane.

3. All of the Tracker Searches are listed on the Tracker Setup page.
   a. To add a Tracker, just click the checkbox next to the Tracker you want to add and then click Add Trackers. You can click as many checkboxes as you want.
b. You can further define any of the Tracker searches by clicking the target icons next to the Tracker names and selecting additional options such as specific states, document types, and topics.

c. You can also name each tracker search and add additional search terms. When you are finished selecting your options, click OK and then click Add Trackers.
4. The first time you set up Tracker News, you will be asked for your email address. Check the box next to Yes, enter your email address and your user name and click OK.

![Tracker News Delivery Setup]

Delivery options

5. To setup additional email options, click Delivery Options at the top of the right pane. Here you can select your preferred email format. When you are finished, click Apply changes.

![Tracker News Delivery Options]
To view your Tracker Search results:

1. Click on Tracker News on the Quick Bar.
2. Your Tracker searches are listed in the left pane. Click on a Tracker search and the news stories will appear in a list in the right pane.

3. To read a news article, click on a title and the news article will open in a split screen view reflecting the article in the document preview pane.

If you want to see news stories from a particular time period, click on the calendar icon to the right of each Tracker search in the left pane. Select the desired date range and click Search. Your results will appear in the right pane.
E-Newsletters/Report Letters

There are two ways you can receive Report Letters via email:

- You can subscribe to selected Report Letter alerts via the standard tracker process and receive a Tracker Search email alert when a specified Report Letter has been published within *IntelliConnect*.

- You can choose to receive selected individual Report Letters in their entirety via email in *IntelliConnect* as shown below. In other words, each Report Letter is sent in a separate email with the title of the Report Letter in the subject line of the email message and the full text of the report in the body of the email.
Trackers via RSS feed

You have the option of having your Tracker results delivered to your RSS reader. Before you can receive Tracker feeds with your RSS reader, you must add the custom URL for the Tracker to your RSS reader.

To add a Tracker to your RSS reader:

Click the Tracker News link located on the Quick Bar.

The main Tracker News page displays and your Trackers display in the left pane under Tracker News.

- Click the Add/Modify Trackers link.
- Click the Delivery Options link located at the top of the Add New Trackers screen.

The Tracker News Delivery Options dialog box displays.

- Copy and paste the URL displayed at the bottom of the Tracker News Delivery Options dialog box into your RSS reader.

For detailed instructions on how to add the URL for the Tracker see your RSS reader help file.
History

History lists all of the searches and documents you have found in past research sessions. You can view them separately or all on one list. You can click on previously viewed documents or searches to see them again.
# Finding Your Answers

| **Browse - View and walk through all your content** | • The browse tree displays in the left pane. Click through the tree using the + and - icons to review the items in your subscription until you reach a document of interest.  
  • Click the document you wish to view. The document displays in the right pane. |
|---|---|
| **Search selected content** | • Locate the publication, state, or other area on the tree you want to search.  
  • Click in the checkbox(es) next to the area you want to search. The search scope will be automatically changed to **selected content**.  
  • Type your terms in the search box and click **Go**. |
| **Search your entire subscription** | • Make sure **selected practice areas** is selected in the search scope box.  
  • Type your search terms (e.g., **home office deduction**) in the search box and Click **Go**.  
  • Then use the filters on the left pane to narrow your choice.  
  
  - **Document Type** - such as Explanations, Laws, and Regulations  
  - **Practice Tools** - such as Smart Charts and Toolkits  
  - **Library** - such as Federal Tax, State, Pension  
  - **State Tax Type** - such as Sales and Use, and Corporate Income  
  - **Jurisdiction** - such as Federal, State, and International |
| **Search for a document using its citation** | • Type in your citation and click go to search or select **citations** from the Search scope drop-down box.  
  • Type the citation reference you wish to search in, the search box. For example, **IRC 172** or type **172**.  
  • Click **Go**.  
  • Click **Citations** on the **Quick Bar**.  
  • Using the tree on the left, select the type of document you are looking for, e.g., **Code Section**  
  • On the right, type the citation number in the appropriate box, e.g., **172** and Click **Go**. |

| **Topical Index** | • Select the Practice Area, then select library and locate the **Topical Indexes**. |
| **Titles A-Z** | • Use the **Titles A-Z** command to look up titles in your subscription contents using an alphabetical index or conduct a search for terms within a title. |

Your feedback on this session is important to us. Please log on to [www.cchgroup.com/training/feedback](http://www.cchgroup.com/training/feedback) to tell us what you think by filling out our evaluation form.
Help
If you need help while you are researching, click on the Help link in the top right corner. Additional help and tutorials are available on the Home page.

Log Out
Click Log Out when you finish your research session.
Integration

CCH ProSystem fx Tax and CCH IntelliConnect

ProSystem fx Tax and IntelliConnect provides access to tax research from within the tax return with a click of the mouse. This valuable integration tool allows quick and easy access to your questions while preparing and reviewing the return. Find fast, accurate answers and cross references to Internal Revenue Code and Income Tax Regulations, CCH Standard Federal Tax Reporter, Tax Research Consultant and Tax Prep Partner Series.

Find quick and easy answers to your questions within:
  - U.S. Master Tax Guides
  - CCH State Smart Charts
  - Tax Prep Partner Series

ProSystem fx Tax to Federal Tax Research - USMTG

Scenario 1

Mary, a tax preparer at ABD, LLP, is preparing the Smith’s tax return. She wants to know if interest received from a New York City bond is taxable or tax-exempt for federal tax purposes. She is in the Worksheet View in ProSystem fx Tax ready to input the amount from the 1099 INT-received from the Smith’s investment broker.

With the cursor in the Interest Income field Mary clicks on the IntelliConnect button on her toolbar.

IntelliConnect automatically launches and takes her to the U.S. Master Tax Guide discussion on Interest.
If Mary wants to look at the cross references to the *Internal Revenue Code*, *Income Tax Regulations*, the *CCH Standard Federal Tax Reporter* or the *Tax Research Consultant* she can easily access them within the document.


All interest received or accrued is fully taxable (Reg. §1.61-7), except interest on (1) tax-exempt state or municipal bonds, (2) certain ESOP loans (§725), and (3) interest on U.S. savings bonds used to pay qualified educational expenses (§78B). A cash-basis taxpayer is taxed on interest when received. Interest on bank deposits, coupons payable on bonds, etc., is considered available and taxed to a cash-basis taxpayer under the doctrine of constructive receipt and is taxed when credited or due.

Interest earned on corporate obligations is generally taxed when actually received by, or credited to, a cash-basis taxpayer (Reg. §1.61-7(a)). The same rule applies to interest on certificates of deposit, time obligations, and similar deposit arrangements on which interest is credited periodically and can be withdrawn without penalty even though the principal cannot be withdrawn without penalty prior to maturity. However, interest on a six-month certificate that is not credited or made available to the holder without penalty before maturity is not includible in the holder’s income until the certificate is redeemed or matures (Rev. Rul. 80-157).

Mary determines from her research that interest received from a New York City bond is tax-exempt interest and enters the dollar amount with the appropriate coding on the Interest Income Summary Grid.
**Scenario 2**

Tom, a tax manager at ABD, LLP, is reviewing the Smith’s tax return. He wants to review the treatment of the amount on Line 8b, Form 1040, to ensure that the interest received from a New York City bond is tax-exempt interest. He is in Government Form view within ProSystem fx Tax.

With the cursor on Line 8b of Form 1040, Tom clicks on the *IntelliConnect* button on his toolbar.

![Government View](image)


> All interest received or accrued is fully taxable (Reg. §1.61-7). Except interest on (1) tax-exempt state or municipal bonds, (2) certain ESOP loans (§725), and (3) interest on U.S. savings bonds used to pay qualified educational expenses (§130A). A cash basis taxpayer is taxed on interest when received. Interest on bank deposits, coupons payable on bonds, etc., is considered available and taxed to a cash basis taxpayer under the doctrine of constructive receipt and is taxed when credited or due.

Interest earned on corporate obligations is generally taxed when actually received by, or credited to, a cash basis taxpayer (Reg. §1.61-7(a)). The same rule applies to interest on certificates of deposit, time obligations, and similar deposit arrangements on which interest is credited periodically and can be withdrawn without penalty even though the principal cannot be withdrawn without penalty prior to maturity. However, interest on a six-month certificate that is not credited or made available to the holder without penalty before maturity is not includible in the holder’s income until the certificate is redeemed or matures (Rev. Rul. 80-157).
Tom determines from his research that interest received from a New York City bond is tax-exempt interest after reading the *U.S. Master Tax Guide* and reviewing Final Regulation §1.61-7.

Tom enters a tick mark within the tax return next to Line 8b to indicate his review of the entry.

<table>
<thead>
<tr>
<th>Income</th>
<th>7 Wages, salaries, tips, etc. Attach Form(s) W-2</th>
<th>8a Taxable interest. Attach Schedule B if required</th>
<th>7</th>
<th>107466.7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attach Form(s) W-2 here. Also attach Forms W-2-26 and 1099-R if tax was withheld.</td>
<td>b Tax-exempt interest. Do not include in line 8a</td>
<td>8b Ordinary dividends. Attach Schedule B if required</td>
<td>8a</td>
<td>6500.7</td>
</tr>
<tr>
<td></td>
<td>9a Ordinary dividends. Attach Schedule B if required</td>
<td>9b Qualified dividends (see page 21)</td>
<td>9a</td>
<td>5000.7</td>
</tr>
<tr>
<td></td>
<td>10 Taxable refunds, credits, or offsets of state and local income taxes</td>
<td>10b</td>
<td>2000.7</td>
<td></td>
</tr>
</tbody>
</table>

**Tick mark**

**ProSystem fx Tax and IntelliConnect - CCH Tax Prep Partner Series (TPP)**

ProSystem fx Tax includes integration for linking to the *Tax Prep Partner Series* content. This integration:

- Allows you to link from line level fields on Federal tax forms directly to explanatory content; giving instant references to tax form line explanations
- Provides unique interactive practice materials and tools that offer step-by-step analysis during the preparation process
- Is available for the *Tax Prep Partner Series* research products for the following return types (Main forms only):
  - 1040
  - 1041
  - 1065
  - 1120
  - 1120S
  - 990

To link from a specific line in a return to *IntelliConnect*, place your cursor on a field in a Government form and click on the *Tax Prep Partner Series* icon on the toolbar.
You will automatically be logged into **IntelliConnect** and linked from line level fields on Federal tax forms directly to explanatory content - giving instant references to tax form line explanations dealing with the issue at hand.

Since you are now logged into **IntelliConnect** you can continue your tax research as you normally would until you log out.

Click on any link within the document (or scroll down the screen) and you will have instant references to tax form line explanations dealing with the issue at hand.
**Setting up the Integration**

Establishing a link between *IntelliConnect* and ProSystem fx Tax provides access to research from within tax compliance with a click of the mouse.

Start by having the system administrator configure ProSystem fx Tax to provide the link.

Open *Office Manager*, click on *Configure Applications*.

Then click on *Research*; check the boxes that are shown with the checkmarks.
When the system administrator has completed these steps, the system is ready for each user to configure their respective workstation.

To configure your workstation, open ProSystem fx Tax and follow the instructions below:

1) In Tax Preparation, select *Options, Interface Options, and then Research* from the menu bar.

![Menu Bar Image]

2) Check *IntelliConnect* radio button and enter your *IntelliConnect* User ID and Password. (This is **NOT** your ProSystem fx User ID and password. Rather, your *IntelliConnect* User ID and password needs to be entered here)

![IntelliConnect User ID and Password]
3) Add the **IntelliConnect** icon to the ProSystem fx Tax toolbar. Choose *Options, Customize Toolbar* from the menu bar. Locate the **IntelliConnect** button, highlight it, and then click the *Add* button.

You may also utilize the Notes feature in ProSystem fx Tax. This feature gives you the ability to document the conclusion by copying and pasting a research answer from **IntelliConnect** to ProSystem fx Tax.
ProSystem fx Tax to State Tax Research - SmartCharts

In addition to integration with our federal tax products, ProSystem fx Tax now links directly to the CCH Smart Charts within the CCH State Tax Reporters. Now, you can move seamlessly between preparing and reviewing tax returns and verifying state tax treatment. You do not have to exit out of ProSystem fx Tax to get fast answers to crucial related questions about state issues.

Within the state portion of a ProSystem fx return, simply click on the Smart Charts icon on the ProSystem fx toolbar.

For example, let’s access California tax form CA 3519.

You will be logged into IntelliConnect and automatically launched to a topic screen; that is, the jurisdictional Smart Chart is already selected based on the form from which you are linking.
From this point, you select the topic of which you need a quick answer. Just select a topic and a *Smart Chart* is created with a *Comment*, *Citation* and *CCH paragraph* link.

CCH State Smart Charts offer:

- **Seamless access to rates, requirements and hot issues** — right from a state tax preparation form.
- **Export capability** — your answers can easily be exported into either Microsoft Word or Microsoft Excel and *Smart Charts* can be saved directly to client files.
- **Links to official material** — *Smart Charts* provide immediate access to state statutes and regulations for deeper research and audit trail purposes.
- **Links to deeper research** — *Smart Charts* also provide links to CCH’s State Tax Reporters which are the industry standard for state tax research and editorial commentary.

You can add the *CCH Smart Charts* icon to the ProSystem fx Tax tool bar for quick access. This can be done quickly and easily by clicking Options and click on Customize Toolbar. On the left side list scroll down, locate the CCH Smart Charts icon, and click the ADD button. Once the icon is added, click *Close* and you will see the *CCH Smart Charts* icon displayed on your ProSystem fx Tax toolbar.
Training & Support

Our Research Specialists can assist you in conducting research, locating information in CCH reporters, and using any CCH product. Contact us via phone, chat, or email.

- Frequently asked questions
  — Please visit [http://tax.cchgroup.com/intelliconnect/faqs](http://tax.cchgroup.com/intelliconnect/faqs)

- CCH Customer Service
  — Please visit [http://support.cch.com](http://support.cch.com)
  — 1-800-835-0105
  — [CCHcustomerservice@wolterskluwer.com](mailto:CCHcustomerservice@wolterskluwer.com)

- Research Product Specialists – Ask product related questions
  — 1-800-344-3734

CCH Customer Training

At CCH we pride ourselves on offering a wide variety of consulting and training options to help you become more efficient with your CCH Research and ProSystem fx software products. CCH has over 50 consultants and trainers with years of industry experience. These professionals take pride in assisting our customers.

- Research Training Courses
  — Please visit [http://cchgroup.com/intelliconnecttraining](http://cchgroup.com/intelliconnecttraining)
Appendix A – Preferences

*IntelliConnect* also includes a number of *Preferences* you can set to further customize your research experience. To see the preferences that are available, click on *Preferences* at the top of your screen.

![Preferences screenshot](image-url)
Search Results

- Highlight search terms within search results excerpts
- Show search results excerpts
- Show results categorized by document type

Document Preferences

*Double-click a document in the results list to open it in:*

- Preview Pane (default setting) — with this option selected, the document displays in the Preview Pane at the bottom half of your screen.
- Full Screen — with this option selected, the document displays in full-screen mode in the Preview Pane.
- New Window — with this option selected, the document displays in a new browser window.

Print/Export/Email Preferences

*Print multiple documents (non-PDF printing only)*

- *Serially (default setting)* — with this option selected, multiple selected documents are printed in RTF/HTML format one after the other, separated only by a horizontal line on the page (not a page break). (When you print documents in PDF format, each document will print separately.)

- *Separately* — with this option selected, multiple selected documents are printed with page breaks in between documents.

*When emailing documents*

- *Send as attachments only (default setting)* — with this option selected, emailed documents are sent as attachments (e.g., they won’t appear in the body of the email).

- *Send as text in body of email* — with this option selected, emailed documents will appear in the body of the email (not as attachments).

- *Send as link only* — with this option selected, emailed documents will contain a link to the document only (plus whatever text message you have added to it).

Browse

- Expand My Favorites automatically when I log in option. *(default setting)*