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Overview of Publications and Tools

TaxNotes.com includes all of Tax Analysts’ publications, three specialized practice area modules, and four research tools.

After you’ve logged in to the platform, you can check what’s in your subscription by hovering your cursor at the orange Publications and Research Tools (1) tabs at the top right.

The material that’s in your subscription will appear as a white link. The material not included in your contract will be in a faint orange type with a lock to the left.

Daily Publications
- Tax Notes Today
- State Tax Today
- Worldwide Tax Daily
- Exempt Organizations (EO-related material excerpted from Tax Notes Today)
- Highlights and Documents

Weekly Publications
- Tax Notes
- State Tax Notes
- Tax Notes International
- TaxPractice

Monthly publications
- Exempt Organizations Tax Review
- Insurance Tax Review

Practice Centers
- BEPS Expert
- FATCA Expert
- Transfer Pricing Expert

Research Tools
- Federal Research Library: Primary source federal tax documents
- Worldwide Tax Treaties: Collection of over 10,000 tax-related treaties
- Tax Directory: Searchable listing of tax officials in both the public and private sectors
- Exempt Organizations Master List: Searchable directory of tax-exempt organizations

If you’d like to try a publication or tool not in your subscription, please contact: customer.service@taxanalysts.org
Opt In to Emails

Tax Analysts sends daily news messages each morning for federal, state, and international tax. As important news breaks, we send subscribers “Latest News” alerts. We also send messages with the tables of contents for our weekly and monthly publications, and a weekly update on treaties.

Set up your email subscriptions from the Manage Email Subscriptions (1) option in the drop-down under My Tax Notes.

Check the boxes (2) corresponding to the publications you want to receive.

Custom alerts are also available — these begin with a search. See Creating Alerts (page 13).

If you subscribe to Tax Notes Today, you can receive a daily message with the top news first, or sort by code section.
Retrieving Documents by Citation, Title, or Key Word

You can retrieve Tax Analysts’ articles or documents and IRS documents by citation. To retrieve a document, use the citation fields on the Advanced Search template.

Click on the Search icon (1) and then on Advanced (2) to pull up the template.

Retrieving a Tax Analysts or IRS Document by Citation

In the Advanced Search template, enter the citation in the Tax Analysts Cite (3) or IRS Citation (4) field.
Finding New Material by Code Section

Bring up the Advanced Search template as illustrated in Retrieving Documents by Citation, Title, or Key Word (page 3).

Enter the code section (1) in the template.

This search will retrieve many types of documents – not just news articles, but viewpoints, practice articles, and special reports, as well as primary source documents like proposed regulations, court decisions, and letter rulings pertaining to that code section.

This is a wealth of material, so you’ll likely want to narrow these results before you save your search. See the section on Narrowing Your Search Results (page 11).

To have new material on this code section sent to you automatically, save your search – this will allow you to create an alert. See the section on Creating Alerts (page 13).
Once you've narrowed your search, look at the top of the left column for the blue **Save Search** box (1), and click on it.

You'll be invited to **name your search** (2) (the code section will appear as the default name), and you'll be asked **how often** (3) you want to receive an email with new results. You'll receive an email only when there's new material.
Searching: 4 Ways

There are four ways of searching on taxnotes.com

- Intuitive searching (terms and connectors)
- Advanced search
- Click-through searches with menus
- Free-form search (begin with filters)

Intuitive Search

Click on the **Search icon** (1) and the search box will appear.

To see search operators, click on the **blue link** (2). Using search operators may help you run a more precise search but it isn't required.

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### Search Connectors

- **AND**
  - Both (or all) the words appear in the document
  - Example: Treasury AND anti-inversion AND guidance

- **OR**
  - Search for alternate terms
  - Example: law OR legislation

- **"**
  - Exact phrase
  - Example: "disguised sales"
  - Example: "profit and loss"

- **"**
  - Wildcard / Root expander
  - Example: Cuberto*n will retrieve Cuberto, Cubertoan, Cubertoan, etc.
  - Example: audit* will retrieve all words beginning with "audit," including audits, auditor, and auditing

- **NOT or ~**
  - Example: legislative NOT History
  - Example: legislative -History

- **-n**
  - Use fuzzy match to retrieve words with similar spelling
  - Example: Sheperd - will retrieve Shepard

- **-n**
  - Proximity - within n words
  - Example: "Ireland Inversion" -5 retrieves documents where Ireland is within 5 words of Inversion

- **()**
  - Group terms together to build searches
  - Example: (Swiss OR Switzerland) AND bank AND (record or account)

---

An example of a search with search connectors (3).
Advanced Search

To bring up a search template, click on the **Search icon (1)** and then on **Advanced (2)**.

Enter your terms in the fields. Put exact phrases in quotes.
If you enter terms in more than one field, the criteria are combined and so the search is narrowed.
The search below retrieves all articles by **Lee Sheppard (3)** with the phrase “**dividend equivalent withholding** (4)” in the title.
Click-Through Searches With Menus

The buttons labeled Tax Topics, Key Documents, Contributors, and Jurisdictions (1) at the top of the search page will take you to click-through search menus.

Tax Topics

Clicking on Tax Topics will bring you to a menu of topics. If you don’t see your topic, put your cursor in the gray box (1) and begin entering it. A list of topics will appear.

Click on the white link (2) to see materials on that topic.

Key Documents

Tax Notes Today, State Tax Daily, and Worldwide Tax Daily each republish dozens of primary source documents each day (see Reading Tax Analysts’ Publications Online (page 14)). You can find these documents by clicking on the document type.
Contributors
This menu will let you see all the articles written by a select list of Tax Analysts contributors.

Jurisdictions
This menu will let you easily find documents from or about a particular state, country, or multinational organization.
Free-Form Searching

If you want to begin with the entire collection of documents and then narrow it, use the Free-Form search. First, click on the Search icon (1) and then click on the orange arrow (2) to the right of the search bar.

The screen will refresh, and you’ll see the complete set of over 4 million Tax Analysts documents. Look to the left rail for the Narrowing Search Results (2) to begin narrowing the documents.
Narrowing Your Research Results

Whenever you run a search, all the documents that meet your search criteria will load. You'll likely want to tighten your criteria to winnow out results that aren't of interest. The tools for narrowing your results are in the left rail.

You may elect to specify that your search terms appear only in the title of the document. Use the drop-down under the search terms box to change Search Full Text to Search Title Only (1).

Adding dates is another good way to hone the search (2).
The other filters appear lower on the left rail. Note that using a code section (1) may be an effective way to limit your material.

You can begin entering the name of a category in a filter box and the list of categories (2) will appear.

Once you’ve honed your search results, you may want to make the search into an alert, so you’ll automatically receive new material by email. See the section on Creating Alerts (page 13).
Creating Alerts

Once you have a search that produces the documents you want to monitor, click on the blue **Save Search** button to create an alert.

You’ll be invited to **name your search** and you’ll be asked how often you want to receive an email with new results.

If you choose Weekly, your alert will arrive Monday morning.

You’ll receive an email only when there’s new material.
Reading Tax Analysts’ Publications Online

Tax Analysts publishes daily, weekly, and monthly publications. As a courtesy to our readers, when you log in you’ll see the headlines and abstracts for the top three stories in each of our three daily publications along the left side of the screen.

These headlines and abstracts are available whether or not they're part of your subscription.
After you log in, you can see your subscriptions by hovering your cursor under the orange Publications tab (1).

The publications in your subscription are in white type; the ones outside your subscription are in lighter type with a padlock (2) to the left.

By scrolling down below the “Top News” stories on the right hand you will see the cover stories for each of our weekly magazines, whether or not you subscribe.

To see full contents, click on the More From Tax Notes (3) tab at the bottom of each magazine’s image. You can toggle between magazines by clicking on the magazine title (4).
Daily Publications

Tax Analysts issues three daily publications:

**Tax Notes Today**: U.S. federal tax

**State Tax Today**: State and local tax

**Worldwide Tax Daily**: Non-U.S. nations, and developments in international tax

On the Tax Notes landing page, you'll see the top three headlines and abstracts from each of these publications. You can see the full contents to any publication in your subscription.

To open the full edition of a daily publication, click on the See All (1) link.

If breaking news has been announced during the day, you’ll see a Latest News (2) banner across the top of the page.
The date box (1) at the top of the edition is a calendar tool. Click in the box and you can go back to previous day’s issues.

If you’re looking at Tax Notes Today, you can reorganize it by code section (2).
As you go back to previous issues — or return to today’s issue — the articles you’ve already read will be in a lighter gray (1) font.

If you see an article you’d like to set aside to read later, use the + icon (2) to save it to your reading queue.

The article will go into your Reading Queue (3), and will stay there until you read it.

For more tools, see the section on Personalizing Your Tax Notes (page 21).
Weekly Magazines

Tax Analysts publishes three weekly magazines:

**Tax Notes:** U.S. federal tax

**State Tax Notes:** State and local tax

**Tax Notes International:** Non-U.S. nations, and developments in international tax

These appear toward the bottom of the left column on the landing page (1).

Click on the magazine title to see the contents of the week's issue.

If your subscription includes the magazine, you'll be able to see the full contents by clicking on the **More From** (2) link at the bottom of the page.
When you open the magazine, you can:

- Search in the magazine with **Search Tax Notes** (1) (the current issue as well as the archives)
- Using **Download the PDF** (2) you can save full issues in a PDF file format
- In **Past Issues** (3) you can retrieve a full back issue
- Open the **Flipbook** (4), which will let you turn pages on screen as though you were holding the magazine in your hands

Full back issues are available to:

- *Tax Notes* ............... 1998
- *State Tax Notes* .......... 2000
- *Tax Notes International* .... 2001
Personalizing your Tax Notes

There are several ways to enhance your Tax Notes reading experience. Select My Profile (1) under the Welcome tab.

Setting Search Display Preferences

In the lower portion of the profile, you'll see two options for changing how your search results are displayed. Use the drop-downs to set these preferences.

- You may increase the number of search results that appear when your search has run (2)
- You may opt to have search results show your search terms in context (3)

Click Save Changes (4) when you're finished changing your preferences.

If you subscribe to more than one daily publication, in the Primary Publication (5) drop-down menu you can select which one you want to see at the top of your landing page.
Recommended for You

You can also indicate **Tax Topics** (1), **Jurisdictions** (2), or **Industries** (3) in which you have a particular interest.

You can select from the **drop-down lists** (4), or begin entering a topic in the box.

Tax Analysts’ platform will take these interests into account in selecting articles Recommended for You.

The **Recommended for You column** (5) will appear on the right after you’ve left the landing page. You’ll see articles from publications in your subscription that are recommended for you, based on the topics you identified and the subjects of the articles you’ve opened.
Favorites

Favorites gives you a place to store documents that you want to refer to again. Your Favorites are in the drop-down under My Tax Notes (1).

To put an article in your Favorites, click on the Favorite icon (2) in the ribbon below the title. When you have an article in your Favorites (3), consider adding a tag (descriptive caption).

Go to Favorites and select View All (4).

In the New Tag (5) field, enter a tag to remind you what the article is about. You can have more than one tag on an article — just separate the tags with a comma.
As you're tagging your articles, be consistent in using the same tag for articles that you want to group together, because clicking on a blue tag (1) will bring up all articles that have that same tag (2).