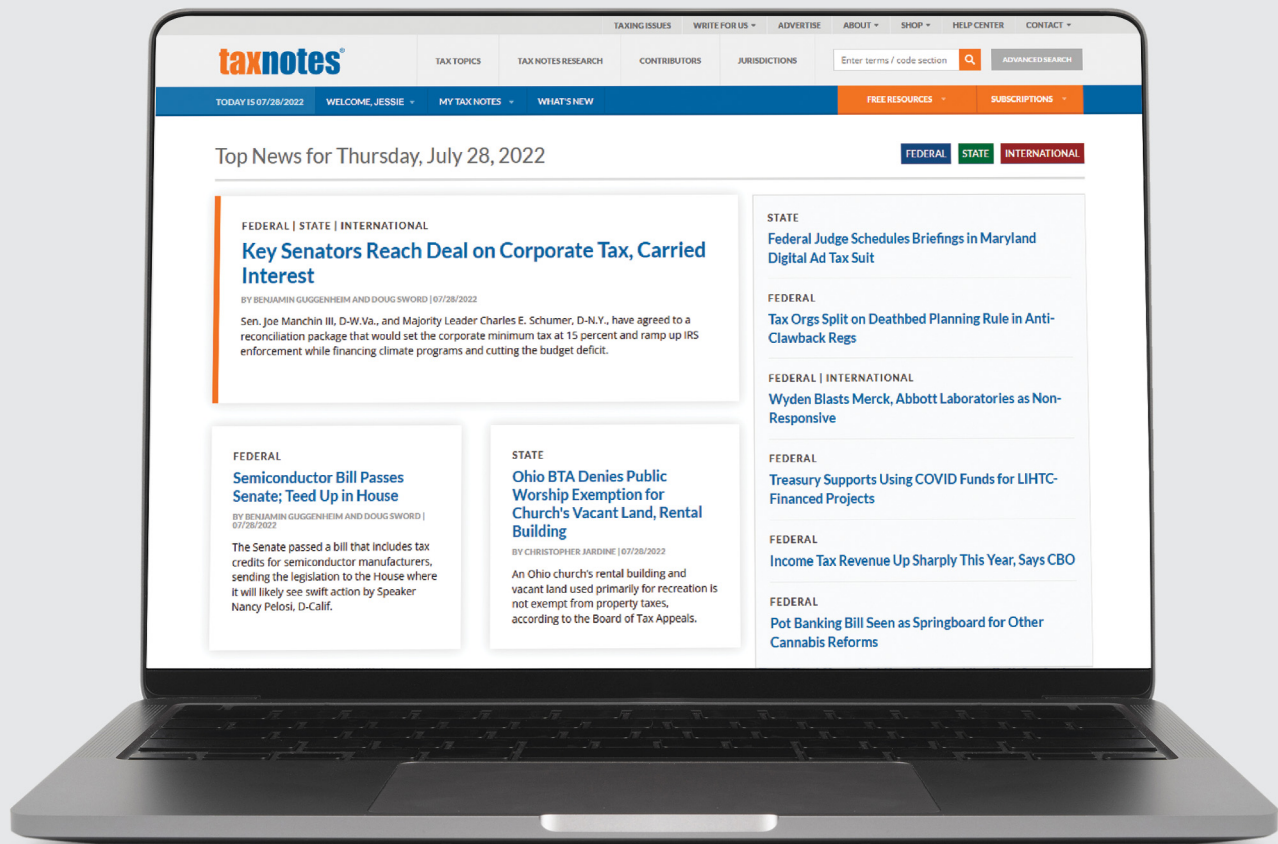


# taxnotes<sup>®</sup>.com

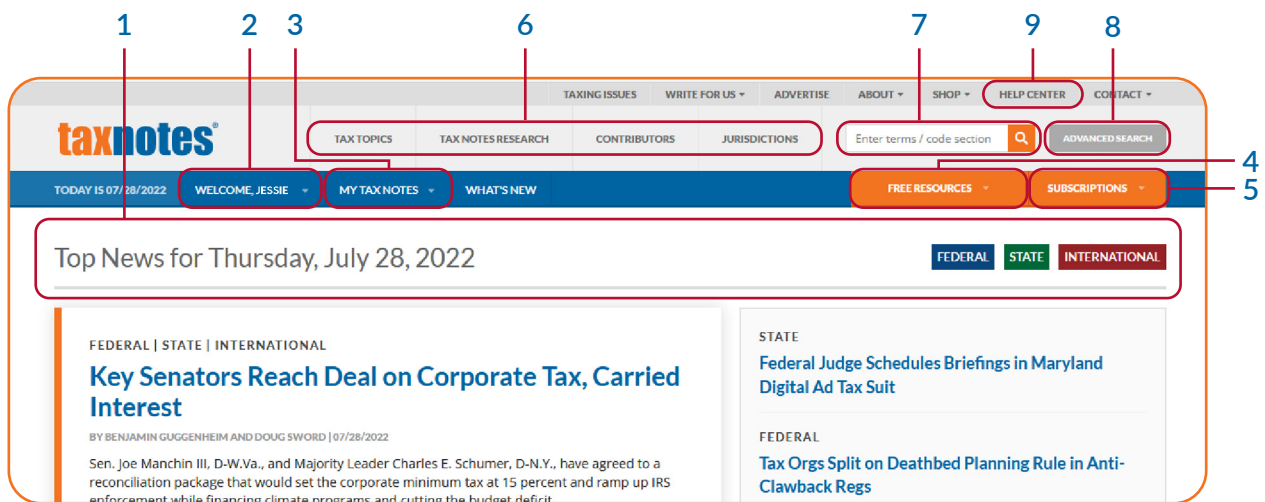
Welcome

Quick Reference Guide

## Website Overview



## Tax Notes Homepage



1. Read the daily news.
2. Reset your password, sign out, and manage account settings.
3. Personalize your Tax Notes:
  - Manage your favorites, tags, and reading queue.
  - Create and manage saved searches.
  - Manage email subscriptions.
4. Access our [Free Resources](#), including federal primary source documents.
5. View what's included in your subscription and access tools such as Nexus Tracker and Transfer Pricing Center.
6. How to navigate and search: Click and browse selections including Tax Notes Research.
7. How to navigate and search: Go directly to a primary source by citation on Tax Notes Research.
8. How to navigate & search: Use the advanced search with Boolean terms and connectors.
9. Access our [Help Center](#) for:
  - User guides and how-to videos.
  - Contact information to get legal research help.

## Personalize Your Tax Notes

Personalize Tax Notes by managing email subscriptions and using functions such as Favorites, Tags, Reading Queue, and Saved Searches. To manage email subscriptions and functions, hover over "My Tax Notes" and select the relevant option.

1. **Favorites** are saved/stored documents. Tags organize your Favorites into categories.
2. **Reading Queue** saves articles from the daily news.
3. **Saved Searches** can be used to notify you when a document is published that matches your search criteria.

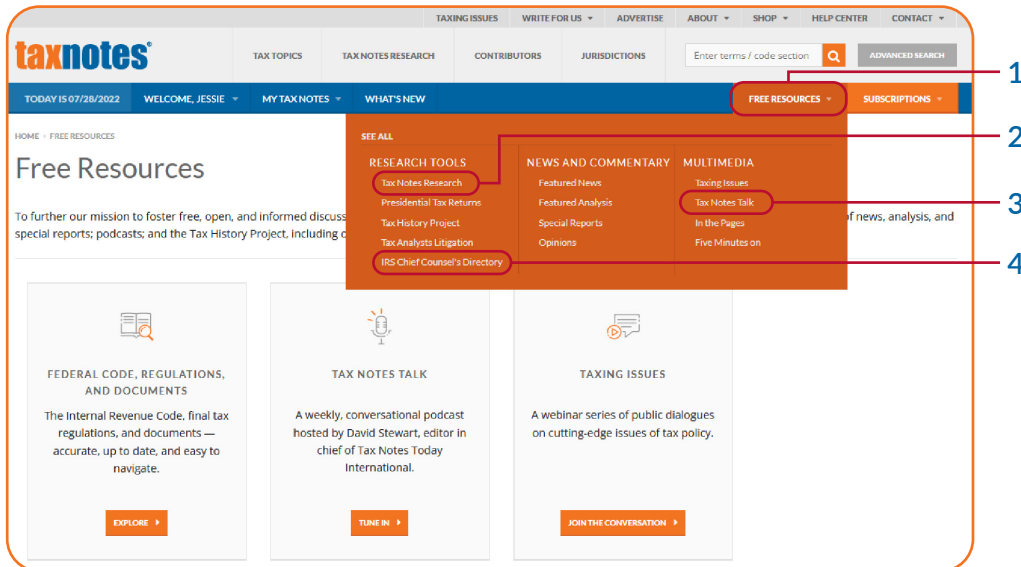
The screenshot shows the 'Manage Email Subscriptions' page on the Tax Notes website. The page is titled 'Manage Email Subscriptions' and includes a 'Manage Email Subscriptions' link in the top navigation bar. The page is divided into several sections: 'Select Content', 'Additional Options', and 'LATEST NEWS'. The 'Select Content' section has checkboxes for 'Tax Notes Today Federal', 'Tax Notes Today State', and 'Tax Notes Today International'. The 'Additional Options' section has checkboxes for 'Tax Notes Today Federal (Sorted by Code Section)', 'Tax Notes Today Global', and 'Exempt Organizations Expert'. The 'LATEST NEWS' section has checkboxes for 'Tax Notes Today Federal', 'Tax Notes Today State', and 'Tax Notes Today International'. The page also includes a 'SAVE SUBSCRIPTIONS' button at the bottom. Numbered callouts 1 through 9 point to various elements: 1 points to the 'Manage Email Subscriptions' link, 2 points to the 'Manage Email Subscriptions' link, 3 points to the 'Manage Email Subscriptions' link, 4 points to the 'I want to receive Monday's news on Saturday' checkbox, 5 points to the 'SELECT YOUR TIME ZONE' dropdown, 6 points to the 'LATEST NEWS' section, 7 points to the 'Select Content' section, 8 points to the 'Additional Options' section, and 9 points to the 'SAVE SUBSCRIPTIONS' button.

## Manage Email Subscriptions

4. If you wish to receive Monday's news on Saturday, check this box.
5. Choose what time you receive your emails.
6. **Latest News** refers to important, breaking news alerts sent via email. To unsubscribe from these, uncheck the boxes.
7. Check the box next to any publication you wish to receive via email.  
If you are subscribed to all three (like here), you will receive one email instead of a separate email for each publication.
8. If you want to receive *Tax Notes Today Federal* in a separate email, sorted by IRC section, check this box.
9. Click **SAVE SUBSCRIPTIONS** after any changes.

## Access Free Resources

1. Visit our Free Resources page, or click on any of the options to navigate to each resource directly.



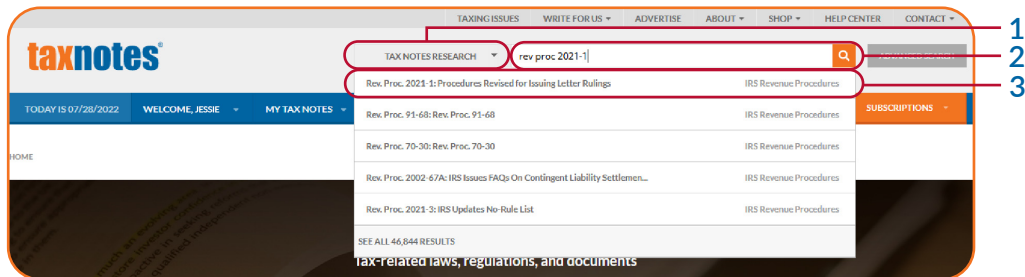
2. Click "Tax Notes Research" to access the federal code, regulations, and documents.
3. Access Tax Notes Talk: A weekly podcast hosted by David Stewart, editor in chief of *Tax Notes Today International*.
4. See a listing of attorneys assigned by IRC section.

An updated Code and Subject Matter Directory is forwarded monthly to Tax Analysts for posting to the tax community.

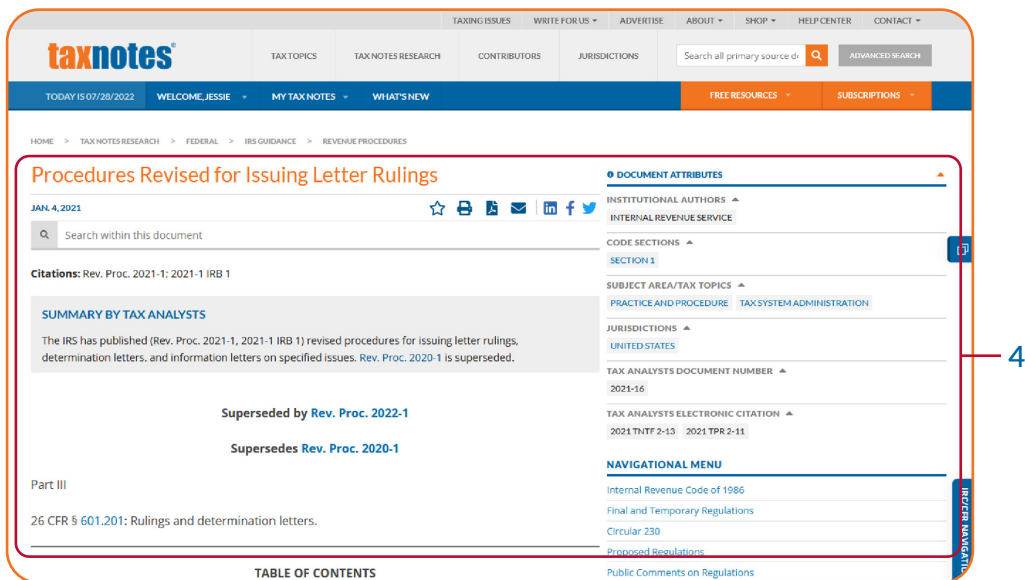
## Navigate/Search: Primary Source

Go directly to a primary source with a citation in three clicks on Tax Notes Research.

1. Select **Tax Notes Research**.
2. Type the citation here.
3. Click your document from the dropdown list.

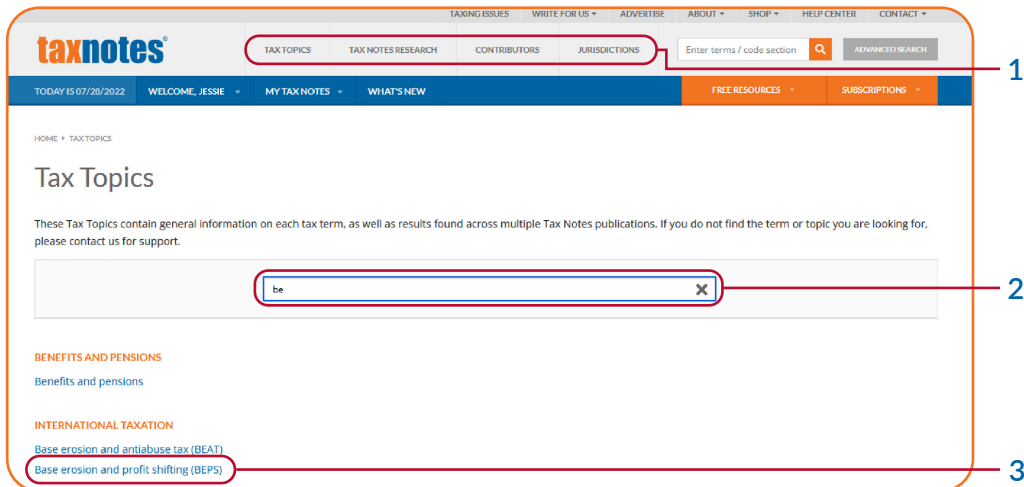


4. Land here.

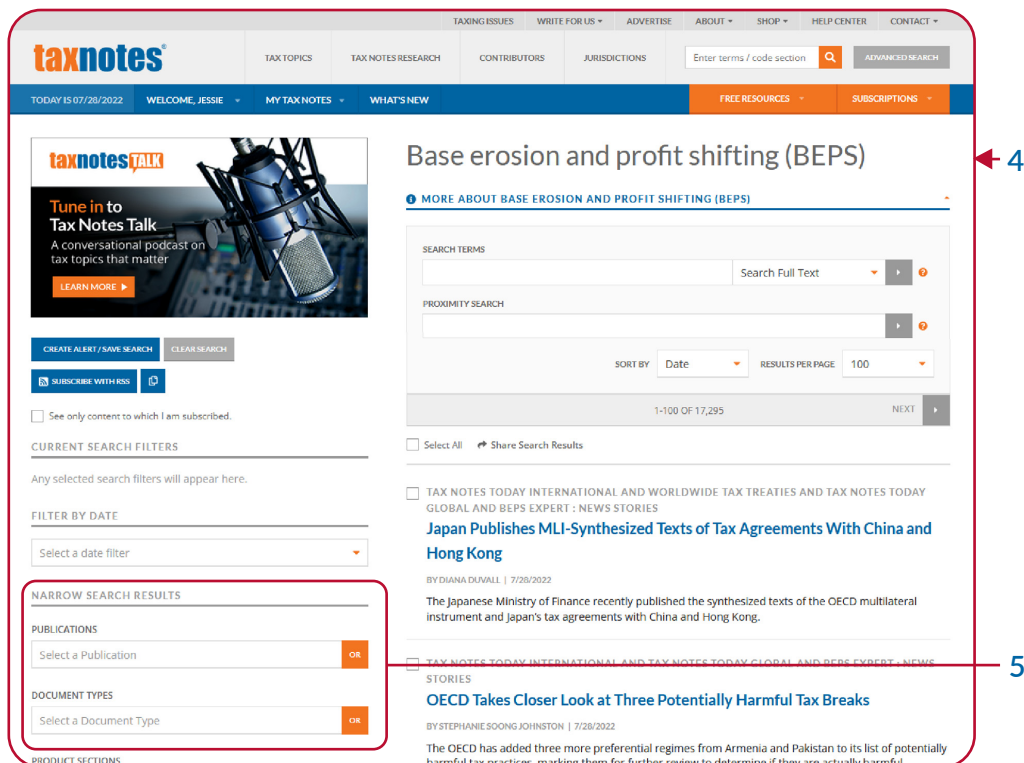


## Navigate/Search: Click and Browse

1. Click any of these tabs.
2. Start typing here to search our [Tax Topics](#) or browse the entire list below.
3. Click on the topic.



4. Land here.
5. Use the filters to further narrow your search results.



## Advanced Search and Boolean Terms and Connectors

1. Click to start an advanced search.
2. Use Boolean terms and connectors or keywords here.
3. Click the orange "?" or hover over the search operators in blue boxes for more guidance.
4. Add proximity search connectors here.
5. Hover over orange "(More About Proximity Searching)" for more proximity search instructions.
6. To do a code-based search, enter the IRC section here.
7. Start to type in the **Authors** field to see search suggestions pop up.
8. Click the name to add it to your search.

The screenshot shows the taxnotes.com Advanced Search page. The interface includes a top navigation bar with links like TAXING ISSUES, WRITE FOR US, ADVERTISE, ABOUT, SHOP, HELP CENTER, and CONTACT. Below this is a blue header with the taxnotes logo and a search bar. The main content area is titled "Advanced Search" and contains several input fields and buttons. Red lines with numbers 1 through 8 point to specific features: 1 points to the "ADVANCED SEARCH" button; 2 points to the "SEARCH TERMS" input field; 3 points to the Boolean connectors (AND, OR, NOT, (), +); 4 points to the "PROXIMITY" input field; 5 points to the "(MORE ABOUT PROXIMITY SEARCHING)" link; 6 points to the "CLEAR SEARCH" and "SUBMIT" buttons; 7 points to the "AUTHORS" input field; and 8 points to the search suggestions dropdown for "Sullivan, Martin A.".

1. Click to start an advanced search.

2. Use Boolean terms and connectors or keywords here.

3. Click the orange "?" or hover over the search operators in blue boxes for more guidance.

4. Add proximity search connectors here.

5. Hover over orange "(More About Proximity Searching)" for more proximity search instructions.

6. To do a code-based search, enter the IRC section here.

7. Start to type in the **Authors** field to see search suggestions pop up.

8. Click the name to add it to your search.

## Create Alert/Save Search

Once you have a search that produces the articles or documents you want to monitor:

1. Click Create Alert/Save Search.
2. Name your search.
3. Select how often you want to receive an email with new results. (If you choose Weekly, your alert will arrive on Saturday. You'll receive an email only when there's new material.)
4. Enter email addresses to send copies of the results to other subscribers.

The screenshot shows the TaxNotes.com website interface. A modal dialog box titled "Saved Search Settings:" is open over the "Search Results" page. The dialog box contains the following elements:

- 1**: A red box highlights the "CREATE ALERT / SAVE SEARCH" button in the top left corner of the page.
- 2**: A red box highlights the "Name this saved search:" text input field, which contains the text "(codesections:('section 172'))".
- 3**: A red box highlights the "How often would you like to receive email alerts about this search:" section, which includes three radio button options: "Daily" (selected), "Weekly", and "Never".
- 4**: A red box highlights the "Send Copies To:" text input field, which is currently empty. Below this field is a small icon and the text "Separate email addresses with a comma".

At the bottom of the dialog box are two buttons: "SAVE AND GO TO SAVED SEARCHES" and "SAVE AND CONTINUE".

## How to Get Legal Research Help

Our reference attorneys are available to help you with legal research.

Here are some things we can do to help:

- Show you how to attack your research problem on TaxNotes.com and our Tax Notes Research platform.
- Give some advice on your tax research project.
- Direct you to a reputable source if we don't have the resources you need on TaxNotes.com.

Email: [Research.Help@TaxAnalysts.org](mailto:Research.Help@TaxAnalysts.org)