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Overview of Publications and Tools

TaxNotes.com includes all of Tax Analysts’ publications, three specialized practice area modules, and five 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 Expert (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

Practice Centers
- BEPS Expert
- FATCA Expert
- Transfer Pricing Expert
- Exempt Organizations Expert
- Insurance Expert

Research Tools
- Federal Research Library: Primary source federal tax documents
- Worldwide Tax Treaties: A comprehensive collection of 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
- Audit Insight: Audit training manuals for most of the U.S. states.

If you'd like to try a publication or tool not in your subscription, please contact: taxnotes.com/support
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 14).

If you subscribe to Tax Notes Today, you can receive a daily message with the top news first, or sorted 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 12).

To have new material on this code section sent to you automatically, create an alert. See the section on Creating Alerts (page 14).
Once you've narrowed your search, look at the top of the left column for the blue Create Alert / 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.
Finding what you Need on TaxNotes:

Retrieving a document: 3 ways

When you have the title of an article:

Enter the title (or partial title) of an article, in quotes, in the search box. (Be sure to put the title phrase in quotes.)

When you have the citation to an IRS document, like a Treasury Decision:

Enter the citation – in quotes – in the search box.

With this method you’ll also retrieve articles about the document

When you have a Code section, a case name, or other primary law citation information:

These materials are best retrieved from the Federal Research Library (1).

If the Federal Research Library isn't in your subscription, please contact taxnotes.com/support. If you don't have a title or citation, run a search.
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.

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 all 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 four million Tax Analysts documents. Look to the left rail for the Narrowing Search Results (2) to begin narrowing the documents.
Narrowing Your Search Results

When you run a search, all the documents meeting your criteria will display. You may then want to add more criteria to winnow out some of your initial results. The tools for narrowing your results are in the left rail (1).

You may want to add terms to your search. As a default, the entire document will be searched. To see only documents with the key words in the title, use the drop-down under the search terms to select Search Title Only (2).

As with Advanced Search, if you want to add terms and require that they be near each other (for example, in the same sentence or within 3 words), use the Proximity Search field (3) and proximity operators.

Adding dates is another good way to hone the search (4).
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 14).
Creating Alerts

Once you have a search that produces the documents you want to monitor, click on the blue Create Alert / Save Search (1) button to create an alert.

You’ll be invited to name your search (2), and you’ll be asked how often (3) 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.
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 22).
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 your search results show as headlines or as abstracts. (3)

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

If you subscribe to more than one 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.
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).

For Help, or to Give Feedback
Please contact us at: taxnotes.com/support