

# CCH® AnswerConnect

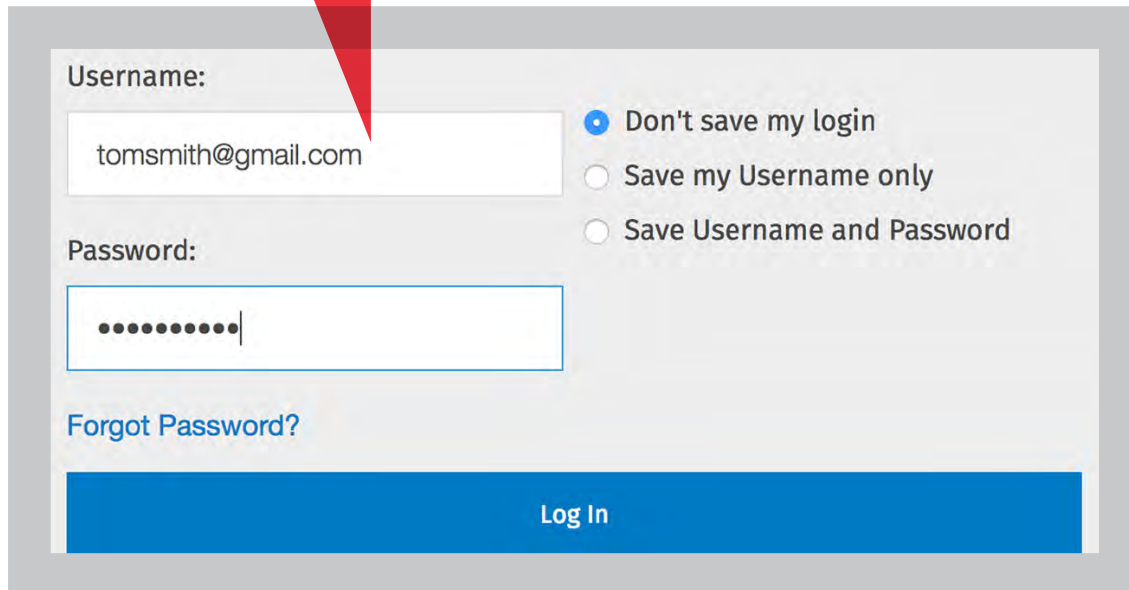
## 2017 Quick Start Guide

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## Logging into CCH AnswerConnect

To log into CCH AnswerConnect from your Web browser:

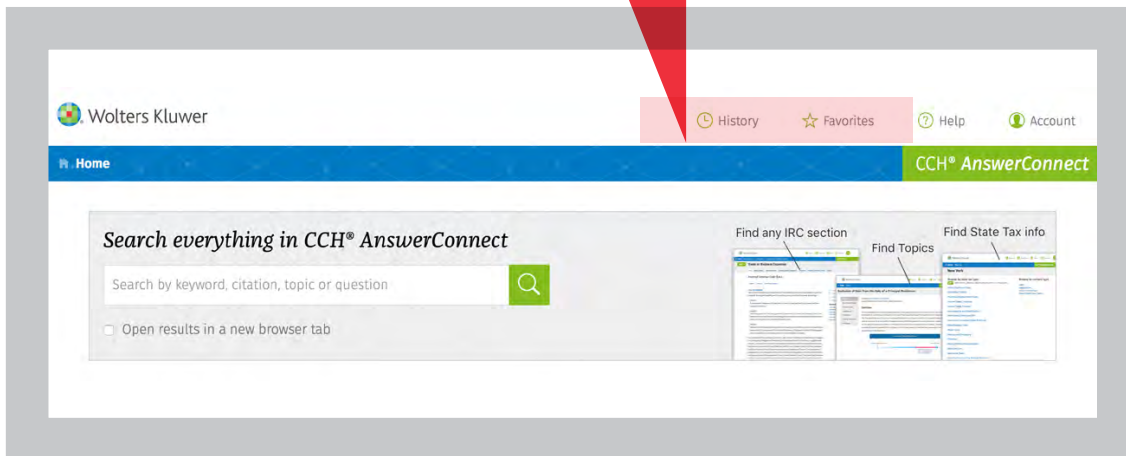


The screenshot shows the login interface for CCH AnswerConnect. It includes a 'Username:' label, a text input field containing 'tomsmith@gmail.com', a 'Password:' label, a password input field with masked characters, and three radio button options: 'Don't save my login' (selected), 'Save my Username only', and 'Save Username and Password'. A 'Forgot Password?' link is located below the password field. A blue 'Log In' button is at the bottom of the form.

- Point your Web browser to **AnswerConnect.cch.com**
- The Log In screen will display.
- Enter your **Username** (usually your email address) and **Password**.
- Click the **Log In** button.

## Tool Bar

At the top of the main CCH AnswerConnect are several links that provide you quick access to often used functionality that will enable you to perform your research quickly and efficiently.



### The Tool Bar includes the following links:

- **History** — View your recent searches
- **Favorites** — View your saved searches



A keyword search box is also located at the top or near the top of every screen, giving you the flexibility to perform a search from anywhere.

## Using a Keyword Search


Searching in CCH AnswerConnect allows you to find answers to frequently asked questions, search by topic, or perform an all content search. When searching with a keyword, CCH AnswerConnect automatically searches singular or plural and acronyms or synonyms.

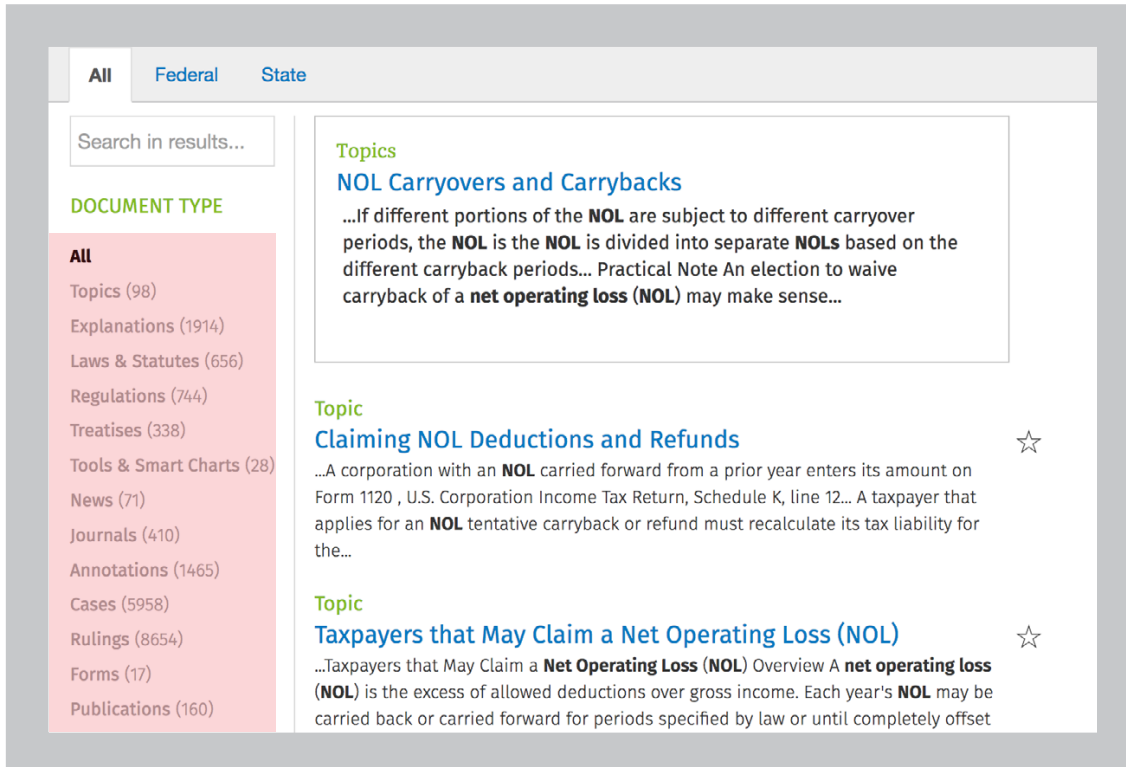
The screenshot displays the CCH AnswerConnect search results for the keyword "depreciation". The interface includes a search bar at the top with the text "Search everything in CCH® AnswerConnect". Below the search bar, the results are organized into several sections:

- Questions & Answers:** A list of frequently asked questions related to depreciation, such as "Can I claim bonus depreciation on qualified leasehold improvement property?" and "What is the order for claiming the Section 179 deduction and bonus depreciation on the same asset?". A red callout box highlights a specific question: "Can I claim bonus depreciation on qualified restaurant improvement property?" with the answer: "Bonus depreciation cannot be claimed on qualified restaurant improvement property unless it meets the definition of qualified leasehold improvement property. See additional information here."
- Topics:** A list of topics related to depreciation, including "Depreciation Deductions", "Bonus Depreciation or First-Year Additional Depreciation Allowance", "Depreciation Deductions (State Tax)", "General Depreciation Rules", and "Bonus Depreciation (State Tax)".
- Documents:** A list of documents related to depreciation, including "Principal Residence Gain Exclusion: Special Types of Sales", "Principal Residence Gain Exclusion: Limitations and Reductions", "White House Proposes Tax Rate Cuts; Repeal of Most Credits and Deductions", "House Ways and Means Subcommittee Examines 2017 Tax-Filing Season", "Inmate in State Mental Hospital Not Entitled to EITC (Skaggs, TC)", "California—Corporate, Personal Income Taxes: Guidance on New Business Entity Return Due Dates Updated", "Illinois—Sales and Use Tax: Sales of Extended Warranties Were Not Taxable", "Tennessee—Corporate Income, Franchise Taxes: Broadband Internet Access Equipment Credit Enacted", "Revenue Procedure: Revenue Procedures, Ruling, Rev. Proc. 2002-33, (Apr. 29, 2002)", "Citator: Federal Tax Citator, Rev. Proc. 2002-33", "2002 fed", and "Explanation: Code Explanations, §168, Modified Accelerated Cost Recovery System of Depreciation..."
- My Favorites:** A section for saving favorite documents.
- Searches:** A list of recent searches, including "principal residence gain exclusion" and "incentive stock option".
- My History:** A section for viewing search history.


### To use a keyword search:

- Type a **keyword or phrase** in the search box. Search suggestions will appear along with Questions & Answers, Topics and suggested searches.
- Hover over the **Questions to see quick answers** to commonly asked questions and links to deeper material on the subject.

- Click a suggested search, then the green search icon  (or press Enter) to display a results screen. Your search results will display by relevance with the top hits appearing at the top of the list.



The screenshot displays the CCH AnswerConnect search results interface. At the top, there are tabs for 'All', 'Federal', and 'State'. Below these is a search bar labeled 'Search in results...'. On the left side, there is a sidebar titled 'DOCUMENT TYPE' with a list of document types and their counts: All, Topics (98), Explanations (1914), Laws & Statutes (656), Regulations (744), Treatises (338), Tools & Smart Charts (28), News (71), Journals (410), Annotations (1465), Cases (5958), Rulings (8654), Forms (17), and Publications (160). The main content area shows a list of search results. The first result is 'Topics' with a green icon. Below it is 'NOL Carryovers and Carrybacks' with a blue icon. The next result is 'Claiming NOL Deductions and Refunds' with a blue icon and a star icon. The final result is 'Taxpayers that May Claim a Net Operating Loss (NOL)' with a blue icon and a star icon. Each result has a brief description below the title.

- Filter your search results by a document type. For example, if you are looking for just Topics, click the Topics filter to narrow your results to just the Topic document type.
- Click the star icon  to save your search as a Favorite for quick access in the future.

## To open a document

Click on the document title. The selected document will open.

The screenshot shows the CCH AnswerConnect interface. At the top, there is a breadcrumb trail: Home » Topics » Business Deductions and Credits » Net Operating Losses. The document title is 'NOL Carryovers and Carrybacks'. Below the title, there is a 'Back to search results' link. On the left, there is a table of contents with links to 'Overview', 'General Carryover Rules', 'Election to Waive Carryback', 'Three-Year Carryback for "Eligible Losses"', 'Five-Year Carryback for Farming Losses', '10-year carryback for specified liability losses', 'CERT Limits on Carrybacks', and 'Recommended'. The main content area shows the 'Overview' section, which explains that a net operating loss (NOL) is not deducted in the tax year it occurs (the "loss year"); instead, the taxpayer deducts the NOL during the carryback and carryover periods. The taxpayer generally must:

- carry back the NOL for two tax years, then
- carry forward any remaining NOL for up to 20 tax years after the loss year.

Any NOL remaining after the 20-year carryforward period is lost.

**Caution**  
The statutory limitations on NOL carryback and carryover periods are absolute and cannot be extended, even if the NOL is unusable during part of the carryback/carryover period because the taxpayer does not have enough income to fully absorb it.

On the right side of the document, there is a search bar with a 'Highlight search terms' checkbox and a search icon. Below the search bar, there are icons for 'Star', 'Print', 'Download', and 'Email'.

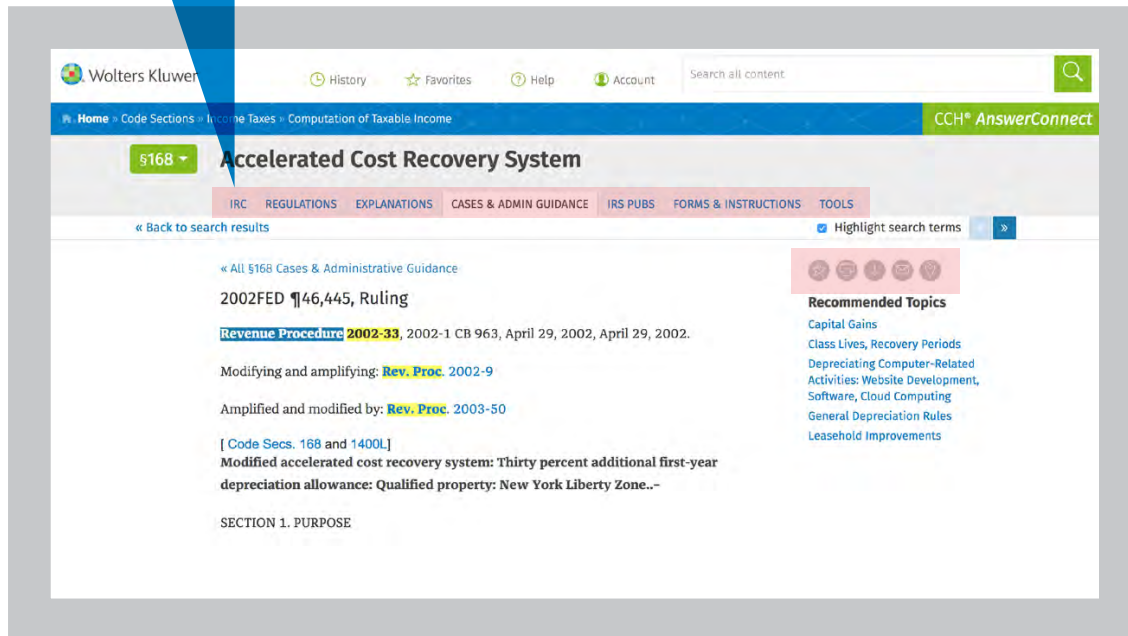
Once a document is open, you have several options available:

- Return to the search results page by clicking the **Back to search results** link.
- Move from one keyword to the next by clicking the arrow next to **Highlight search terms**.
- Save this document to your Favorites.
- Print the document.
- Save the document as a Word or PDF file.
- Email the document.




## Searching for a Specific Citation

Citation searching in CCH AnswerConnect allows you to quickly get to the citation and all of its related documents.



### To search for a specific citation:

- Type a citation in the search box. Click the search icon  to display your search results for that citation.
- Click on the citation that you want to view. The citation will display in the results screen.
- Access all of the documents, forms, and tools related to your citation with the navigation bar at the top of the citation screen.

*Citator: Rev. Proc. 2002-33*

Amplified and modified by:

[Rev. Proc. 2003-50](#)

Cited in:

[Rev. Proc. 2016-29](#)

[Rev. Proc. 2015-14](#)

[Rev. Proc. 2011-14](#)

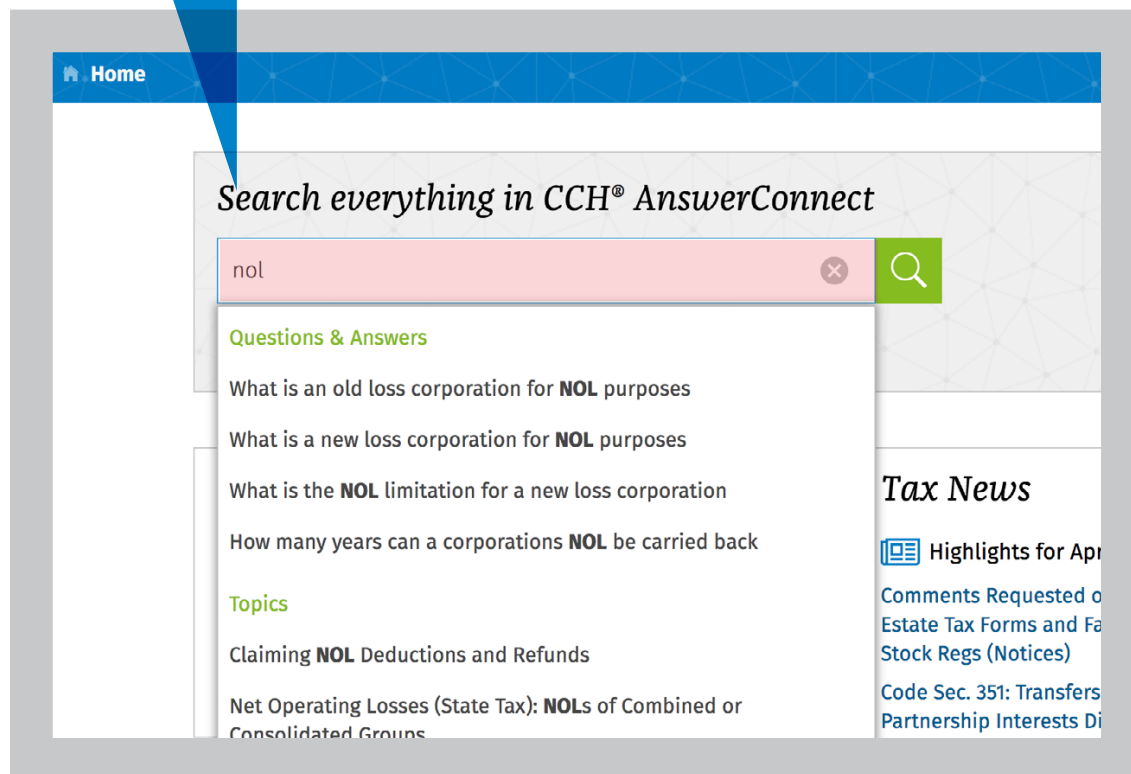
The citatory listing will tell you if the document has been changed and if other documents have cited it.

- Move this citation to Favorites, Print, Save, Share, or open a citator listing for cases and rulings.




## Working with Search Suggestions

CCH AnswerConnect provides search suggestions when a keyword, citation, topic, or question is entered in the search box.

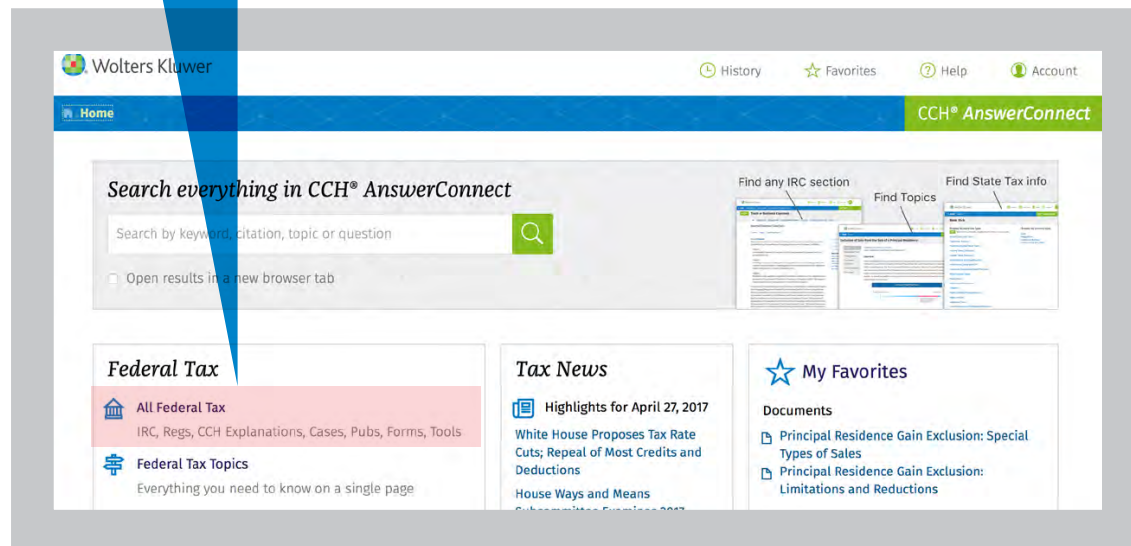


### To see the search suggestions within CCH AnswerConnect:


- Type your keyword, citation, topic or questions in the search box.
- Search suggestions will appear as Questions and Answers, Topics, or Search all content.
- Select the suggestion you want, click the green search icon  and CCH AnswerConnect will then display a results page for your selected search.

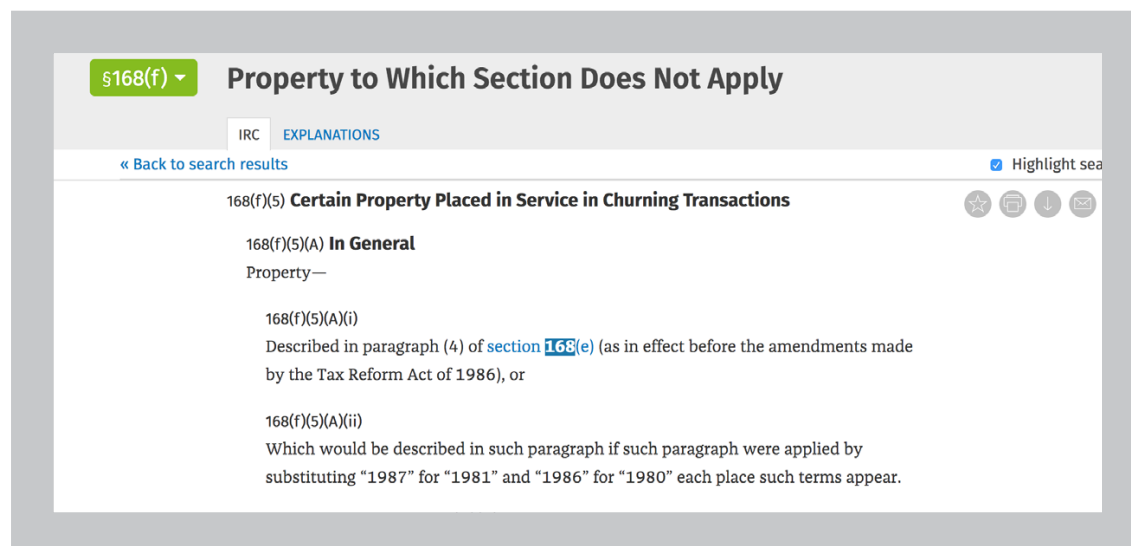
## Finding Code Sections Locations

CCH AnswerConnect allows you to quickly find Internal Revenue Codes (IRCs) by using the Search Box or clicking the All Federal Tax link.



### To locate an Internal Revenue Code using the search box:

- Enter a revenue code in the search box and click the search icon . The search results will display.
- Open a code section to get a 360-view of your IRC.



## To locate an Internal Revenue Code by topic:

- Click the **Federal Tax Topics** link on the home page. Related topics will display.
- Click a topic. The selected topic will display.
- From the menu bar on the left, click **Key Primary Sources**.

The screenshot shows the Wolters Kluwer website interface. At the top, there's a navigation bar with links for History, Favorites, Help, and Account, along with a search bar. Below this is a blue header with 'Home » Topics'. The main content area is titled 'General Depreciation Rules'. On the left, a sidebar menu lists various resources: Overview, Recommended Topics, Key Primary Sources (highlighted in red), Smart Charts, Practice Aids, Forms, IRS Publications, and CPE Courses. The main content area features a profile picture of Eric P. Wallace, CPA, and the text 'Curated by Eric P. Wallace, CPA'. Below this is an 'Overview' section with a paragraph explaining depreciation: 'Depreciation is a tax deduction that allows taxpayers to recovery expenditures that the capitalize. Taxpayers should first determine if an expenditure should or should not be c... When taxpayers purchase a tangible asset that costs more than their capitalization poli... *minimis* safe harbor amount, land, and/or a building, the purchased asset must be capit... taxpayer expends funds related to an asset that it has already placed in service, it must... the **tangible property regulations** (TPRs) measured against the asset's proper unit(s) of... determine if those expended funds should or should not be capitalized. The depreciatio... "kick in" once the taxpayer determines that it must capitalize an expenditure.'

- You can now access your IRC, as well as the regulations related to that IRC.

## Saving a Search

CCH AnswerConnect allows you to mark a keyword or phrase as a Favorite. Once you run the keyword search, you will be able to mark it as a Favorite.

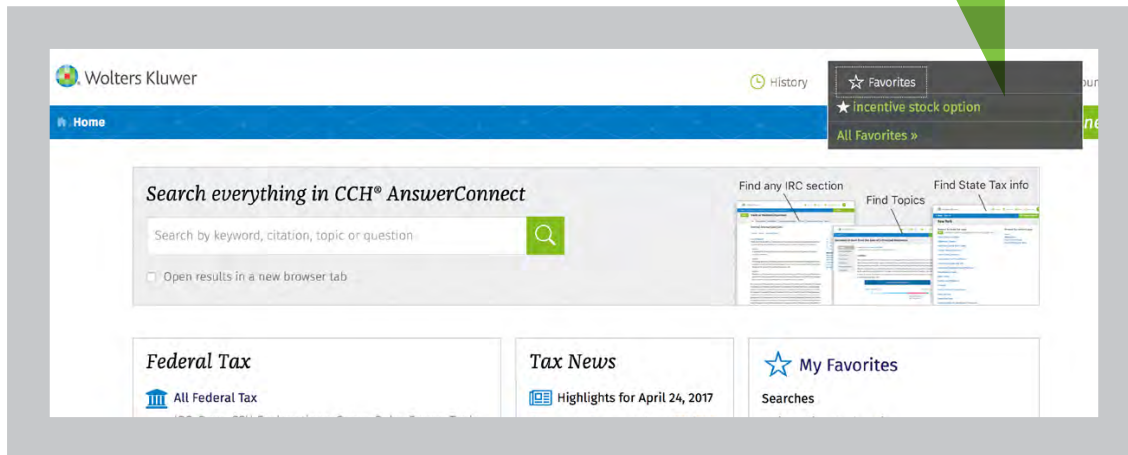
The screenshot shows the CCH AnswerConnect web application. At the top, there's a navigation bar with 'Wolters Kluwer' logo, 'Home', 'History', 'Favorites', 'Help', and 'Account' links. Below this is a search bar containing the text 'incentive stock option'. To the right of the search bar is a checkbox labeled 'Open results in a new browser tab'. Below the search bar, there are tabs for 'All', 'Federal', and 'State'. On the left side, there's a 'DOCUMENT TYPE' section with a list of categories: All, Topics (18), Explanations (134), Laws & Statutes (43), Regulations (28), Treatises (53), Tools & Smart Charts (5), News (1), and Journals (31). The main content area displays search results for 'incentive stock option'. It includes a 'Topics' section titled 'Incentive Stock Options and Other AMT Timing Adjustments' with a brief description. Below this is an 'Explanation' section titled 'Incentive Stock Option AMT Adjustment' with a brief description. A red star icon is visible next to the explanation title. A red 'Favorite' button is also present. A 'Mark as Favorite' popup window is overlaid on the right side of the screen. It contains a 'Folder' dropdown menu set to 'Uncategorized', a 'Client/Project' text input field with 'optional' entered, and a 'Notes' text area with 'optional' entered. At the bottom of the popup are 'Save' and 'Cancel' buttons.

### To save a keyword search:

- Type your keyword or phrase in the search box. Search suggestions will appear.
- Click a search suggestion and then click the search icon . The search results will display for the selected search suggestion.
- Click the star icon to save this keyword search into your Favorites. The **Mark as Favorite** popup window will display.
- Select a folder and enter information in the optional fields if you prefer.
- Click the **Save** button to save your keyword search as a favorite. Notice that the star is now filled in , marking your keyword search as a Favorite.

## To view your saved searches:

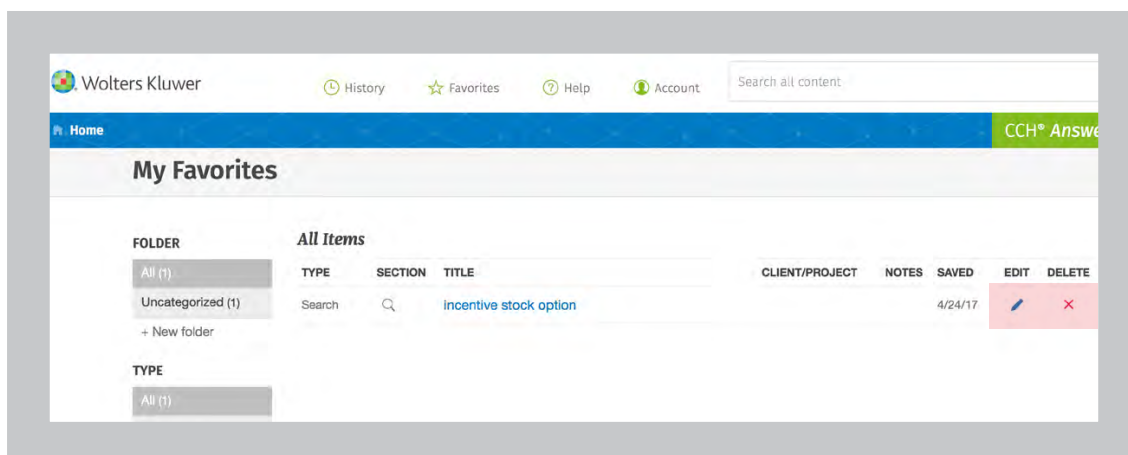
Click the Favorites link at the top of the screen. Your most recent saved searches will display.



- Click a saved search to view the results for that search.

OR

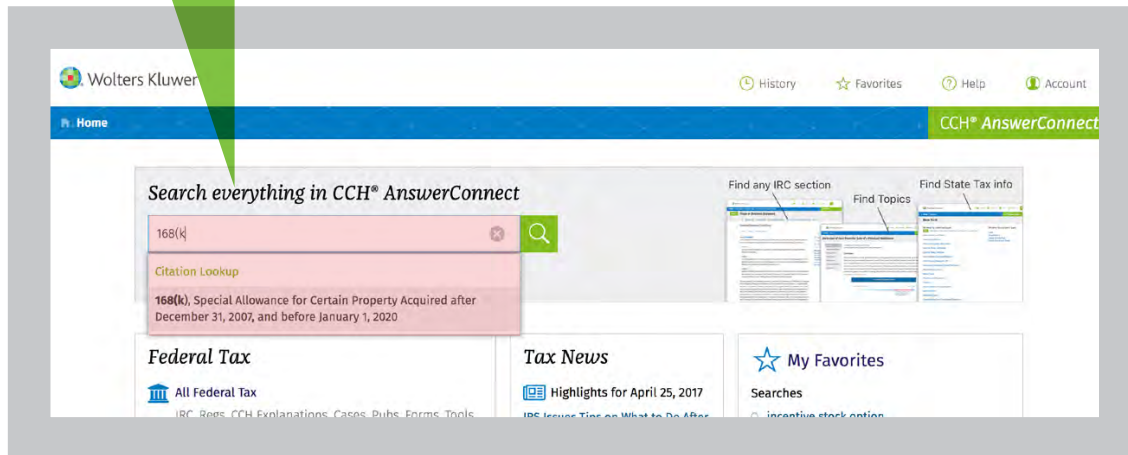
- Click **All Favorites** to view all of your saved keyword searches. The **My Favorites** screen that lists all of your favorites will display.



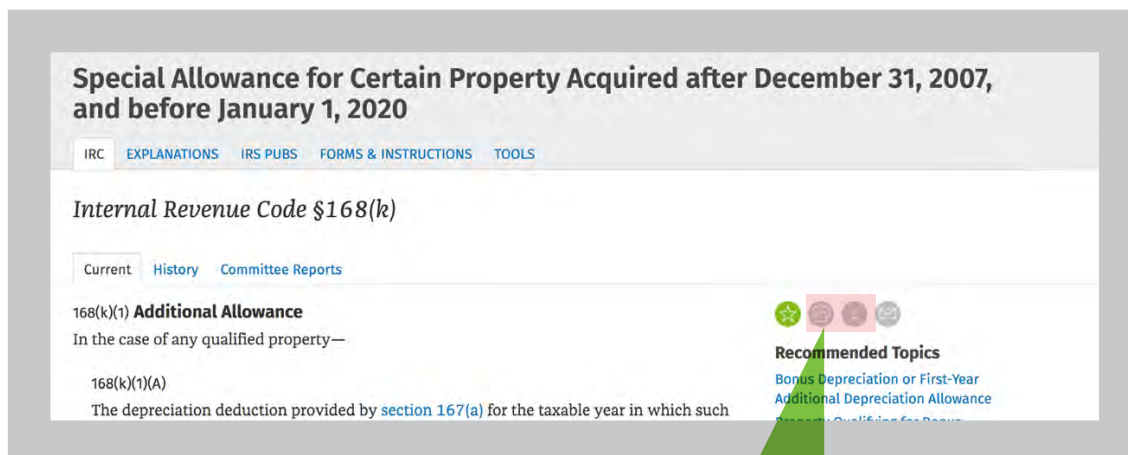
- Notice on the right that you can edit or delete any of your Favorites.

## Printing and Saving a Document to a Word or PDF file

With CCH AnswerConnect, you can print or save any document while viewing it on a screen.



- Open a document. For example, enter **168(k)** in the Search Box.
- Under Citation Lookup, select **168(k) Special Allowance for Certain Property Acquired after December 31, 2007, and before January 1, 2020**.




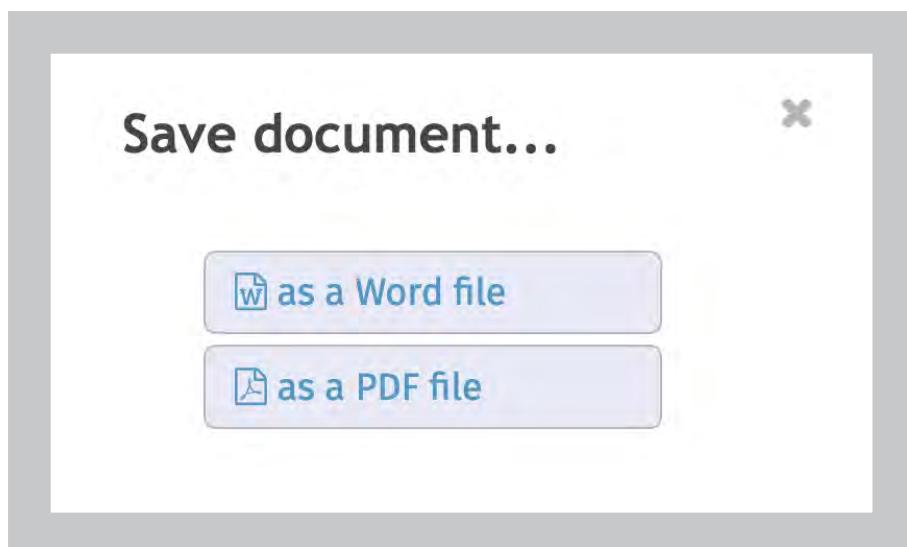
Print and Save Options appear on the right hand side of every document.

## To print a document:

- Click the print icon . A PDF version of your document opens in another window.

## To save a document as a PDF or Word document:

- Click the save icon . The **Save document** popup window will display.



- Select **as a Word file** to save as a Word document.

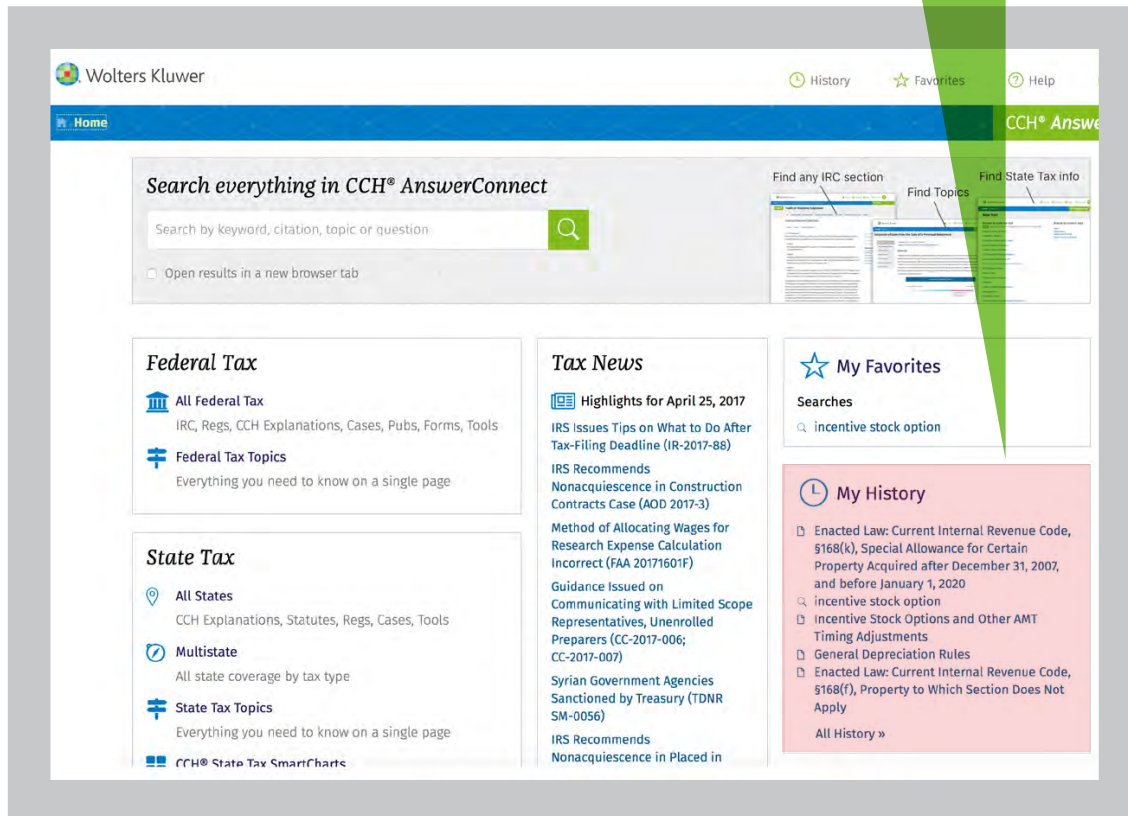
**OR**

- Select **as a PDF file** to save as a PDF file.



## Viewing Recent Research Activity

Every search you run and every document you open in CCH AnswerConnect will remain in your history log for a full year.



### To access your History:

- Click the **History** link located in the CCH AnswerConnect tool bar on the top right of every screen.
- OR
- Go to the **My History** section on the Home page.
- The far right column on the home page features your latest research activity for easy tracking. It includes the most recent documents you've viewed and the most recent keyword searches you've performed.
- Click **ALL HISTORY** to view your entire history log.

The My History page displays a list of your entire research activity, including all documents, practice tools and searches presented in reverse chronological order.

The screenshot shows the 'My History' page on the Wolters Kluwer platform. The page has a navigation bar with 'Home', 'History', 'Favorites', 'Help', and 'Account' links. A search bar is located in the top right corner. The 'My History' section features a sidebar with filters for 'TIMEFRAME' and 'TYPE'. The main content area displays a list of research activity in reverse chronological order, with items grouped by date. Each item includes a timestamp, a type (e.g., Internal Revenue Code, Search, Topic), and a title. Star icons are visible next to some titles, indicating they are in the user's favorites.

TIMEFRAME	TYPE	Timestamp	Type	Title	Star Icon
Last 7 days (17)	Internal Revenue Code	07:02 AM	Internal Revenue Code	Special Allowance for Certain Property Acquired after December 31, 2007, and January 1, 2020	
	Search	09:53 PM	Search	incentive stock option	★
This month	Topic	09:52 PM	Topic	Incentive Stock Options and Other AMT Timing Adjustments	☆
	Topic	05:09 PM	Topic	General Depreciation Rules	☆
	Internal Revenue Code	05:04 PM	Internal Revenue Code	Property to Which Section Does Not Apply	☆

The My History page also includes several filtering options:

- **Timeframe** — narrow your search by month or within the last 7 days.
- **Type** — narrow your information to just searches or to just documents only.
- **Search** — use the search box on the top far right of the screen to locate past research activity by keywords.

The star icon ☆ appearing next to each title allows you to mark that document or search and permanently store it in your Favorites.

## Documenting Searches

Documenting your findings is an important part of any research project. With CCH AnswerConnect, you can mark individual documents or mark an entire search and store them in your Favorites.

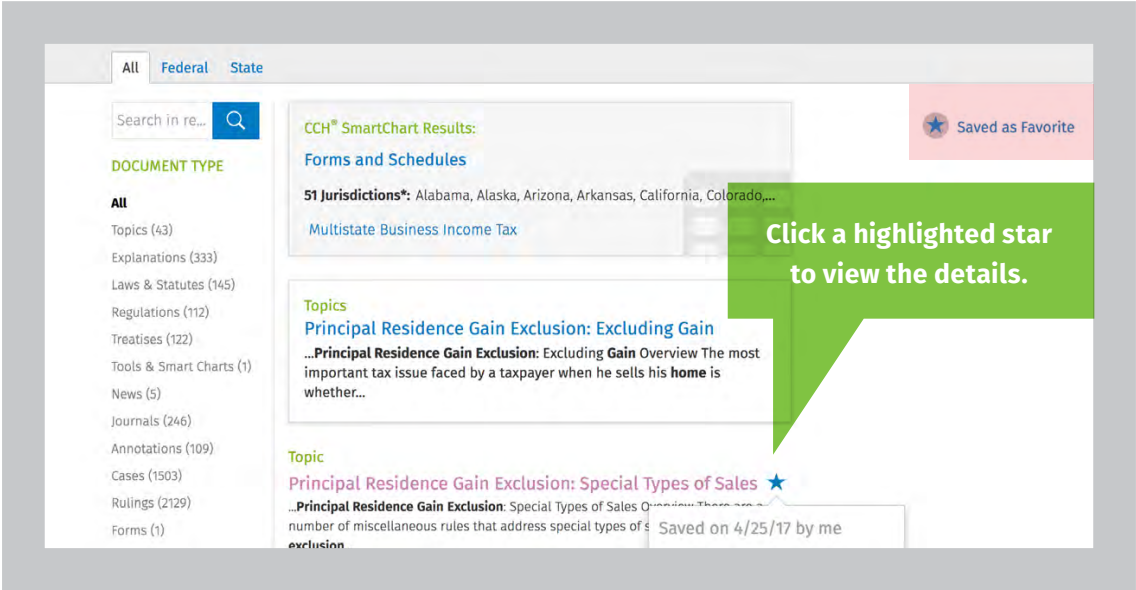
### To mark a search as a favorite:

- On a search results page, click the star icon appearing next to your search terms above your list of results. The **Mark as Favorite** dialog box that will allow you to manage your selection will display.
- You can create a new folder or use an existing folder to store your search.
- You have the option of assigning a Client or Project name to the saved search.
- You also have an option to add notes to accompany this search.
- Click **Save** to save the search. The search is now stored in your Favorites where you'll be able to access it at anytime.

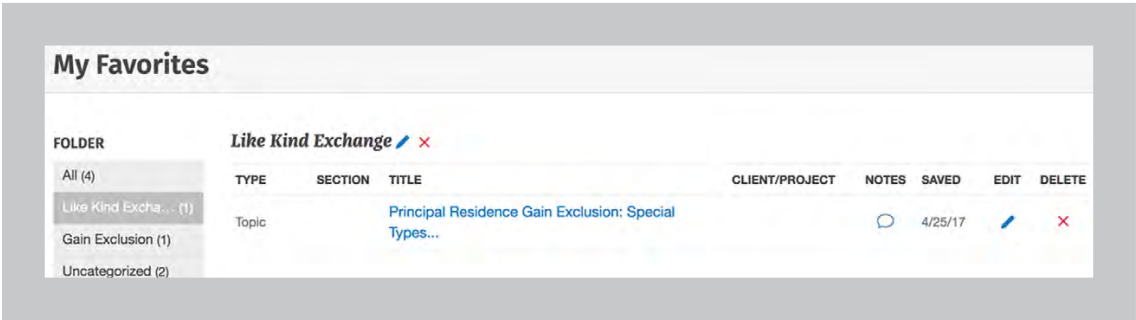
### To mark a document on your search result list as a favorite:



- Click the star icon ☆ located next to the document. The **Mark as Favorite** dialog box will display.
- Complete the options available and click the **Save** button.

When a star appears highlighted, it's indicating that this document or search is currently marked in your favorites.



- Click a folder link to go directly to that folder under your Favorites.



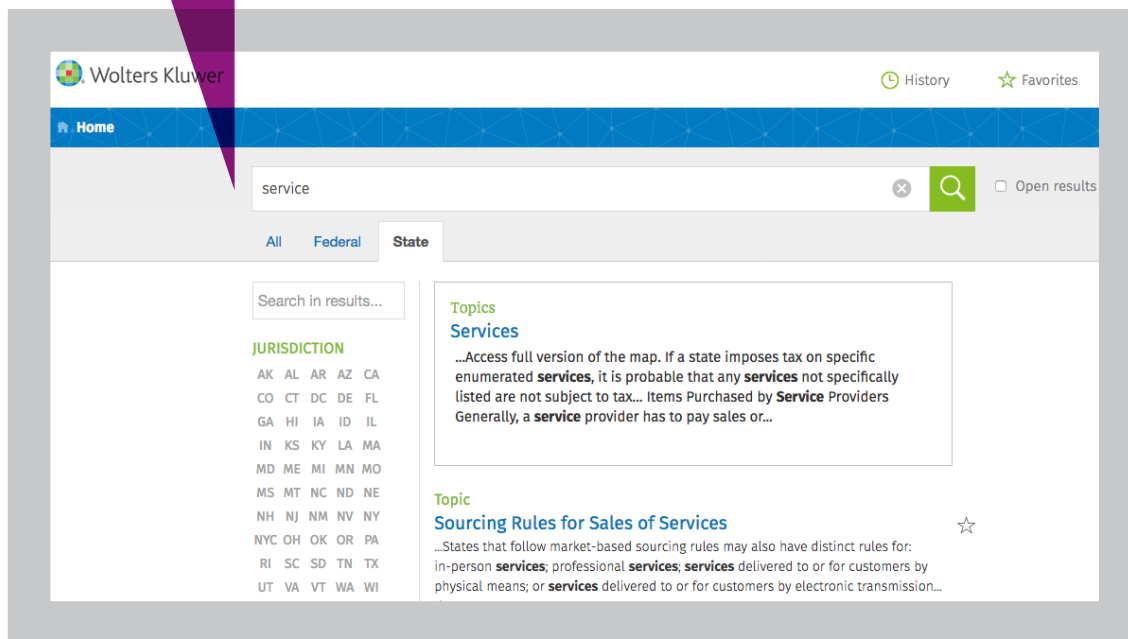
- Access any document or search within that folder.
- You can edit any entry by clicking the edit icon .
- You can also delete a document or a search by clicking on the delete icon .





To view all items stored in your favorites in one screen, click the Favorites link on the top menubar and select All Favorites.

## Searching for State Tax Content

State keyword searching in CCH AnswerConnect allows you to select answers to frequently asked questions, search by topic, or perform an all content search. CCH AnswerConnect searches singular or plural and acronyms or synonyms.



### To search for state tax content:

- Type a keyword or phrase in the search box. Search suggestion will appear along with Questions & Answers, Topics, and All Content.
- Select a search suggestion and then click the search icon  . The search results for the selected search suggestion will display.
- Filter your results by document type, jurisdiction, or tax type.
- You can also save this search as a Favorite for quick access in the future by clicking on the star icon  .
- Narrow your results further by entering a search term in the search box at the left above the filters.



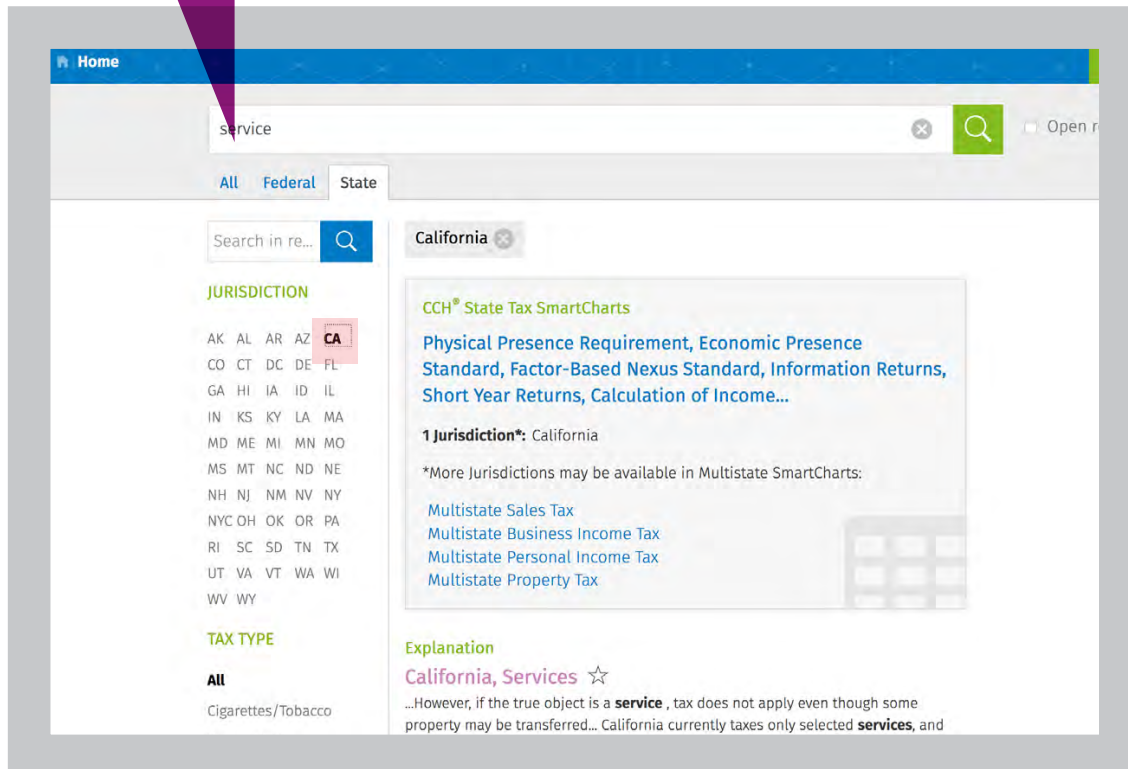
**TIP:** The filters appear across the top of the search results list. You can remove any filter by clicking on the X next to the filter.

- Click a document title to open a document. The document will display.
- Navigate from one keyword to the next by clicking the arrow next to the Highlight.
- Move from one keyword to the next by clicking the arrow next to **Highlight search terms** in the upper right of the document.

*You can also move the document to Favorites, Print, Save, or Share.*

## Finding Similar Explanations in Other States

CCH AnswerConnect provides you the ability to research a state tax issue and to find the same information in all states.



For example, look for services in California and find the same content in other states.

- Enter **service** in the search box on the home page.
- Scroll down and select **service** in the **Search in all content** section. The results for your search will display.
- Under the Jurisdiction filter on the left, select **CA**.
- Click the **California, Services** document title to open the document.



- Click the **Other States** tab to see the other states explanations similar to the CA explanations.

The Other States tab will show how this topic is treated in other states.

The screenshot shows the CCH AnswerConnect website interface. The breadcrumb trail at the top reads: Home » State Tax » California » Sales and Use » TAXABILITY OF PERSONS AND TRANSACTIONS. The main heading is 'California, Services'. Below this, there is a navigation bar with tabs: EXPLANATIONS, STATUTES, REGULATIONS, CASES & RULINGS, FORMS & CERTIFICATES, TOOLS & SMART CHARTS, and OTHER STATES. The 'OTHER STATES' tab is currently selected. Below the tabs, there is a link '« Back to search results' and a checkbox 'Highlight search terms'. The main content area is titled 'Other States' and contains the text: 'See how this topic is treated in other states or jurisdictions by selecting an item below.' Below this text is a grid of state links under the heading '- Services'. The links are arranged in four columns and ten rows, listing states from Alabama to Wyoming. The first link, 'AL Alabama', is highlighted in red.

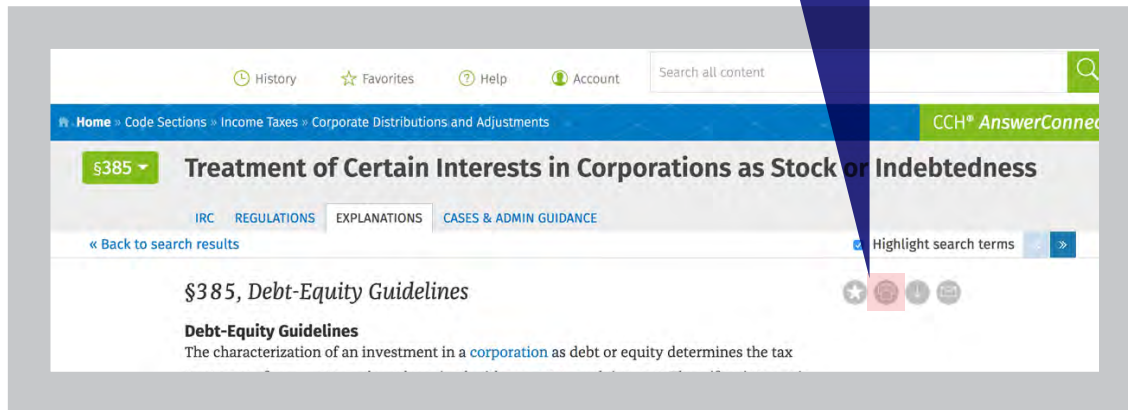
- Services			
AL Alabama	IL Illinois	MT Montana	PA Pennsylvania
AK Alaska	IN Indiana	NE Nebraska	RI Rhode Island
AZ Arizona	IA Iowa	NV Nevada	SC South Carolina
AR Arkansas	KS Kansas	NH New Hampshire	SD South Dakota
CA California	KY Kentucky	NJ New Jersey	TN Tennessee
CO Colorado	LA Louisiana	NM New Mexico	TX Texas
CT Connecticut	ME Maine	NY New York	UT Utah
DE Delaware	MD Maryland	NYC New York City	VT Vermont
DC District of Columbia	MA Massachusetts	NC North Carolina	VA Virginia
FL Florida	MI Michigan	ND North Dakota	WA Washington
GA Georgia	MN Minnesota	OH Ohio	WV West Virginia
HI Hawaii	MS Mississippi	OK Oklahoma	WI Wisconsin
ID Idaho	MO Missouri	OR Oregon	WY Wyoming

- Click on **Services** to see the states that have related explanations.
- Select **Alabama** to see the services explanation.


You can return to the **Other States** tab by using the browser back button.

## Sharing Information with Colleagues

CCH AnswerConnect makes it easy to share a document by email.



### To share a document by email:

- With a document open, click on the Share icon  located on the right side of the screen. The **Share document with...** box will display.
- Enter an email address in the **Recipient's email address** field. If you include an optional message, it will appear in the body of the email.
- Click the **Send** button to send the document. Your intended recipient will receive a PDF attachment of this current document. The email they receive will additionally indicate that it came from CCH AnswerConnect on your behalf.

To send this document to multiple recipients all at once, enter the successive email addresses in the Recipient's email field, and separate the email addresses by a semicolon.

Example:  
email1@email.com;  
email2@email.com;  
email3@email.com

 A screenshot of the 'Share document with...' dialog box. It has a title bar with a close button. The dialog contains two main input fields: 'Recipient's email address' and 'Message (optional)'. Below the message field, there is a small text indicator: '(Recipient will receive a PDF)'. At the bottom right of the dialog is a blue 'Send' button.

## Working with Practice Tools

CCH AnswerConnect provides easily accessible, action-oriented practice tools to assist you every step of the way in your tax research and planning.

### Tax Tools

- CCH® A-LINE-D™
- CCH® Apportionment Suite SmartCharts
- CCH® Client Letter Toolkit
- CCH® Depreciation Toolkit
- CCH® Election & Compliance Toolkit
- CCH® Federal Penalties and Interest Calculator
- CCH® FinEst Calcs
- CCH® IntelliForms Install
- CCH® IntelliForms Online Library
- CCH® Multistate Property Tax SmartCharts
- CCH® Multistate Business Income Tax SmartCharts
- CCH® Multistate Personal Income Tax SmartCharts
- CCH® Multistate Sales Tax SmartCharts
- CCH® NexusExpert Business Income SmartCharts
- CCH® NexusExpert Sales and Use SmartCharts

There are multiple ways to access these tools, including right from the CCH AnswerConnect home page, which prominently displays some of the most commonly used practice tools.

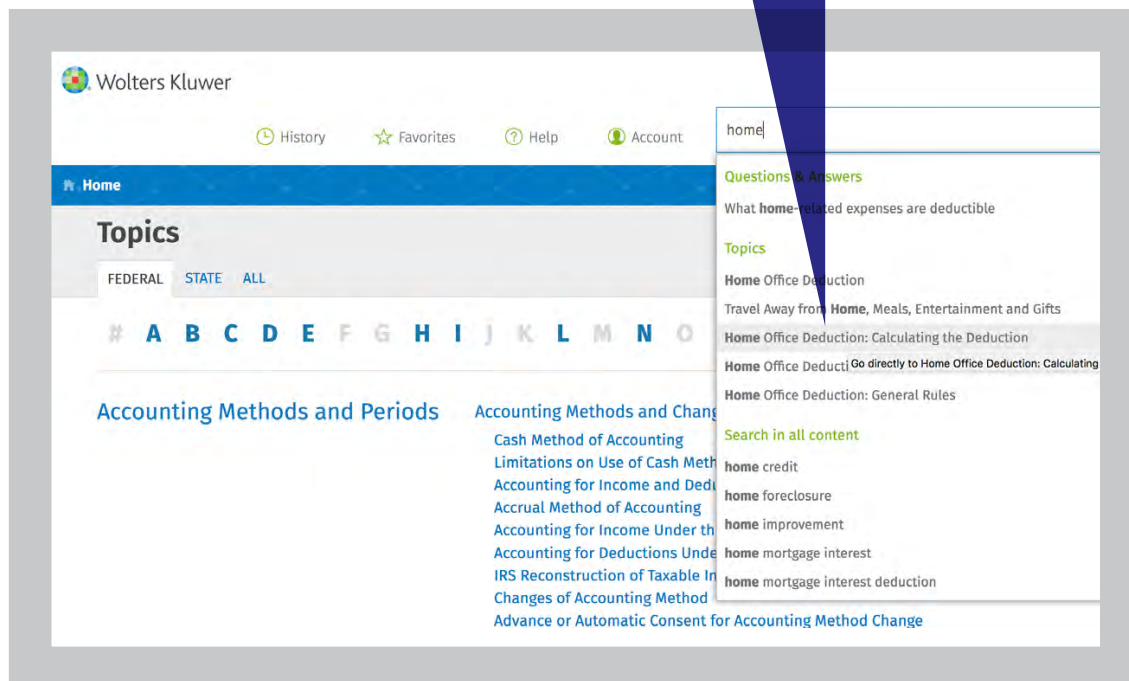
Scroll down the home page and click **Tax Tools** in the **Federal & State Tax** section. A list of **Tax Tools** will display.

### Some of the most commonly used practice tools include:

- **Tax Calendar** — allows you to create a customized calendar of federal and state tax due dates and sync the results with your own calendar application.
- **Election and Compliance Toolkit** — features over 700 customizable sample elections and compliance statements.
- **Depreciation Toolkit** — allows you to quickly create a depreciation schedule for any business asset and calculate recovery years.
- **Client Letter Toolkit** — helps you communicate technical tax concepts to clients.

## Working with Topics

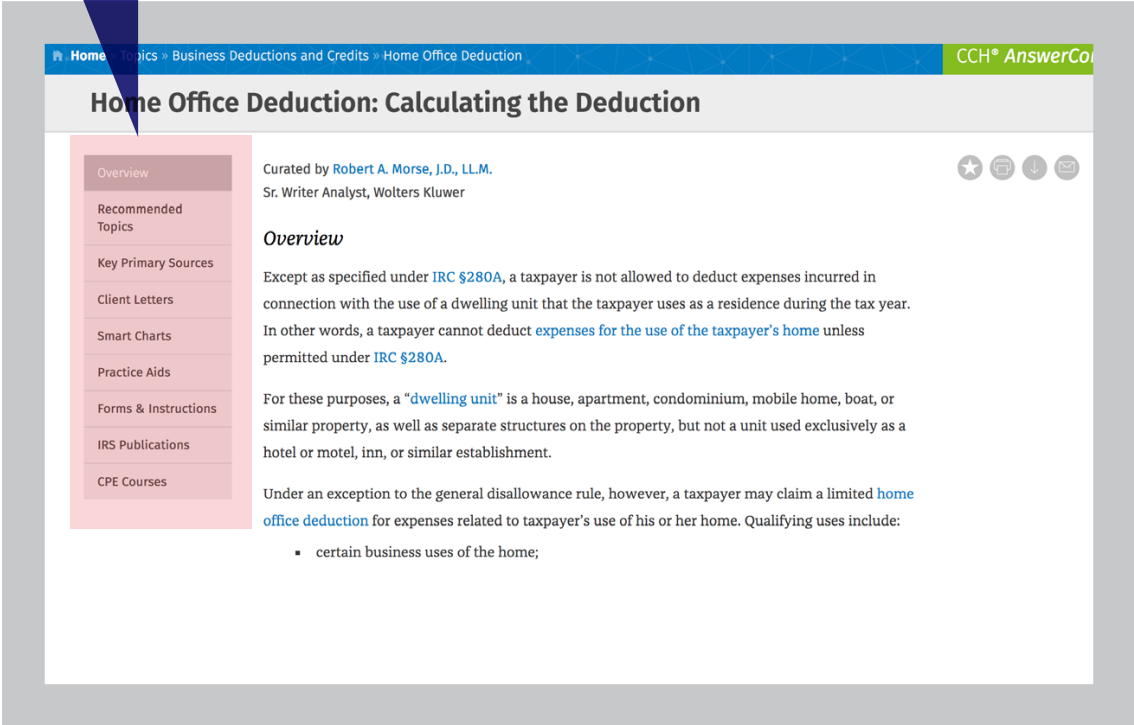
CCH AnswerConnect allows you to access your content by Topic. You can access topics through a keyword search or by the Tax Topics links under Federal or State content.



For example, we will search for Home Office Deductions under Federal Tax Topics.

- From the home page, click the **Federal Tax Topics** link. All of the Federal Tax Topics will display.
- Enter home in the search box and select **Home Office Deduction: Calculating the Deduction**.

The Home Office Deduction topics screen will display.



On the left side, you will see all of the content related to Home Office Deduction.

The content includes:

- An overview from our editor
- Recommended Topics
- Key Primary Sources
- Client Letters
- Smart Charts
- Practice Aids
- Forms & Instructions related to the selected topic

## Account

**Easily make changes to your User ID, password, and your CCH AnswerConnect profile.**

### To edit your profile:

- Click the **Account** link at the top right of the CCH AnswerConnect website.
- Select **Edit my profile**.
- Edit your First Name, Last Name, EndUserID, and Email.
- Click the **Save** button to save your changes.

## Customer Support

**If you have questions about CCH AnswerConnect, please do not hesitate to contact our team of specialized Customer Support personnel.**

**For assistance with research of functionality,  
Please contact: 800-344-3734.**

**You may also visit our support website: <http://support.cch.com/>.**

*Contact information:*  
Wolters Kluwer  
2700 Lake Cook Road  
Riverwoods, IL 60015  
United States  
800-344-3734

Please call **800-344-3734** or  
visit **<http://support.cch.com/>**  
for more information.

