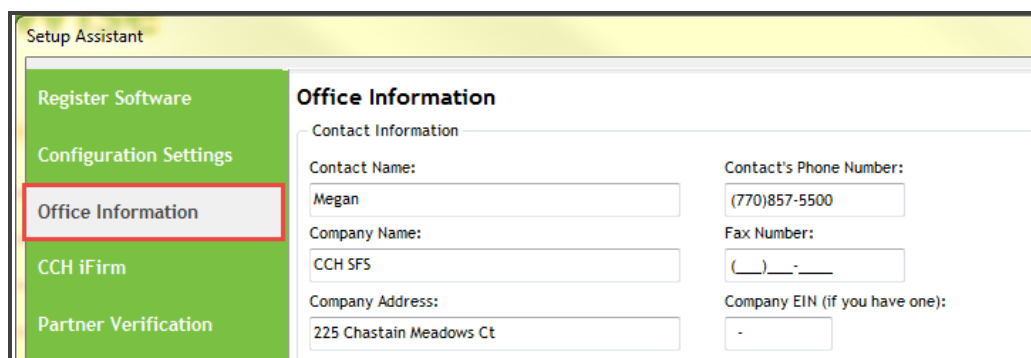


## Integrated Research Tools

TaxWise 2016 includes integrated research tools you can use if you sync TaxWise with your IntelliConnect research account.

To enter your credentials:

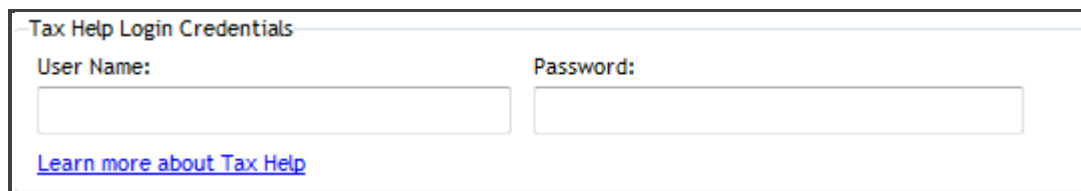
1. Log in as the admin user.
2. From the Tools menu, click **Utilities/Setup Assistant**.
3. On the Utility window, click the **Setup menu**, and click **Setup Assistant**.
4. TaxWise displays the Setup Assistant. Click the **Office Information** tab.



The screenshot shows the 'Setup Assistant' window with a green sidebar on the left containing the following options: 'Register Software', 'Configuration Settings', 'Office Information' (highlighted with a red border), 'CCH iFirm', and 'Partner Verification'. The main area is titled 'Office Information' and contains a 'Contact Information' section with the following fields:

Contact Name:	Megan	Contact's Phone Number:	(770)857-5500
Company Name:	CCH SFS	Fax Number:	( ) - -
Company Address:	225 Chastain Meadows Ct	Company EIN (if you have one):	-

5. In the Tax Help Login Credentials section, type your email address and password for IntelliConnect.



The screenshot shows the 'Tax Help Login Credentials' section with two input fields: 'User Name:' and 'Password:'. Below the fields is a blue link that reads 'Learn more about Tax Help'.

6. Click **Save and Close** to save your changes.

## Toolbar Icons

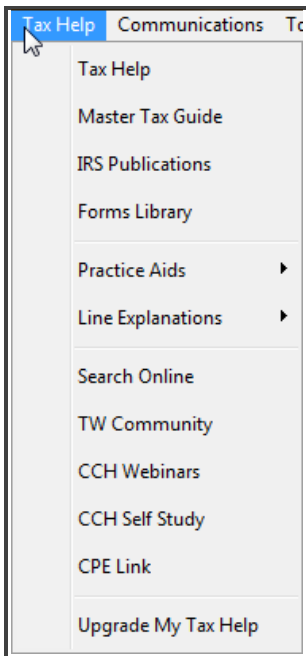
There are 3 toolbar icons for quick access to tax research tools: Tax Help, Search Online and Practice Aids.



- **Tax Help:** Displays the IntelliConnect homepage, where you can search for content.
- **Search Online:** Displays a search bar inside the return, where you can search your default search engine. If you install the IntelliConnect Browser Plug-in, you also receive IntelliConnect results within your default search engine.
- **Practice Aids:** Opens the IntelliConnect website, displaying 1040 Practice Aids, such as flowcharts, checklists, and client letters.

## Tax Help Menu

The Tax Help menu includes several options you can use to quickly find accurate answers to your tax preparation questions.



The chart below describes each option:

Options	Description
<b>Tax Help</b>	Opens the IntelliConnect homepage.
<b>Master Tax Guide</b>	Opens IntelliConnect, displaying the Master Tax Guide, saving you steps in accessing this resource.

Options	Description
<b>IRS Publications</b>	Opens IntelliConnect with the IRS Publications section expanded. Allows you to quickly access the IRS publication you need.
<b>Forms Library</b>	Displays the Online Library webpage, where you can search for forms that are not included in TaxWise. Use the filters to locate the form you need and print a PDF copy.
<b>Practice Aids</b>	Provides access to the checklists and flowcharts for both individual and business returns, similar to the Practice Aids icon on the toolbar.
<b>Line Explanations</b>	Provides detailed information about specific lines on forms used in both individual and business returns.
<b>Search Online</b>	Opens the Internet search bar, similar to the Search Online toolbar icon.
<b>TW Community</b>	Opens the TaxWise Customer Solution Center, displaying the Community Board, so you can log in and interact with other TaxWise users on a variety of subjects.
<b>CCH Webinars</b>	Displays the CCH Webinars homepage, which displays a list of upcoming webinars you can purchase and attend to earn CPE credits.
<b>CCH Self-Study</b>	Displays the CCH Learning Center information page, where you can purchase access to hundreds of online, self-study courses that offer CPE credits.
<b>CPE Link</b>	Displays the CPE Link homepage, which provides access to an additional CPE training option. Access webinars and self-study content from this page.
<b>Upgrade My Tax Help</b>	Depending on the research package you purchase, you may not have access to all features. To upgrade your research package, click this option.