


CHECKPOINT STATE & LOCAL – QUICK REFERENCE

Logging in to Checkpoint

1. Launch your browser and enter the Checkpoint address in the browser location bar:


<http://checkpoint.tr.com>

The **Checkpoint Login** screen appears.

 **NOTE:** Bookmark this page or add it to your Favorites so you will not have to retype the URL every time you want to access Checkpoint.

2. Enter your **User Name** and **Password**, and then click **Login**.

The Checkpoint screen that appears depends on the Login and Search Practice Area settings in the General Settings Options.

 **NOTE:** You can use your user name and password to open only one Checkpoint session at a time. Select the **Save Name/Password** check box to save your login information. You will not be prompted to enter your User Name and Password on future Checkpoint sessions.

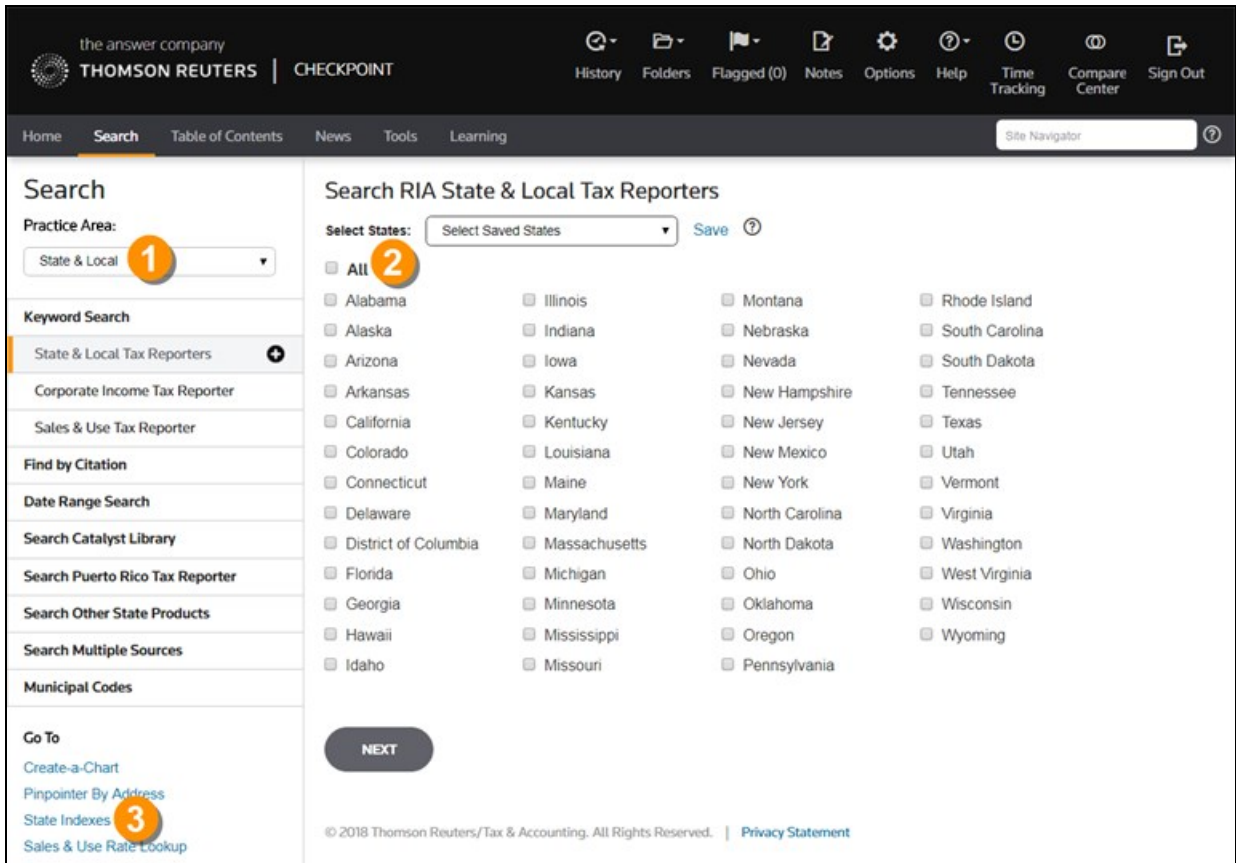
Ending a Session Remotely

Checkpoint does not permit multiple logins with the same User ID. If you are logged into Checkpoint on another machine or browser and attempt to login, Checkpoint will provide an option for you to close the original session and continue the login process.

For support, go to <http://support.checkpoint.tr.com>, or call 800.431.9025.

Using the State & Local Search Screen

The **State & Local** practice area on the **Search** screen provides a launch point from which to perform keyword searches on state and local sources.



1	To perform a State & Local search, select State & Local from the Practice Area drop-down list.
2	Select the check box for the state or states whose sources you want to search. Select All to include all states in your search.
3	The State Index tool provides access to tax-related laws for each state, indexed by the state's own categories.

State Tax Types and Document Types

Using the **State & Local** search wizard, you can restrict your search to particular tax types and document types.

The screenshot shows the Thomson Reuters Checkpoint search interface. The top navigation bar includes 'Home', 'Search', 'Table of Contents', 'News', 'Tools', and 'Learning'. The 'Search' section is active, showing 'Practice Area: State & Local'. The 'Keyword Search' section is selected, with 'Tax/doc type/keyword' as the search method. The 'Search by Tax Type/Document Type/Keyword' section is visible, with a search input field and a search button. The 'Intuitive Search' option is selected. The 'Searching: New York' section shows 'Select Tax Types' and 'Select Document Types' with various checkboxes. The 'Find by Citation' option is highlighted with a callout '5'.

1	Tax types are state specific and vary by state. Here, they reflect the options for the state of New York .
2	Select one or more tax types .
3	Select one or more document types .
4	You can perform a Keyword Search in two ways: Intuitive Search recognizes questions, common phrases, connectors, or citations, and interprets your query accordingly to retrieve the most relevant results, including relevant variations. Terms & Connectors will limit your search to the exact words you typed, without any variations. The search AutoComplete feature will suggest keywords as you type in the field.

5	Use Checkpoint's predesigned Find by Citation search templates to retrieve a specific case, statute, ruling, or regulation. The fields on the individual templates are state specific.
6	To see what is included in a tax type or document type, hover over any of the Tax Type and Document Type check boxes when searching within a single state to view specific information for the state selected. This feature is not available for searches within multiple states.

Note: The document types that you choose to view appear in the **Search Results** screen, with the document name .

Using Search Connectors

To locate documents:	Use:	Example:
containing any of my keywords	OR,	funding OR deficiency
containing all of my keywords	space, &, AND	funding & deficiency
that contain one keyword but exclude another	^, NOT	funding ^ deficiency
containing my exact phrase	" "	"funding deficiency"
containing variations of my keywords	* (asterisk)	deprecia*
disabling automatic retrieval of plurals and equivalencies	# (pound sign)	#damage (retrieves only damage, not damages)
containing single-character variations	? (question mark)	s????holder (retrieves stockholder, shareholder)
containing compound words	- (hyphen)	e-mail (retrieves e-mail, e mail, email)
containing terms that occur at least # times	atleast#()	atleast5(customer)

Using Connectors in Intuitive Search

If the Terms & Connectors search method is selected, the AND, SPACE, or & connectors can all be used to require more than one term in each of the documents of your search results.

However, if Intuitive Search is left as the default search method, Checkpoint will read the word "AND" and any SPACE as it would any other word used in your query. Although the most

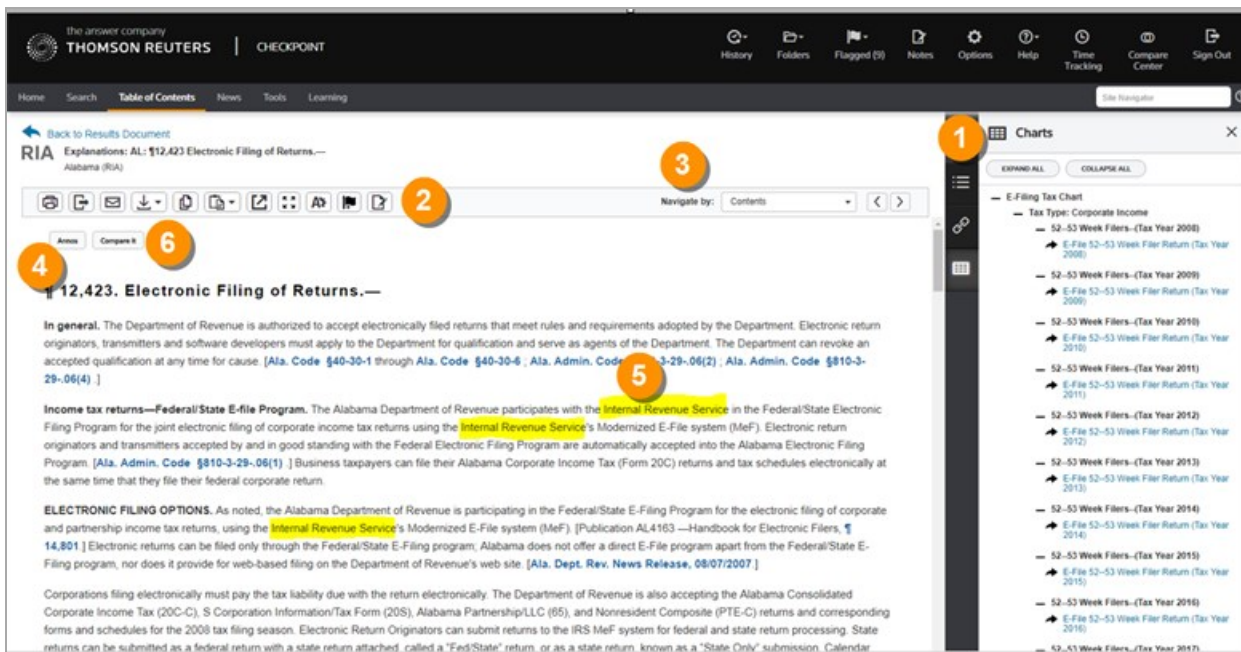
relevant documents are likely to have all words used, you may get results that have only most of the words.

Also, when using the Intuitive Search method, the use of quotations to search for a phrase will find the most relevant documents that include the exact phrase and relevant variations that contain the keywords within 3 words of one another.

To search for a word or phrase:	Use:	Example:
within n words of another (in any order)	/# (where # equals number)	"disclosure exception" /7 negligence
within n words of another (in exact order)	pre/# (where # equals number)	"disclosure exception" pre/7 negligence
within the same sentence (20 words) as another (in any order)	/s	"disclosure exception" /s negligence
within the same sentence (20 words) as another (in exact order)	pre/s	"disclosure exception" pre/s negligence
within one paragraph (50 words) as another (in any order)	/p	"disclosure exception" /p negligence
within one paragraph (50 words) as another (in exact order)	pre/p	"disclosure exception" pre/p negligence

Using the State & Local Document Screen

The **Document** screen provides the format for viewing and managing Checkpoint documents, with various tools and features for navigating, saving, printing, sharing, exporting, adding notes, and flagging the content. You can also highlight document text and save the highlighted text as a note.



<p>1</p>	<p>The Context Panel provides access to related documents, navigation to sections within the document, access to charts available for this topic, or additional search options. In the Contents tab, the names of viewed documents appear in purple text. Every 24 hours at midnight, Checkpoint refreshes document links and all purple text changes back to blue.</p>
<p>2</p>	<p>Document tools include Print, Export, E-mail, Save, Open in New Window, Selected Text Option, Show Permalinks, Full Screen, Document Display Options, Flag this document, and Add Note.</p>
<p>3</p>	<p>Use the Navigate by field and arrow buttons to advance to the next Best result or Document found by your search, the next document listed in the Table of Contents, or the next occurrence of a Keyword.</p>
<p>4</p>	<p>When applicable, top-line links provide access to supporting documentation from various primary and editorial sources. Also, look for side-line links embedded in the document.</p>

5	Keyword occurrences appear with yellow highlighting. You can also highlight content within a document and saved it as a note.
6	You can perform multistate searches by selecting multiple states from the State & Local Taxes screen or by executing a keyword search for a single state and then use Checkpoint's Compare It feature in RIA's State Explanations to find out how other states treat the same topic.

State & Local Create-a-Chart

With the State & Local **Create-a-Chart** feature, you can access pertinent state tax information from one convenient table, with links to the controlling authority and Thomson Reuters' detailed explanations.

1. You can create this chart from the **Search** screen or **Tools** screen.
 - From the **Search** screen, select the **State & Local** practice area, and then click **Create-a-Chart** from the left navigation bar.
 - From the **Tools** screen, click **Create-a-Chart** from the left navigation bar. Then click **State & Local**.

The screenshot shows the Thomson Reuters Checkpoint interface for creating a State Tax Chart. The top navigation bar includes the logo and various utility icons like History, Folders, and Sign Out. The main navigation bar has tabs for Home, Search, Table of Contents, News, Tools (highlighted), and Learning. A left-hand navigation menu lists various tools, with 'State & Local' selected under the 'Create-a-Chart' section. The main content area is titled 'State Tax Chart' and features a '1 Select Tax Type' step. It prompts the user to 'Please choose the tax type for your chart:' and provides a grid of radio button options. The 'NEXT' button is visible in the top right of the selection area.

State Tax Chart	
1 Select Tax Type	
Please choose the tax type for your chart:	
<input checked="" type="radio"/> Corporate Income ?	<input type="radio"/> Sales/Use
<input type="radio"/> Personal Income	<input type="radio"/> Property ?
<input type="radio"/> Partnerships	<input type="radio"/> Cigarettes and Alcohol
<input type="radio"/> S Corporations	<input type="radio"/> Estate and Gift
<input type="radio"/> Limited Liability Companies	<input type="radio"/> Fuel--Minerals
<input type="radio"/> Limited Liability Partnerships	<input type="radio"/> Public Utilities
<input type="radio"/> Franchise ?	<input type="radio"/> Insurance
<input type="radio"/> Initial Taxes	

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2. Select a tax type and click **Next**.
3. Select one or more chart types and click **Next**.
4. Select the state or states whose tax information you want to display on your chart.
5. Click **Create the Chart**.

Checkpoint displays your chart results. The type of chart you selected determines which columns appear on your chart.

State Tax Chart Results

Tax Type: Corporate Income

Legend:
N/A - Not Applicable

Display Charts:
 Separate Charts
 Combined View - Charts on Top
 Combined View - States on Top

State Imposes Corporation Income Tax
 This chart shows whether or not the state imposes a corporation income tax or a franchise tax based on net income.

State	Corporation income tax	Authority	Editorial Reference
AK	Yes. A Corporation Income Tax is imposed in Alaska.	Alaska Stat. § 43.20.011(e)	¶10,020
AL	Yes. A Corporation Income Tax is imposed in Alabama.	Ala. Code § 40-18-2(a)(2) ; Ala. Code § 40-18-2(a)(3)	¶10,020
AR	Yes.	Ark. Code Ann. § 26-51-205	¶10,020

Note: You can export charts to Microsoft Excel © using the export feature in the document tools.

Setting State & Local News Options

You can set State & Local news display options by selecting **State & Local Tax Updates** from the left navigation bar on the **News** screen.

The screenshot shows the Thomson Reuters Checkpoint News interface. The top navigation bar includes 'Home', 'Search', 'Table of Contents', 'News', 'Tools', and 'Learning'. The 'News' section is active, displaying a list of news items. On the left, the 'Outline' section lists various update categories, with 'State & Local Tax Update' highlighted in a red box. In the top right corner of the news content area, a button labeled 'Set Display/E-mail Preferences' is also highlighted in a red box. The main content area displays a 'State & Local Tax Update' section with a 'Publisher's Note' and several news items, including 'Arizona bill makes numerous changes to electronic filing and exempt organization provisions', 'Michigan increases interest rate on underpayments and overpayments of tax for second half of 2018', and 'Michigan revises unitary business group control test and relationship tests for corporate income tax'.

Click **Set Display/E-mail Preferences** to access the **Options** screen, where you can change display options.

Options ✕

Document

General Settings

News

News Service

News E-mail/Display

Checkpoint Updates

Accounting & Compliance Alert

PPC News

BNA Daily Tax Report & TaxCore

IBFD Daily Tax News Service

TR Global Indirect Tax Update

Willis Towers Watson

EBIA Weekly

AAEI International Trade ALERT

Journals E-mail

RSS Feeds

Personal/Password

Search/Display

Application Integration

Time Tracking

Debug Options

News E-mail/Display: ⓘ

Checkpoint Updates	E-mail		Display
	Weekly Update (or other frequency as noted)	Daily Update	
Estate Planning Update	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Federal Tax Update	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Howard Zaritsky's Estate Planning Update (Semimonthly)	<input type="checkbox"/>		
Pamela D. Perdue's Pension & Benefits Update (Semimonthly)	<input type="checkbox"/>		
Payroll Update	<input type="checkbox"/>	<input type="checkbox"/> Customize	<input checked="" type="checkbox"/> Customize
Pension & Benefits Update	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Puerto Rico Tax Newsletter (Monthly)	<input type="checkbox"/>		
RIA Tax Watch (as authored)		<input type="checkbox"/>	<input checked="" type="checkbox"/>
State & Local Tax Update	<input type="checkbox"/>	<input type="checkbox"/> Customize	<input checked="" type="checkbox"/> Customize

News Flash: E-mail News Flashes for any e-mailed news updates

SAVE AND CLOSE
CANCEL

You can also customize some updates by selecting the **Customize** link in the **Daily Update** column or the **Display** column to assign filtering options for your selections. You can select the states and tax types to be included in the State & Local updates you receive. After assigning any filtering options, click **Save and close**.

State Legislative Highlights

State Legislative Highlights allows you to create a document that lists enacted legislation, with links to the primary source document.

1. You can create this document from the **Search** screen or **News** screen.
 - From the **Search** screen, select the **State & Local** practice area, and then click **State Legislative Highlights** from the left navigation bar.
 - From the **News** screen, click **State Legislative Highlights** from the left navigation bar.
2. Select the state or states whose information you want to display and click **Next**.
3. Select the tax types and click **Next**.
4. Select a date range and click **Search**.
5. When the **State Legislative Highlights Results** document appears, you can sort the information by tax type or by state. You can also save the document to a folder or schedule for a quarterly report to be sent to you via email.

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History Folders Flagged (1) Notes Options Help Time Tracking Compare Center Sign Out

Home Search Table of Contents **News** Tools Learning Site Navigator

News

Checkpoint Daily Updates

All Checkpoint Updates

Checkpoint Weekly Updates

News Library

Search News Library

State Legislative Highlights

States

Tax Types

Date Range

Results

State Proposed Legislation

WG&L Tax Journals

Sort by Tax Type Save or Schedule to Run Quarterly

State Legislative Highlights Results

November 1, 2017 - June 6, 2018

Alabama—Business and Occupation Tax

No Results

Alabama—Charts and Calendars

No Results

Alabama—Cigarette, Alcohol & Miscellaneous Taxes

Administration of county and municipal taxes.

L. 2018, S111 (Act 150), effective 03/01/2019, and as otherwise indicated, amends various provisions regarding the administration of county and municipal sales, use, rental, lodging, and other local taxes. The legislation amends the interest rate charged by self-administered counties and municipalities on underpayments/overpayments of county/municipal taxes, amends county/municipal

State Proposed Legislation

State Proposed Legislation allows you to identify and follow proposed legislation at any or all stages of the legislative process.

1. You can view state proposed legislation from the **Search** screen or **News** screen.
 - From the **Search** screen, select the **State & Local** practice area, and then click **State Proposed Legislation** from the left navigation bar.
 - From the **News** screen, click **State Proposed Legislation** from the left navigation bar.
2. Select the state whose legislation you want to view, a date range, and statuses, and click **Submit**.

The **State Proposed Legislation Results** appears for the state you selected.

The screenshot displays the Thomson Reuters Checkpoint News interface. The top navigation bar includes the Thomson Reuters logo, the word "CHECKPOINT", and various utility icons like History, Folders, Flagged (1), Notes, Options, Help, Time Tracking, Compare Center, and Sign Out. Below this is a secondary navigation bar with Home, Search, Table of Contents, News (highlighted), Tools, and Learning. A Site Navigator search box is on the right.

The main content area is titled "News" and features a sidebar on the left with a dropdown menu set to "Checkpoint Daily Updates". The sidebar lists several categories: All Checkpoint Updates, Checkpoint Weekly Updates, News Library, Search News Library, State Legislative Highlights, State Proposed Legislation (highlighted), State, Date Range and Status, Results, and WG&L Tax Journals.

The main content area shows "State Proposed Legislation Results" for "New York legislation introduced or enrolled or signed or vetoed in the last 3 months." It lists "NY A 1354 – Complete Status" with a summary: "ROBACH CUSICK, ORTIZ, ABBATE, SCHIMMINGER, TITONE, ENGLEBRIGHT, MORELLE, PERRY, OTIS; M-S: Aubry, Colton, Gunther, Hooper, Lupardo, Peoples-Stokes, Rivera Add Art 27-CCC i2747, Pub Health L; add ii209-K & 630-e, Tax L; add i97-pppp, St Fin L Provides a program to promote leukemia, lymphoma and myeloma research, education and treatment and establishes the leukemia, lymphoma and myeloma research, education and treatment fund; authorizes the commissioner of taxation and finance to create a check-off gift on individual income tax returns for contributions to leukemia, lymphoma and myeloma research, education and treatment." The latest status is "03/22/2018 (S) REFERRED TO SENATE HEALTH" with a "Follow It" button highlighted by a red box. Below this is "NY A 1986 – Complete Status" with a summary: "BOYLE LENTOL Add ii209-K & 630-e, Tax L; add i95-i, St Fin L Creates the rescued animals spay and..."

3. To follow a bill through the legislative process , click the **Follow It** button.

The system tracks the bill until the end of the calendar year in which it was introduced. An email is sent every time the bill being followed has an updated status.

Note: You can view followed legislation from the **Follow It** pane on the **Home** screen.