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Welcome!

Welcome to the next generation of Checkpoint that now delivers an immersive experience that was built to deliver the latest in artificial intelligence, cognitive computing, and machine learning technologies. Checkpoint Edge™ offers you fast, intuitive ways to find answers to your tax and accounting research questions. Here you will find all of the information you need to do research successfully in Checkpoint Edge.


Before you get started, check the [System Requirements](#) for using Checkpoint Edge.

For support contact information, frequently asked questions, articles, tips, and documentation, see the [Customer Help Center](#).

[Live, recorded, on-demand, and YouTube functionality learning](#) included in your subscription


Logging in to Checkpoint Edge

1. Launch your internet browser and enter <http://checkpoint.tr.com> in the browser location bar:

 **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 Edge 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 Edge does not permit multiple logins with the same User ID. If you are logged into Checkpoint Edge on another machine or browser and attempt to log in, you will be prompted to close the original session and continue the log in process.

Using In-Product Training and Guidance

In-Product Training and Guidance offers simple, easy to access training and guidance on both new and existing key Checkpoint Edge features so that you can be confident that you are using Checkpoint Edge to its full potential.

Upon logging in for the first time, as a new user to Checkpoint Edge, you will receive quick training and guidance through product tours and guides that will display in context so that you can immediately engage with key features of the platform.

Additionally, as new features or enhancements are made to the platform, you will continue to be alerted to them either via the Notifications page or within the context of your work.

To learn about new key product features:

1. Click on Notifications (upper right corner of the screen)
2. Click on the Notification Feed (if not already selected)
3. Select the appropriate Product Tour or Walkthrough from the list

To access or re-execute existing Product Tours and Guides:

1. Click on the Help dropdown (upper right corner of the screen)
2. Select Updates and Walkthroughs and then Feature Updates
3. Select the appropriate Product Tour or Walkthrough from the list

Introduction to Searching

Conducting research is one of Checkpoint's primary activities. The goal is to find the information you need from Checkpoint's taxation and financial sources as quickly and efficiently as possible. You will find searching features available in several locations in Checkpoint, including:

- **Search** section of each **Practice Area** screen
- **Site Navigator** feature on the menu bar

Practice Area

The primary screen for searching in Checkpoint is the **Practice Area Search** screen.

To access the **Search** screen from any other screen in Checkpoint, click the Practice Area name in the menu bar.

On the **Practice Area** screen, you can use several methods for performing searches of Checkpoint's sources.

Word search	Submit the question, sentence, phrase, or words that best describe your research topic using either an Intuitive search or Terms & Connectors method. You can also use the Query Tool for advanced search functions. Click Practice Areas & Sources to specify specific sources to search, or to search across more than one practice area.
Find by Citation	Locate a specific law, ruling, or case by typing its citation. Available from the Citation and Other Search Tools link.
Table of Contents search	Target your search to specific titles, chapters, sections, or other areas of the Table of contents for the practice area you are viewing. Use the Filter Sources field to search for relevant subscribed titles by keyword(s) to further focus your search.
Data Range search	Locate Federal rulings or cases in a specified date range. Available from the Citation and Other Search Tools link.
Legislation search	Search for current or prior legislation by topic, year, code, or section. Available from the Citation and Other Search Tools link.

WG&L Tax Dictionary	Search for definitions and explanations in a reference guide to key taxation terminology. Available from the Citation and Other Search Tools link.
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After completing a search on the **Search** screen, the results are displayed on the **Search Results** screen.

Site Navigator

You can click the menu bar's [Site Navigator](#) feature from any screen in Checkpoint to quickly find and display resources in Checkpoint.

Understanding the Practice Area Screen

The **Practice Area** screen contains tools and content specific to each practice area. Click the practice area name in the menu bar: The available practice area(s) will vary depending on your subscription.

- Federal
- State
- Estate
- Pension & Benefits
- International Tax
Payroll
- Accounting, Audit & Corporate Finance

Each Practice Area screen has several sections:

Search

The Search section contains the Keyword search field and links to **Citation and Other Search Tools, Sources**, and the **Query Tool**. Use this section to perform an [Intuitive](#) or [Terms and Connectors](#) search.

Use the Table of contents section to browse your subscribed sources for the practice area you are viewing. Click the + sign to drill into a particular area. Click the selection boxes to target a search to a specific set of titles, chapters, sections, etc., of your choosing.

Table of Contents

Use the Table of contents section to browse your subscribed sources for the practice area you are viewing. Click the + sign to drill into a particular area. Click the selection boxes to target a search to a specific set of titles, chapters, sections, etc., of your choosing.

Quick Links

Use the Quick Links section to access common resources, sources, and search tools. You can edit and customize the Quick Links section by clicking the **Edit** link.

Tools

Use the Tools section to access standalone tools.

Use the Find Tools search field to search by keyword(s) for context-specific tools (such as advisory maps, computational worksheets, checklists, calculators, elections, statements, letters, and more) that are discussed within Checkpoint Edge documents.

News

Use the News section to view news alerts and updates for the current practice area. Click the **All News** link to open the News screen and view an expanded list of news content.

Calendar

Use the Calendar feature to monitor upcoming tax obligations and associated due dates.

Using the Site Navigator

Checkpoint's Site Navigator feature provides a quick way to find various sources and documents within Checkpoint. When you enter search criteria in the **Site Navigator** field on the menu bar, Checkpoint searches through its extensive reference content and returns a list of matching results, up to 20 links at a time. The links are organized into sections with menu headers, such as Search, Table of Contents, and Tools.

Site Navigator search criteria conventions include the following:

- Upper or lower case letters (case does not matter)
- Single or multiple words
- Letters within words (for example, entering "ap por" would find "GAAP Reporter")

To run a Site Navigator search from any screen in Checkpoint:

1. On the menu bar, click the **Site Navigator** field.
2. Enter the words or phrases of your search criteria. You do not need to press or click anything to start the search. Checkpoint automatically builds and displays a list of up to 20 items that include your search term, such as templates, tools, and Table of Content titles.
3. Scroll through the list and click the document or feature you want to access.
4. To see the complete list of search results, click **Show All Results** at the bottom of the list.

Using the Enhanced Search Feature

Checkpoint Edge has enhanced its searching capabilities through new evolutions in artificial intelligence (AI) and machine learning and our search algorithms have been created to provide you with the most fluid and accurate researching experience ever. Checkpoint Edge gets to the point faster and becomes more intelligent with every search.

Simply ask Checkpoint Edge a question the way you happen to be thinking about an issue instead of feeling like you have to translate your search to fit Checkpoint. Checkpoint Edge will automatically search all subscribed sources for a Practice Area (excluding Archives since they may not reflect current law) by default. To limit your search to a specific set of sources, click Sources below the search field. Checkpoint will remember your source selections for subsequent searches.

Getting Started

Using the Search section in your chosen Practice Area enter a query in the form of a question using 4 or more words. As you type, the enhanced search feature generates suggestions that appear below the Search field. You can select a suggestion listed to view that resource or use the search icon to the right of your question to go directly to the Search Results page.

Viewing and Navigating Search Results

After completing a search, the results are displayed on the **Search Results** screen. Click the title of a document in the search result list to view it.

Filtering Results

The Search Results list can be filtered by content type and by source.

To filter by content type, select one of the **Content Categories**. Depending on the content included in your subscription, practice area, and search query, possible content categories may include::

- Editorial Materials
- EY Content
- Primary Source Materials
- News/Current Awareness
- Interactive Tools
- Create-a-Chart

The results list will adjust to display only the content for the selected category in relevance order.

To filter by source, check the boxes for individual sources in the **Filter By** pane. The number of results within each source is displayed to the right of the source title. Use the + and - icons to expand and collapse sections within the filter list.

Concept Markers

[Concept Markers](#) provide you with concepts that are relevant to your query and search results. Selecting a Concept Marker may re-order the list of results and help you locate the best results without re-executing a new query.

Snapshots

Snapshots make it easy to get quick answers or orient yourself to unfamiliar topics directly from the search results page. Depending on the Practice Area and your search criteria, Snapshots may appear above your list of search results to help you find answers to straightforward questions, become more familiar with a topic or new area of law, identify the authoritative primary source, gain directional guidance to deepen your research or provide tools to use to take an action.

Tools & Settings

Several search tools and settings are available from the **Tools & Settings** menu.

Feature	Purpose
Save/Schedule Search	Allows you to save your search parameters to run again later. At the same time, you can schedule your search parameters to run later.
Query Tool	Open the Thesaurus/Query Tool .
Search Within Results	Toggle open a search field to search within the current set of results.
Related Checkpoint Learning	Lets you browse and register for a wide variety of training.
Text Snippets	An On / Off toggle to set the display of text snippets for search results. Checkpoint provides context for results by showing 25 words around the first keyword occurrence in a document. (The default setting is On .)

Document Tools

Document tools are available by selecting the check box next to a document in the search results list.

Print Documents

1. Select the check box next to each document title you want to print.
2. Click the **Print** icon in the document tools. The selected documents appear in a window with source and document citations, along with a **Print** dialog box.
3. Click **Print**.

Export Documents

1. Select the check box next to each document title you want to export.
2. Click the **Export** icon in the document tools. The **Export** dialog box appears.
3. Review the default settings for format and links, and then click **Export**.

The browser **File Download** dialog box appears.

4. Click **Open** to view the exported documents or **Save** to save to your local PC.

Note: The export format for the document is defined in your Checkpoint Print/Export/E-mail setting on the **Options** screen.

5. Click **X** to close the dialog box.

Save to Folders

1. Select the check box next to each document title you want to save.
2. When you click the drop-down arrow next to the **Save** icon, you get a menu with choices to **Save** to the default folder or **Save As** to a different folder.

If you click **Save**, the document is saved to the current folder on the **Folders** screen and you are finished.

If you click **Save As**, the **Save Document** window opens, where you can select another folder. Continue with Step 3.

3. On the **Save Document** window, click **Change Folder**.
4. When the **Change Folder** window opens, you can either select another folder from the list or click a link to create a new folder.

If you want to select another folder, click the folder name and click **OK**.

If you want to create a new folder, click **Create New Folder**. When the **Create Folder** window opens, enter the new folder name, select a location, and click **Create**. The new folder is added to the **Change Folder** window. Click the new folder name and click **OK**.

5. Optionally, on the **Save Document** window, you can enter a **Note** for the document. If you enter a note, the note is added to the top of the document.
6. On the **Save Document** window, click **Save** to add the document to the selected folder on the **Folders** screen.

Flag Documents

1. Click the **Flag** icon in the document tools. Checkpoint adds the flagged document to the **Flagged Documents** screen.
2. To access flagged documents, click **Flagged** in the top toolbar.
3. To unflag a document, in the open document, click the **Flag** icon in the document tools again.

Sort Results by Date

For searches that include results from Primary Source Materials and News/Current Awareness content categories, you can now display results for each source in reverse chronological order by date. While viewing results by Source (not Relevance), click the **Sort this source by date** toggle that appears directly below the source heading. This toggle is available only for certain primary sources and news materials for which a date sort is appropriate.

Public Content

Depending on your subscription, you can now search Checkpoint sources and trusted public sites such as IRS.gov (including IRS Tax Map and Forms & Instructions), Big 4, RSM, Tax Executives Institute (TEI), and State Departments of Revenue. Click the Trusted Public Sites link in the left pane of the search results screen to switch views to your public site results. Clicking a document from a trusted public site opens the document in a separate browser tab so that you can easily navigate to your Checkpoint results.

Advisory Maps

If your subscription includes access to Tax Planning and Advisory Guides, you may notice Advisory Maps (depending on which Guides are included in your subscription). Advisory Maps provide an end-to-end process for delivering specific tax planning and advisory engagements by identifying the required phases and tasks to be completed. Each Map provides step-by-step guidance and implementation aids for every phase and task of the process, enabling all levels of staff to confidently evaluate and determine the best options for their client or business.

To quickly see all available Advisory Maps, click the Notifications link from the top of any screen.

Content Recommendations: Related News Updates and Recommended Documents

Related News Updates and **Recommended Documents** are subscription-sensitive and included in Checkpoint Edge product subscriptions that include the applicable content sets.

With **Related News Updates** and depending on their subscription, Checkpoint Edge users that are viewing Federal, Pension and Benefits, Estate Planning analysis documents and State explanations, can now find coverage of any new or recent developments that might affect what they are currently researching. These updates will provide the most recent related new articles and will go back up to a year if users want to review older news items that may still be relevant to their research.

With **Recommended Documents**, Checkpoint Edge users that are viewing Federal, Pension and Benefits, Payroll, Estate Planning analysis documents and State explanations, can now find related documents (depending on their subscription) from WG&L Treatises, Journals and EBIA manuals.

Using Related News Updates & Recommended Documents

To use the **Related News Updates** or **Recommended Documents** features, begin by conducting a search. On the Search Results screen, choose an analysis document from the Federal Tax Coordinator, Pension and Benefits Coordinators, Payroll Guide (Recommended Documents only) or Estate Planning analysis documents.

How does a self-employed person take COVID-19 Sick Leave?

Continuing health coverage Accrued sick leave Self-employed taxpayer Small employer health reimbursement arrangements FMLA test

1-20 of 62 best results Sorted by Relevance ▾ Tools & Settings

Overview ^

Under Sec. 7002 of the Families First Coronavirus Response Act (PL 116-127, 3/18/2020), a refundable credit (the "self-employed sick leave credit") is allowed to "eligible self-employed individual" (defined in Sec. 7002(b), PL 116-127, 3/18/2020) against the tax imposed by subtit...

¶ 2331.2. Self-employed's refundable credit ("self-employed sick leave credit") for pre-2021 sick le...

[Feedback](#)

Definition v

¶ L-18430 Refundable Credit for Sick Leave for Certain Self-Employed Individuals During Coronavirus (COVID-19) Pandemic

★★★★★ | Federal Tax Coordinator Analysis (RIA)

Sick Leave for Certain **Self - Employed** Individuals During **Coronavirus (COVID - 19)** Pandemic Under Act Sec. 7002 of the Families First **Coronavirus** Response Act (PL 116-127, 3/18/2020), 1 Sec. 7002 , PL 116-127 , 3/18/2020 . a refundable credit (the " **self - employed sick leave credit**") is allowed

After choosing an analysis document, Checkpoint Edge users may notice the option to select and research **Related News Updates** or **Recommended Documents** where applicable.

With **Related News Updates**, users can scroll through the results and then choose an article they wish to view:

The screenshot displays the Thomson Reuters Checkpoint Edge web application. The main content area shows a document titled "RIA 1L-18430 Refundable Credit for Sick Leave for Certain Self-Employed Individuals During Coronavirus (COVID-19) Pandemic". The document text includes an introduction and an RIA observation. On the right side, a sidebar titled "Related News Updates" is open, listing several news items dated from April 14, 2020, to April 27, 2020. The sidebar is highlighted with a red box, and a red box also highlights the "Related News Updates" title bar.

Related News Updates

- April 27, 2020**
First quarter 2020 Form 941 is still due on April 30, Federal Tax Update (04/27/2020)
Although, earlier this month, IRS extended the deadline for many returns and other actions whose due date would otherwise had been between April 1, 2020 and July 15, 2020, it
- April 22, 2020**
Residency/presence tests for foreign exclusions waived due to COVID-19 (04/22/2020)
In a Revenue Procedure, in response to the COVID-19 pandemic, IRS has waived the residency and presence tests that apply for purposes of the 1015 and 1021 Code Sec. 917
- April 21, 2020**
IRS adds to FAQs on COVID-19 family, medical and sick leave credits (04/21/2020)
IRS has updated its website that provides frequently asked questions regarding employer credits for wages paid for family and medical leave and for emergency paid sick leave paid to
- April 20, 2020**
COVID-19 update for tax professionals (04/20/2020)
As the COVID-19 pandemic continues, Thomson Reuters's Federal Tax Update on Checkpoint is providing tax updates on a daily basis, especially concerning the Coronavirus Act
- April 14, 2020**
IRS issues guidance on CARES Act deferral of employment tax deposits (04/14/2020)
On its website, IRS has issued FAQs on the deferral of the deposit and payment of employment taxes that is provided by the Coronavirus Act, Relief and Economic Security Act

With **Recommended Documents**, users can look through the results and then choose the document they wish to view:

The screenshot displays the Thomson Reuters Checkpoint Edge web application, showing the same document as the previous image. On the right side, a sidebar titled "Recommended Documents" is open, listing two recommended documents. The sidebar is highlighted with a red box, and a red box also highlights the "Recommended Documents" title bar. A red box also highlights the thumbs-up icon in the sidebar.

Recommended Documents

- IRS SETS OUT HOW EMPLOYERS CAN GET CORONAVIRUS-RELATED CREDITS, Practical Tax Strategies, May 2020**
(Practical Tax Strategies/Toolbox for Accountants (05/20/20))
- RELIEF FROM FAILURE TO MAKE EMPLOYMENT TAX DEPOSITS DUE TO CORONAVIRUS CREDITS, Practical Tax Strategies, May 2020**
(Practical Tax Strategies/Toolbox for Accountants (05/20/20))