

**When you need support:**

**Technical Support**  
1-800-431-9025 prompt 4  
9 a.m. to 7 p.m. ET

**Editorial Questions**  
1-800-742-3348  
9 a.m. to 6 p.m. ET

**Customer Support**  
1-800-431-9025  
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**RIA Sales**  
1-800-950-1216

**Sales Rep Voice Mail**  
1-800-346-7377  
24 hours a day

**For help on:**

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# Checkpoint®

## Quick Reference

The Internet is tailor-made for tax research. With Checkpoint, RIA takes advantage of this explosive medium, and now you can enjoy instant access to the most up-to-date taxation information.

All you need is your computer and Internet access. You can access Checkpoint no matter where you are, from your home office or a branch office in a different state.

Keep this quick-reference guide handy and get started now to increase your productivity.

## *Launching Checkpoint and Changing Your Password*

The Checkpoint **Login** screen is easy to use and includes helpful information on other RIA product offerings, technical information, trial/ordering, customer service, support, and more.

When you subscribe to Checkpoint, you receive a user name. The first time you log in, use this user name as your password. You are taken to a **License Agreement** screen, where, after accepting the agreement, you are asked to select a new password. Choose something that is easy for you to remember.

Checkpoint lets you save your user name and password so you do not have to enter them each time you access the system. To do so, the next time you log in, check the **Save Name/Password** checkbox.

For future reference, record your user name and password in the space below.

<b>User Name:</b>	
<b>Password:</b>	

**TIP:**

To change your password after the initial login, click the **Change Password** link on the Checkpoint **Login** screen. Type the new password and other required information and click **Continue**.

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## Using RIA-Speedlink

RIA-Speedlink provides access to key features of Checkpoint in one easy-to-use tool, making searching for information faster by bypassing the need to log in each time you want to perform a search or move to a related area. RIA-Speedlink resides in your desktop system tray for convenient access.

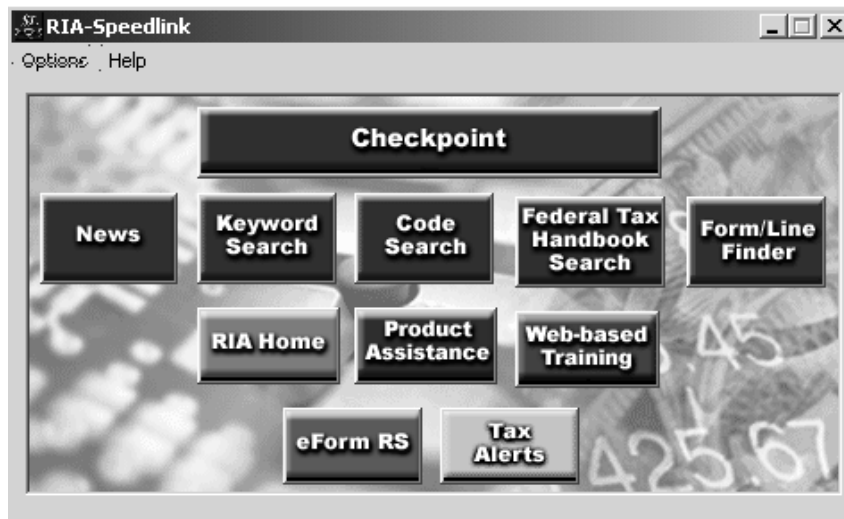
### Downloading RIA-Speedlink

To download RIA-Speedlink:

1. Navigate through your browser to <http://www.riahome.com/speedlink>.
2. In the **RIA-Speedlink Registration** screen, enter the required data.
3. Click **Submit** to save your information and begin downloading, or click **Clear Form** to reset your information.
4. Follow the onscreen instructions to complete the installation.
5. Double-click the **RIA-Speedlink** desktop icon to access RIA-Speedlink.

**Note:** You must input your user name and password when launching RIA-Speedlink for the first time.

### Using RIA-Speedlink



From the RIA-Speedlink toolbar, click the button for the desired option or feature:

**Checkpoint** - Launches the Checkpoint start URL you have designated in the **Speedlink Options** screen.

**News** - Launches the latest news headlines.

**Keyword Search** - Lets you perform a search by keyword. Enter the keyword in the dialog field and click **Go** to begin the search.

**Code Search** - Searches IRS code. Enter the code selection in the dialog field; click **Go**.

**Federal Tax Handbook Search** - Search for a specific paragraph number with the Checkpoint Federal Tax Handbook source set.

**Form/Line Finder** - Allows you search for a specific Form and Line number within Checkpoint.

**RIA Home** - Launches the RIA home website.

**Product Assistance** - Launches RIA Product Assistance support site.

**Tax Alerts** - Launches Tax Alerts home. You must log in with a valid user ID and password to enter the site.

**e-Forms** - Launches e-Form RS.

**Web-based training** - Launches the Checkpoint Web-based 'Getting Started' tutorial.

## Options Screen

Click **Options** from the toolbar to access the Checkpoint **Options** screen. The **Options** sidebar is divided into five areas:

- **Document** – set document viewing preference
- **General** – set general options, such as startup preferences and e-mail notification.
- **Newsstand**– set preferences for newsletters and other news service subscriptions.
- **Personal/Password** – set password and user name options
- **Search/Display** – set searching and display preferences
- **Options help** – access additional help topics related to the **Options** screens.

**Login** – Choose to have Checkpoint open to the **Search** screen, **Table of Contents**, or the **News** screen.

**Startup Practice Area** – Choose to have Checkpoint open to the last practice area used or to a specific practice area.

**User Info.** –If you provide an e-mail address, you can be notified of scheduled search results and receive online newsletter(s) to which you subscribe. This e-mail address is also where your password information is sent if you ever use the **Forgot your password?** option on the **Login** screen.

**History** – If this option remains checked, History will always display the last 10 sessions regardless of the date. If you have more than 10 sessions in your history, Checkpoint will delete any session older than 14 days.

**Show** – You have the option to view **only subscribed materials**. If you do not check the **Only Subscribed Materials** option, the material to which you do not subscribe appears in italics. You also can choose whether to be warned when you are navigating to content in a new tab.

**Export** – Based on your Microsoft Windows options, select from the drop-down list to export documents from Checkpoint to your word processor or open your word processor within the Checkpoint browser.

Each option screen has a **Save** button and a **Restore** button. You must click **Save** to send your desired options to the Checkpoint system before they take effect. **Restore** resets the options to the last selections that you had before changes were made.

## Conducting a Keyword Search

The search function in Checkpoint is streamlined and simple. You can conduct your searches from a single main screen.

To conduct a search, follow the steps below:

1. Log in to Checkpoint.

2. Type a keyword in the **Enter Keywords** field.
3. Check the box(es) next to the desired selection(s) under **Editorial Materials**, **Primary Source Materials**, **Legislation** and/or **News/Current Awareness**, or select from the **Choose Sources from** drop-down list.
4. Click **Search**.

## Searching Databases

Checkpoint provides easy database selection. All databases in the user library are presented in a clearly labeled menu of checkboxes. Databases are grouped logically together according to the original sources of the content based on the practice area selected.

To view all available databases, select **All Practice Areas** from the **Practice Area** drop-down list. Database groups include:

- Editorial Materials
- Primary Source Materials
- Legislation – including both source materials and editorial analysis grouped by year
- State and Local Taxes – by state
- Archive Materials – grouped by year
- News/Current Awareness – journals and newsletters.

## Searching by United States Tax Reporter (USTR) Code

Checkpoint provides a tool to search for specific U.S. Tax Reporter Code references in the Federal practice area. To access the USTR search template:

1. On the Search screen, select the **Federal** practice area from the **Practice Area** drop-down menu.
2. Under the **Go to** section on the left sidebar, click the **USTR Code section** link.

**Note:** You can also access the USTR search template from the Table of Contents screen by clicking on the link under the **Jump To** heading on the left side-bar.

**Jump To USTR Code Section**

**1 Choose USTR Tax Type:**

Income (USTR)  
 Estate & Gift (USTR)  
 Excise (USTR)

**2 Choose Current or Repealed:**

Current  
 Repealed

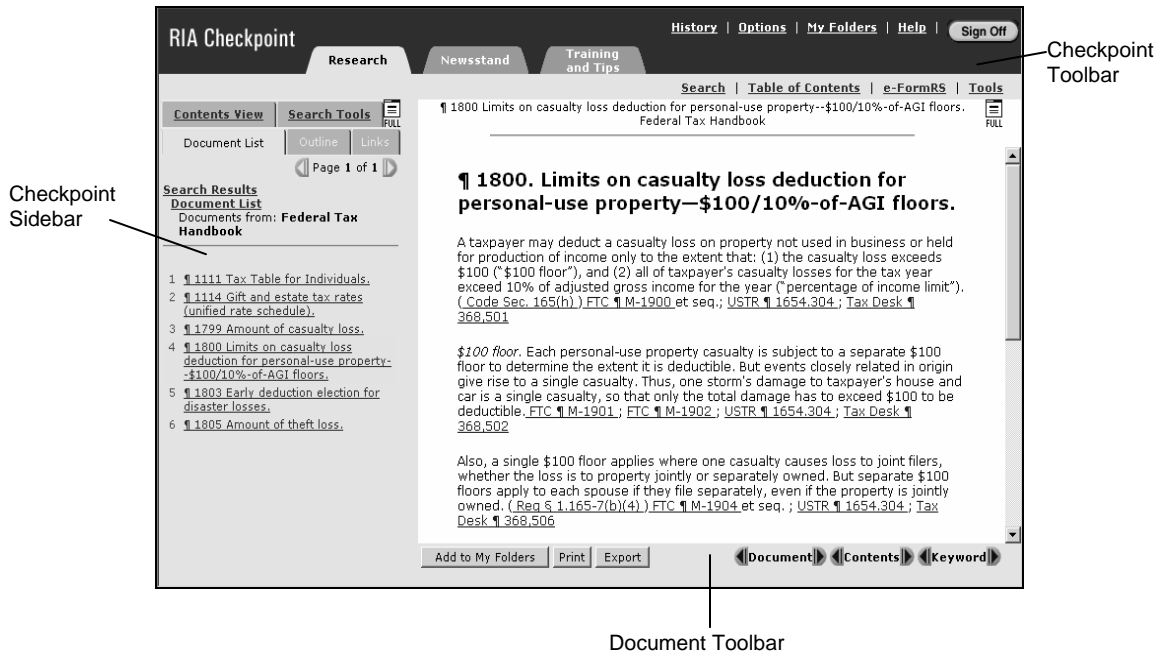
**3 Enter Code Section:**   
Example: 401

To search for specific USTR code references:

1. Select the USTR tax type from the three provided options: **Income**, **Estate & Gift**, and **Excise**.
2. Select the applicable option to search under **Current** or **Repealed** code.
3. Enter the **Code Section** number you want to search for and click the **Go to USTR** button.

## Navigating Documents

Becoming familiar with the tools for viewing results and navigating within the documents found by your search will help you use Checkpoint to the fullest.



## Checkpoint Toolbar

**History** – Displays the last 10 searches or documents viewed.

**Options** – Allows you to customize your preferences for Checkpoint.

**My Folders** – Retrieve a previously saved document or launch a previous search from this table.

**Help** – Click to access online help to assist you in using Checkpoint.

**Sign Off** – Logs the user off of Checkpoint.

**Search** – Takes you to a comprehensive search screen where you can manage your search.

**Table of Contents** – Organized like a print-based Table of Contents, you can browse or search for your topic.

**e-FormRS** – Use the Internet to access the most current forms you need with RIA's e-Form RS software.

**Tools** – Launches Checkpoint productivity tools such as Calculators and Create a Chart.

## Content Tabs

**Research** – Complete all your searches from this single, main Checkpoint screen.

**Newsstand** – Access the latest editions of daily tax updates and other tax news sources.

**Training & Tips** – Access links to tool, training options, demos, and support information concerning Checkpoint.

## Checkpoint Sidebar

**Contents View** – Displays the document you are viewing in its Table of Contents location. It also provides quick access to “neighboring” documents in the section of the Table of Contents that you are viewing.

**Search Tools** – Provides quick access to the modify, save, and schedule functions. You can also link to your search results presented in the full **Table of Contents** view.

**Document List** – Displays all the documents found that meet your search criteria in a given source (database). Clicking the document title on the left portion of the screen immediately displays that document on the right, this eliminates the need to click the back button to return to the document list.

*Navigating  
Documents  
(continued)*

**Outline** –Provides quick links into sections and subsections of longer documents eliminating the need to scroll through the document. It can be used to quickly find a specific area of the document.

**Document Toolbar**

**Add to My Folders** – Allows you to save the current document to **My Folders**.

**Print** – Select to print the current document.

**Export** – Export documents out of Checkpoint to your word processor.

**Document** – View documents in your entire search result set one document at a time either forwards or backwards. If you select multiple sources in your search, at the end of a source it will go on to the next source.

**Contents** – Lets you link to the next document in the Table of Contents (just like turning a page in a book.)

**Keyword** – Jumps you to the next highlighted query term in your entire result set. An easy way to see your keywords in context to help determine if the document you are viewing is on target.

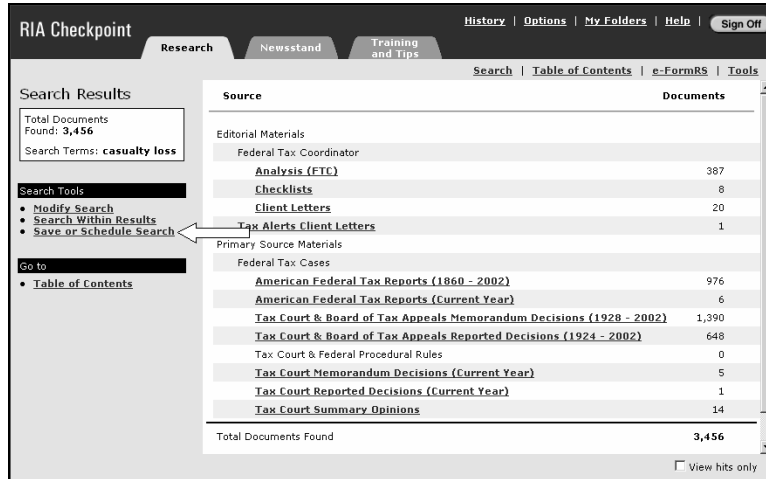
## Saving Search Results

You can save a search or schedule a search to run automatically (weekly, or monthly) within Checkpoint.

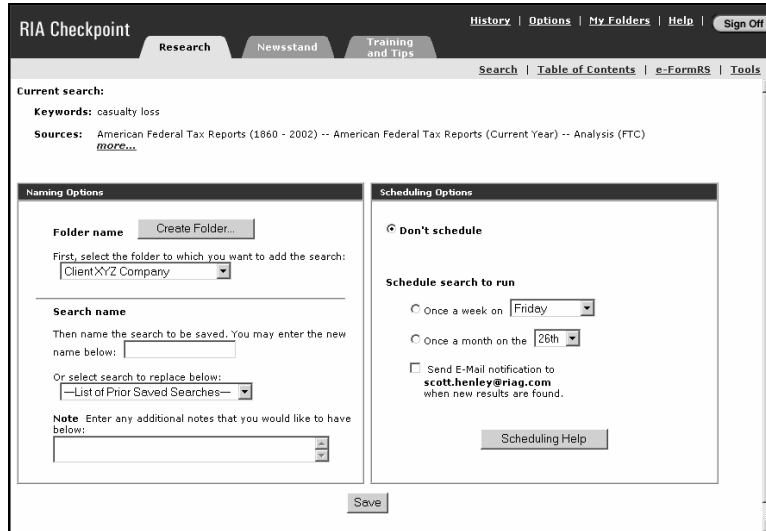
### Saving a Search

To save a search:

1. Click **Save or Schedule Search** on the **Search Results** sidebar.



The following screen appears.



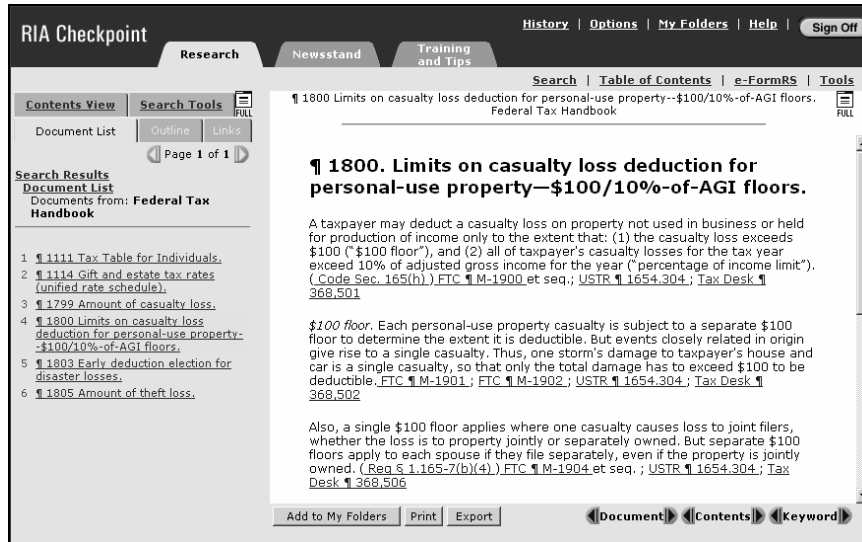
2. Select the folder to which you want the search added or create a new folder.
3. Type the desired name of the search in the **Search name** field, or select a previous saved search to replace.
4. Enter additional information in the **Note** field and click **Save**.

## Printing a Document

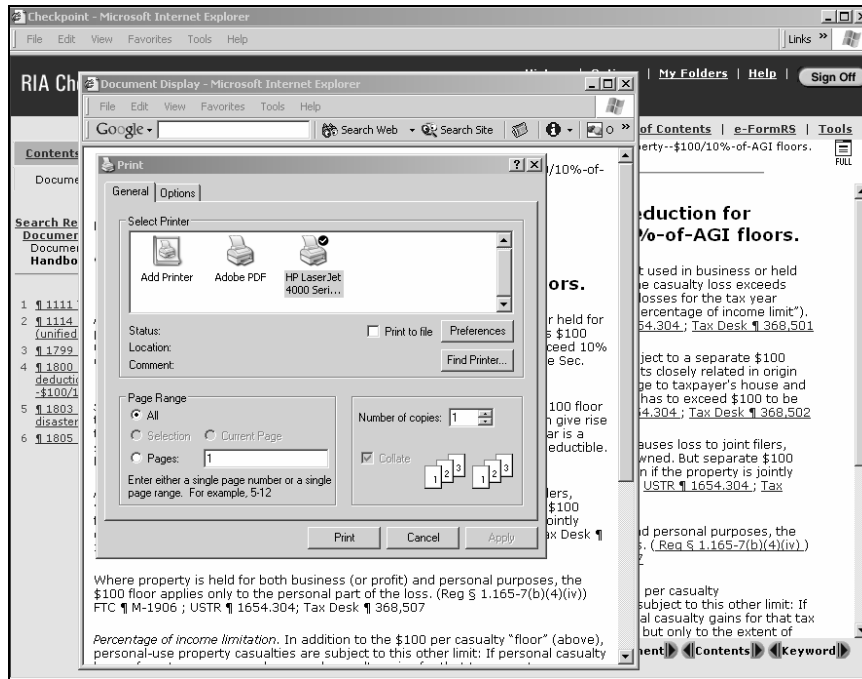
Checkpoint lets you print selected text or an entire document and makes use of your browser's print function for this purpose. You can print a document that you are viewing or select multiple documents to print from within a project folder.

To print a document:

1. Open a document.



2. Click **Print** on the document toolbar at the bottom of the screen to prepare the document for printing. The document is copied to the separate **Document Display** screen that appears on top of the Checkpoint browser.



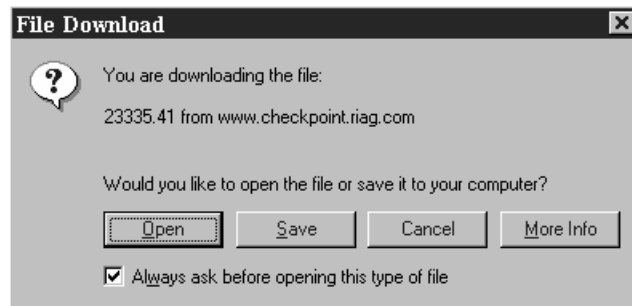
3. When the **Print** dialog screen appears, select the printer and number of copies as needed, then click **OK**.

## Exporting a Document

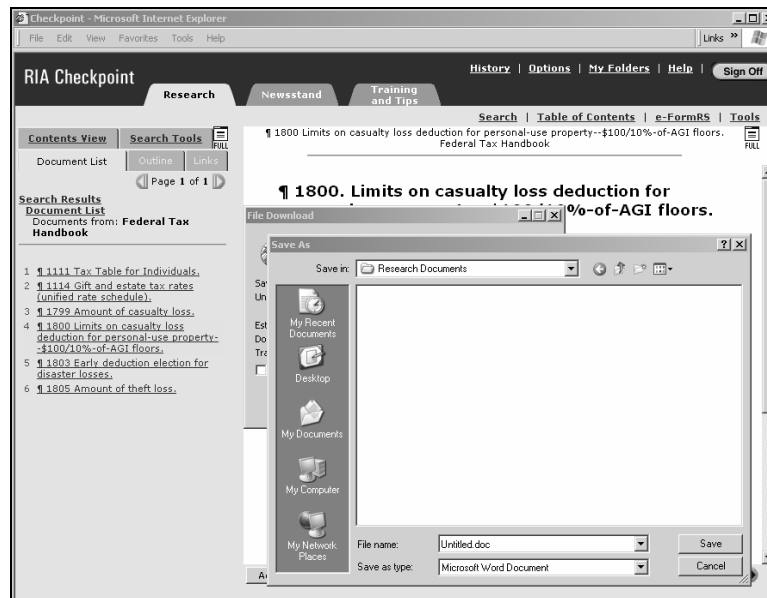
You can save or export a document from Checkpoint to open in another software application using your Web browser.

To export a document to another application using Internet Explorer:

1. Open a document.
2. Click **Export** on the **Document** toolbar at the bottom of the screen. The **File Download** screen appears. Click **Save**.



3. Choose a directory on your hard drive or a network drive. Remember the location so you can retrieve it easily.



4. Type a file name in the **File Name** field or accept the default file name.
5. Click **Save**.

Checkpoint  
Productivity  
Tools

### Chart Wizard


The Chart Wizard allows you to quickly create a chart that provides pertinent customer tax information in one convenient table, with links to the controlling authority and links to detailed explanations. You can select a tax type (Corporate Income, Sales Use, etc.), a chart type (Effective Rates, Due Date of Return, Late Filing Penalty, etc.) and a jurisdiction.

1. On the Checkpoint Search screen, select **State & Local** from the Practice Area drop-down menu. (You can also access the **Chart Wizard** from the **Tools** menu.)
2. Under **Go to** on the left sidebar, select **Create a Chart**. The State Tax Chart appears.
3. Select the **Tax Type** to use for this chart from the drop-down menu.
4. Select the **Chart Type** from the drop-down menu.
5. Select the desired state(s) check boxes or click the **Select All** button to select all 51 jurisdictions. Click the **Create Chart** button.

**Tax Type:** Sales Use  
**Chart Type:** State Sales Tax Rate

State	State Sales Tax Rate	Authority	RIA Paragraph
AK	N/A	N/A	N/A
AL	4%	<a href="#">Ala. Code § 40-23-2(1)</a>	<a href="#">¶ 22,710</a>
AR	5.125%	<a href="#">Ark. Code Ann. § 26-52-301</a>	<a href="#">¶ 22,710</a>
AZ	5.6%	<a href="#">Ariz. Rev. Stat. Ann. § 42-5010 (G)</a>	<a href="#">¶ 22,710</a>
CA	6%	<a href="#">Cal. Rev. &amp; Tax. Cd. § 6051</a>	<a href="#">¶ 22,710</a>
CO	2.9%	<a href="#">Colo. Rev. Stat. § 39-26-105(1) (a)</a>	<a href="#">¶ 22,710</a>
CT	6%	<a href="#">Conn. Gen. Stat. § 12-408(1)</a>	<a href="#">¶ 22,710</a>
DC	5.75%	<a href="#">D.C. Code Ann. § 47-2002</a>	<a href="#">¶ 22,710</a>
DE	N/A	N/A	N/A
FL	6%	<a href="#">Fla. Stat. § 212.05</a>	<a href="#">¶ 22,710</a>
GA	4%	<a href="#">Ga. Code Ann. § 48-8-30</a>	<a href="#">¶ 22,710</a>
HI	4% 	<a href="#">Haw. Rev. Stat. § 237-13</a>	<a href="#">¶ 22,710</a>
IA	5%	<a href="#">Iowa Code § 422.43</a>	<a href="#">¶ 22,710</a>
ID	6%	<a href="#">Idaho Code § 63-3619</a>	<a href="#">¶ 22,710</a>
IL	6.25%	<a href="#">ILCS Chapter 35 § 120/2-10</a>	<a href="#">¶ 22,710</a>

Checkpoint will generate the chart and display it in the right pane. The columns that are displayed depend on the chart type selected. To view related explanations for each jurisdiction, click the hyperlink in the RIA Paragraph column. The explanation paragraph will launch into the link viewer window.

**Note:** Hover your cursor over the  icon to view specific notes about that jurisdiction.

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**Form/Line Finder**

The Form/Line Finder feature allows you to search by specific Form and line number. Checkpoint will locate and display the applicable section in the Return Guides for review.

1. On the Checkpoint Search screen, click the **Form/Line Finder** link in the left sidebar under **Go to**.

**Jump To Form/Line Finder**

**1 Enter Tax Year:**  
Example: 2002

**2 Enter Form Number:**  
Example: 1040

**3 To further narrow your search, complete one of the following fields.**

<b>Form Line Number: (optional)</b> Example: 9 or 15a <input type="text"/>	<b>Schedule: (optional)</b> Example: B <input type="text"/>
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2. Enter the **Tax Year** and **Form Number** to search for. You may also specify a **Form Line Number** and **Schedule**.
3. Click **Go** to begin the search.

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## Calculators

Checkpoint provides over 104 different easy to use calculators under 10 different categories. The categories are:

- Auto
- Business
- Credit Card
- Investment
- Loan
- Mortgage
- Personal
- Retirement
- Savings
- Tax

To access the calculators, click the **Tools** link on the top right menu bar. On the **Tools** screen, click **Calculators**. Expand a specific calculator category by clicking the "+" symbol next to the heading. Clicking **Show All** will expand all of the calculator categories.

Select a calculator from the categories listed below: [Show All](#)

- + Auto
- + Business
- + Credit Card
- Investment
  - [Annual Stock Option Grants](#)
  - [Asset Allocator](#)
  - [Future Contracts](#)
  - [Investment Loan](#)
  - [Investment Property](#)
  - [Investment Returns](#)
  - [Stock Option](#)
- + Loan
- + Mortgage
- + Personal
- + Retirement
- + Savings
- + Tax

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To use a calculator, click the calculator name and fill in the calculation fields. If you need an explanation on what a field does, click the field label to display a description.

**Asset Allocator**

The Asset Allocator is designed to help you create a balanced portfolio of investments. Your age, ability to tolerate risk, and several other factors are used to calculate a desirable mix of stocks, bonds and cash. The calculated asset allocation is a great place to start your analysis in building a balanced portfolio. Click on the "View Report" button for a detailed look at your results.

Age:

Current assets:

Savings per year:

Marginal tax rate:

Income required:

Risk tolerance (scale of 0 to 10):

Economic outlook (scale of 0 to 10):

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**Document Assembly**

The **Document Assembly** feature allows you to create customized documents from standard RIA practice aid templates. It allows you to input variable information one time and have it carry throughout the document.

Documents that are enabled with the Document Assembly capability will display the



icon at the top of the document body. When you click the icon, Checkpoint will display the document in a template format:

*CAUTION: Certain of the documents available for document assembly contain language that has important legal consequences. As with any legal document, they should be prepared and executed by an attorney conversant with the applicable federal and state law.*

**Tax Matters Partner Election**

Q1: Partnership's Name , taxpayer identification number Q2: Partnership's Taxpayer Identification Number  
located at Q3: Partnership's Address hereby designates Q4: Tax Matters Partner's Name as tax matters  
partner for the taxable return for which the attached return relates to Q5: Tax Year

The designated tax matters partner's address and taxpayer identification number are:

Q6: \_\_\_\_\_  
Q7: Tax Matters Partner's Address  
Q8: Tax Matters Partner's Taxpayer Identification Numb...  
\_\_\_\_\_

Q9: \_\_\_\_\_

Notes:

1. A person may be designated the tax matters partner only if the person was either a general partner in the partnership at some time during the taxable year for which the designation was made or is a general partner in the partnership as of the time the designation is made.
2. An individual who is otherwise qualified to be the tax matters partner may not become the tax matters partner.

Save Answers    Get Answers    Preview    Assemble    Update Form    Close

**Note:** To customize your individual forms, you can change any of the variable fields (in blue text).

**Template Options**

The following buttons appears at the bottom of the template:

**Save Answers** - Use this option to open the Select a Folder window, where you can name your new document and designate which folder to save it in.

**Get Answers** - Use this option to access a template that you previously created.

**Note:** To get answers such as client information that you previously saved when you filled out a previous form, select one of the templates in My Folders. Then Checkpoint will extract the input from the fields on the selected templates in My Folders and populate any matching fields on your new document automatically.

**Preview** - Use this option to see how your document looks at any stage of its creation (in HTML format).

**Note:** Variable fields that you have changed are highlighted in green. Unchanged variable fields are highlighted in yellow.

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**Assemble** - Use this option to see the final version of your document.

**Update Form** - Use this option to save any new data or changes before saving the entire document. Checkpoint performs an update automatically before Save Answers, Preview and Assembly. However, you can force the update at any time.

Some of the fields change the form automatically. For example, if you select a particular radio button, Checkpoint will display a new section. Other changes will not be applied to the document until **Update Form** is executed. For example, when the same value is used multiple times in the template, after you enter the text, it will not appear in all of the other places until you do an update or perform another action that causes an update.

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