

# NOVATAX

**EASY**  
STEP BY STEP

**QUICK  
START GUIDE**

AFFORDABLE.  
INTUITIVE.  
AI-POWERED.

[WWW.NOVATAXINTELLIGENCE.COM](http://WWW.NOVATAXINTELLIGENCE.COM)

Jan 2026

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# CUSTOMIZABLE NEWS ALERTS

We partner with industry leader **Tax Analysts®** to bring you the latest Federal & State Tax news. Our news provides insightful analysis and detailed explanations from industry specialists to keep you informed!

- Federal Tax news consists of 18-20 articles each week focusing on tax topics impacting your small to mid-sized firm or business.
- State Tax news consists of 70+ articles each week covering all 50 States and D.C., including news impacting multiple States.

**NOVATAX**

Tax News

Tax Advisor AI **BETA**

Federal Tax Library

State Tax Library

**Alerts Settings**

Help Center

### Alerts Settings

#### Weekly News Alerts

##### Federal Tax News

☐ I don't want to receive the NovaTax Federal News Alert

☒ I want to receive the NovaTax Federal News Alert (recommended)

☐ I want to personalize my NovaTax Federal News Alert ⓘ

##### State Tax News

☐ I don't want to receive the NovaTax State News Alert

☒ I want to receive the NovaTax State News Alert

☐ I want to personalize my NovaTax State News Alert (recommended) ⓘ

##### Digital Marketing Content

☐ I don't want to receive the NovaTax Digital Marketing Alert

☒ I want to receive the NovaTax Digital Marketing Alert

**Customize your weekly E-mail alerts through your “Alerts Settings”!**

## What do we recommend?

- **Set your Federal Tax News alerts to receive ALL the Federal Tax News alerts**
- **Personalize your State Tax News alert to include news from just the States you want and select Multi-state Topics (packed with valuable information)**

*TIP! Email alerts are delivered to your inbox each Monday morning, but you can always access news documents on the NovaTax platform. Federal Tax news is published weekly. State Tax news is published daily.*

# TAX ADVISOR AI (beta)

Tax Advisor AI (beta) is a powerful, new product—designed to help tax pros work faster, communicate more effectively, and make confident decisions backed by authoritative sources. Expect:

- Fast answers to tax questions using plain-English queries—no specialized search skills required.
- Clear, easy-to-understand analysis from authoritative sources.
- Defensible answers with source links for quick oversight and validation.
- Reliable answers that can be quickly converted to client communications.
- Streamlined research and communication workflows for smoother, faster decision-making.

NOVATAX

Tax News

Tax Advisor AI **BETA**

Federal Tax Library

State Tax Library

Alerts Settings

Help Center

Tax Advisor AI

How can I help you today?

Summarize 2024 tax deduction for seniors

General Prompt Tips | Follow Up Prompt Examples | Examples of Good Prompts

Plain-English Query

Prompt Tips

Fast, Easy-To-Understand Response

Authoritative Source Links

One Click Generates Customizable Client Memo

One Click Copies Response

## What do we recommend?

- Before you start your research, take a moment to review the **General Prompt Tips**, **Follow Up Prompt Examples**, and **Examples of Good Prompts**—they'll help you work faster and get better results with less effort

*TIP!* Easily create engaging communications—for internal and external use—with the “Create a Memo” and “Copy” features.



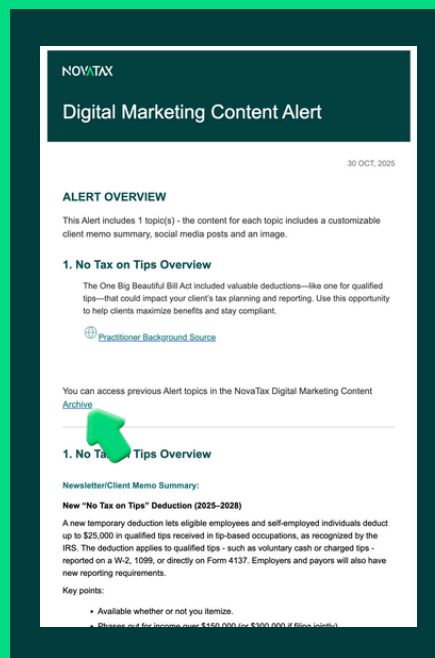
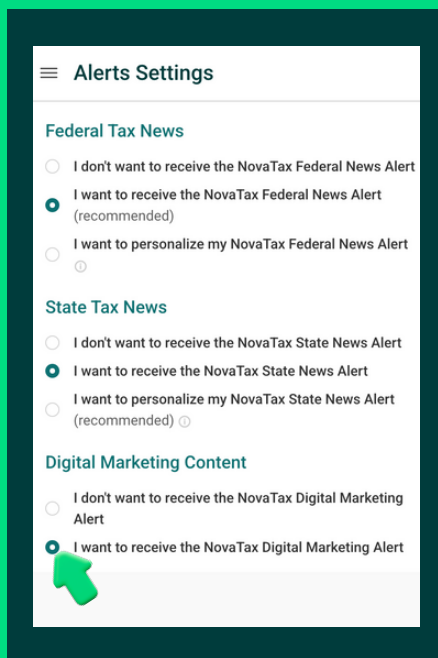
# DIGITAL MARKETING CONTENT

Smart shortcuts aren't cutting corners — they're just good strategy. That's why we've created a complimentary Digital Marketing Content feature designed to give you a head start.

We turn complex Federal and State Tax information into clear, customizable content, so you can focus on your clients and growing your practice.

**Opt-in** on your **Alerts Settings** page to access:

- Customizable summaries perfect for newsletters, emails, and your website
- Ready-to-go social posts for LinkedIn and Facebook
- Images to elevate your marketing materials and keep clients and prospects engaged



## What do we recommend?

- **Opt-in to access our FREE Digital Marketing Content.**
- **Copy-Paste. Add your voice. Expand your outreach. It's that simple.**

*TIP! Digital Marketing Content Alerts are delivered to your inbox on designated Fridays. Copies of each Alert are stored for 3 months in our Digital Marketing Content Archive. Click on the "Archive" link in an Alert to access.*

# FEDERAL TAX RESEARCH LIBRARY

Our comprehensive Federal Tax Research Library consists of 300,000+ Federal law documents, including the Code, Regulations, Rulings, Memorandums, Notices, Announcements, Court Cases, Quick Reference Tables, and more!

**NOVATAX**

**Federal Tax Library**

Find a Document | Research an Issue

Select a document type

CODE/REGULATIONS

- Internal Revenue Code of 1986
- Final and Temporary Regulations
- Proposed Regulations
- Public Laws
- Treasury Decisions

IRS RULINGS

- Letter Rulings and other Advice
- General Council Memorandums

OTHER DOCUMENT TYPES

- Court Cases
- Archives Code and Regs (previous 5 tax years)
- Quick Reference Tables

**Reference Tables**

- Tax Tables
- Interest on Underpayments and Overpayments
- Applicable Federal Rates
- Automobile Expenses: Standard Mileage Rates
- Automobile Depreciation & Leasing
- Regulatory Agenda: Department of the Treasury
- Annual Inflation-Adjusted Amounts
- Kiddie Tax
- Earned Income Tax Credit
- Standard Deduction
- Dependent Care Credit
- Adoption Credit
- Qualified Transportation Fringe
- Per Diem Rates
- Fringe Benefits: SIFL Rates
- Depreciation: Business & Income-Producing Property
- Cost-of-Living Adjustments (COLA) On Qualified Retirement Plans
- OASDI Wage Base

**Select a Court**

- Supreme Court
- Courts of Appeals
- District Courts
- Court of Federal Claims
- Tax Court
- Board of Tax Appeals
- Bankruptcy Courts (Tax Related Cases)

**Premium content, updated daily!**

**Under “Other Document Types” you can find a complete listing of:**

- **Tax-related court cases, by clicking on “Court Cases”**
- **Quick Reference Tables that provide easy access to dozens of tax tables, credits, deductions, rates, plus more**

# FEDERAL TAX RESEARCH LIBRARY

Each document in our Federal Tax Research Library is enhanced by **Tax Analysts®** experts - with unique features that allow you to quickly determine those documents that address your specific issue.

- A concise Headline highlights the document's main topic.
- A Summary provides an expert overview of the document's primary points.
- Documents are editorially classified by Tax Topics and key Code Sections.

The screenshot displays the NOVATAX Federal Tax Library interface. On the left is a dark sidebar with navigation links: Tax News, Tax Advisor AI (with a BETA badge), Federal Tax Library (highlighted), State Tax Library, Alerts Settings, and Help Center. The main content area is titled 'Federal Tax Library' and includes a 'Back to Notices' link. The document title is 'IRS Guidance Signals Pending Proposed Regs on Trump Accounts', with a green arrow pointing to it. Below the title are tabs for 'NOTICE 2025-68', '2025-52 IRB 856', and 'NOTICES'. The date 'DECEMBER 1, 2025' is shown. A green arrow points to the 'Summary' section, which contains the following text: 'The IRS has issued guidance (Notice 2025-68) announcing its intention to issue proposed regulations under [section 530A](#) on Trump accounts, which are a new type of IRA for eligible children. A Trump account is established for the exclusive benefit of an eligible individual who becomes the owner of the account when it is established. The accounts are subject to special rules inapplicable to other IRAs under [section 408](#), most of which apply only during the period that ends before January 1 of the calendar year in which the account beneficiary attains age 18 (the growth period). Notice 2025-68 provides a general overview of how the accounts work, addresses certain initial questions that Treasury and the IRS intend to answer in the future proposed regs, and requests comments that will be considered in drafting those regs. Notice 2025-68 includes a discussion, in question-and-answer format, of certain specified issues regarding the accounts that is intended to be reflected in the pending proposed regs. One section of the guidance addresses the establishment of the accounts, including how the accounts are initially funded and what types of entities can serve as trustees. Another section covers pilot program contributions under [section 543d](#), including how and when an election is made for an eligible child. A section is also devoted to contributions, including procedures to prevent a contribution from exceeding the annual limit under [section 530A\(c\)\(2\)\(A\)](#) during the growth period. One section of Notice 2025-68 discusses eligible investments, including definitions of the terms "mutual fund" and "exchange traded fund" and how to track the returns of an index for purposes of [section 530A\(b\)\(3\)\(A\)\(i\)](#). Another section covers distributions, including procedures to prevent distributions during the growth period other than those permitted by the statute and what happens when the beneficiary of the account dies. A section deals with reporting requirements, including information regarding the source of contributions and qualified rollover contributions under [section 530A\(i\)\(2\)](#). One section addresses coordination with other IRA rules, including taxation of distributions from an account after the growth period and interaction with simplified employee pension arrangements under [section 408\(k\)](#) or SIMPLE IRA plans under [section 408\(n\)](#). Another section is devoted to qualified general contributions, including how the beneficiary will receive the contribution and how general funding contributions are made. A final section covers [section 128](#) employer contributions, including how much can be excluded from the gross income of an employee for a contribution by an employer under the program and what information an employer must provide to the trustee of an account when making a section 128 contribution. Comments on the

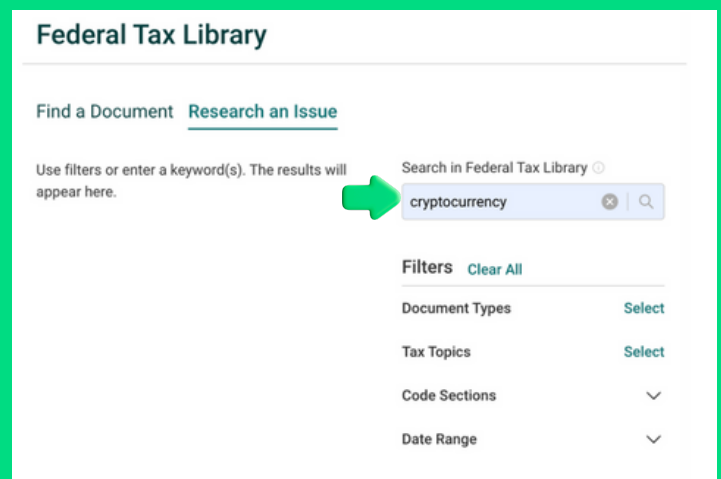
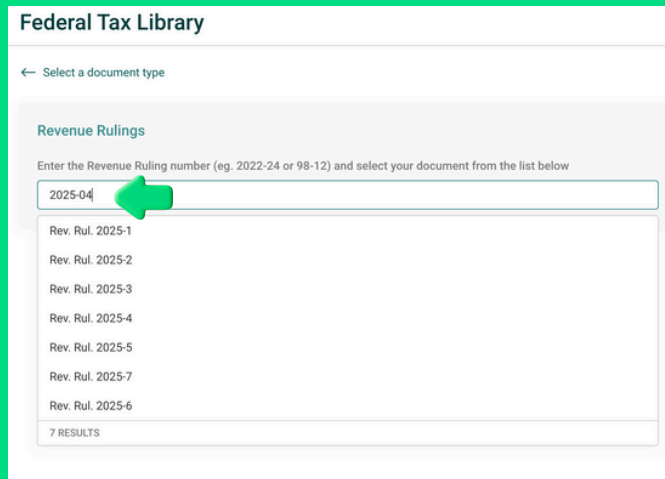
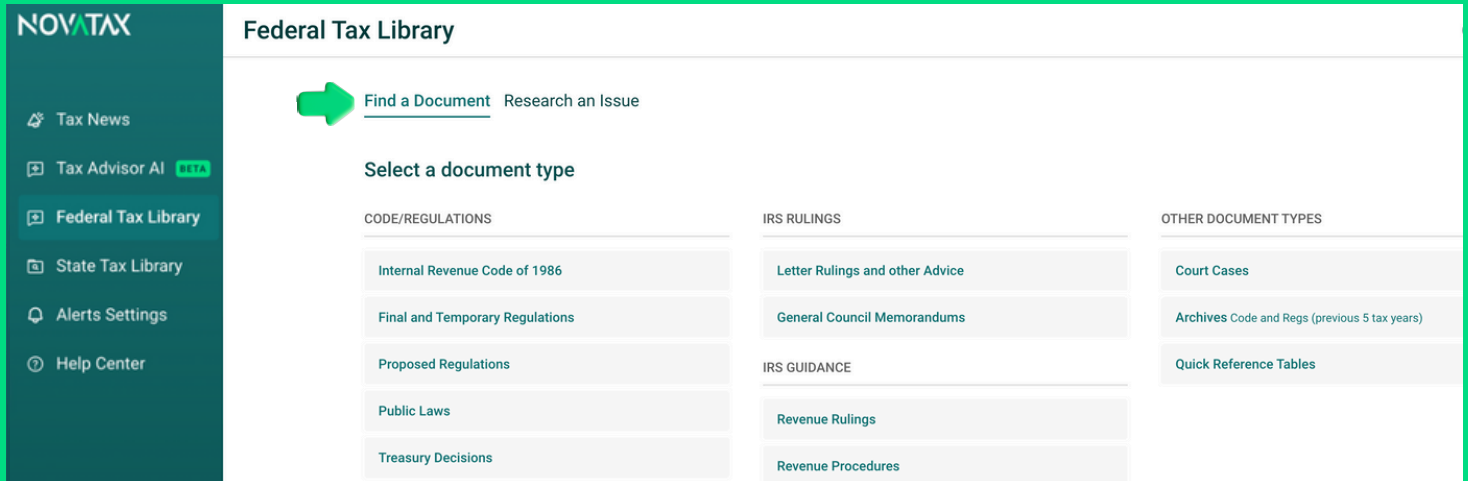
 On the right, the 'Document Classification' panel shows 'Tax Topics' with 'Benefits and pensions' selected, and 'Code Sections' with 'Sec. 530A' selected. A green arrow points to the top of this panel.

**Premium content, updated daily!**

**A document's Headline, Summary, and Document Classification (Tax Topics, Code Sections) allow you to quickly identify the documents that address your specific issue.**

# FEDERAL TAX RESEARCH LIBRARY

There are two ways to find the documents you need in our Federal Tax Research Library - you can “Find a Document” or “Research an Issue”.



**Premium content, updated daily!**

## To Find a Document:

- Select the document type, enter the document number, citation, or party name (for cases), and select your document

## To Research an Issue:

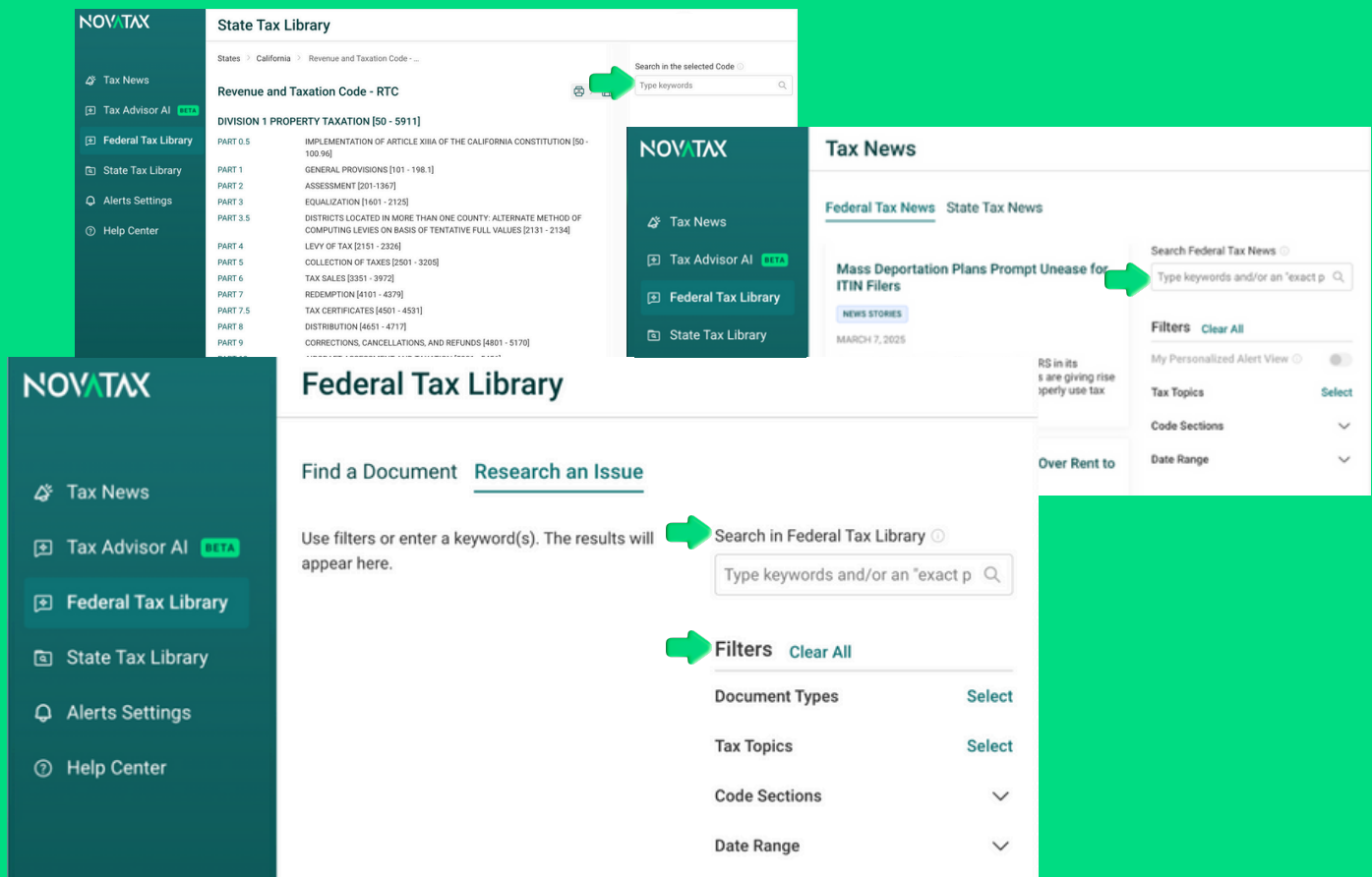
- Enter your keyword or exact phrase and/or use one or more Filters to narrow your search, as explained in more detail below

*TIP! Use “Find a Document” when you know the document you need. Use “Research an Issue” when you don’t know the document name or citation and/or you want to retrieve a broader set of documents.*



# AI-ASSISTED SEARCHING (KEYWORDS)

NovaTax is **AI-Powered!** Easily find the documents you need with our proprietary AI-assisted search technology. Enter your keywords and/or select Filter options to tailor your searches. NovaTax quickly retrieves and ranks all relevant documents!



## Leverage the power of AI-Assisted Searching:

- Enter one or more keywords in the search box, click the search icon, and let NovaTax do the rest
- You can also select one or more Filters to tailor your search

*TIP! Use double quotes around a phrase - "employee retention credit" - or code subsection - "3134(n)" - for exact phrase searching.*

# AI-ASSISTED RANKING (BEST MATCH)

Once you input your keywords and Filter selections, NovaTax uses AI technology to rank documents based on relevancy. The documents most likely to be relevant appear at the top of your Results list. Searching our comprehensive libraries is easy, fast, and effective!

The screenshot displays the NovaTax Federal Tax Library search interface. On the left is a dark sidebar with navigation links: Tax News, Tax Advisor AI (marked BESTA), Federal Tax Library (highlighted), State Tax Library, Alerts Settings, and Help Center. The main content area is titled 'Federal Tax Library' and has two tabs: 'Find a Document' and 'Research an Issue'. Below the tabs, it shows 'Results (1000+)' and a dropdown menu set to 'Best Match'. A search bar on the right contains the text 'tip deduction'. To the right of the search bar are filter options: Document Types, Tax Topics, Code Sections, and Date Range, each with a 'Select' or 'Clear All' button. The search results are displayed in three cards. The first card is titled 'Guidance Provided for Tip, Overtime Income Deductions for 2025' and includes tags for 'NOTICE 2025-69', '2025-50 IRB 766', and 'NOTICES'. The second card is titled 'WAITRESS MAY OFFSET TIP INCOME BY AMOUNT SHARED WITH CO-WORKERS.' and includes tags for 'BROWN, KATHLEEN A. V. COMM.' and 'UNITED STATES TAX COURT'. The third card is titled 'Roberts, Harry A., et ux. v. Comm.' and includes tags for 'ROBERTS, HARRY A., ET UX. V. COMM.' and 'UNITED STATES TAX COURT'. Each card shows the date of the document and a brief summary of the content.

**Research made simple!**

## Leverage the power of AI-Assisted Ranking:

- NovaTax's Best Match feature retrieves and ranks your documents, starting with the most relevant, based on how many times your keyword occurs, how close the occurrences are, and where they are in the document - like Google
- You can also sort documents in reverse chronological order

# CODE SECTIONS FILTER

Every document in the Federal Tax Library and Federal Tax News is enhanced by **Tax Analysts®** experts to include unique and powerful search Filters like Code Section, Tax Topics, and Document Type - to help you quickly locate the documents and answers you need!

If you have narrowed your research to a Code Section - you can quickly retrieve only those documents with that Code Section at issue.

The screenshot displays the NOVATAX Federal Tax Library interface. On the left is a dark sidebar with navigation links: Tax News, Tax Advisor AI (BETA), Federal Tax Library (highlighted), State Tax Library, Alerts Settings, and Help Center. The main content area is titled 'Federal Tax Library' and has two tabs: 'Find a Document' and 'Research an Issue' (selected). A green arrow points to the 'Research an Issue' tab. Below the tabs, it shows 'Results (19)'. Three document results are visible, each with a 'FINAL AND TEMPORARY REGULATIONS' tag. The first two results are 'Sec. 31.3134-1 Recapture of credits.' (dated JULY 24, 2023 and SEPTEMBER 9, 2021). The third result is 'Suit Against Employee Retention Tax Credit Advisers Is Dismissed' (dated OCTOBER 7, 2025). A fourth result, 'Transfer of Case to DOJ Deprives IRS of Powers, Court Says' (dated JULY 30, 2025), is partially visible. On the right side, there is a search bar 'Search in Federal Tax Library' and a 'Filters' section. The 'Filters' section includes 'Document Types' (Select), 'Tax Topics' (Select), and 'Code Sections' (expanded). Under 'Code Sections', 'Sec. 3134' is entered in the search box, and a checkbox is selected for 'Sec. 3134 Employee retention credit for employers subject to closure due to COVID-19'. A green arrow points to this checkbox. At the bottom right, there is a 'Date Range' dropdown menu.

## Filter by Code Sections!

**Code Section filtering is an easy way to find the documents you need!**

- Click on the “Code Sections” filter on the right panel
- Type in your main Code Section number
- Click the box for the Code Section you want - you've instantly narrowed 300,000+ documents to just those with your Code Section at issue

# TAX TOPICS FILTER

**Federal Tax Library**

Find a Document Research an Issue

Results (39)

**IRS Revokes Regs on Decentralized Finance Reporting Requirements**

T.D. 10021 (REVOCATION) 90 F.R. 30825-30826 2025-31 IRB 264 TREASURY DECISIONS

JULY 10, 2025

The IRS and Treasury have revoked final regulations (T.D. 10021) published in December 2024 on information reporting by brokers that regularly provide services effectuating digital asset sales and exchanges, specifically those providing front-end services in decentralized finance transactions, requiring the brokers to file information returns and furnish payee statements.

**IRS Continues Eliminating 'Extraneous and Unnecessary' Guidance**

NOTICE 2025-36 2025-30 IRB 192 NOTICES

JULY 2, 2025

The IRS has continued (Notice 2025-36) its process of eliminating "extraneous and unnecessary" Internal Revenue Bulletin guidance by identifying and making obsolete 83 documents.

**Relief Extended for Digital Asset Reporting, Withholding Failures**

NOTICE 2025-33 2025-27 IRB 4 NOTICES

JUNE 11, 2025

The IRS has extended (Notice 2025-33) for one year the transitional relief (Notice 2024-56) from penalties for brokers who make a good-

**Filters** Clear All

Document Types Select

Tax Topics Select

Code Sections

Date Range

**Selected Filters**

Tax Topics

Cryptocurrency

**Tax Topics Filter Table:**

<input type="checkbox"/> Tax technology	<input type="checkbox"/> Net investment income tax	<input type="checkbox"/> Exempt organizations
<input type="checkbox"/> <b>TAXPAYER TYPES</b>	<input type="checkbox"/> Personal holding companies	<input type="checkbox"/> Exemption applications
<input type="checkbox"/> Cooperatives taxation	<input type="checkbox"/> <b>INSURANCE</b>	<input type="checkbox"/> Hospitals
<input type="checkbox"/> Corporate taxation	<input type="checkbox"/> <b>INTERNATIONAL TAXATION</b>	<input type="checkbox"/> Political organizations
<input type="checkbox"/> Domestic relations and divorce	<input type="checkbox"/> Base erosion and antiabuse tax (BEAT)	<input type="checkbox"/> Private foundations
<input type="checkbox"/> Exempt organizations	<input type="checkbox"/> Base erosion and profit shifting (BEPS)	<input type="checkbox"/> Tax-exempt bonds
<input type="checkbox"/> Farm and ranch taxation	<input type="checkbox"/> Common reporting standard (CRS)	<input type="checkbox"/> Unrelated trade or business
<input type="checkbox"/> Financial institutions	<input type="checkbox"/> Controlled foreign corporations (CFCs)	<input type="checkbox"/> <b>SALES AND EXCHANGES</b>
<input type="checkbox"/> Individual income taxation	<input type="checkbox"/> Cross-border mergers and acquisitions	<input type="checkbox"/> Basis
<input type="checkbox"/> Limited liability companies	<input type="checkbox"/> Currency transactions and issues	<input type="checkbox"/> Gains and losses
<input type="checkbox"/> Marketplace facilitators	<input type="checkbox"/> Domestic international sales corporations	<input type="checkbox"/> Like-kind exchanges
<input type="checkbox"/> Native American (Indian) taxation	<input type="checkbox"/> Expatriate taxation	<input type="checkbox"/> Sales and exchanges
<input type="checkbox"/> Nonresident taxation	<input type="checkbox"/> FATCA	<input type="checkbox"/> <b>TAX CUTS AND JOBS ACT</b>
<input type="checkbox"/> Partnerships	<input type="checkbox"/> Foreign tax credit	<input type="checkbox"/> <b>TAX POLICY</b>
<input type="checkbox"/> RICs, REITs, and REMICs	<input type="checkbox"/> Foreign-source income	<input type="checkbox"/> Amnesties
<input type="checkbox"/> Subchapter S corporations	<input type="checkbox"/> Global intangible low-tax income (GILTI)	<input type="checkbox"/> Budgets
<input type="checkbox"/> Trusts and estates taxation	<input type="checkbox"/> Information exchange	<input type="checkbox"/> Digital economy
<input type="checkbox"/> <b>BANKRUPTCY AND INSOLVENCY</b>	<input type="checkbox"/> International taxation	<input type="checkbox"/> Federal and state conformity
<input type="checkbox"/> <b>EMPLOYMENT TAXES</b>	<input type="checkbox"/> Nonresident taxation	<input type="checkbox"/> Fundamental tax system structure
<input type="checkbox"/> Employment tax-related penalties	<input type="checkbox"/> Passive foreign investment companies (PFICs)	<input type="checkbox"/> Politics of taxation
<input type="checkbox"/> Employment taxes	<input type="checkbox"/> Permanent establishment	<input type="checkbox"/> Social welfare taxation
<input type="checkbox"/> FICA and SECA	<input type="checkbox"/> Residency	<input type="checkbox"/> Tax history
<input type="checkbox"/> FUTA	<input type="checkbox"/> Trade	<input type="checkbox"/> Tax policy
<input type="checkbox"/> Withholding	<input type="checkbox"/> Transfer pricing	<input type="checkbox"/> Tax reform
<input type="checkbox"/> Worker classification	<input type="checkbox"/> Treaties	<input type="checkbox"/> Tax system administration
<input type="checkbox"/> <b>FINANCIAL PRODUCTS AND BANKING</b>	<input type="checkbox"/> Withholding	<input type="checkbox"/> Transparency
<input checked="" type="checkbox"/> Cryptocurrency		

Reset Filters Cancel Apply Filter

**Filter by the  
Tax Topics at  
issue!**

## It's easy to find relevant materials using the Tax Topics filter!

- Click on "Tax Topics" and select from among the extensive table of Tax Topics to narrow down your search
- Click "Apply Filter" and NovaTax quickly retrieves documents discussing your tax topic

*TIP! You can press CTRL+F to keyword search for a topic name within the Tax Topics table.*



# STATE TAX RESEARCH LIBRARY

Our State Tax Research Library gives you access to the Tax Codes & Regulations of all 50 States and D.C. plus access to State Tax Audit Manuals of 40+ States and D.C.!

**Updated monthly!**

Our State Tax Research Library is presented in a clean, uniform, and user-friendly format.

- Keyword searching and enhanced Table of Contents make locating the materials you need easy

Be prepared for a State Tax audit with our unique collection of audit manuals that auditors themselves use.

# NOVATAX

**For further training, please visit  
our Help Center.**

**THANK YOU!**

[WWW.NOVATAXINTELLIGENCE.COM](http://WWW.NOVATAXINTELLIGENCE.COM)