

Using the IntelliForms™ Online Library

If you need quick access to PDF's of federal or state forms, instructions or publications, the IntelliForms Online Library is your ideal resource! The Online Library is an invaluable resource included with your IntelliForms subscription that:

- Provides advance access to forms before they are available in interactive format in IntelliForms
- Puts blank forms, instructions and publications dating back to 1998 at your fingertips
- Allows you to open a form or instruction quickly for reference purposes

Accessing the Online Library

The Online Library is easily accessible from different locations, depending on your current work task.

1. If you are in IntelliForms:

- Under any tab, click "Support" → "Web sites" → "Current and Archive PDF's."

The screenshot shows the IntelliForms 2009 software interface. At the top, there are tabs for 'Blank Forms', 'Client Forms', and 'Profiles'. Below these, there are buttons for 'Open Forms' and 'Clear All'. A search bar is visible with 'Year 2009' selected. On the left, there are checkboxes for 'Federal', 'State', and 'Local' forms, and a list of categories like 'Individual', 'Corporation', etc. The 'Support' menu is open, showing options like 'QuickStart Tour', 'QuickStart Guide', 'Quick Tutors', 'Program Help', 'Instructions', 'FAQs', 'Form Release Schedule', 'CCH Support', 'Contact Us...', 'Web Sites', and 'About...'. The 'Web Sites' option is selected, and a sub-menu is open showing 'IntelliConnect', 'Tax Prep Partner', and 'Current and Archive PDF's'. The 'Current and Archive PDF's' option is highlighted. Below the menu, a table lists various forms and instructions with their status and a 'View Instr' link.

Description	Status	PDF
Susp/Disapproved Continuation Sheet	Available	
Le Cont Cost Susp and/or Disapproved	Available	
er Sheet	Available	
ificate of Reporter	Available	
f Costs	Available	
Form	Available	View Instr
IntelliConnect	Available	View Instr
Tax Prep Partner	Available	View Instr
Current and Archive PDF's	Available	
Order Protective Order by witness	Available	
ly Bond For Temp. Restraining Order	Available	
ipation Tax/Reg. Rtn for Wagering	Available	View Instr
rsedeas Bond (Surety)	Available	
Bond w/Collateral - Temp. Restrain. Order	Available	
Application for Enrollment Practice/IRS	Available	View Instr
Notice Concerning Fiduciary Relationship	Available	View Instr
Notice-Fid. Relationship-Financial Inst.	Available	View Instr
Appl. for Reward for Original Info	Available	View Instr
Collection Information for Individuals	Available	View Instr
Collection Information for Business	Available	
Installation Agreement	Available	View Instr
Plan de Pago a Plazos	Available	View Instr
Collection Information Statement	Available	View Instr
App. for Registration (Excise Tax Act)	Available	View Instr
Offer in Compromise	Available	View Instr
Income Cert. for OIC App. Fee, OIC Wkst.	Available	View Instr
Offer in Compromise Doubt to Liability	Available	View Instr
Offer In Compromise - Payment Voucher	Available	View Instr
Notice Of Levy	Available	
Statement for Claiming Exemption With	Available	View Instr
Cert. of Payment of Foreign Death Tax	Available	
Additional Estate Tax Return	Available	View Instr
Distribution - Generation-Skipping Trust	Available	View Instr
Generation-Skipping Transfer Tax, Distr.	Available	View Instr
Generation-Skipping for Terminations	Available	View Instr
Estate Tax Return NR (DOD >12/31/2008)	Available	View Instr
Estate Tax for Domestic Trusts	Available	View Instr

2. If you are connected to the Internet:

- Simply paste <https://support.atxinc.com/download/OnlineLibrary.aspx?brand=cch> into your Internet browser.

It is a terrific idea to bookmark the Online Library as a favorite by clicking "Favorites" at the top of your Internet browser, and then "Add to Favorites." From then on, the Online Library can easily be accessed by selecting "Favorites."

Navigating the Online Library

Once you are in the Online Library, simply select the desired year, document type (e.g., form, instruction, publication), jurisdiction and any keywords (such as a portion of the form name or the form number). Then click "Search" to pull up the desired PDF:

The screenshot shows a web browser window with the URL <https://support.atxinc.com/download/OnlineLibrary.aspx?brand=cch>. The browser's address bar and menu bar are visible. Below the browser, the IntelliForms website is displayed. The header features the IntelliForms logo and the text "IntelliForms™". A green banner below the header reads "Tax forms, instructions, and publications". Below this banner, there is a search instruction: "Select the year and the type of information you want to download. Then select **Federal** or a specific state and click **Search**. You can refine your search by entering keywords. When the **Search Results** window opens, click an instruction, form, or publication name to open it, or right click and select **Save Target As...** to download a copy to your computer." Below the instruction, there is a link for "Form Release Schedule". The search form includes four fields: "Year" (set to 2009), "Type" (set to All), "Federal / State" (set to Federal), and "Keywords" (empty). A "SEARCH" button is located at the bottom right of the form.

Year	<input type="text" value="2009"/>
Type	<input type="text" value="All"/>
Federal / State	<input type="text" value="Federal"/>
Keywords	<input type="text"/>

Viewing Forms Without Assigning a Client

The Online Library offers you the convenience of opening a blank form without adding it to a client. If you enjoy this versatility, did you know that this same feature is available in IntelliForms?

To disable the "Selecting Client Type" pop-up box in IntelliForms, simply perform these steps once:

1. Click the "Preferences" icon at the top:

The screenshot shows the IntelliForms application window. At the top, there are tabs for 'Blank Forms', 'Client Forms', and 'Profiles'. Below these are icons for 'Open Forms', 'Clear All', 'Preferences' (which is highlighted with a blue border), 'Tutor', 'Instructions', and 'Help'. The main area displays a list of forms with columns for 'Name', 'Description', 'Status', and 'PDF'. A sidebar on the left contains various filters and search options.

Year	Name	Description	Status	PDF
2009	1-C (EF) DCAA	Cost Susp/Disapproved Continuation Sheet	Available	
	1-DCAA	Notice Cont Cost Susp and/or Disapproved	Available	
	2	Cover Sheet	Available	
	3B	Certificate of Reporter	Available	
	4	Bill of Costs	Available	
	5	EAJA Form	Available	View Instr
	7	Caption of All Filings in Vaccine Cases	Available	
	7A	Subpoena in Vaccine Cases	Available	View Instr
	8	Protective Order in Procurement Cases	Available	View Instr
	9	Info. Under Protective Order By Counsel	Available	
	10	Info. Under Protective Order By Witness	Available	
	11	Surety Bond For Temp. Restraining Order	Available	
	11-C, 11-C(V)	Occupation Tax/Reg. Rtn for Wagering	Available	View Instr
	12	Supersedeas Bond (Surety)	Available	
	13	Bond w/Collateral -Temp. Restrain. Order	Available	
	23	Application for Enrollment Practice/RS	Available	View Instr
	56	Notice Concerning Fiduciary Relationship	Available	View Instr
	56-F	Notice-Fid. Relationship-Financial Inst.	Available	View Instr
	211	Appl. for Reward for Original Info	Available	View Instr
	433-A	Collection Information for Individuals	Available	View Instr
	433-B	Collection Information for Business	Available	
	433-D	Installment Agreement	Available	View Instr
	433-D (SP)	Plan de Pago a Plazos	Available	View Instr
	433-F	Collection Information Statement	Available	View Instr
	637	App. for Registration (Excise Tax Act)	Available	View Instr
	656	Offer in Compromise	Available	View Instr
	656-A	Income Cert. for OIC App. Fee, OIC Wkst.	Available	View Instr
	656-L	Offer in Compromise Doubt to Liability	Available	View Instr
	656-PPV	Offer In Compromise - Payment Voucher	Available	View Instr
	668-A(c)(DO)	Notice Of Lewy	Online	
	673	Statement for Claiming Exemption With	Available	View Instr
	706-CE	Cert. of Payment of Foreign Death Tax	Available	
	706-D	Additional Estate Tax Return	Available	View Instr
	706-GS(D-1)	Distribution - Generation-Skipping Trust	Available	View Instr
	706-GS(D)	Generation-Skipping Transfer Tax, Distr.	Available	View Instr
	706-GS(T)	Generation-Skipping for Terminations	Available	View Instr
	706-NA	Estate Tax Return NR (DOD >12/31/2008)	Available	View Instr
	706-ODT	Estate Tax for Domestic Trusts	Available	View Instr

2. Click on "Select Forms," uncheck the box next to "Show Selecting Client Type dialog," then just click "Apply:"

The screenshot shows the IntelliForms 2009 application window. The 'Preferences' dialog box is open, and the 'Select Forms' section is selected. In this section, the 'Default state' is set to 'All' and the checkbox for 'Show Selecting Client Type dialog' is unchecked. The background window displays a list of forms with the following columns: Name, Description, Status, and PDF.

Name	Description	Status	PDF
1-C (EF) DCAA			
1-DCAA			
2			
3B			
4			
5			
7			
7A			
8			
9			
10			
11			
11-C, 11-C(M)			
12			
13			
23			
56			
56-F			
211			
433-A			
433-B			
433-D			
433-D (SP)			
433-F			
637			
656			
656-A			
656-L			
656-PPV			
668-A(c)(DO)			
673			
706-CE			
706-D	Additional Estate Tax Return	Available	View Instr
706-GS(D-1)	Distribution - Generation-Skipping Trust	Available	View Instr
706-GS(D)	Generation-Skipping Transfer Tax, Distr.	Available	View Instr
706-GS(T)	Generation-Skipping for Terminations	Available	View Instr
706-NA	Estate Tax Return NR (DOD > 12/31/2008)	Available	View Instr
706-QDT	Estate Tax for Domestic Trusts	Available	View Instr