

How to Access the BNA Portfolios for Work in the SJSU MST Program

The focus of the instructions below is to access Portfolio #100, Tax Research. You should make time to see what else is available as you will find resources to help you with most of your MST studies.

First – the instructions to access the site through the SJSU King Library are here:

<http://www.sjsu.edu/people/annette.nellen/website/ClassInfo.html#Access>

Information for Professor Nellen's Classes

San José State University

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Administrative Matters

Go to the link on the right – How to Access RIA, CCH and BNA

For CCH and BNA, you need your student ID and a PIN. If you do not have a PIN, follow the instructions to get one.

How to Access RIA, CCH, BNA and IRS Tax Research Tools

- CCH and BNA - need to access through the King Library website:
 - The database website asks for your name, library card or student ID and PIN.
 - If you do not have a pin, then follow these instructions [here](#).
 - If you have any difficulty accessing CCH or BNA, contact (408) 808-2470 for assistance.
- [RIA Checkpoint](#)
 - How to obtain an RIA Checkpoint user id and passcode usable for the duration of your class - Click on this URL (<http://ri-computer>) - at the King Library or ask Professor Nellen to assist you with this. Once you've provided the requested information from any computer with Internet access (the URL for that is <http://www.checkpoint.riag.com>). If your access expires on your account (sun.chou@sjsu.edu).
 - [Quick reference guide](#)
- [CCH IntelliConnect](#) (see instructions above about the library database access)
 - [Quick tour/tutorial](#)
 - [Training Guide](#) (no need to print; but instead refer to it as you use CCH)
 - [Quick Start Guide](#)
 - [User Guides](#) - various guides on how to do international research, create tables, and more
- [BNA Tax Management Portfolios - Federal and Multistate](#) (see instructions above about the library data)
- To access other library databases including Lexis Nexus - click [here](#).
- IRS - use the search and [advanced search](#) features (and the [search tips](#)) or try [IRS Tax Map](#) - MST student search, you'll need to use a commercial tax research tool (see above)

When you click on the BNA link, it takes you to this screen:

DR. MARTIN LUTHER KING, JR. LIBRARY
SAN JOSE STATE UNIVERSITY LIBRARY

Off Campus Access to SJSU Resources

Access to **restricted SJSU resources** from off campus is limited to currently enrolled SJSU Students, Faculty and Staff. Use of this system indicates digital format is subject to copyright law. (U.S. Copyright Act, Pub. L. Section 108).

Please enter the following information:

Your Name: For example, type "Jane Smith" and tab or mouse down

SJSU ID or SJPL Barcode: For example, type "001023871" or "21197..." and tab or mouse down

PIN: Enter or create your numeric library pincode

[Forgot Your PIN?](#)

Once you enter the info, you get to (note, if you get a "my profile" page first, just click on the go to product button to get the following page):

The screenshot shows the Bloomberg BNA Tax and Accounting Center website. The top navigation bar includes links for MY HOME PAGE, SITE MAP, PREFERENCES, MY FOLDERS, ACCOUNT PROFILE, GETTING STARTED, ABOUT, CONTACT US, HELP, and SIGN OUT. The main header features the Bloomberg BNA logo and the text "Tax and Accounting Center". A search bar is located in the top right corner, with options for SEARCH HISTORY, SAVED SEARCHES, and SAVED CHARTS. Below the search bar are links for ADVANCED SEARCH, GUIDED SEARCH, and GO TO. The website is categorized by "Federal" and includes a navigation menu with items like Daily Tax Report, Compensation & Benefits, Estate Planning, State, Sales & Use, International, Transfer Pricing, Accounting, Tax Practice Series, Payroll, More Practice Areas, and All. A welcome message reads "Welcome. Create an account profile. Set as My Home Page Search this tab August 11, 2015". The main content area is divided into several sections: "MASTER YOUR TAXES 2015 >>> FEDERAL TAX GUIDE Your Essential Desk Reference" with an "ACCESS NOW >>>" button; "GO TO DOCUMENT BY CITATION" with a dropdown for "Internal Revenue Code" and a "GO" button; "EXPERT ANALYSIS" with a "List of Portfolios/Chapters >>" link; "DAILY TAX REPORT" with links to IRS Rules Govern Beneficiary Basis in Trust Transactions (Corrected) and Final IRS Rules Govern Beneficiary Basis in Trust Transactions; "NEWS & COMMENTARY" with links to Daily Tax Report [Index], Daily Tax Report Highlights, Weekly Report [Index], IRS Practice Adviser Report, Green Incentives Monitor, BNA Insights, Tax Management Memorandum [Index], Compensation Planning Journal [Index], Estates, Gifts and Trusts Journal [Index], Financial Planning Journal [Index], Real Estate Journal [Index], and Sign up for email updates; and "FROM THE EDITORS". A red arrow points to the "Procedure and Administration" link under the "U.S. Income Portfolios" section.

The quickest way to get right to Portfolio #100 is to click on “Procedure and Administration” (in the middle column), which takes you to:

U.S. Income Portfolios: Procedure and Administration

- ⊕ **Portfolio 100-2nd: U.S. Federal Tax Research**
- ⊕ **Portfolio 540-3rd: Discharge of Indebtedness, Bankrupt**
- ⊕ **Portfolio 618-1st: Tax Planning Patents**
- ⊕ **Portfolio 619-1st: Tax Opinions and Other Tax Advice –**
- ⊕ **Portfolio 620-2nd: Practice Before the IRS; Attorney’s F**
- ⊕ **Portfolio 621-3rd: IRS National Office Procedures – Rul**
- ⊕ **Portfolio 623-3rd: IRS Procedures: Examinations and Ap**
- ⊕ **Portfolio 624-2nd: Audit Procedures for Pass-Through E**
- ⊕ **Portfolio 625-2nd: Obtaining Information from the Gove**
- ⊕ **Portfolio 626-1st: Obtaining Information from the Cover**

When you click the + to the left of Portfolio 100, you get to the table of contents for it and then can easily do the assigned reading.

The quickest way to get to the portfolios on consolidated returns (such as for BUS 225S), click on “Corporate Returns and Computation of Tax.” Once you get to the desired portfolio and open it, you can use the “portfolio outline” (table of contents) towards the top of the page and arrow keys at the right side (← previous next →) to maneuver around and read and reread the text. The text also has links to the primary authority which you also always need to read!

Here is what a BNA portfolio looks like in paper:

