

Taxnet Pro



USER GUIDE



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INTRODUCTION

Welcome to Taxnet Pro! Carswell, a Thomson Reuters business, is committed to helping you make the most of our sophisticated internet-based research resources. We know that the more you learn, the more successful you will be. In today's competitive marketplace, your time is more precious than ever. This User Guide will help you learn how to use Taxnet Pro efficiently, saving you valuable research time and helping maximize your productivity.

Fast, simple, reliable and comprehensive – our service reflects our philosophy. Taxnet Pro allows you to apply the power of internet research to vast amounts of tax information, quickly pinpointing the answers you need. TaxNews provides you with the most current tax information available and is fully integrated with comprehensive research databases containing legislation, government documents, commentary and case law. Our functionality is the best in the industry, allowing you numerous search, display and delivery options, plus cross-referencing and the ability to schedule tasks.

■ Getting Help

Online Help

- Click **Learn It** located in the left frame of the Home page to access a number of instructional online tutorials.
- Access the **Quick Reference Card and User Guide** in the About Taxnet Pro section located on the right-hand side of the Login page or from online Help.
- Click **Help** in the upper right corner of the Taxnet Pro navigation bar.
- Click  where available to retrieve help related to that specific function.
- You may also link to descriptions of recently added enhancements by clicking **Recent Enhancements** on the Navigation bar in the left frame.
- You may also link to descriptions of recently added content enhancements by clicking **Featured Content** on the Navigation bar in the left frame.

Technical Support

- Included in your subscription, available weekdays 8:30am to 11:00pm ET, and 9:00 am to 5:00pm ET on weekends. Contact the Carswell Technical Support team if you have any technical questions.
- Phone: 416.609.3800 / 1.800.387.5164
- Email: carswell.techsupport@thomsonreuters.com

Reference Support

- Included in your subscription, available weekdays from 8:30am to 9:00pm ET. Contact the Carswell Reference Support team if you have any content-related questions.
- Phone: 416.609.3800 / 1.800.387.5164
- Email: carswell.reference@thomsonreuters.com

Learning Support

- Interested in receiving a complimentary training session on Taxnet Pro? Contact our Training Coordinator in Customer Learning and Support during regular business hours (Eastern Time) to book your training session.
- Phone: 416.609.3800 / 1.800.387.5164
- Email: carswell.learning@thomsonreuters.com

■ What information is in Taxnet Pro?

For a general overview of the content included in Taxnet Pro, click the **Taxnet Pro** flash ads on the left side of the Login page. Flash ads also notify you of new features and other developments.

For more information on Taxnet Pro, click the options available in the **About Taxnet Pro** and **Training and Support** sections on the right side of the Login page.

To see what content is included in your subscription, login and click **My Subscription** on the Options toolbar or the Site Map.

■ Setting up Your OnePass Account

All Taxnet Pro users **must** set up a OnePass Account where you create your own Username and Password.

To set up a OnePass account, follow these steps:

1. Go to the Manage My OnePass Account page located at:
<https://onepass.westlaw.com/onepass/registration.aspx>.
2. Select **Create Account**.
3. Enter your Registration ID (found at the bottom of the Welcome email sent to you) and your email address and click **Continue**. (You will be alerted if you already have a OnePass Account and prompted to update your Account.)
4. Enter your First Name, Last Name and confirm your email address.
5. Create your OnePass Username and Password in accordance with the OnePass requirements set out on the right of the screen.
6. Set your security question details.
7. Click **Create Account and Sign On to Taxnet Pro**.

Note: You will need your Registration ID handy which was emailed to you. If you can't find your email, please contact Carswell Technical Support at 1.800.387.5164, option #2 for assistance.

Figure 1

Important note: You must create a OnePass Account in order to login to Taxnet Pro. If you subscribe to other Thomson Reuters online offerings and have already registered a OnePass Account, use the Update section to update the account and add your Taxnet Pro registration key to that account.

■ Logging In and Out of Taxnet Pro

1. To log in to Taxnet Pro, go to: www.v2.taxnetpro.com
2. Enter your **OnePass username** and **password** into the fields provided and click **Login**.
3. Select **Remember Username** or **Remember Username and Password** to save your OnePass login on credentials on your computer. (This is optional but highly recommended.)
4. The Assign Client File page appears, if this option is turned on. If you do not wish to see this page, you can disable it on the Change Preferences page in Options.

To log out of Taxnet Pro, click **Logout** located in the upper right corner of the top Navigation bar. The Log Out page shows the elapsed time on Taxnet Pro and provides a link to the Log In page.

■ Setting up your Preferences

To set up your preferences, click **Options** located on the Navigation bar at the top of the screen.

- **Client Management:** Enables or disables the Assign Client page at login.
- **Time Zone:** Enables the user to select their time zone.
- **Language (Document/Email):** Affects the text of the daily email, the TaxNews retrievals and all search results. If you choose only one language, you will not see Tax Court of Canada or CRA Views documents that may not be translated but have English headnotes.

- **Email Notification:** Set up TaxNews and other Email Notifications.
- **Search Results:** Allow you to show or hide details and PPV items, display or turn off the “Add Related Terms” and “Did You Mean” features in your search Result Lists.
- **Order of Results:** Search results from any search template may be changed here as well as **Default Search Template** and the **Search Results** views.
- **TaxNews Areas of Interest (TaxNews Summary Table):** Select the areas of interest you wish to track in the Recently Posted Documents table.
- **TaxNews Areas of Interest (Email Notifications):** Select the areas of interest you wish to track in your email notifications. Note: Enter your email address into the Email Notification section and select a frequency for which you would like to receive them.

■ Add/Remove Tabs

On the Tab bar click **Add/Remove Tabs** to add/remove/order/set as default the available Taxnet Pro Tabs.

■ Switch between English and French sites

On the Navigation bar click **Version française** or **English version** to switch from the English or French version of the site.

■ Home Page

The Home page is your primary point of access to the major Taxnet Pro components.

The screenshot shows the Taxnet Pro Home Page with the following numbered callouts:

- 1:** Client File: None
- 2:** Add/Remove Tabs button in the navigation bar
- 3:** Search input field with a dropdown menu set to 'All Documents'
- 4:** HIGHLIGHTS section containing several news items with links
- 5:** PINPOINT SEARCH section with input fields for Government Document Number, Income Tax Act Section, Excise Tax Act Section, and Case Name, each with a Search button
- 6:** CALCULATORS section with buttons for 'Date Plus X Days' and 'Days Between Two Dates'
- 7:** Saved Search Updates section with a link to 'All Saved Searches'
- 8:** SEARCH TEMPLATES section with a list of search options including TaxNews, Table Of Contents, Legislation, Government Documents, Commentary, Case Law, Tax & Estate Planning Centre, Corporate Tax Centre, Basic Search, and Advanced Search
- 9:** Related Links section on the left sidebar

Figure 2

1	Top Navigation bar	Retrieve the Table of Contents, Research Trail or your default options. Contact us, send us your feedback, or review the Site Map. Access online help, logout or switch to the French version of the service. You can also view the current client file you are working on.
2	Tab bar	Access a specific content collection or the Taxnet Pro Home page. Add or remove tabs and change your default tab in your view.
3	Quick Search	Use Quick Search to search the entire Taxnet Pro library or select a specific content from the drop-down list.
4	Highlights	Provides information on important developments in tax. Click a link to retrieve the document.
5	Pinpoint Search	Search for a specific government document, section of the Income Tax Act, or Excise Tax Act or find a case by name.
6	Calculators	Select a calculator to determine a specific date or number of days between two dates.
7	Saved Search Updates	Review new hits for automated searches you created.
8	Search Templates	Access a search template.
9	Left Navigation bar	Review Featured Content, Recent Enhancements and online tutorials on the Learn-it page. Also, link to other tax-related sites or access various Taxnet Pro search templates.

ONCE I HAVE LOGGED IN, WHERE DO I START?

If you want to retrieve...	Then...
A statutory provision in the Income Tax Act or Excise Tax Act	Use Pinpoint Search located on the Home page. Enter the section number (down to subsection level) into the appropriate Section field and click Search .
An IT bulletin by its unique number	Use Pinpoint Search located on the Home page. Enter the IT number into the Government Document Number field and click Search .
A case by its name	Use Pinpoint Search located on the Home page. Enter the case name into the Case Name field and click Search .
A case citing a statutory provision	Retrieve the statutory provision using the instructions above and then click the Cases tab at the top of the document or click the Cases cross-reference link above a section or subsection.
A tax treaty	Click Table of Contents on the top Navigation bar or in the Search Templates section of the Home page. Expand the

If you want to retrieve...	Then...
	following headings: Federal Income Tax, Treaties, Full Text of Current Tax Treaties and then the grouping that contains your treaty. Foreign treaties are located under Corporate Tax Centre. Click the document hypertext link to retrieve the treaty.
A tax table	Click Table of Contents on the top Navigation bar or in the Search Templates section of the Home page. Expand the Tax Rates and Reference Tables heading. Select a category and click a document link to retrieve the table you want to see.
A topical index	Click Table of Contents located on the top Navigation bar or in the Search Templates section of the Home page. Expand the following headings: Federal Income Tax and then Topical Indexes . Select the category you want to see and then click a document link to retrieve its index.
All documents on a given topic	Use Quick Search on the Home page. Enter your search terms into the input field to search the entire Taxnet Pro library and click Go . Since you are searching all documents in Taxnet Pro, you most likely will retrieve a large number of hits.
A future date for filing requirements	Use the Date Plus X Days calculator located on the Home page. Enter your information in the template and click Calculate .
The number of days between two specific dates	Use the Days Between Two Dates calculator located on the Home page. Enter your information in the template and click Calculate.

WHAT ELSE CAN I DO WITH MY DOCUMENT?

If you want to...

Then...

See related documents

Use the **tabs** located at the top of your document, or the **cross-reference links** located within your document. Tabs and/or links provide access to related **Legislation, Government Documents, Commentary, Cases, Cases under appeal, History & Treatments, Compliance** and the **French Version** of the document, where available. To retrieve a list of related documents citing a specific statutory provision, retrieve the provision and click the cross-reference links located directly above the statutory provision.

Narrow down your search

Use **Search Within Results**. You may narrow your search from the search Results list. Click **Search Within Results**. Your original search remains intact. Add additional terms in the search fields provided and click **Search**.

Print a clean document

Use **Full-text (Clean Copy)**. Click the **Print** icon. Click **Settings**. Uncheck all the Content Options to remove all highlighting and cross-reference links. Click **Done** to return to the main Print page. In Page Options select **Full-text (Clean Copy)** and uncheck Additional Options. Click **Print** to activate your browser printer. Click your browser's **Print** button.

Copy a part of document along with the document title

Use **Copy with Reference**. Highlight the portion of the text you wish to copy and click **Copy with Ref** located in the lower right corner. A window confirming the copy appears. Click **Close**. Switch to your word processing document or email message and paste the selected text into your document.

Email or download a document

Use **Email** or **Download**. Click the **Email** or **Download** icon located in the upper right corner while viewing your document in the right frame. Use the email or download dialog box to select your Settings, or other options and then click **Send**.

Save to document folder

Use **Save to Document Folder**. Documents are automatically saved to the Document Folder. To access the Document Folder click **Options** on the top Navigation bar and then **Document Folder** in the side Navigation bar.

KEEPING CURRENT

■ TaxNews

Use TaxNews to keep current by accessing documents posted today or within the last 60 days. You can search or browse the TaxNews database as well as receive an email notifying you of newly posted documents. Your TaxNews preferences can be customized so that you are notified for your areas of interest.

TaxNews is updated continuously throughout the day to let you access the latest documents released by the Department of Finance, Canada Revenue Agency, as well as expert commentary and case law.

To access TaxNews, click the **TaxNews** tab located at the top of any page.

The screenshot shows the Taxnet Pro website interface. At the top, there is a navigation bar with tabs for 'TaxNews', 'Tax Experts Directory', and 'Corporate Tax Centre'. A search bar is located at the top right, with a callout box pointing to it that says 'Search TaxNews'. Below the navigation bar, there is a 'Highlights of Recent News' section with a sub-heading 'Federal Budget 2011' and a date '(updated August 5, 2011)'. To the right of this section is a table titled 'RECENTLY POSTED DOCUMENTS' with columns for 'Today' and 'LAST 60 DAYS'. The table lists various categories and their counts. A callout box points to a link below the table that says 'Click to view all or select documents'.

	Today	LAST 60 DAYS
Income Tax	3	856
Legislation	0	8
Government Documents	2	478
Commentary	1	222
Case Law	0	148
GST	0	112
Legislation	0	6
Government Documents	0	63
Commentary	0	6
Case Law	0	37
Excise/Customs	4	67
Alberta	0	21
British Columbia	0	60
Manitoba	0	17
New Brunswick	0	16
Newfoundland	0	12
Northwest Territories	0	1
Nova Scotia	1	11
Nunavut	0	0

Figure 3

To set up your preferences for the **Recently Posted Documents** table on the TaxNews page, click **Options** located on the top Navigation bar:

1. Scroll down to the **TaxNews (Areas of Interest – Used for TaxNews Summary Table)** section.
2. Select the areas you want to track. (All areas are selected by default)
3. Click **Save Changes** at the bottom of the page. Changes will only be saved when an email address has been entered in the Email Notification field.

■ Browsing TaxNews Documents

To view all TaxNews documents at one time, select **All TaxNews** from the **Select to View ...** drop-down list located above the Recently Posted Documents table on the TaxNews page. The TaxNews Retrieval page appears listing all documents in reverse chronological order.

The screenshot shows the Taxnet Pro interface with a table of documents. The table has columns for Num, Date, Doc Type, and Description. The first document is titled 'CRA Views 2011-0409221E5: Automobile Standby charge -- Section 6(1)(e): 6(2)'. Below the table, there are two orange callout boxes. The first box on the left says 'Click TaxNews to return to the TaxNews page' and has an arrow pointing to the 'TaxNews' tab in the navigation bar. The second box on the right says 'Click a link to retrieve the full text of the document' and has an arrow pointing to the 'Hide Detail' link in the first document row.

Figure 4

The TaxNews **Recently Posted Documents** table provides you with the ability to browse the last 60 days worth of documents broken down by area of interest. Click a link to retrieve the list of documents posted.

The screenshot shows a table titled 'RECENTLY POSTED DOCUMENTS' with two columns: 'Today' and 'LAST 60 DAYS'. The rows are: Income Tax (3, 856), Legislation (0, 8), Government Documents (2, 478), Commentary (1, 222), Case Law (0, 148), and GST (0, 112). An orange callout box on the right says 'Click a number to view the documents posted to this area today or within the last 60 days.' and has an arrow pointing to the number '3' in the 'Today' column for 'Income Tax'.

Figure 5

■ Searching TaxNews Documents

To perform a simple search (one or two search terms only), use the Quick Search option located in the upper right corner of the TaxNews page.

Search: for:

Figure 6

1. Search all TaxNews or select the content you want to search from the **Search** drop-down list.
2. Enter your search terms into the input field.
3. Click **Go**.

To perform a more complex search using multiple search terms, and/or restricting the search to specific content or various document types, use the TaxNews search template.

1. Click **TaxNews** in the Search Templates section of the Home page. *Alternatively*, from the TaxNews home page click **TaxNews Search Template** on the left Navigation bar.

The screenshot displays the Taxnet Pro TaxNews Search interface. At the top, there are navigation links for Client File, Table of Contents, Research Trail, Options, and Version française. Below this is a breadcrumb trail: TaxNews > Tax Experts Directory > Corporate Tax Centre. The main heading is 'TaxNews Search'. On the left, a 'SEARCH TEMPLATES' sidebar lists options: TaxNews (selected), Advanced Search, Basic Search, Legislation, Government Documents, Commentary, Case Law, Tax & Estate Planning Centre, Corporate Tax Centre, and Saved Searches. The main search area includes:

- Search Terms:** A link to 'Switch To Boolean Search Field' and a 'Search' button.
- The results must contain:** Two dropdown menus, both set to 'All of these words', with a 'Connector' dropdown set to 'and'.
- Order of Results:** Radio buttons for 'Relevancy' (selected) and 'Reverse Chronological'.
- Areas of Interest:** A section with checkboxes for 'Federal', 'GST/HST', 'Corporate Tax Centre', and 'Tax & Estate Planning'.
- Provinces/Territories:** A section with checkboxes for Alberta, British Columbia, Manitoba, New Brunswick, Nfld. and Labrador, Northwest Territories, Nova Scotia, Nunavut, Ontario, P.E.I., Quebec, and Yukon.
- Research Database(s):** A section with checkboxes for 'Legislation', 'Commentary', 'Government Documents', and 'Case Law'.
- Search Fields:** Input boxes for 'Case Name:' and 'Document Number:'.

 At the bottom right, there are 'Search' and 'New Search' buttons.

Figure 7

2. Enter your search terms into the Search box(es) and select an option from **The results must contain** drop-down list.
3. Select your order of results. Select Reverse Chronological if you want to see the most recent document first in your Result List. **Note:** You may set this as a preference in Options.
4. Restrict your search to a specific area(s) of interest, provinces/territories, research database(s) by using the checkboxes provided and/or entering information into the pre-defined fields.
5. Click **Search**.

You can also retrieve a list of TaxNews documents by combining areas of interest, or just a subset of documents within an area of interest, by using the **TaxNews Search Template**.

To create a combined list of Federal Income Tax and GST/HST documents:

1. Click **TaxNews** in the Search Templates section of the Home page.
2. Enter your search terms into the first **Search Terms** box.
3. Select **Reverse Chronological** in the Order Of Results section.
4. Select **Federal** and **GST/HST** in the Areas of Interest section.
5. Click **Search**.

To create a list of Ontario government documents:

1. Click **TaxNews** in the Search Templates section of the Home page.
2. Enter your search terms into the first **Search Terms** box.
3. Select **Reverse Chronological** in the Order Of Results section.
4. Select **Ontario** in the Provinces/Territories section.
5. Select **Government Documents** in the Research Database(s) section.
6. Click **Search**.

■ TaxNews Email Push

To receive an email notifying you of newly posted documents in your area(s) of interest as selected in your Preferences, follow these steps:

1. Click **Options** located on the Navigation bar at the top of the screen. *Alternatively,* you may click **Preferences** in the Options section of the Site Map.
2. Enter and verify your email address in the Email Notification section.
3. Select language preference in the Email Language section.
4. Scroll down to the TaxNews Email Notification section.
5. Select the email notification option you want (e.g. as posted, daily or weekly).
6. Select the areas of interest you want to track.
7. Click **Save Changes** at the bottom of the page.

An email will be sent to you listing all the documents posted in your area(s) of interest as selected in your preferences.

■ Tax Hyperion

Tax Hyperion is the monthly newsletter, edited by Bruce Russell of McInnes Cooper. It continues to cover recent developments in Canadian tax law and policy.

To setup your monthly newsletter:

1. Click **Options** on the Navigation bar on the top of the screen. *Alternatively,* you may click **Preferences** in the Options section of the Site Map.
2. Select **Send Email** located in the Tax Hyperion section of the Preferences page.
3. Click **Save Changes** at the bottom of the page.

■ Special Emails

Special Emails are emails containing important announcements such as budgets, proposed legislation, sent out a few times a year by the content editors at Taxnet Pro.

To receive Special Emails:

1. Click **Options** on the Navigation bar on the top of the screen. *Alternatively*, you may click **Preferences** in the Options section of the Site map.
2. Select **Send Email** located in the Special Emails section of the Preferences page.
3. Click **Save Changes** at the bottom of the page.

■ E- Bulletin

E-bulletins are quarterly publications designed to inform subscribers about recent enhancements to the service and other recent developments.

To setup your monthly E-Bulletin:

1. Click **Options** on the Navigation bar on the top of the screen. *Alternatively*, you may click **Preferences** in the Options section of the Site map.
2. Select **Send Email** located in the E-Bulletin section of the Preferences page.
3. Click **Save Changes** at the bottom of the page.

SEARCHING THE DATABASES

Taxnet Pro provides you with a variety of search options:

- **Table of Content Search:** Use Table of Contents (TOC) Search to perform a search across all Taxnet Pro databases or specific areas.
- **Quick Search:** Use Quick Search to perform a simple search (one or two search terms) across all the Taxnet Pro databases at one time. You may also select specific content from the drop-down list provided.
- **Basic Search & Advanced Search:** Use Basic Search or Advanced Search to search across all or selected content-types (databases) at one time. Both Basic Search and Advanced Search provide more flexibility than Quick Search.
- **Content-specific Search Templates:** Use a search template targeted to a particular database. These templates provide checkboxes and fields specific to the content you are searching.

■ Searching Legislation

To retrieve a specific statutory provision of the Income Tax Act or Excise Tax Act:

1. Enter the provision into the appropriate **Section** field in the Pinpoint Search section of the Home page.
2. Click **Search**.

To search any legislation in Taxnet Pro:

1. Click **Legislation** in the Search Templates section of the Home page. The Legislation Search template appears.

Figure 8

2. Enter your search terms into the **Search Terms** boxes and select an option from *The results must contain* drop-down list. Two Search Terms fields are provided for more complex searching (i.e. phrase and phrase, phrase and word, etc.) Use the *Connector* drop-down list between the two search fields to establish a relationship between the two sets of search terms.
3. Select the order in which you want to view your results. Relevancy ranks your results and places documents with the most occurrences of search terms at the top of the list. Table of Contents Order provides your results in the order in which they appear in the Taxnet Pro Table of Contents. **Note:** You may set a specific default order of results in your preferences.
4. Select the areas of interest and legislation by using the checkboxes provided.
5. The Section Number field provides you with a quick way to access a specific legislative provision. You can enter a legislative reference down to the subparagraph level. Examples: 212, 13(21.2), 37(1)(a)(iii), 248(1)gross revenue(a)
6. If you want to know if a term is defined somewhere in legislation, but you are not sure where, use the Defined Terms/Definition field. Enter the term without quotation marks to retrieve a list of documents that contain that definition.
7. Click **Search**.

■ Searching Government Documents

For Interpretation Bulletins, Information Circulars, Guides, CRA Views, Department of Finance News Releases, Policy Statements, GST/HST Info Sheets, GST-Related Information Circulars, Voluntary Disclosures Program Guidelines, GST Guides and Pamphlets, Ministerial Delegations, GST Memoranda and Technical Information Bulletins and any other government document on Taxnet Pro:

1. Enter the unique document number into the **Government Document Number** field in the Pinpoint Search section of the Home page.
2. Click **Search**.

For all documents:

1. Click **Government Documents** in the Search Templates section of the Home page. The Government Documents Search template appears.

The screenshot shows the Taxnet Pro website interface. At the top, there is a navigation bar with 'Home', 'Tax & Estate Planning Centre', 'TaxNews', 'Tax Experts Directory', and 'Corporate Tax Centre'. Below this is the 'Government Documents Search' section. On the left, a sidebar lists search templates: TaxNews, Advanced Search, Basic Search, Legislation, Government Documents (selected), Commentary, Case Law, Tax & Estate Planning Centre, Corporate Tax Centre, and Saved Searches. The main content area includes a search bar with 'Search' and 'New Search' buttons. Below the search bar, there are two 'The results must contain:' fields, each with a dropdown menu set to 'All of these words'. A 'Connector' dropdown is set to 'and'. There are also radio buttons for 'Order of Results' (Relevancy, Table of Contents Order, Reverse Chronological). Below that, there are sections for 'Areas of Interest' and 'Government Documents' with various checkboxes for categories like Federal, GST/HST, Corporate Tax Centre, Tax & Estate Planning, Provinces/Territories, and specific document types like Interpretation Bulletins, Information Circulars, etc. At the bottom, there are 'Search Fields' for Title, Document Number, and Years (After/Before).

Figure 9

2. Enter your search terms into the **Search Terms** boxes and select an option from *The results must contain* drop-down list. Two Search Terms fields are provided for more complex searching (i.e. phrase and phrase, phrase and word, etc.) Use the *Connector* drop-down list between the two search fields to establish a relationship between the two sets of search terms.

3. Select the order in which you want to view your results. Relevancy ranks your results and places documents with the most occurrences of your search terms at the top of the list. Table of Contents Order provides your results in the order in which they appear in the Taxnet Pro Table of Contents. Reverse Chronological ranks your results in reverse date order. **Note:** You may set a specific default order of results in your preferences.
4. Select the areas of interest and government documents by using the checkboxes provided.
5. The Title field allows you to enter any words you know from the title or heading of the document you are searching.
6. The Document Number field allows you to enter the unique number of the document you wish to retrieve.
7. The Years field allows you to enter a range of years.
8. Click **Search**.



Use the ! wildcard when searching by IT or IC number to retrieve all revisions of that IT or IC. For example: *IT-104!* retrieves *IT-104R*, *IT-104R2* and *IT-104R3*.

Here are some examples of how to search by government document number:

Document Type	Example
Interpretation Bulletins	IT-105
Information Circulars	89-2R2
Advance Tax Rulings	ATR-1
IT Technical News	ITTN-37
Dept. of Finance News Releases	2007-101
Income Tax Act	20(1)(a)
Ministerial Delegations	MD20-1999
Policy Statements	P-052
Technical Information bulletins	B-001
Voluntary disclosures Program Guidelines	2002-09-30
CRA Views	2001-0085000
Guides	RC4028 or T4114
GST Memoranda	400-1-2
GST Guides and Pamphlets	RC4008
GST Headquarters Letters	97516
GST-Related Customs Memoranda	D2-3-6
GST-Related Information Circulars	89-2R2
GST/HST Info Sheets	GI-009

■ Searching Commentary

1. Click **Commentary** in the Search Templates section of the Home page. The Commentary Search template appears.

The screenshot shows the Taxnet Pro web application interface. At the top, there is a navigation bar with links for 'Table of Contents', 'Research Trail', 'Options', 'Version française', 'Contact Us', 'Feedback', 'Site Map', 'Help', and 'Logout'. Below this is a secondary navigation bar with 'Home', 'Tax & Estate Planning Centre', 'TaxNews', 'Tax Experts Directory', 'Corporate Tax', 'Add/Remove Tabs', and 'Advanced Search'. The main content area is titled 'Commentary Search' and features a 'SEARCH TEMPLATES' sidebar on the left with options like 'TaxNews', 'Advanced Search', 'Basic Search', 'Legislation', 'Government Documents', 'Commentary', 'Case Law', 'Tax & Estate Planning Centre', 'Corporate Tax Centre', and 'Saved Searches'. The 'Commentary' option is selected. The main search area includes two 'The results must contain:' dropdown menus, both set to 'All of these words', and a 'Connector' dropdown set to 'and'. Below these are 'Order of Results' options: 'Relevancy' (selected) and 'Table of Contents Order'. A section titled 'Commentary (will search in all categories)' contains a grid of checkboxes for various categories such as 'Canada Tax Service - McCarthy Tétrault', 'Canada GST Service - Sherman', 'Hogg, Magee and Li', 'Ontario Corporate Tax', 'Practitioner's Guide to Trusts, Estates & Trust Returns', 'Taxation and Estate Planning', 'Canadian Taxation of Life Insurance', etc. At the bottom, there are 'Search Fields' for 'Title' and 'Document Number', and 'Search' and 'New Search' buttons.

Figure 10

2. Enter your search terms into the **Search Terms** boxes and select an option from *The results must contain* drop-down list. Two Search Terms fields are provided for more complex searching (i.e. phrase and phrase, phrase and word, etc.) Use the *Connector* drop-down list between the two search fields to establish a relationship between two sets of search terms.
3. Select the order in which you want to view your results. Relevancy ranks your results and places documents with the most occurrences of search terms at the top of the list. Table of Contents Order places the results in the order in which they appear in the Taxnet Pro Table of Contents. Reverse Chronological ranks your results in reverse date order. **Note:** You may set a specific default order of results in your preferences.
4. Select the commentary areas by using the checkboxes provided.
5. The Title field allows you to enter any words you know from the title or heading of the document you are searching.
6. The Document Number field allows you to enter the unique number of the document you wish to retrieve.
7. Click **Search**.



The Commentary template can also be used to search for legislative history.

■ Searching Case Law

1. Click **Case Law** in the Search Templates section of the Home page. The Case Law Search template appears.

The screenshot shows the Taxnet Pro Case Law Search interface. At the top, there is a navigation bar with links for Client File, Table of Contents, Research Trail, Options, Version française, Contact Us, Feedback, Site Map, Help, and Logout. Below this is a secondary navigation bar with Home, Tax & Estate Planning Centre, TaxNews, Tax Experts Directory, Corporate Tax Centre, Add/Remove Tabs, and Advanced Search. The main content area is titled 'Case Law Search' and features a sidebar on the left with 'SEARCH TEMPLATES' and a list of categories including TaxNews, Advanced Search, Basic Search, Legislation, Government Documents, Commentary, Case Law, Tax & Estate Planning Centre, Corporate Tax Centre, and Saved Searches. The main search area includes a 'Search Terms' section with two input fields, a 'Connector' dropdown set to 'and', and 'The results must contain' dropdowns set to 'All of these words'. Below this is the 'Order of Results' section with radio buttons for Relevancy (selected), Table of Contents Order, and Reverse Chronological. The 'Areas of Interest' section contains checkboxes for Federal, GST/HST, Corporate Tax Centre, and Tax & Estate Planning. The 'Provinces/Territories' section lists checkboxes for Alberta, British Columbia, Manitoba, New Brunswick, Nfld. and Labrador, Northwest Territories, Nova Scotia, Nunavut, Ontario, P.E.I., Quebec, and Saskatchewan. The 'Search Fields' section includes input boxes for Court/Level, Case Name, Judge, Headnote, Years (After and Before), Citation, and Counsel. Search and New Search buttons are located at the bottom right of the form.

Figure 11

2. Enter your search terms into the **Search Terms** boxes and select an option from *The results must contain* drop-down list. Two Search Terms fields are provided for more complex searching (i.e. phrase and phrase, phrase and word, etc.) Use the *Connector* drop-down list between the two search fields to establish a relationship between two sets of search terms.
3. Select the order in which you want to view your results. Relevancy ranks your results and places documents with the most occurrences of search terms at the top of the list. Table of Contents Order will list your results in reverse chronological order by court and then by jurisdiction. Reverse Chronological is based on judgment date. **Note:** You may set a specific default order of results in your preferences.
4. Select the areas of interest and provinces/territories by using the checkboxes provided.
5. The Search Fields allow you to enter search terms into fields provided. You may use any combination of these fields. When entering a court level in the Court/Level field, enter one or more terms from the court name and avoid abbreviations. For example: Entering *supreme canada* will find decisions from the *Supreme Court of Canada*. To search for cases from a specific year, enter the year into the **After** field only. When searching between years, for example to retrieve cases from 2010 and 2011, enter the year 2009 into the **After** field and 2012 into the **Before** field. When entering a citation into the **Citation** field, always add the periods (e.g. *C.T.C.*, or *G.S.T.C.*, do not use *CTC* or *GSTC*.)
6. Click **Search**.



When using the Case Name field, it is best to use the last name as first names can be cited by initials or full name.

■ Advanced Search

Advanced Search provides you with the most flexibility in a search template. Additional checkboxes are provided allowing you to precisely target your area of interest.

1. Click **Advanced Search** in the **Search Templates** on the Home page. The Advanced Search template appears.

Taxnet Pro®

Client File: None Table of Contents | Research Trail | Options | Version française Contact Us | Feedback | Site Map | Help Logout

Home Tax & Estate Planning Centre TaxNews Tax Experts Directory Corporate Tax > Add/Remove Tabs Advanced Search

Advanced Search

SEARCH TEMPLATES

TaxNews

Advanced Search

Basic Search

Legislation

Government Documents

Commentary

Case Law

Tax & Estate Planning Centre

Corporate Tax Centre

Saved Searches

Search Terms: [Switch To Boolean Search Field](#)

The results must contain: Connector: The results must contain:

Order of Results:
 Relevancy Table of Contents Order

Areas of Interest (will search in all categories) [Check All](#) [Uncheck All](#)

Federal GST/HST Corporate Tax Centre Tax & Estate Planning

Provinces/Territories

Alberta British Columbia Manitoba New Brunswick
 Nfld. and Labrador Northwest Territories Nova Scotia Nunavut
 Ontario P.E.I. Quebec Saskatchewan
 Yukon

Legislation (will search in all categories) [Check All](#) [Uncheck All](#)

Federal Tax Legislation

Income Tax Act Income Tax Application Rules Income Tax Regulations
 Excise Tax Act and GST Regs Customs Act Excise Act
 Interpretation Act Tax Court of Canada Act Canadian Tax Treaties

Provincial Tax Legislation

Fuel Taxes Income and Capital Taxes Property Taxes
 Resource Taxes Tobacco Taxes Property Transfer Taxes
 Sales Taxes Payroll Taxes Miscellaneous Taxes

Non-Tax Legislation

Business & Companies Acts Estate & Trusts Related Acts Family Law Acts
 Insurance Acts Pension Related Acts Procedural Acts
 Property Related Acts Other Legislation Environmental Legislation
 Partnership Acts Securities Legislation Reporting Standards

Government Documents (will search in all categories) [Check All](#) [Uncheck All](#)

Government Documents

Interpretation Bulletins Information Circulars Advance Tax Rulings
 IT Technical News GST Memoranda GST Tech Info Bulletins
 GST Policy Statements CRA Views Guides
 Technical Notes Federal Budgets Provincial Bulletins
 Income Tax Forms GST/HST Forms Provincial Tax Forms
 Other Publications Budgets Finance Comfort Letters
 Reporting Standards Excise & GST/HST News Headquarters Letters

Commentary (will search in all categories) [Check All](#) [Uncheck All](#)

Tax Commentary

Canada Tax Service - McCarthy Tétrault Canada GST Service - Sherman Hogg, Magee and Li
 Krishna/Canadian Income Tax RST and the Transition to HST Ontario Corporate Tax
 Morin and Papillon (French) Yelle's Income Tax References Canadian Petroleum Tax Journals
 Legislative Notes Legislative History CRA Views in Focus
 Tax Hyperion Tax Times GST Times
 Pound's Tax Case Notes Tax Executives Institute C.D. Howe Institute
 Tax Practitioners' Forum GST Case Notes Other Commentary

Tax & Estate Planning Resources

Practitioner's Guide to Trusts, Estates & Trust Returns Taxation and Estate Planning Canadian Taxation of Life Insurance
 Newsletters Tax Planner Guides Articles
 Checklists Comparative Tables Probate Tables

Case Law (Case Law will be searched)

TaxNews (TaxNews will be searched)

Figure 12

2. Enter your search terms in the **Search Terms** boxes and select an option from *The results must contain* drop-down list. Two Search Terms fields are provided for more complex searching (i.e. phrase and phrase, phrase and word, etc.) Use the *Connector* drop-down list between the two search fields to establish a relationship between the two sets of search terms.
3. Select the order in which you want to view your results. Relevancy ranks your results and places documents with the most occurrences of search terms at the top of the list. Table of Contents Order places the results in the order in which they appear in the Taxnet Pro Table of Contents. **Note:** You may set a specific default order of results in your preferences.
4. Select the areas of interest, legislation, government documents, commentary, and cases by using the checkboxes provided.
5. Click **Search**.



This template is designed to perform word searches across multiple types of information. If you want to search just one database, e.g. cases, we recommend you use the template specifically designed for that database as it will provide you with more flexibility to find specific information.

■ The Results Must Contain Drop-down List

The **results must contain** drop-down list is used to establish a relationship between your search terms:

- **All of these words** retrieves documents containing all words.
- **Any of these words** retrieves documents containing at least one of the words.
- **This Phrase** retrieves documents containing this exact phrase.
- **Keywords 5 words of each other** retrieves documents where the words are within five words of each other regardless of order.
- **Keywords 10 words of each other** retrieves documents where words are within 10 words of each other regardless of order.

■ Wildcards

The wildcard symbol (!) provides you with a useful way to retrieve the information you need. For example, you might type *depreciat!* to pick up all instances of *depreciate, depreciates, depreciated, depreciation etc.*

The universal character symbol (*) provides you with a useful way to retrieve documents where one, or a specific number of characters may vary. Each * represents one character only. For example, you may type *licen*e* to pick up both *licence* and *license*.

Note: You may use a space or hyphen with a wildcard.

To Find	Wildcard/Expander	Example
variant letters	*	<i>wom*n finds woman & women</i>
multiple letters	!	<i>rust! finds rust, rusted, rusting, rustproof</i>

■ Search within Results

Use Search within Results to search within a set of search results. Simply run a search and click **Search within Results** located on the Result List to further refine your search. Your original search terms will be saved within the template so that you can be sure of no duplication. You can incrementally refine your searches until you have exactly the search terms you want.

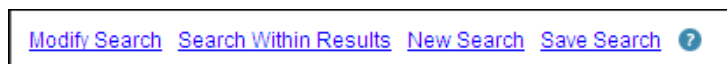


Figure 13

■ Boolean Searching

Taxnet Pro provides you with the option of creating a search using Boolean connectors. Using Boolean connectors to specify a relationship between search terms gives you more flexibility in creating your searches and provides you the ability to create more complex searches.

To create a Boolean search, click **Switch to Boolean Search Field** in the Search Terms section of any search template. You may enter your search terms prior to clicking this link. Your search will automatically convert to a Boolean query. Also, you may use any of the checkboxes provided within the template along with your Boolean search.

The following Boolean connectors can be used to narrow or broaden your search results:

To Find:	Connector	Example
one term OR another (This is the default connector which is represented by a space between search terms.)	or	farm losses
one term AND another	and	farm & losses
one term BUT NOT another	%	farm % losses
a phrase	" "	"transfer pricing"

To Find:	Connector	Example
one term near another, regardless of order	term1 /n term2	resulting /5 trust finds the terms within 5 words of each other.
one term near another in the order you typed them	term1 +n term2	child +10 interests finds the terms as entered within 10 words of each other.

A description of these connectors is located on the Boolean page. You may need to click the down arrow next in the **Add Connectors or Expanders** line to see the list.

■ Did You Mean

Did You Mean detects the misspelling of a search term and offers the correct spelling without having to navigate back to the search template. Simply click the term to re-run the search automatically. This tool appears at the top of the Result List.

Did You Mean is a user preference that can be turned on or off. The default is on.

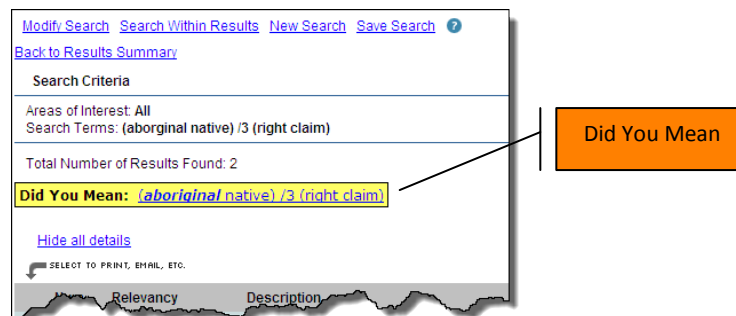


Figure 14

■ Add Related Terms

Add Related Terms makes your research more thorough by automatically suggesting tax synonyms for your query. Synonyms of 2,500+ Canadian tax terms and phrases are included in Taxnet Pro, and you can add any or all of the suggested terms to a new search.

For example, if you include the phrase *capital gain* in a query, Taxnet Pro might also suggest *capital loss*, *foreign tax credit* and *deduction*. You are given the option to add any or all alternative terms to strengthen your query.

Add Related Terms will display on the full screen Result List immediately after running your search. It will not display after you have selected a document from this list and are in split-screen view with the Result List in the left frame and full text document to the right.

To add a related term to your search, click the term you want. The Boolean search page appears displaying your original terms along with the term you added. You may add additional terms here as well. Click **Search** to run your new search.

Add Related Terms is a preference that can be turned on or off. The default is on.

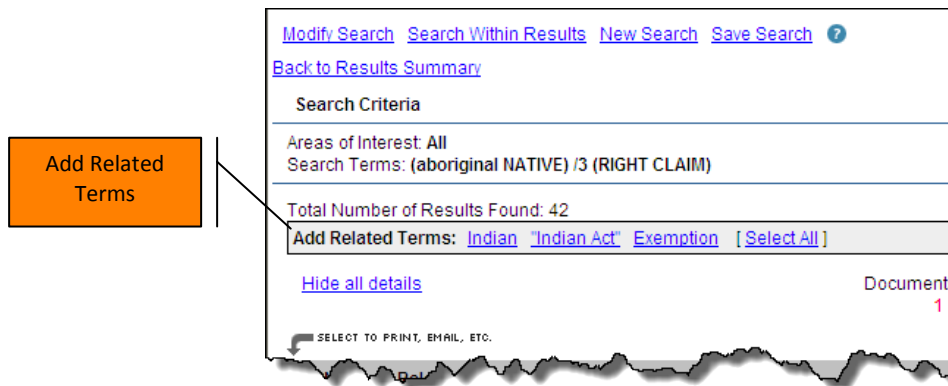


Figure 15

THE TABLE OF CONTENTS

The Table of Contents gives you quick and easy access to all the documents available in Taxnet Pro in a logical format that is quite familiar to most users. A search is not limited by subscription; all content is searched to ensure the most relevant documents are always located.

■ Browsing the Table of Contents

1. Click **Table of Contents** on the top Navigation bar. *Alternatively*, you can click Table of Contents in the Search Templates section on the Home page.

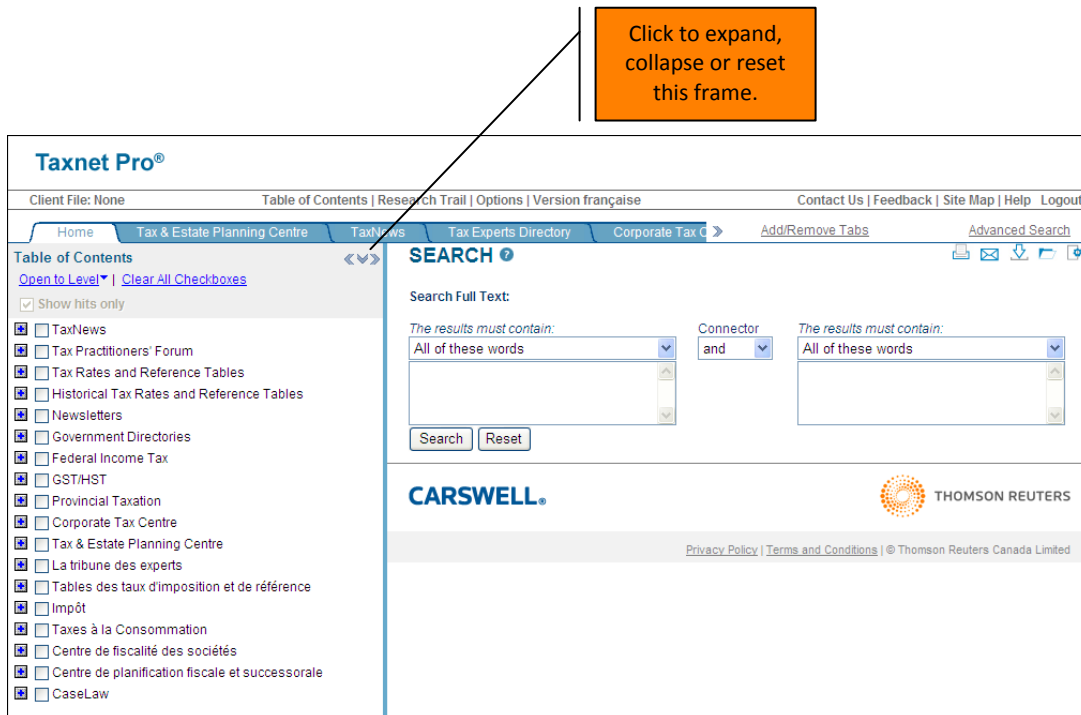


Figure 16

The Table of Contents appears in split-screen view, with the directory located on the left side and the search template at the top of the right.

2. Click a + button to expand a specific heading in the left frame. Continue expanding headings until you reach the document level represented by a link. (Click the – button to collapse an item.)
3. Resize the left pane width by pulling it over to the right see an entire line item.
4. Click the link to retrieve the full text of the document into the right frame.
5. To open the headings three levels deep at one time, click Open to Level at the top of the left frame. (We recommend to a maximum of 8 headings.)

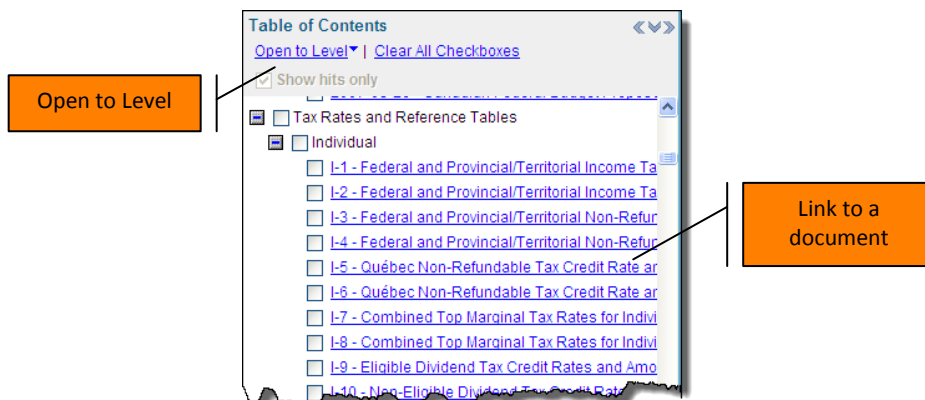


Figure 17

■ Searching the Table of Contents

Taxnet Pro allows you to work with your search results and quickly view any of the documents returned by your search. You will be able to see where your hits are located within the various content-types and subject areas.

1. Click **Table of Contents** on the top Navigation bar. *Alternatively*, click Table of Contents in the Search Templates section on the Home page.
2. Enter your search terms in the **Search Full Text** fields and select an option from *The results must contain* drop-down list(s) located above each field. Two Search Full Text fields are provided for more complex searching (i.e. phrase and phrase, phrase and word, etc.) Use the *Connector* drop-down list between the two search fields to establish a relationship between the two sets of search terms.
3. Use the heading checkboxes to *limit* your search to a specific heading(s), if you wish. There is no limit to the number of headings you can select to search at one time.

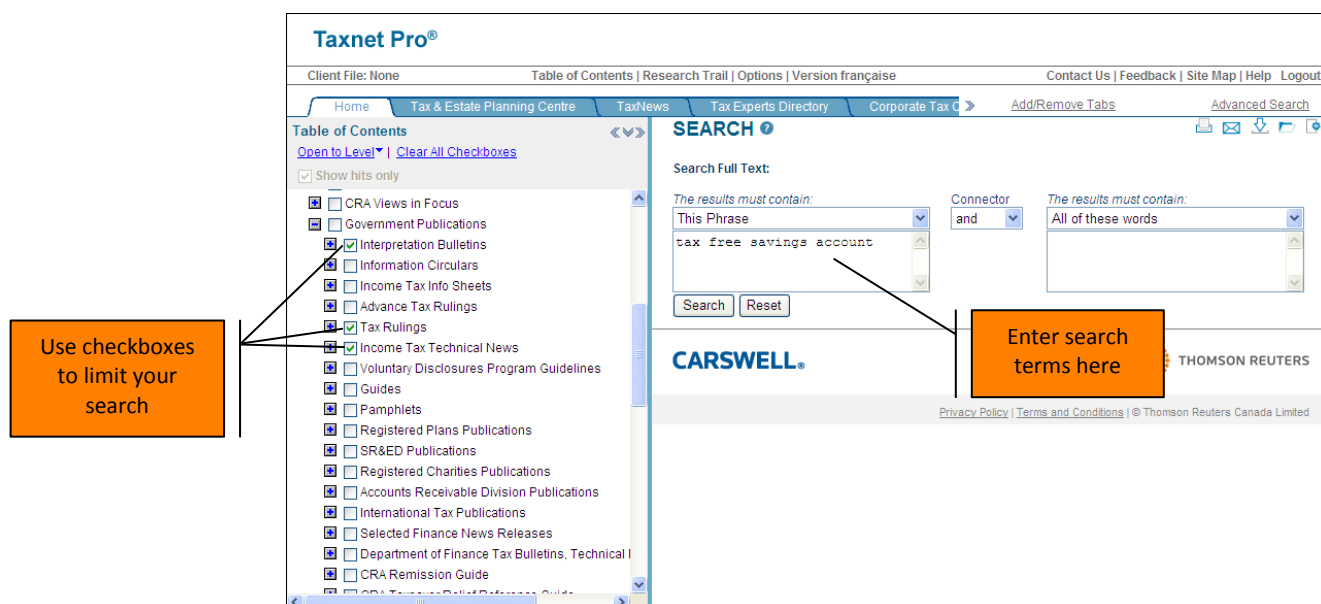


Figure 18

4. Click **Search**.

Your search results appear in the left frame.

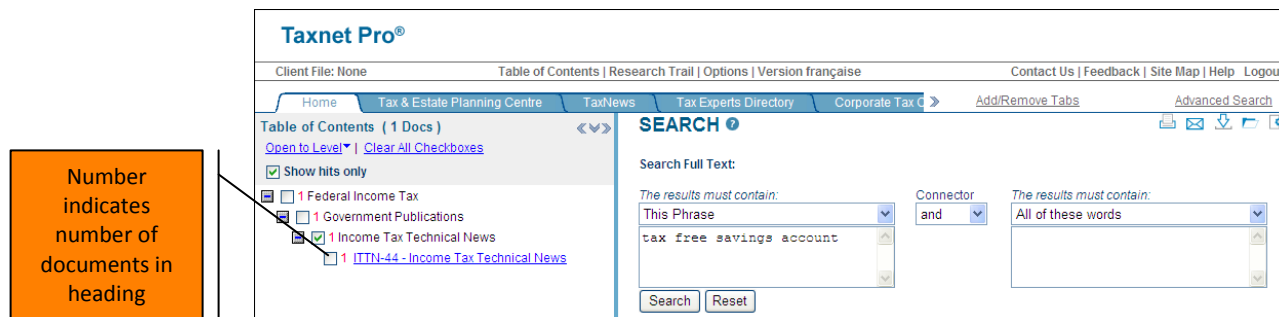


Figure 19

Select the document(s) to print, email or download by placing a checkmark in the checkbox beside each document link and click the **Print**, **Email** or **Download** icon located in the upper right corner of the right frame.

The screenshot shows the Taxnet Pro interface. On the left, a 'Table of Contents (1 Docs)' list includes '1 Federal Income Tax', '1 Government Publications', '1 Income Tax Technical News', and '1 ITTN-44 - Income Tax Technical News'. The checkbox for 'ITTN-44 - Income Tax Technical News' is checked. On the right, a 'SEARCH' panel is visible with a search input field containing 'tax free savings account' and a 'Search' button. In the top right corner of the search results area, there are icons for printing, emailing, and downloading. Two orange callout boxes are present: one on the left labeled 'Selected item' pointing to the checked checkbox, and one on the right labeled 'Print, email download icons' pointing to the action icons.

Figure 20

■ Topical Indexes

The Topical Indexes can be found in the Table of Contents in the Federal Income Tax or in the GST/HST sections. Sometimes a topic such as *butterfly reorganization* is not specifically referred to in legislation or other types of documents. The topical indexes give you an opportunity to search for a topic and find references to documents to begin your research.



These indexes are extremely useful when you are looking for key words/phrases, or do not know or remember the particular section of the legislation to begin your research.

WORKING WITH DOCUMENTS

■ Navigating your Search Results List

After running a search, the Result List appears providing a link, a document summary and approximate length (in pages) for each document.

The screenshot shows the Taxnet Pro search results interface. At the top, there are navigation tabs for 'Home', 'Tax & Estate Planning Centre', 'TaxNews', 'Tax Experts Directory', and 'Corporate Tax'. Below the tabs, there are search options like 'Modify Search', 'Search Within Results', 'New Search', and 'Save Search'. The search criteria section shows 'Areas of Interest: All' and 'Search Terms: "(registered retirement savings plan)" rrsp'. The total number of results found is 3881. A callout box labeled 'Hide all details' points to the 'Hide all details' link. Another callout box labeled 'Hide Details' points to the 'Hide Detail' button for the first document. A third callout box labeled 'Navigate through your hits' points to the page navigation arrows and numbers (1-10) at the top of the document list. The document list has columns for 'Num', 'Relevancy', and 'Description'. The first document is 'CRA Views. Tech Interp. 9822675 -- Registered retirement savings plan transfer of funds between spouses' registered retirement savings plans' with a summary and a 'Hide Detail' button. The second document is 'CRA Views. 9220225 -- Registered retirement savings plan -- excess contributions' with a summary and a 'Hide Detail' button. The third document is 'CRA Views. 9206875 -- Registered retirement savings plan' with a summary and a 'Hide Detail' button.

Figure 21

The first 20 documents that match your search criteria appear. To view the next 20 documents, click the navigational arrows or page numbers at the top or bottom of the list.

Note: You may change the Search Results display to show between 10 to 50 results from within Options.

Click **Hide Detail** to hide information for a particular document on your Result List. Click Hide all details in the upper left corner to hide information for all documents, thereby allowing you to maximize the number of documents you see on the screen. Click **Show Detail** to show the information for a particular document. Click Show all details to show the details of all the documents listed.

■ Navigating Your Hits

Once you have retrieved a document from your Result List, use the following options to help navigate through your documents.

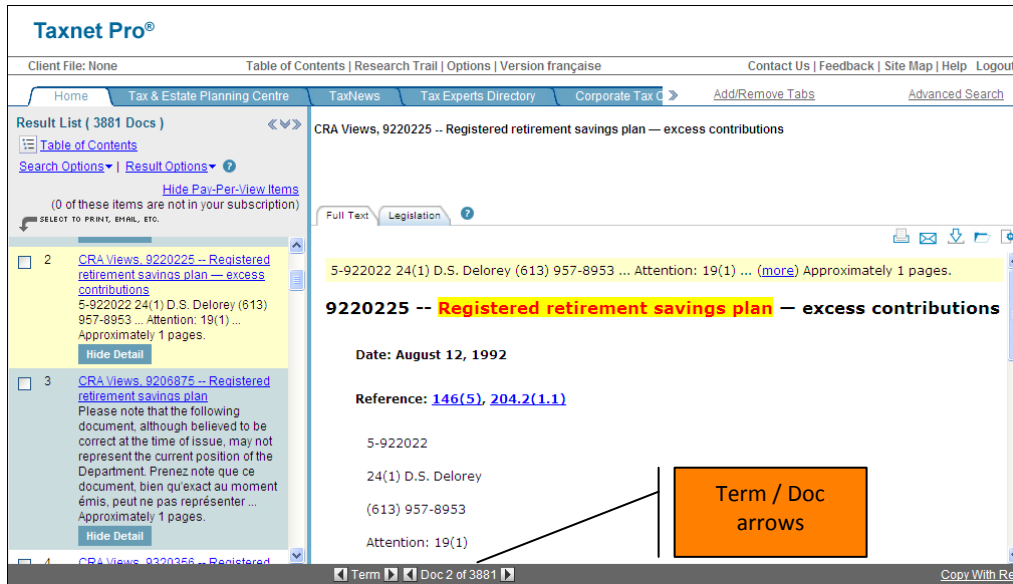


Figure 22

Next/Previous Search Term: Click the **Term** arrows at the bottom of the screen. Upon reaching the last instance of your search terms in a document, clicking right Term arrow retrieves the next document in your search result list.

Next/Previous Document in Search: Click the **Doc** arrows at the bottom of the screen to navigate from one document to another in your Result List. *Alternatively*, you can click the document link in the Result List on the left side.

■ Document Summaries

Most documents in the Taxnet Pro database have an associated summary which is displayed at the top of the document. This same summary is displayed on the search Result List. The summary allows you to quickly select which documents are the most relevant to your line of query.

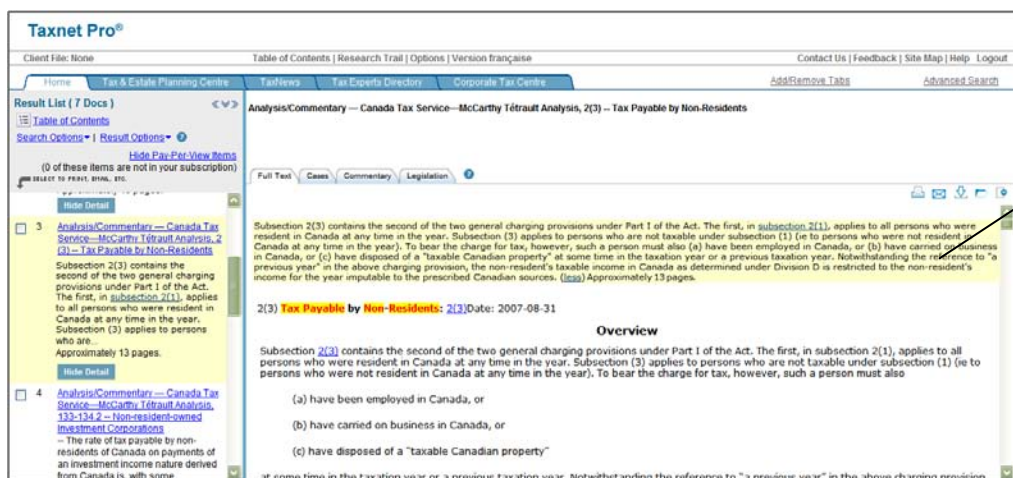


Figure 23

■ Search Results Options

On the full screen Result List, use the options located in the upper left corner to modify your search, search within results, create a new search, or save your search.

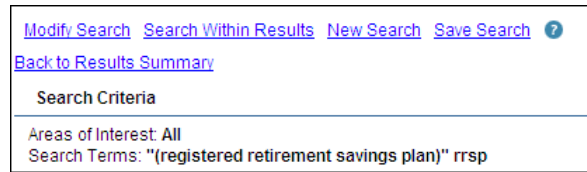


Figure 24

On the split screen Result List tab located in the left frame, use the *Search Options* drop-down list to modify your search, search within results, starts a new search, save your existing search or view your search summary. **Note:** There are no limits to the number of searches that can be saved. Saved searches will be sorted in reverse chronological order.

Use the *Result Options* drop-down list to view your Result List in full screen, hide or show all details or navigate to a specific document on the list.

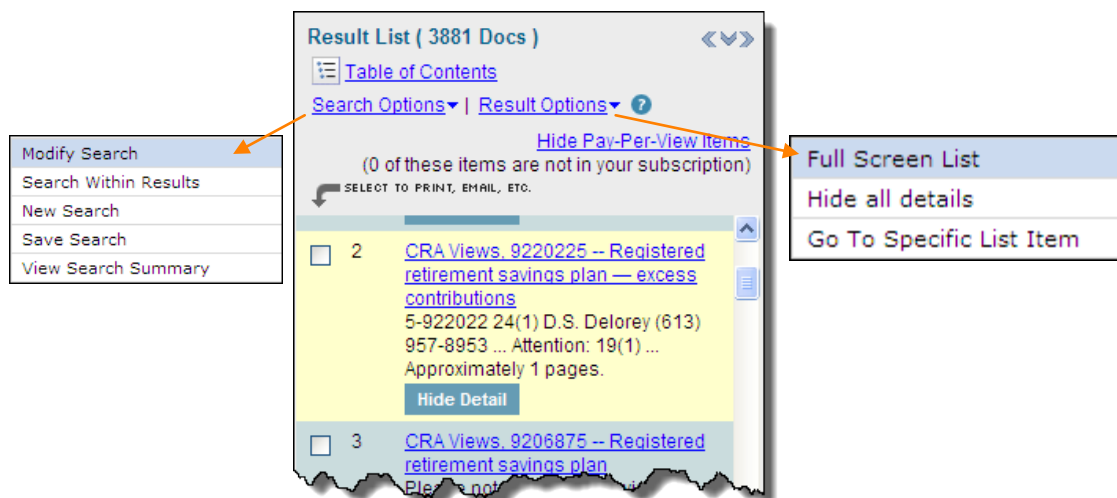


Figure 25

■ Document Delivery Options

Use the icons located at the top right corner to print, email, download, save to document folder or change delivery preferences.



Figure26

Copy with Reference

Copy with Reference allows you to copy or print a portion of text along with its reference information. It is useful when compiling documentation requiring references across multiple types of documents.

1. With a document in the right frame, highlight the relevant text you want to copy.
2. Click Copy with Ref located in the bottom right corner. The information is copied to your Windows clipboard. The Taxnet Pro Reference window appears displaying the text you selected along with the reference information immediately below it.
3. Click **Print** if you want to print the selection directly from this window; otherwise, click **Close** to close the window.
4. Switch to your word processing program (or email message, etc.) and paste the selected text and reference information into your document.

Save to the Document Folder

The Document Folder icon is located in the upper right corner of the Result List or document with the other print/email/download icons. There is no limit to the number of documents you can save to the Document Folder.

1. Click the **Save to Document Folder** icon. The Save Document Confirmation dialog box appears.
2. Click **Close** to return to your document or [click here](#) to go to your Document Folder. The Document Folder resides on the Taxnet Pro server.

Download a Document

1. Click the **Download** icon. The default document format is shown in the *Format* drop-down list. If this is not the format you want, select another format.
2. Select your options in the dialog box and click **Save**.
3. Click **Complete Download** to save or open the document or result list.
4. Once completed you are returned to your document or result list.

Email a Document

1. Click the **Email** icon.
2. Enter the full internet email address(es) into the field provided. Separate multiple email addresses with a semicolon.
3. Use the default Subject or enter your own.
4. Choose a format from the *Format* drop-down list, if the default is not the one you want.
5. Select your other options in the dialog box and click **Send**.
6. The file is emailed as an attachment in the format you selected and you are returned to your document or Result List.

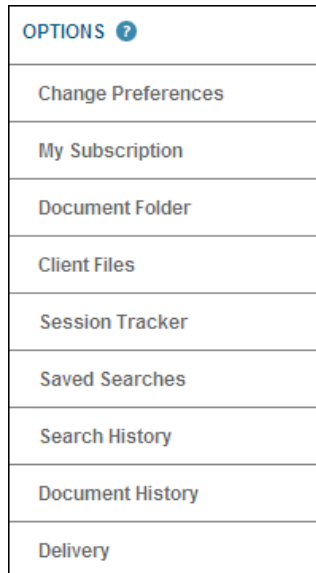
Printing your Results

1. Click the **Print** icon.
2. The default print format is shown in the *Format* drop-down list. If this is not the format you want, select another.
3. Select your options in the dialog box and click **Print**.
4. Your browser Print option appears. Click **Print**.

MANAGING YOUR RESEARCH

■ Setting up Your Options

Click **Options** on the Navigation bar at the top of the screen. *Alternatively*, these options are available in the Site Map.

A screenshot of a vertical menu titled "OPTIONS" with a question mark icon. The menu items are: Change Preferences, My Subscription, Document Folder, Client Files, Session Tracker, Saved Searches, Search History, Document History, and Delivery.

OPTIONS ?
Change Preferences
My Subscription
Document Folder
Client Files
Session Tracker
Saved Searches
Search History
Document History
Delivery

Figure 27

Change Preferences	A variety of default preferences may be set up here along with subscribing to Tax Hyperion and the TaxNews emails.
My Subscription	To view the name and associated databases that are included in available subscriptions.
Document Folder	Click this link to view, delete, print, email or download your saved documents.
Client Files	Set up client files to track your work in Taxnet Pro by client name/number.
Session Tracker-Rapport de Session	To run usage reports for cost recovery purposes click the link to <u>Go To Session Tracker</u> .

Saved Searches	Access all previously saved searches. Searches appear in reverse chronological order.
Search History	Use the search history to rerun previously executed searches. The last 20 searches are automatically saved by Taxnet Pro.
Document History	Use the document history to retrieve the last 20 documents you viewed.
Delivery	Use to change Document Delivery Preferences.

■ Scheduling a Saved Search Alert

You can automate your research and be notified when new documents are posted that match your search criteria. You can also save a search and run it manually whenever you wish. There is no limit to the number of searches you can save and run. Scheduled searches run for 90 days and appear in reverse chronological order.

After running a search, click [Save Search](#) located in the top left of the Result List or from the *Search Options* drop-down list on the Result List tab.

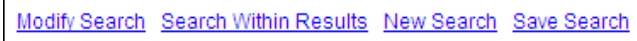


Figure 28

The Save Search page appears.

Save Search:

Search Name:

Query: "(registered retirement savings plan)" rrsp

Search Type: Basic Search

Databases: TNP-BASIC-SRCH

Saved searches are run automatically every night with notification of new results provided at the bottom of the Home page. Saved searches can also be run manually at any point from the Saved Searches page.

Notify of new search results by email at:

Figure 29

Enter a name into the field provided. Taxnet Pro automatically runs this search whenever an update to the databases is made and notifies you of new search results at login. You may also choose to be notified by email. Click **Save**.

■ Research Trail

Review your research history – searches conducted/documents viewed – for up to 90 days. You can download or email your trails to keep as part of your permanent record.

- Click **Research Trail** on the top Navigation bar to see the current research events.
- Click a link to reactivate a search or document, download or email the trail.
- Click [List of All Research Trails](#) to view trails from the previous 90 days.
- Click any Research Trail date/time link to open the list of research events for that session. You may also rename, delete, reset or add a note to any trail.
- Click [New Research Trail](#) to change client id and enter new trail name.

■ Client Files

Use Client Files feature to track your research to a specific client file. To access Client Files, click **Options** located on the Navigation bar at the top of the screen and then click **Client Files** in the left side.

- Select a client file by clicking the radio button next to the file name.
- To add a new client file, complete the Client File and Description fields and click [Add to Client Files](#).
- You may edit a description, delete a file that's no longer necessary or run a report to view the Research Trail for a particular client.

■ Session Tracker-Rapport de Session

Session Tracker-Rapport de Session allows designated users to run usage reports for cost recovery purposes. To access Session Tracker-Rapport de Session, click **Option** on the top Navigation bar and then click **Session Tracker** on the left side. Click [Go To Session Tracker](#) to access this application.

■ My Subscription

My Subscription displays the actual subscription name. This will give you a picture of the exact content that is contained in your subscription.

TAX EXPERTS DIRECTORY

The Tax Experts Directory is a listing of all Taxnet Pro authors/contributors. Organized alphabetically, this directory provides links to a specific author's biography along with links to selected works available on Taxnet Pro.

The screenshot shows the Taxnet Pro website interface. At the top, there's a navigation bar with 'Taxnet Pro®' and various links like 'Table of Contents', 'Research Trail', etc. Below that, the 'Tax Experts Directory' is displayed, organized by letter. An orange callout box highlights the link 'Ideas, Paula' under the letter 'I'.

Figure 30

The screenshot shows the profile page for Vern Krishna. It includes a portrait photo, his name in all caps, a detailed biography, contact information, and a list of selected works available on Taxnet Pro.

Tax Experts Profile

VERN KRISHNA

Vern Krishna, CM, QC, LL.D, FRSC, FCGA, Tax Counsel, has been a professor in the Faculty of Law at the University of Ottawa since 1981. He is a national expert in the area of tax and has published extensively in the area. He is the Executive Director of the Tax Research Centre at the University of Ottawa. Professor Krishna served a two-year term as Treasurer of The Law Society of Upper Canada from 2001 to 2003. He is also currently Tax Counsel to Borden Ladner Gervais LLP. His practice areas include international tax, wealth management, tax litigation and personal tax planning.

SELECTED WORKS AVAILABLE ON TAXNETPRO

- Fundamentals of Canadian Income Tax
- [Taxpayers require Bill of Rights](#)
- [Helping poor countries by sparing taxes](#)

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Practice Area(s)

- Tax Litigation
- International Treaties
- Wealth Management

Figure 31

TAX & ESTATE PLANNING CENTRE

See the *Tax & Estate Planning Centre Quick Reference Card* for detailed information. You may retrieve the card by clicking **Help** in the upper right corner of the screen.

The screenshot shows the Taxnet Pro website interface. At the top, there is a navigation bar with "Client File: John Smith", "Table of Contents | Research Trail | Options | Version française", and "Contact Us | Feedback | Site Map | Help | Logout". Below this is a secondary navigation bar with "Tax & Estate Planning Centre" (selected), "TaxNews", "Tax Experts Directory", "Corporate Tax Centre", "Add/Remove Tabs", and "Advanced Search". A search bar contains "All Tax & Estate Planning Documents" and a "Go" button. The main content area is divided into sections: "Featured Content", "Related Links", "Learn It", "Recent Enhancements", and "Tax & Estate Planning Centre Search Template". The "HIGHLIGHTS" section features a link to "Tax Planner Guide 10 - What a Tax Planner Needs to Know about the Principal Residence Exemption (updated July 2011)". Below this is a "What's New" section with a link to "Soberman LLP Benefits of naming a successor annuitant for your RRIF". The "Spotlight on Arthur B. C. Drache" section includes a photo of Arthur B. C. Drache and a biographical text.

Figure 32

CORPORATE TAX CENTRE

See the *Corporate Tax Centre Quick Reference Card* for detailed information. You may retrieve the card by clicking **Help** in the upper right corner of the screen.

The screenshot shows the Taxnet Pro website interface for the Corporate Tax Centre. The navigation bar at the top includes "Client File: John Smith", "Table of Contents | Research Trail | Options | Version française", and "Contact Us | Feedback | Site Map | Help | Logout". The secondary navigation bar shows "Home", "Tax & Estate Planning Centre", "TaxNews", "Tax Experts Directory", "Corporate Tax C" (selected), "Add/Remove Tabs", and "Advanced Search". The search bar contains "All Corporate Tax Centre" and a "Go" button. The main content area includes "Featured Content", "Related Links", "Learn It", "Recent Enhancements", and "Corporate Tax Centre Search Template". The "Highlights" section features a link to "From the Foreign Desk - Australia: A report from Carswell, a Thomson Reuters Business". Below this is an "In The News" section with a link to "Vern Krishna, in this in-depth and extensive 98-page report from the Rome 2010 International Fiscal Conference". The "EVENTS CALENDAR" section includes links to "CICA Advanced Tax Issues for the Owner-managed Business Tax Course", "Fundamentals of Canadian Mining Taxation", "Taxation of Inbound Investment", "Tax Planning for the Wealthy Family", and "Tax Essentials for Business Transactions". The "IN THE KNOW" section includes links to "Ogilvy Renault Merges with Norton Rose Group", "Deloitte Ranked a Tier 1 Tax Firm in Canada", "Lang Michener and McMillan LLP Combine to Create New Canadian Firm", and "Wendy Brousseau Joins McCarthy Tetrault's Tax Practice".

Figure 33