

Taxnet Pro®
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CUSTOMER LEARNING & SUPPORT TEAMS

For technical or reference support or to inquire about training, contact Carswell at:

Toll-Free: 1.800.387.5164 / In Toronto: 416.609.3800

v2.taxnetpro.com



01 How do I set up my OnePass account and log in/out of Taxnet Pro?

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

To set up an OnePass account, select Register/Edit Username and Password located below the Login section and then follow the instructions that appear.

Important note: If you subscribe to other Carswell products (i.e. Westlaw Canada, Reporting System v2, or Session Tracker-Rapport de Session) and have already registered an OnePass Account, use the Update section to update the account and add your Taxnet Pro registration key to that account. However, if you currently do not have an OnePass Account, you **must** create one in order to log in to Taxnet Pro.

To log in to Taxnet Pro:

1. Using a web browser access: v2.taxnetpro.com.
2. Enter your OnePass username and password into the fields provided and select **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.)

To log out of Taxnet Pro, select **Logout** located on any page.

02 Coverage, frequency and what's in my subscription

The TaxNews database is updated throughout the day and can be accessed from the News or Table of Contents tabs. Check the Featured Content page available from the Help drop-down list for selected information on newly created productivity tools and content.

To view the name and associated databases that are included with available subscriptions, check the My Subscription page accessible from Options menu.

03 Taxnet Pro Home Page

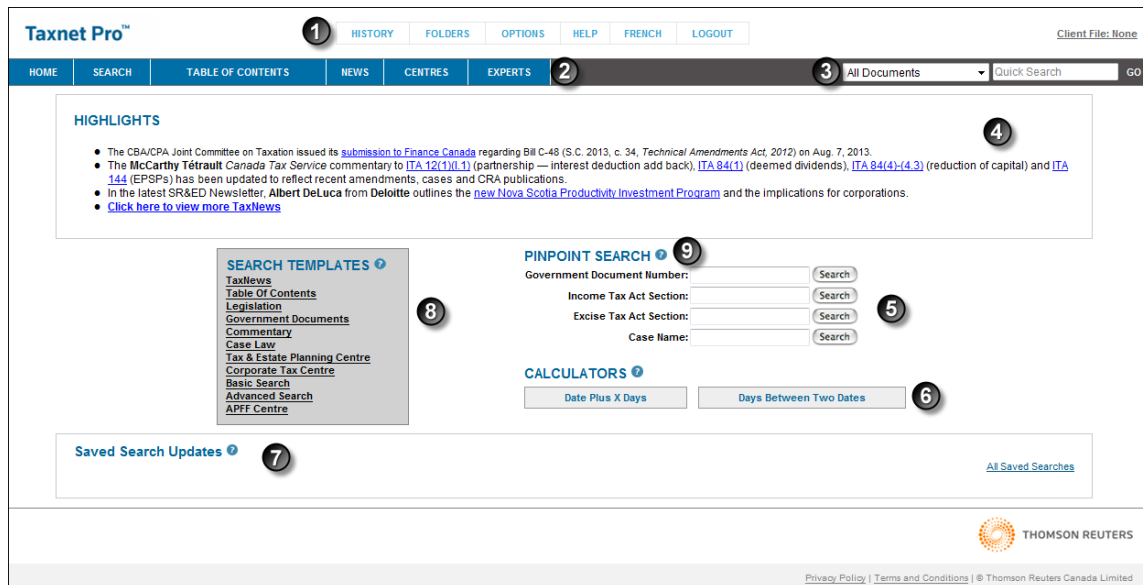



Figure 1: Taxnet Pro Home page

1	Toolbar	Access your research History, documents saved to your Folders, and various preferences set in Options. You can also access online help, switch to the French interface and logout of the service.
2	Menu Bar	Access the Taxnet Pro home page, search templates, Table of Contents, and TaxNews. Retrieve the Corporate Tax Centre and Estates & Tax Planning home page or search for an expert.
3	Quick Search	Use Quick Search to search the entire Taxnet Pro library or select specific content from the drop-down list.
4	Highlights	Provides information on important developments in tax. Select a link to retrieve the document.
5	Pinpoint Search	Search for a specific government document, section of the Income Tax 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 and access all saved searches.
8	Search Templates	Retrieve a customized search template.
9	Specialized Help 	Select the Help icon located throughout Taxnet Pro to obtain specialized Help.

04 Table of Contents

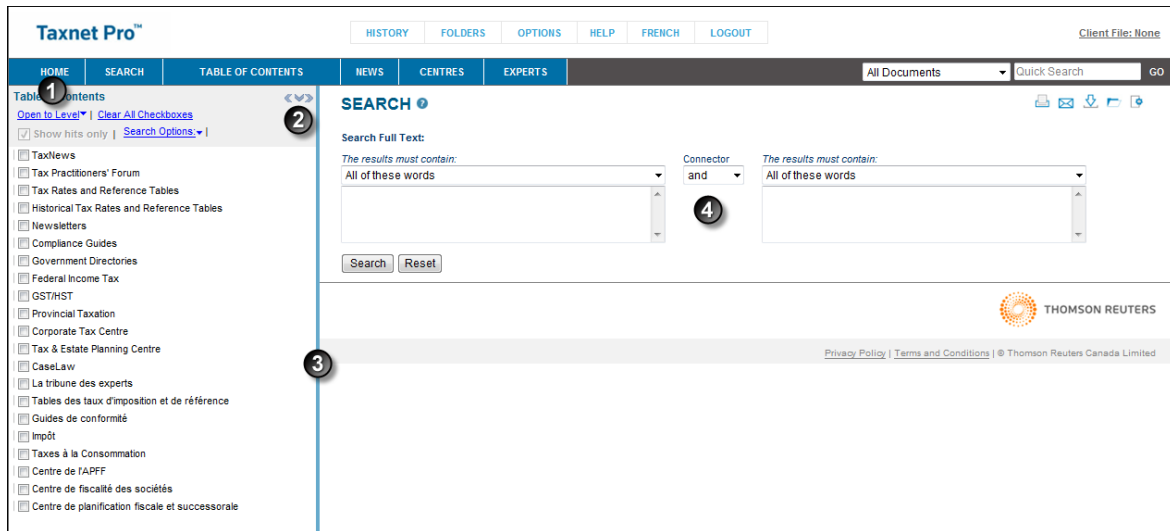


Figure 2: Table of Contents

1	Open to Level	Expand the Table of Contents headings three levels deep.
2	Expand/collapse/reset directory frame	Expand the entire left frame to view the Table of Contents directory in full screen view. Collapse the left frame or rest it to split-screen view.
3	Resize directory frame	Select and drag the border to resize the directory frame.
4	Search template	Enter search terms here to search all or selected content in the Table of Contents.

05 How do I keep current with 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 area of interest.

Set up your Preferences

To set up your preferences, select **Preferences** from Options located on any page.

- A. For the TaxNews Summary Table (Recently Posted Documents) on the TaxNews page:
- B. Select Uncheck All in the TaxNews section and then select the areas you want to track. Select **Save Changes**.

For the email notification:

1. Select the email notification option you want (e.g. as posted, daily or weekly) in the TaxNews Email Notification section.
2. Select the areas you want to track and select **Save Changes**.

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

For your preferences to be saved you **must** enter in a valid email address. If you do not wish to receive the email notification, go to the TaxNews Email Notification section and select **Do not send me any TaxNews documents**.

Browse TaxNews Documents

There are two effective ways to access TaxNews. It can be done through the News or through the Table of Contents tabs.

News

Use the Recently Posted Documents table to browse the TaxNews database by your area of interest, as set up in your TaxNews Summary Table preferences above.

1. Select **TaxNews page** from the News menu.
2. Select a link in the Recently Posted Documents table to view documents posted to that area of interest today or in the last 60 days.

To browse all documents posted to a specific category within the last 60 days:

1. Select the category from the News menu. *Alternatively*, select the **All TaxNew for...** drop-down arrow located above the Recently Posted Documents table, select a category and select **Go**.
2. The Result List appears displaying all documents in reverse chronological order.
3. Select a link to retrieve the document.

Table of Contents

TaxNews is organized by area of interest and then further broken down by document type such as Finance Comfort Letters, Income Tax Forms or Information Circulars.

Search TaxNews Documents

Quick Search: Used to perform a simple search using one or two search terms.

1. Search all documents or a content-type you want from the drop-down list.
2. Enter your search terms into the **for** field and select **Go**.


TaxNews Search Template: Used to perform more complex searches using multiple search terms, and/or restricting the search to specific content or various document types.

1. Select **TaxNews** from the Search menu (or from the Search Templates section of the Home page).
2. Enter your search terms into the Search box(es) and select an option from **The results must contain** drop-down list.
3. Select the order in which you'd like to see your 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 content-type by using the checkboxes provided and/or enter information into the pre-defined fields and select **Search**.

06 How do I retrieve a statutory provision of the Income Tax Act or Excise Tax Act by its number?

1. Enter the section number into the Income Tax Act Section or Excise Tax Act Section field in the Pinpoint Search section of the Home page.
2. Select **Search**.

07 How do I retrieve a government document by its unique number?

There are a number of government documents you can retrieve through the Pinpoint Search section of the Home page. For a complete listing and tips on how to enter the unique number, select the Help icon .

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

For all documents:

1. Select **Government Documents** from the Search menu (or from the Search Templates section of the Home page).
2. Enter the unique government document number into the Document Number field and select **Search**. **Note:** This field is not case sensitive.

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

08 How do I find a case citing a specific statutory provision?

1. Select **Legislation** from the Search menu (or from the Search Templates section of the Home page).
2. Select the act you want by using the checkbox.
3. Enter the section number into the Section Number field and select **Search**.
4. Select the document you want from the Result List and then select the **Cases** tab. The cases that cite your statutory provision appear and are grouped by the treatment the provision received.
5. Select the document number link to retrieve the full text.

09 How do I browse the Taxnet Pro table of contents?

1. Select **Table of Contents** menu.
2. Select the + button to expand a heading in the directory. Continue expanding headings until you reach a document indicated by a blue link. *Alternatively*, use the **Open to Level** drop-down list to expand the portions of the Table of Contents down three levels.
3. Select the document link to retrieve the full text.

10 How do I find a tax table?

1. Select the **Table of Contents** menu.
2. Select the + button for the Tax Rates and Reference Tables heading in the directory.
3. Select the type of table you want to retrieve (Individual, Corporate, General or International).
4. Select the document link to retrieve the full text.

Note: There are specialized productivity tools located in the *Corporate Tax Centre* and the *Tax & Estate Planning Centre* for tax practitioners who practice in these areas. The Tools and Solutions sections are updated monthly or as important developments occur.

11 How do I search all documents at one time?

Quick Search: Used to perform a simple search using one or two search terms. You can search all or select content-types.

1. Select an option from the **Search** drop-down list.
2. Enter your search terms into the **for** field and select **Go**.

Advanced Search: Used to perform more complex searches using multiple search terms, and/or restricting the search to specific content or various document types.

1. Select **Advanced Search** from the Search menu (or Search Templates section on the Home page).
2. Enter your search terms into the search box(es) and select an option from **The results must contain** drop-down list.
3. Select the order in which you would like your results to appear.
4. Restrict your search to specific content-type(s) by using the checkboxes provided and then select **Search**.

12 What connectors can I use to structure my search?

In lieu of using *The results must contain* options on the search templates you can structure your search using a number of Boolean connectors. **Note:** Keep your search simple. Search on the main issue only and then refine your search by using [Search Within Results](#).

Use	To retrieve documents containing:
a space (or)	any or all terms. <i>This is the default connector.</i> Example: cca “capital cost allowance”
& (and)	all search terms. Example: child & expenses
/n	search terms within <i>n</i> terms of each other (where <i>n</i> is a number). Example: issue /3 fact
+n	the first search term preceding the second by <i>n</i> terms (where <i>n</i> is a number) Example: death +3 taxpayer
“ ”	terms in this same order. Example: “transfer pricing”

Use	To exclude documents containing
% (but not)	search terms following the percent symbol. Example: tax % income

Use these special characters to retrieve variations of your search terms:

Character	Type	To retrieve
Root Expander (!)	depreciat!	depreciate depreciated depreciation
Universal Character (*) (each * represents one character only)	licen*e	licence license

Order of Processing

Connectors are processed in the following order: “phrase”, or (space), +n, /n, &, %

Parentheses can be used to change the order of the search.

13 How do I modify or refine my search?

To modify your search by running a new search, select [Modify Search](#). To refine your original search, select [Search Within Result](#).

These options are available from the Full screen Result List or from the [Search Options](#) drop-down list when viewing a document.

14 How can I track my research?

A Research Trail history is automatically created when you sign on to Taxnet Pro and is saved when you end your research session. The trail displays all searches conducted and documents viewed. They are available for 90 days after they are saved and can be saved for additional days by selecting [Reset](#). You may download or email any trail.

- To access your Research Trail history, select **History** and then [View Research Trail](#) from the Toolbar.
- You may access previous trails by selecting [List of All Research Trails](#) from the current Research Trail.

15 How do I print, email, download or save on Taxnet Pro?

Select an icon located on the result list or document page and then follow the instructions that appear.




Figure 3: Document Delivery icons

To print or copy a selection of text with its reference information:

1. Highlight the portion of text you want to print and then select Copy With Ref. A copy of the text is placed in your clipboard.
2. Select **Continue** if you wish to add another selection; otherwise select **Print** or simply paste the selection(s) into your document.

16 Where can I find help?

- **Online Help:** Select **View Help Contents** from the Help option located on the Toolbar to access the Help pages. To see the complete list of all Help items, select **Taxnet Pro** from within the Help Table of Contents window. Additionally, you can select the question mark icon , where available, to retrieve help information related to that specific function.
- **Learn It:** Select **Learn It** from the Help option to access a number of instructional online tutorials.
- **Quick Reference Cards:** Access these cards from the Learn it page.
- **Technical and Reference Support:** Contact the Carswell Technical and Reference Support teams for assistance using Taxnet Pro. Support is included with your subscription. Call 416.609.3800 or 1.800.387.5164
 - **Technical Support:** Weekdays from 6:30am to 11:00pm ET, Saturday/Sunday 7:30am – 8:00pm ET, Email: carswell.techsupport@thomsonreuters.com
 - **Reference Support:** Weekdays from 8:30 am to 9:00pm ET, Email: carswell.reference@thomsonreuters.com

We are closed on statutory holidays.