

Taxnet Pro™

Tax Disputes & Resolution Centre

The Tax Disputes & Resolution Centre on Taxnet Pro brings much needed clarity and efficiency to the tax disputes to allow you to prevent and resolve issues for your clients. In-depth commentary and guidance on specific aspects of disputes issues are provided through numerous Practical Insights along with articles and checklists. This material along with relevant legislation and government documents is intuitively divided and consolidated by topic allowing for the quick location of relevant information and answers.

How do I set up my OnePass account and Sign In/Out of Taxnet Pro?

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

To set up a OnePass account, select **Create a new OnePass Profile** located below the Sign In section and then follow the instructions that appear.

Important note: If you subscribe to other Thomson Reuters products and have already registered a OnePass Account, go to the Manage Products section and add your Taxnet Pro registration key to that account. However, if you currently do not have a OnePass Account, you must create one in order to sign in to Taxnet Pro.

To sign in to Taxnet Pro:

1. Using a web browser go to: www.taxnetpro.com.
2. Enter your OnePass Username and Password into the fields provided and select **Sign In**.
3. Select **Save my Username** or **Save my Username and Password** to save your OnePass sign in credentials on your computer. (This is optional but highly recommended.)

To log out of Taxnet Pro, select **Logout** located on the Toolbar.

Accessing the Tax Disputes & Resolution Centre

To access the Tax Disputes & Resolution Centre page:

1. Select **Centres** from the Menu bar.

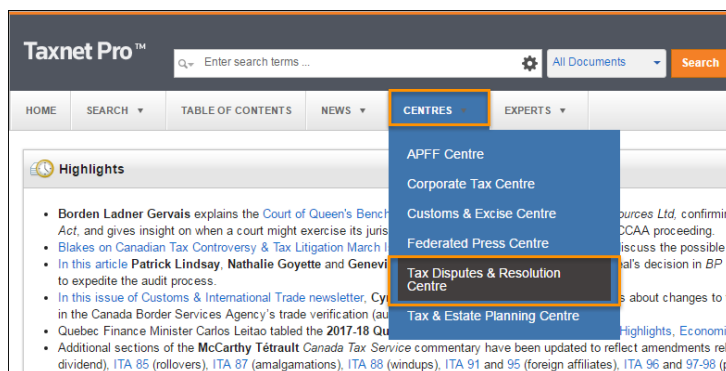


Figure 1: Centres drop-down showing Tax Disputes & Resolution Centre option

2. Select **Tax Disputes & Resolution Centre** to use sources and search tools specific to this area of research.

Navigating the Tax Disputes & Resolution Centre

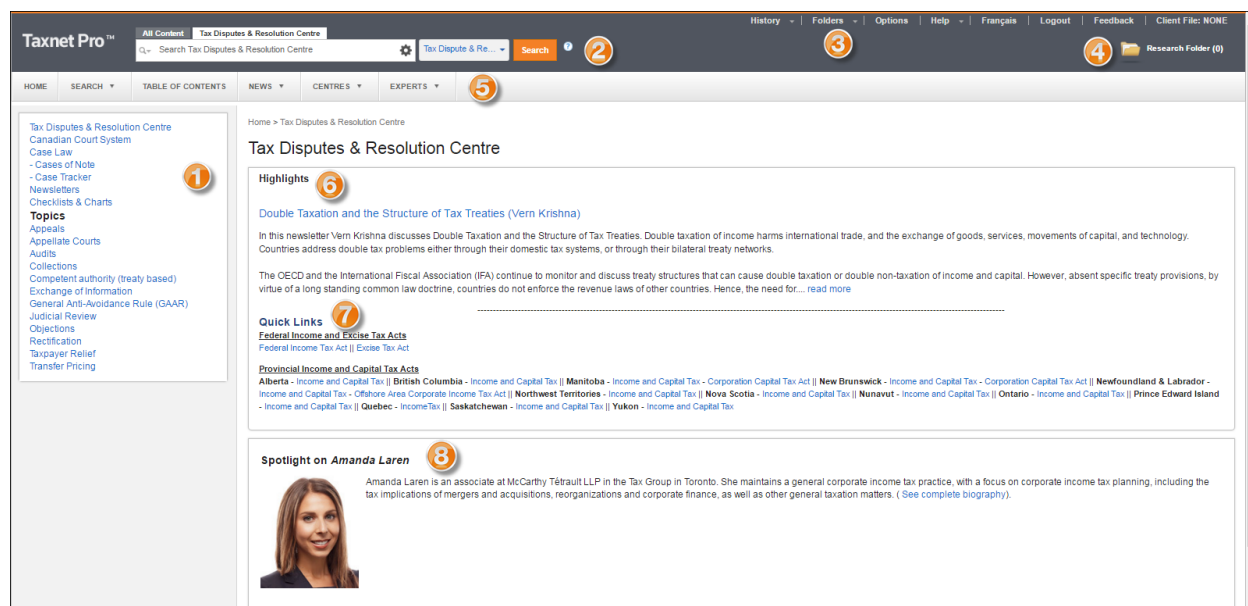


Figure 2: Tax Disputes & Resolution Centre start page

- 1 **Centre Navigation** Select a link in the left panel to directly access a topic or document type.
- 2 **Quick Search** Enter your terms into this search box to search the entire Tax Disputes & Resolution Centre or selected content by using the Tax Disputes & Resolution Centre drop-down list.
- 3 **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.
- 4 **Active Folder** Access your Active Folder.
- 5 **Menu bar** Access the Taxnet Pro home page, search templates, Table of Contents, and TaxNews. Retrieve the landing page for each Centre or search for an expert.
- 6 **Highlights** Find editorially selected alerts to the latest news and important developments in tax disputes and resolution. Headlines and summaries are generally provided for each news article. The headline is a link to the full document or article.
- 7 **Quick Links** Quick Links provides often referred to items such as Federal and Provincial Tax Acts.
- 8 **Spotlight** Read about an author who has written for our newsletter or commentary area with full biographical and contact information.

Canadian Court System

Select the **Canadian Court System** link in the Navigation Centre to retrieve rules for Tax Court of Canada.

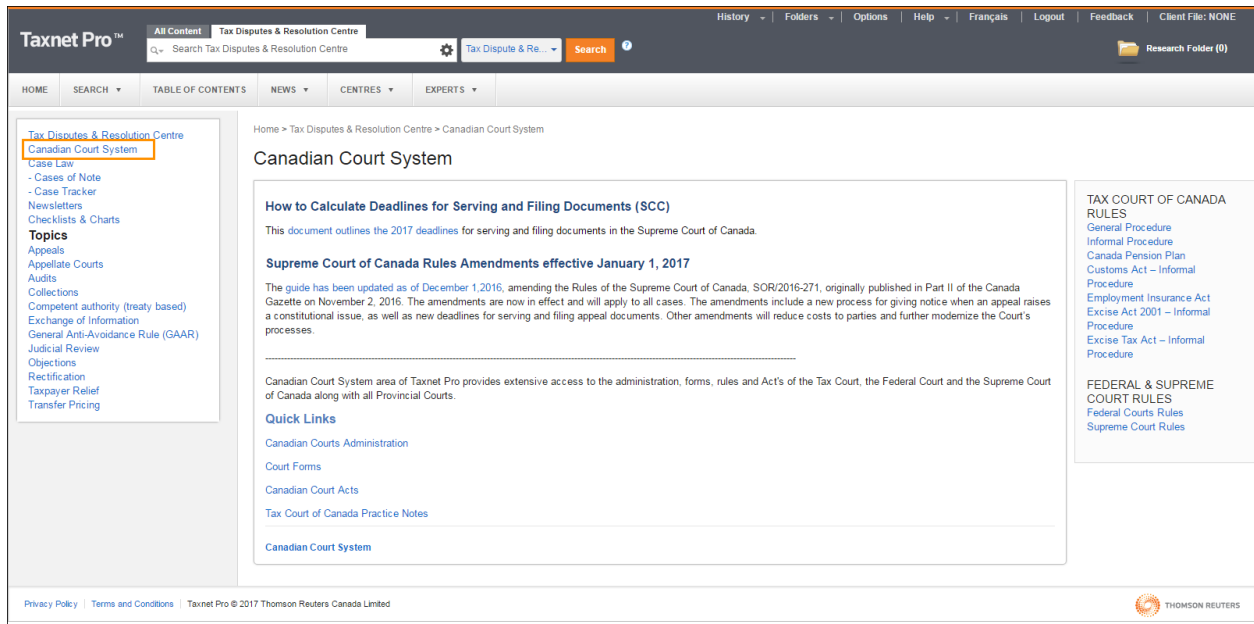


Figure 3: Canadian Court System

Use the links on the right side of the page to navigate the Tax Court of Canada Rules.

Topics

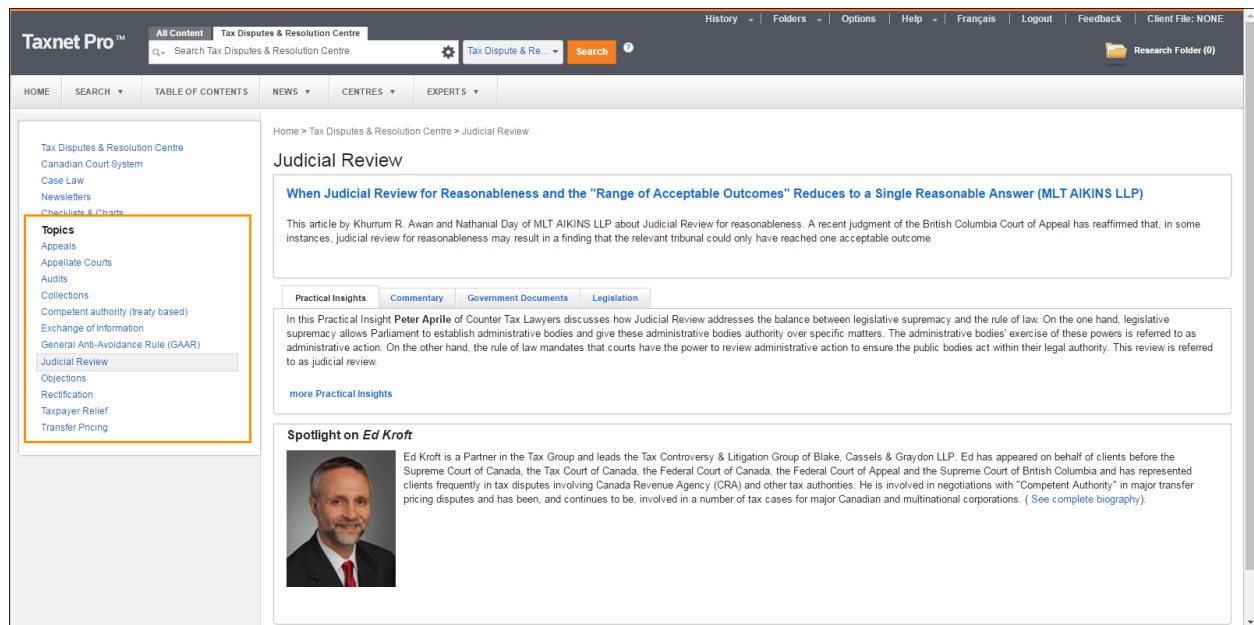


Figure 4: Sample Topics page – Judicial Review

All topics are laid out in a similar manner.

Four areas for per topic: Practical Insights (a pivotal aspect of the centre – 30-100 pgs in length – written on specific areas, by experts within the industry – guidance/tips/traps/helpful hints/best practices), Commentary, Government Documents and Legislation.

Spotlight: Helps you find the experts within that tax area. See their complete biography and contact information.

How do I stay current on specific areas of tax disputes and resolution?

TaxNews: All important Tax Disputes news is available and updated throughout the day. You can quickly and easily stay informed which saves them time through the focused news.

Select the **News** menu located at the top of any page to access the Tax Disputes & Resolution Centre TaxNews page.

Case Tracker: Tracks disputes cases of value before they have been heard in court. It is a source of business intelligence to know who is litigating on what. This also allows you to access the history of a case that has already been heard in the Tax Court of Canada; the link provides you direct access to specific case details on the Tax Court of Canada site.

Select **Case Law** from the Navigation Centre to access the Case Tracker.

Cases under Appeal: These are cases which are now before the court system and have been appealed. When a case has reached the Appeal stage it is more likely to be more important and therefore worthy of note. Cases under Appeal allows you to quickly locate all the cases which have reached this stage.

Select **Case Law** from the Navigation Centre to access Cases under Appeal.

Cases of Note: These are precedent setting cases identified by leading tax advisors organized by high level topic and can be filtered by topic, counsel, court and case and much more. These cases are of high value for any Tax Advisor defending a position.

Select **Case Law** from the Navigation Centre to access Cases of Note.

Newsletters: These are created to continue to help you stay on top of trends and be informed of important changes. New legislation and new cases are always occurring and it would take a great deal of time to follow everything. Newsletters identify for you what you need to know.

Select **Newsletters** from the Navigation Centre to retrieve this page.

How do I prepare written and oral advocacy with confidence?

Practical Insights: These large, in-depth and up-to-date documents on areas within tax disputes provide unparalleled guidance and tips on how to proceed and what to look out for. This will enable you to effectively prepare an advocacy for your client. (E.g.: Employee or Independent Contractor, Audits, Objections/Preparing & Filing Notices of Objection), Advising Canadian resident US citizens before the IRS, GAAR, Confidentiality of Taxpayer Information, Books & Records, Voluntary Disclosure, Legal Privilege).

Select the topic from the Navigation Centre and then select the Practical Insights tab.

Case Tracker: Tracks disputes cases of value before they have been heard in court. It is a source of business intelligence to know who is litigating on what. This also allows you to access the history of a case that has already been heard in the Tax Court of Canada; the link provides you direct access to specific case details on the Tax Court of Canada site.

Select **Case Law** from the Navigation Centre to access the Case Tracker.

Cases under Appeal: These are cases which are now before the court system and have been appealed. When a case has reached the Appeal stage it is more likely to be more important and therefore worthy of note. Cases under Appeal allows you to quickly locate all the cases which have reached this stage.

Select **Case Law** from the Navigation Centre to access Cases under Appeal.

Cases of Note: These are precedent setting cases identified by leading tax advisors organized by high level topic and can be filtered by topic, counsel, court and case and much more. These cases are of high value for any Tax Advisor defending a position.

Select **Case Law** from the Navigation Centre to access Cases of Note.

How do I successfully prepare, respond and defend positions taken?

Practical Insights: These large, in-depth and up-to-date documents on areas within tax disputes provide unparalleled guidance and tips on how to proceed and what to look out for. This will enable you to effectively prepare an advocacy for your client. (E.g.: Employee or Independent Contractor, Audits, Objections/Preparing & Filing Notices of Objection), Advising Canadian resident US citizens before the IRS, GAAR, Confidentiality of Taxpayer Information, Books & Records, Voluntary Disclosure, Legal Privilege).

Select the topic from the Navigation Centre and then select the Practical Insights tab.


Cases of Note: These are precedent setting cases identified by leading tax advisors organized by high level topic and can be filtered by topic, counsel, court and case and much more. These cases are of high value for any Tax Advisor defending a position.

Select **Case Law** from the Navigation Centre to access Cases of Note.

Articles: Important articles have been gathered and identified by topic. This not only saves time but also provide further guidance by topic on how to proceed. These can be found within the commentary area of each topic. More general articles on tax disputes can also be found at the top of the Tax Disputes and Resolution Centre area within the Table of Contents.

How do I search the Tax Disputes & Resolution content?

Quick Search:

1. Enter your Boolean query into the Quick Search box at the top of the page. *Alternatively*, select the Query Builder icon () which can help you build a more intricate Boolean query.

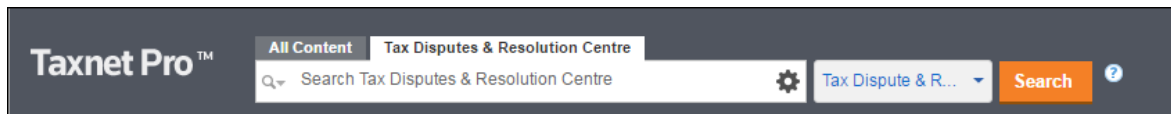


Figure 5: Quick Search box

2. Select **Search**.

TIP: To restrict your search to a specific content type (case law, commentary, government documents, and legislation) select it from the Tax Disputes & Resolution Centre drop-down list.

More complex search:

1. Select **Search** from the Main menu and then select **Tax Disputes & Resolution Centre**.
2. Enter your search terms into the fields provided and select the order in which you would like to retrieve your results.
3. Limit your search by selecting specific practice area(s) and/or enter terms into the search fields provided.
4. Select **Search**.

How do I navigate my results list?

The screenshot shows the Taxnet Pro search results page for the term 'rectification'. The page displays 812 results. The first result is 'Fraser Valley Refrigeration, Re, 2009 CarswellBC 1678, 2009 BCSC 848, [2009] 6 C.T.C. 73 (British Columbia Supreme Court)'. The page includes navigation tools like 'Sort by: Relevance', '1-50', and various filters on the left side.

Figure 6: Results list

-
- 1 **Next/Previous Page** Navigate to your results list pages.
 - 2 **Sort by** Re-sort your results list. (Relevance, Table of Contents or Reverse Chronological).
 - 3 **Show All Documents** Switch between displaying all documents or only those that are included in your subscription.
 - 4 **Save Searches** Save this search to auto-run again.
 - 5 **View Detail** Select from three levels of document details to display.
 - 6 **Save to Folder** Save documents to the Taxnet Pro folder.
 - 7 **Delivery Method** Print, email or download documents. The default option is the option last chosen.
 - 8 **Document Icons** Eyeglasses indicate document was viewed within the last 30 days for this client ID. Folder icon indicated document was saved to a folder.
 - 9 **Document Title** Purple title indicates the document was viewed within the last 24 hours. Select the title to retrieve the full text. Select the document checkbox to print, email, and download or to save multiple documents to the folder at one time.
 - 10 **Narrow section** Select from a number of customized filters to narrow your search.
 - 11 **View section** Select a content type to view.

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

Select the Delivery Method drop-down arrow located on the results list or on the document page and then choose your option. Follow the instructions that appear. **Note:** The last option you selected becomes your default delivery method.

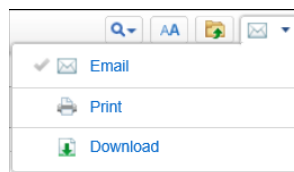


Figure 7: Delivery Method

How do I access documents in a book format?

1. Select the **Table of Contents** tab from the Menu bar.
2. Select the arrow next to the **Tax Disputes & Resolution Centre** heading and subsequent headings to find the document you want.

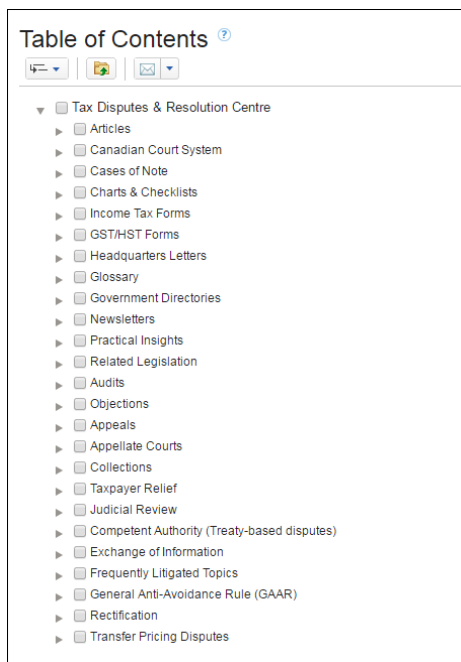



Figure 8: Table of Contents with Tax Disputes & Resolution Centre heading expanded

3. Select the document link to retrieve the full text.

Folders

Taxnet Pro helps you organize and manage your research by storing your documents and snippets of text into folders.

Saving to a Folder

To save the document you are viewing into a folder, select the **Save to Folder** icon () on the document toolbar. Select the folder in which you want to save the document and select **Save**. You may drag and drop items into your Active folder at any time.

To save documents from a result list, select the checkboxes next to the documents you want to save and select the **Save to Folder** icon. Select the folder where you want to save the documents and select **Save**.

To save selected text into your active folder, highlight the text you want to save and choose *Save to...* from the pop-up menu.


To view documents and snippets of text you have saved into your active folder, select your active folder. To view documents/snippets saved into another folder, select **Folders** at the top of any page and then select the name of the folder containing the documents.

Changing and Creating New Folders

To create a new folder, do one of the following:

- Select **Folders** at the top of any page. The Folders page is displayed. Select **New**. The New Folder dialog box is displayed. Enter the name of the folder into the *Folder Name* text box, select a location for the new folder, and select **OK**.
- While viewing a document or a results list, select the **Save to Folder** icon, and then select **New Folder**. Enter the name of the folder into the *Folder Name* text box, select a location for the folder, and select **OK**.

The active folder is the folder that is displayed on the right side of the Toolbar.

To change the active folder, select the active folder and then select the **Change Folder** icon (). The Change Folder dialog box is displayed. Select the folder you want and then select **OK**.

To learn more about folders, please review the tutorials located in the [Customer Learning Centre](http://www.carswell.com/learning/taxnetpro/folders) (www.carswell.com/learning/taxnetpro/folders).

How can I track my research?

A research 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 retained for one year after they are saved. You may print, email or download any trail.

Access your most recently viewed documents and searches by pointing to the History link at the top of any page **OR** select the link to retrieve your complete history from the past 12 months.

Where can I find help?

- **Product Support:** Included with your subscription.
 - Call: 1-800-387-5164 or 416-609-3800 (Toronto).
 - **Technical:**
 - Email: TechSupport.LegalTaxCanada@tr.com
 - Weekdays: 7:00 am – 9:00 pm (ET)
 - Weekends and Ontario holidays: 7:30 am – 8:00 pm (ET)
 - **Research:**
 - Email: ResearchSupport.LegalTaxCanada@tr.com
 - Weekdays: 8:30 am – 9:00 pm (ET)
 - **OnePass and Log in Issues:** 24/7
- Select the **Learn it** option from the **Help** link located at the top of any Taxnet Pro page to access Quick Reference Cards and video tutorials or select **Contact Us** for information on how to contact our Product Support team. *Alternatively*, visit the [Customer Learning Centre](http://learning.thomsonreuters.ca) (learning.thomsonreuters.ca) to access these same resources as well as sign up for a live public webinar facilitated by a Certified Professional Learning Consultant.