

From here you can use one or more of these search criteria:

- Enter a keyword in the **Keywords** field.
- Click **more search options** to expand advanced keyword search options.
- Select **State of Event** from the drop down menu.
- Enter a **From** and **To** date range.

Click **Search** to display a list of search results, or **Reset** to start your search again.

Searching for events

Use the **Find an event** drop down menu. This allows you to search for an event by state. To search for National events, select **All States**.



Only use the Site Search when searching for content, not Event related information.

Click the **arrow down** button to display a list of states. Select the state you require. The ePortal will launch in a second browser window with a list of all events in the state you have selected.

By selecting the event you are interested in, the Event Registration page will display. From here you can register and pay for that event, search again for another event, or return to the main website home page by clicking the **Home** button. You can also pay and register for a colleague if you know their member number.

Searching for content

When searching for tax content you have a few options to locate the information you require. The best place to start is using the Site Search or Advanced Search options.

- **Site Search:** Use this when you know the name of the specific item to search for.
- **Advanced Search:** Use this when you are not sure of the name of the item you are searching for. There are many filters in this search option to assist with narrowing down your search results.



When searching for a particular author, enter First name then Surname.

When a list of search results displays you can search again within this list. To do this, refine your search options (date range), check the **Search within results** box and click **Search Again**.

Library Catalogue

The Institute's Research Library has a unique collection of Australian and International Tax material (hardcopy and online) available for our members to access.

The library home page provides you with many handy search tips to find the material you are looking for. In addition you also have access to a Help section.

As with ePortal. The library catalogue also launches in a second web browser.

Using the Site Map

If you require assistance with navigating the website or finding information, you can also refer to the Site Map. Click the Site Map link at the bottom of the page, and then click the appropriate topic you want to go to.

Getting Help

For further help on how to use the Website, refer to Frequently Asked Questions (FAQs). Click the **Help** link then click **FAQs**. You can also send us an email enquiry via the **Contact Us** web page. Click the **About Us** link, then click **Contact Us**. Contacts for Web Assistance.

Contacts for Web Assistance

General Web Enquiries:

webassist@taxinstitute.com.au

1800 674 426

(8.30am - 5.00pm Monday - Friday, excl. NSW Public Holidays)

New Web Subscription Enquiries:

MemberPlus – Individual Web Subscription

Membership Team

(02) 8223 0060

GroupPlus – Corporate Web Subscription

Web Manager

(02) 8223 0055

General Membership Enquiries:

Membership Team

(02) 8223 0060



Quick Reference Guide

www.taxinstitute.com.au



Help Desk

1800 674 426

webassist@taxinstitute.com.au

Quick Reference Guide

www.taxinstitute.com.au

Logging on to the Tax Institute website

If you have already registered to use the website, from the home page, enter your Username and Password then click **Login**.

You will know you are logged in when your name appears under the Welcome message in the left panel of the website.

New website users

If you are a new user, click **Register Now** to create your profile and to nominate your Username and Password. Once you complete the registration form you will obtain instant access to the website.

What is the ePortal?

Once you have registered to use the site, you will notice that some functions will take you to a second browser window which launches the ePortal. Depending on your level of access, the ePortal provides the following functions:

- Update your personal details
- Find a Tax Specialist
- View CPD Hours
- Pay and register for events
- Shop online for Tax Institute products
- Participate in an e-Community

If you click on any of the above items and the ePortal window does not appear, you need to turn off Popup Blockers in your browser window.

In Internet Explorer click on Tools>Popup Blockers>Turn off Popup Blockers.

Managing my profile

To manage your profile click **Update my Details** on the left side of the web page underneath **Welcome**. The ePortal will open in a second browser window. (see Tip above)

Once you are here you can:

- View your event registrations and product orders
- View your CPD hours, committee involvement, renewal and product order history
- Change your login or password details.

Tracking your CPD Hours

To assist you with meeting your Continuing Professional Development (CPD) requirements, you can access a daily activity status of your CPD hours. After you have logged in, select **Update my details**. The ePortal will launch in a second browser window with a list of all your activities. Select **CPD** to display your current CPD hours.

Finding a Tax Specialist

The Tax Institute website offers a Tax Specialist Directory to assist with finding a suitable Tax practitioner. Go to **Members** in the main menu, highlight **Find a Tax Specialist** and click to select.

If you know the name of the practitioner or practice you are searching for, you can enter these details and click **Search**.

If you are not sure of the name of the Tax Specialist or if you are looking for a new service provider, enter a location then select from a list of job functions and click **Search**. A list of search results will display.

Products and eOrders

You can now purchase Institute products online using your credit card. From the main navigation, go to Online Shop>Product eOrders to purchase products. The ePortal will open in a new browser window. Search for your product by title, description or product code.

When you have found the product you wish to purchase, click **Add to your products** to include this in your shopping basket. You can:

- Choose the number of items you wish to purchase,
- Remove the item from your shopping basket,
- Keep shopping to add more products to your shopping trolley, or
- Continue through to checkout.

Enter your credit card details and click **Continue**.



Note: You will be asked for a Card Security Code, this is three digit number on the back of your credit card for Visa and Mastercard, or a four digit number on the front of your card for American Express.

The Payment Detail screen will display your Order number. You will receive a payment confirmation via email to your nominated email address.

Searching for an article or journal

The best place to start is within the **Publications** section of the website which lists all the publications and journals produced by the Tax Institute. To refine your search results, use the article and journal search to the right side of the page. From here you can use one or more of these search criteria:

- Enter a keyword in the **Keywords** field.
- Click **more search options** to expand advanced keyword search options.
- Enter a **From** and **To** date range.

Click **Search** to display a list of search results, or **Reset** to start your search again.

Searching for a seminar or convention paper

The best place to start is within the **Publications** section. Go to Publications in the main menu at the top of the web page, highlight **Seminar and Convention Papers** and click to select. A list of Seminars and Conventions will display. To refine your search results, use the **Paper search** to the right side of the page.