

Scientific Research and Experimental Development (SR&ED)
www.pwc.com/ca/en/sred

SR&ED Navigator

*Simplify and expedite
your SR&ED claims*



pwc

Looking for a better way to manage your SR&ED claims?



SR&EDNavigator was developed in response to the increasingly complex and challenging SR&ED claims process.

Working with a wide variety of companies, PwC has recognized a need to centralize and project manage the SR&ED claim process. A variety of stakeholders, time zones and projects can make the process overwhelming.

By using this secure, web-based application, project team members can collect and prepare the information quickly and efficiently, helping teams meet their deadlines in a more complete and accurate manner.

Streamlining your claims process



SR&ED*Navigator* helps companies effectively manage their SR&ED claims process by offering these key benefits:

- Easy-to-use, secure and centralized environment for all your SR&ED information
- Seamless import of SR&ED claim information into professional tax preparation software in a few simple clicks
- Significant time saver for tax, finance and engineering departments
- Intuitive user interface means minimal training for your staff
- Workflow flexibility by providing your users with secure web-based access
- No additional support from your IT department
- Allows the collection and uploading of supporting documentation for SR&ED claims
- Comprehensive diagnostics to assist with the preparation of complete SR&ED claims

Project dashboard

Project Dashboard

Division: Your Company | Tax Year End: 12/31/2010 | Status: Active All Users

SR&ED PROJECT TITLE	PROJECT LOCATION (MP & M.L.T. FILE PROVIDER)	EMPLOYEES (NON-SPECIFIED) INCLUDE BONUSES AND TAXABLE BENEFITS		NATIONALS		CONTRACTS	TOTAL
		IN CANADA	OUTSIDE CANADA	EXCLUDED	TRANSFERRED	SR&ED LEAVE	
		300	307	320	325	340	

Costs By Project

Project	Status	Cost	Cost	Cost	Cost	Cost	Total	Buttons
Project 1	OB	\$1,000,000.00	\$0.00	\$200,000.00	\$0.00	\$10,000.00	\$1,210,000.00	Edit Remove
Project 2	OB	\$200,000.00	\$0.00	\$150,000.00	\$0.00	\$210,000.00	\$660,000.00	Edit Remove
Total		\$1,200,000.00	\$0.00	\$350,000.00	\$0.00	\$310,000.00	\$1,860,000.00	

The Project Dashboard displays all projects, related expenditures and project status.

- One simple click takes you to the project details.
- Easily add or remove projects.
- Securely add users and assign them only to specific projects.
- Consolidate multiple divisions into a single claim.

Project tabs

The screenshot displays the PwC SR&EDNavigator web application. At the top, it shows the PwC logo and the title 'SR&EDNavigator'. Below this, there are navigation tabs for 'Drafts', 'Submitted', 'Review', 'Claims', and 'Claim View'. The main content area is divided into several sections:

- Company Information:** Displays 'Company: Your Company', 'Tax Year End: 12/31/2010', and 'Status: Active All Users'.
- Diagnostics:** Includes a 'Ready for Review/Submit' button and a checkbox to 'Check when project information is complete and ready for PwC review prior to submission'.
- Project Information:** A section for entering project details.
- Project Description:** A section for describing the technological advancement. It includes a table with columns for 'Materials, devices, products' and 'Processes'.
- Draft Versions:** A section for managing draft versions, including a table of draft descriptions and a file upload area.

	Materials, devices, products	Processes
The development of new	235	236
The improvement of existing	227	238

File Name	Updated by	Time Updated
SR Template (001-240-240-241) v.1.1.2.doc		Microsoft Word 2003
SR Template (001-240-240-241) v.1.1.2.doc		Microsoft Word 2007

- Project tabs feature comprehensive diagnostics to ensure that all required information is captured.
- Collaborate with multiple contributors for technical project description content using the draft feature.
- Project templates are included that provide guidance with project description content.

For a demonstration of SR&EDNavigator, or to discuss how PwC's national SR&ED practice can add value to your SR&ED claim, please contact your local PwC SR&ED adviser.

We deliver value

Claiming SR&ED tax credits can raise complex issues. Your PwC team would be pleased to help you attain a deeper understanding of the SR&ED program and how your innovative organization can maximize its entitlement. Please feel free to contact any of the PwC SR&ED advisers noted below.

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