

Westlaw[®] Canada Quick Reference Card Cost-effective Research

Overview

Westlaw Canada access is provided based on a flat-rate, annual subscription. **You pay a fixed amount for as much usage as you need for an entire year.** We do not track the amount of time you spend online.

Within your subscription, some actions or functions have a *suggested usage value* and some do not. You are **not** charged or invoiced for any suggested usage values **within** your subscription. These values are used by firms who wish to charge their research back to clients for cost recovery purposes.

Firms may adjust the suggested usage values and develop their **own** cost recovery strategy in order to charge back to their clients at their discretion. An in-house Corporate Administrator can be assigned to run a Chargeback Report from the Westlaw Canada Reporting System should you wish to charge your research back to your clients.

If you access content **outside** your subscription, **you will receive an invoice.** This is considered a pay-per-view charge. A warning screen appears before the action is completed allowing you to cancel the action.

Although KeyCite Canada may be part of your subscription, running a KeyCite Alert at a daily or weekday (Mon-Fri) frequency triggers a charge for each alert that is run. **You will be invoiced for these charges.**

Top 5 strategies for Minimizing Client Research Fees for Cost Recovery Purposes

Use FIND whenever possible

If you know the name or citation of the case or legislation you want, use **Find**. Finding has a lower transactional value than searching.

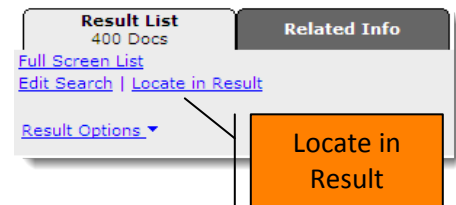
The screenshot shows the 'Find/KeyCite a Document' interface. On the left, there are two radio buttons: 'Find' (selected) and 'KeyCite'. To the right of these are two links: 'Global Find by Name/Title' and 'Global KeyCite by Name/Title'. Below this, there are three main search sections: 'Case:', 'Legislation:', and 'Citation:'. Each section has a text input field, a dropdown menu for 'Jurisdiction', and a 'Go' button. The 'Case:' section has 'little sisters book' in the input and 'Saskatchewan' in the dropdown. The 'Legislation:' section has 'criminal code' in the input, '163(8)' in the 'Section' dropdown, and 'Federal' in the 'Jurisdiction' dropdown. The 'Citation:' section has '62 blr 4th 40' in the input. An orange box labeled 'Find' is positioned to the left of the 'Find' radio button, with a line pointing to it.

Maximize your SEARCH results

Documents retrieved by a search **are included** in the transactional value of the search. You may browse, print, email or download these documents without incurring any additional values. Try to capture as many documents as possible that are relevant to your issue by using broad terms and minimize the use of field restrictions. Up to 10,000 documents can be displayed.

Avoid “Edit Search” – Use “Locate in Result”

Editing a search is treated as a new search and therefore incurs another transactional value. Use [Locate in Result](#) to refine your search. Locate in Result is included in the value of the search. It is best to run a fairly broad initial search (see tip above) and then use Locate in Result to target documents. Use Locate in Result as many times as you wish to refine your search until you find documents on point without triggering any additional transactional values.



Limit KeyCite Display

Use [Limit KeyCite Display](#) to refine your Citing References. No transactional values are accrued. Maximize your efficiency by using Locate to identify key search terms in the KeyCite results.



Access the Research Trail to re-visit your search

Use your [Research Trail](#) to re-run a search or retrieve a document (indicated by a black dot) without incurring any additional transactional values for the remainder of the day (up to 2:00am).

