## TAX INFORMATION REPORTING
### Secure Web Services

# REDUCE COSTS, IMPROVE OPERATING EFFICIENCIES

Increased federal and state focus on tax information reporting requirements is fueling the need for faster, more accurate, and more efficient data collection processes. That's why we offer Secure Web Services as an add-on option to ONESOURCE Tax Information Reporting.

More corporations, banks, and billing companies offer convenient online options as a way of going green and saving green. Providing 1099 forms to your clients online not only enables immediate access to tax data, but saves you time and money by reducing printing and postage costs.

## CUSTOMIZABLE TO MEET YOUR LEVEL OF NEED

To help you communicate with clients the best way for your organization, we provide three levels of support. Each level offers options that increase functionality and provide additional benefits for you and your clients. Choose the level that best meets your organization's needs.

- **Level 1: Recipient Support**
  Enables your clients to view their 1099 tax forms in PDF format via your website. Recipient Support also includes the ability to generate form details that can be used in other client applications such as automated phone support and Integrated Voice Response (IVR) systems.

- **Level 2: Client Support**
  Includes all Recipient Support package features, plus the ability for both recipients and client support personnel to update information in the database without having to learn or access ONESOURCE Tax Information Reporting. All changes made through Secure Web Services are automatically updated in the software.

  With Client Support, training requirements are minimal and support costs are reduced. And since your team can directly input into Secure Web Services during support calls, the speed and accuracy of client recipient inquiries and updates are improved.

- **Level 3: Recipient Interactive**
  Includes all Recipient Support and Client Support features, plus electronic consent functionality and W-8/W-9 data entry for recipients via a Thomson Reuters-hosted web page.
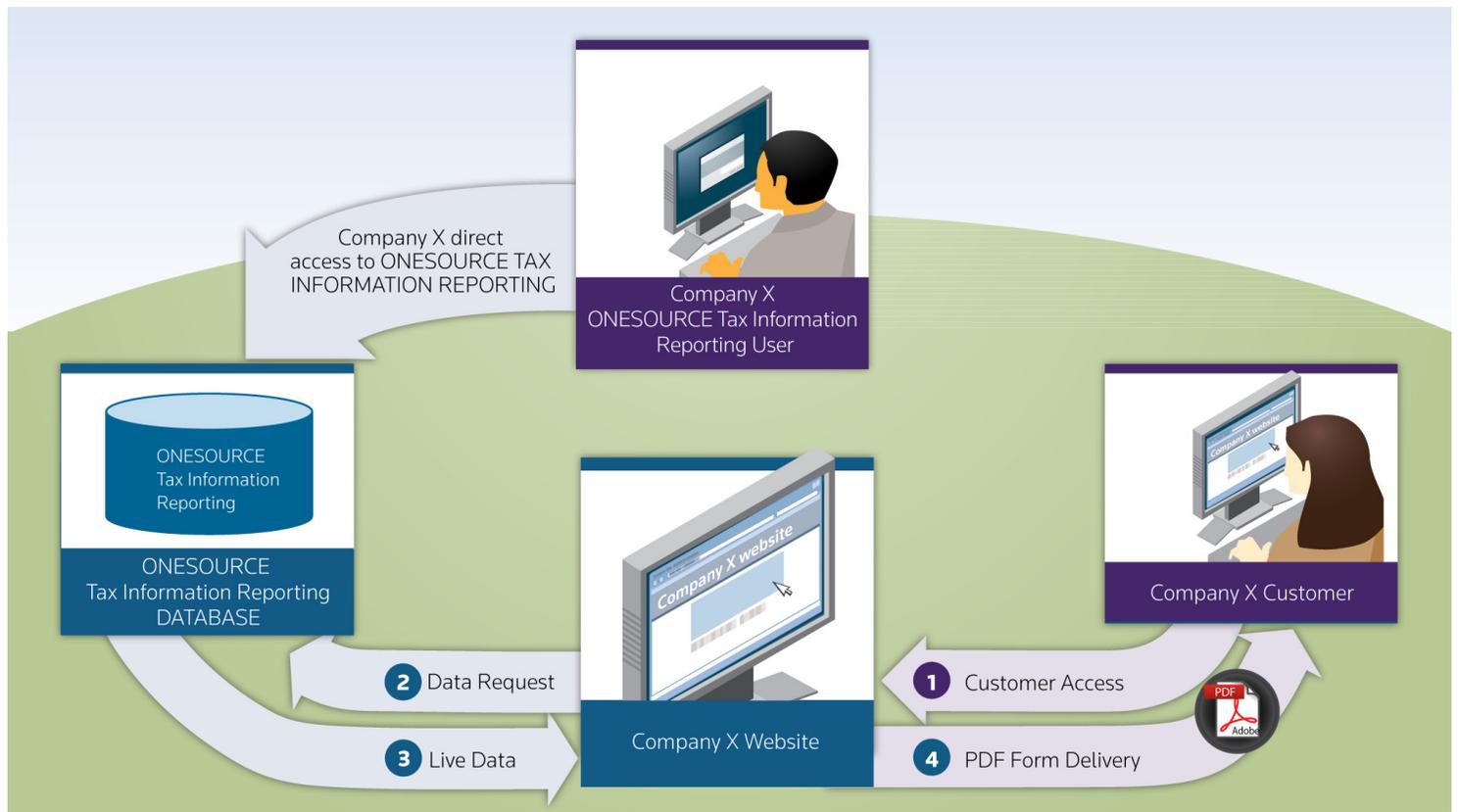
### FEATURES

- Offers three levels of service support
- Creates access to real-time tax forms (electronic statements) for your recipients via the Web
- Tracks recipients who have consented to receive an electronic statement
- Provides separation of what should be printed versus what forms will be accessed electronically
- Enables recipients to print duplicate or access original 1099 forms quickly and easily

### BENEFITS

- Extends your established online relationship with your clients and vendors
- Decreases lead time necessary to print forms using a print vendor
- Offers cost savings by eliminating postage and printing costs
- Provides an environmentally friendly corporate solution
- Reduces support calls from customers
- Eliminates postal delays

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Company X direct access to ONESOURCE TAX INFORMATION REPORTING

Company X ONESOURCE Tax Information Reporting User

ONESOURCE Tax Information Reporting

ONESOURCE Tax Information Reporting DATABASE

Company X Customer

**2** Data Request

**1** Customer Access

**3** Live Data

Company X Website

**4** PDF Form Delivery

## A MORE SECURE ENVIRONMENT

Reducing paper output via our web delivery service not only helps improve version control, but also eliminates the costs of producing, storing, and shipping paper documents. As a result, manual errors and third-party vendor interactions are decreased.

## HOW DOES IT WORK?

Using Secure Web Services, access to tax forms is completed using the recipient's current log-on and authentication process for your system. Recipients don't have direct access to ONESOURCE Tax Information Reporting software, they simply see a link on your website to retrieve a copy of their tax form.

Tax forms are provided with the most up-to-date data. Because tax forms are available in real time, any corrections or changes can be accessed at any time with rules that you determine.

Additionally, the service provides tracking for recipients who have provided consent to receive an electronic recipient statement and prefer an online tax form.

We also offer an "opt-in" option, which enables your clients to receive electronic delivery of their forms. This feature gives clients the ability to log in to your website to download their documents.

And with three levels of service support, you can choose the best option for your company.

To learn more, call **888.706.1041** or visit us at **tax.thomsonreuters.com**.

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