

ONESOURCE TAX INFORMATION REPORTING

INTRODUCING ONESOURCE TAX INFORMATION REPORTING

Document Version 3

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DOCUMENT HISTORY

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2	January 4, 2018	Initial publication of new document format.
3	September 9, 2021	Removed Support email references.

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INTRODUCING ONESOURCE TAX INFORMATION REPORTING

ABOUT ONESOURCE CLASSIC

ONESOURCE (TM) Classic (www.onesourcelogin.com) unifies the tax and accounting applications your company uses every day and helps streamline the way you work. For example, a single sign-on lets you login one time to access all the Thomson Reuters tax and accounting applications you use, and customized gadgets give you instant access to key data.

ABOUT ONESOURCE TAX INFORMATION REPORTING

ONESOURCE Tax Information Reporting is a web application that allows you to import tax data, and process and file information returns with federal and state taxing authorities. ONESOURCE Tax Information Reporting supports IRS, SSA and state information reporting requirements for the 1095 (health coverage) series, 1099 series, 1098 series, W-2, 1042-S, 5498 and W-9 forms, and offers information reporting solutions for Canada and Puerto Rico. Features include, but are not limited, to: flexible import capabilities; data validation checks; and, the ability to view and correct forms online, complete bulk TIN Matching and process B-Notices.

ABOUT THE LEARNING MODULES

This series of learning modules guides you through the process of meeting tax information reporting requirements using ONESOURCE Tax Information Reporting. Each module covers the following ONESOURCE Tax Information Reporting modules, which you access to complete various tasks:

- **Import**-Used to prepare your source files for importing into ONESOURCE Tax Information Reporting. Source files may contain payer information, recipient information, form detail or any combination thereof.
- **Review & Maintenance**-Used to review and update recipient, form, payer and nonqualified intermediary (NQI) information.
- **Print/Filing**-Use to print and distribute forms, and file the appropriate forms with the appropriate taxing authorities, including the IRS, state, Canada, Puerto Rico, and city or local taxing authorities.
- **Compliance**-Used to complete activities that detail your attempts to obtain accurate recipient names and TINs. These activities include submissions for Bulk TIN Matching through the IRS e-Services TIN Matching Program, TIN solicitations, and B Notice and Penalty Notice processing.

- **Options**-Used to set the options that control how ONESOURCE Tax Information Reporting handles the data in your source file during import and how your data is printed and filed with the appropriate taxing authority. You can also set Puerto Rico control and threshold options, master recipient options, Secure FTP options and options for removing test account data.
- **Security**-Used by system administrators use to create and modify security settings for users, user profiles, security groups and group categories.
- **Views & Reports**-Provides a central location for all available views and reports in ONESOURCE Tax Information Reporting. Within this module, you can create custom form, print/filing, payer, recipient, compliance and withholding views.
- **Wh Mgmt (Withholding Management)**-Used to review liability and deposit records. Contact your Account Manager if you do not have access to this module but want to use it.

ADDITIONAL RESOURCES

ONESOURCE Tax Information Reporting provides a variety of support services for users, including answers to questions via phone and access to the [Customer Center](#).

To contact the ONESOURCE Tax Information Reporting Support team via phone:

1-888-706-1041, press 1

When contacting the ONESOURCE Tax Information Reporting Support team, be ready to provide your name, telephone number, and ONESOURCE Tax Information Reporting account number.

LAUNCHING IN TO ONESOURCE TAX INFORMATION REPORTING



Before you can launch ONESOURCE Tax Information Reporting, your system administrator must use [ONESOURCE Classic](#) to add you as a user then authorize you to use ONESOURCE Tax Information Reporting.

To launch ONESOURCE Tax Information Reporting:

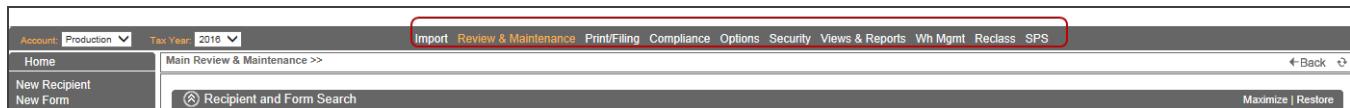
1. Visit ONESOURCE Classic at www.onesourcelogin.com.
2. Enter your Universal ID in the **Universal ID** field and your Universal Password in the **Password** field. Click **Login** or press **Enter**.
3. From the ONESOURCE Tax Information Reporting tab of the ONESOURCE Landing page, click **LAUNCH** in the **Launch ONESOURCE Tax Information Reporting** gadget.
4. Provide an answer to your challenge question in the **Challenge Answer** field then click **Submit** or press **Enter**. The ONESOURCE Tax Information Reporting Home page displays.

EXPLORING A ONESOURCE TAX INFORMATION REPORTING PAGE

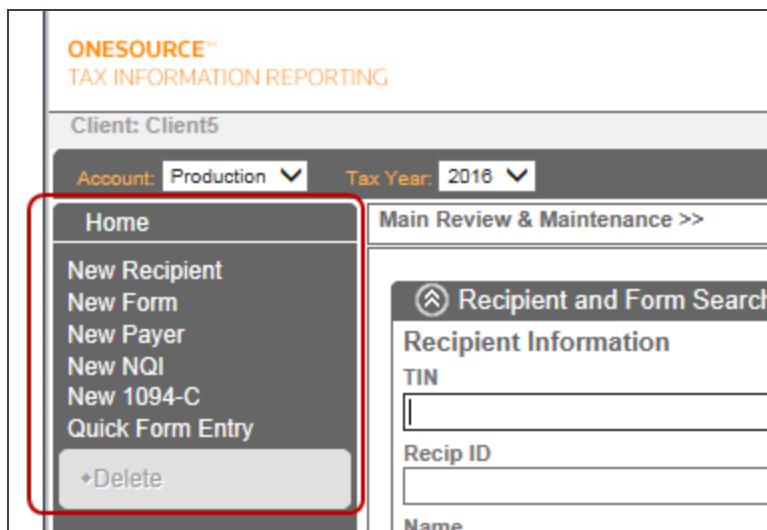
ONESOURCE Tax Information Reporting includes several components and navigation tools to help you complete your tasks. The following graphic shows a ONESOURCE Tax Information Reporting page:

The main components and navigation tools on the page include:

- The **Main Menu** is at the top of each ONESOURCE Tax Information Reporting page. It includes the modules (or areas of the application) that you use to complete tasks. The modules available to you are based on the user rights your system administrator granted to you. For example, the **Compliance** module is not available to you if you do not work with B-Notices.



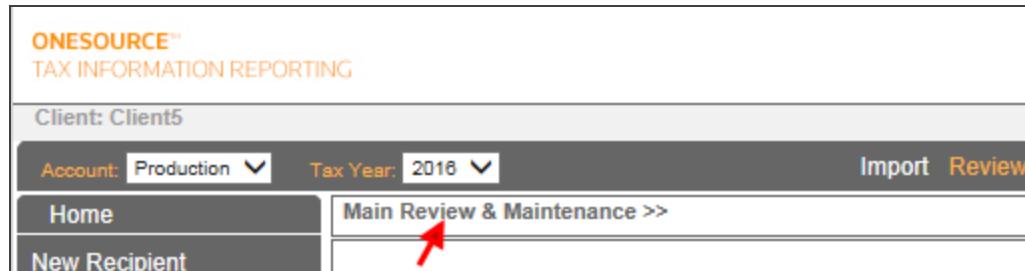
- The **Side Menu** is on the left side of each ONESOURCE Tax Information Reporting page. It includes the options related to the module you selected from the Main Menu.



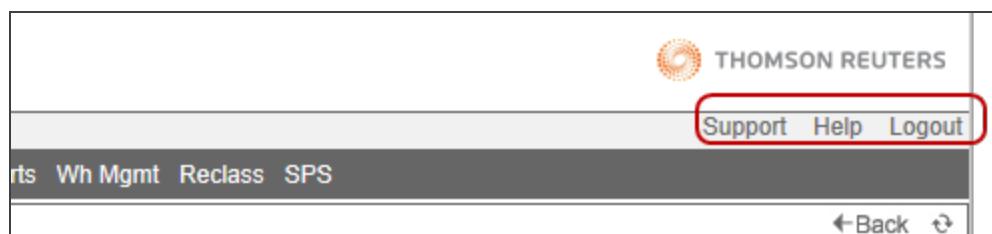
- The **Tax Year** drop-down list is to the left of the Main Menu. It displays the tax year you launched in to. You can switch tax years by selecting another tax year from the drop-down list.



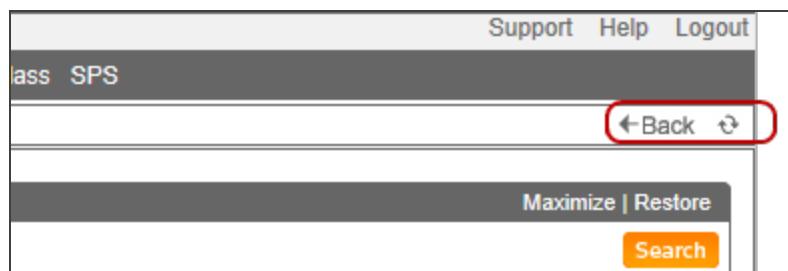
- The **Breadcrumb Trail** is directly below the Main Menu. It includes a horizontal list of the pages you opened. Clicking a breadcrumb in the trail takes you directly to that page. Breadcrumbs are removed from the trail as soon as you close the page or you end your ONESOURCE Tax Information Reporting session.



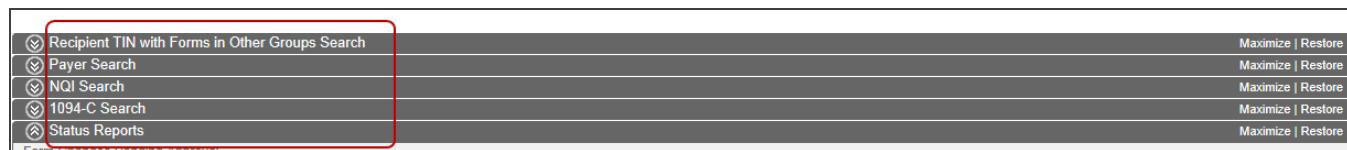
- The **Support**, **Help** and **Logout** links are on the right side of the ONESOURCE Tax Information Reporting page, above the Main Menu. Click **Support** to open the [ONESOURCE Tax Information Reporting Knowledgebase](#). Click **Help** to open the ONESOURCE Tax Information Reporting help system. Click **Logout** to end your ONESOURCE Tax Information Reporting session.



- The **Back** and **Refresh** links are on the right side of the ONESOURCE Tax Information Reporting page, below the Main Menu. Click **Back** to return to the previous section. Click **Refresh** to refresh the section's information.



- The **Collapsible sections** (or sections) are to the right of the Side Menu. They include the details for the option you selected on the Side Menu.



- **Open** and **Close** are to the left of the section headings. Click  to open a section and  to close a section.

 Recipient TIN with Forms in Other Groups Search	Maximize Restore
 Payer Search	Maximize Restore
 NQI Search	Maximize Restore
 1094-C Search	Maximize Restore
 Status Reports	Maximize Restore

Form Changes Pending Approval

- The **Maximize** and **Restore** links are to the right of the section headings. Click **Maximize** to expand the section across the entire page. Click **Restore** to return the selected section to normal size.

 Recipient TIN with Forms in Other Groups Search	Maximize Restore
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You cannot view other sections while in **Maximize** mode.