



## Secure Web APIs

### ONESOURCE Tax Information Reporting

#### Reduce Costs, Improve Operating Efficiencies

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

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

#### Designed to Meet Your Needs

To increase the tax information reporting efficiencies across your organization and to provide the best service to your internal and external customers, we provide secure Web APIs with functionality that meets the requirements and complexity of your particular integration needs. This enables you to view, access, share, and update tax information securely.

**Integrate with your client portal or website** — Your clients can view their tax forms in PDF format securely via your website through Web APIs. Your website or client application can retrieve a list of all available tax forms for a given client and then also get a PDF version of a given form. This allows your client to view and access the latest tax information. No more mailing and no more waiting.

**Integrate with your customer center or IVR** — Web APIs provide the ability to generate form details that can be used in other client applications and in other modalities such as mobile applications and Integrated Voice Response (IVR) systems. Integrate our Web APIs into your customer center and/or IVR systems to provide the ability for both client and your support personnel to update information in the database without having to learn or access ONESOURCE Tax Information Reporting. All changes made through secure Web APIs are automatically updated in the database.

With client support, training requirements are minimal and support costs are reduced. And since the information your team supplies during support calls is directly sent to ONESOURCE Information Tax Reporting using Web APIs, the speed and accuracy of client recipient inquiries and updates are improved.

**Integrate with your tax processing department** — Your system can update the recipient information directly from an online W-8/W-9 form using our client Web API. No more worrying about tracking and storing paper W-9s; our system maintains the history of all updates for a client. Form Web API allows your tax department to create and update tax forms for a client as soon as data is ready within your tax and accounting systems.

#### Frequently Used APIs

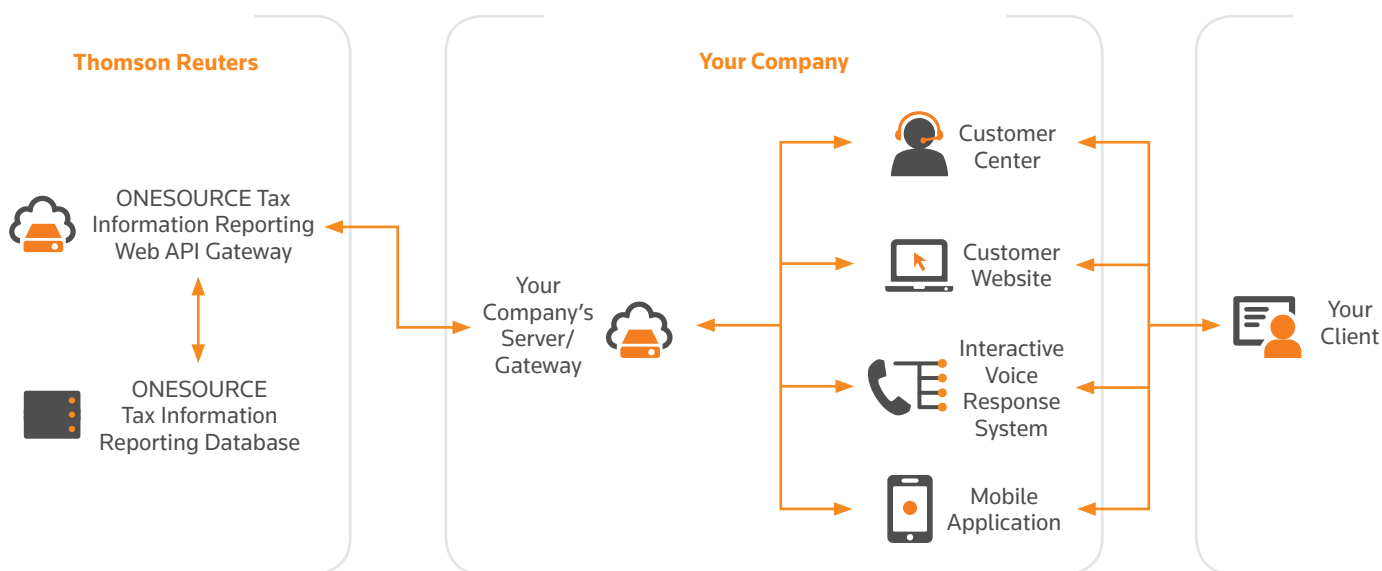
Functionality	
<b>eStatement API</b>	Retrieve original PDF form or correction copies in real time
<b>eW8/W9 Collection Service</b>	Capture recipients' W8/W9 electronically and automatically updates name/TIN to ONESOURCE Information Tax Reporting
<b>eTIN Matching Service</b>	Match TIN in real time as you onboard clients
<b>eForm List and eForm Details API</b>	Access form lists for specific tax years and retrieve form details for automated phone and IVR customer support systems
<b>eConsent and eRecipient API</b>	Gather eConsent and create/edit recipient name/address and automatically update ONESOURCE Information Tax Reporting

## Features

- Levels of support to meet your use case needs
- 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 forms to be printed versus forms 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 delivery delays



## A more secure environment

Reducing paper output via our secure web delivery 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?

Your system directly integrates with the ONESOURCE Tax Information Reporting system using state-of-the-art security (SHA-2, X.509 etc.) with RESTful Web APIs to retrieve and update tax information. Using secure Web APIs, access to tax forms is completed using the client's normal logon and authentication process for your system.

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 clients who have provided consent to receive an electronic client statement and prefer an online tax form.

We also offer an opt-in feature, 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.

Improve your organizational efficiency, secure tax information, and reduce costs by choosing the best option for your company.

**To learn more, call +1 888 706 1041  
or visit us at [tax.thomsonreuters.com](https://tax.thomsonreuters.com).**