HR Plus - Business Intelligence - Tax Jurisdiction Status Report Frequently Asked Questions

Frequently Asked Questions

External Customer Questions

1. **What is the Tax Jurisdiction Status report?**
   The Tax Jurisdiction Status Report in the Business Intelligence app gives you the visibility you need to support compliance, mitigate risk, and operate with confidence. By consolidating the status of tax accounts across multiple jurisdictions into one centralized view, businesses can more easily review tax rates and filing frequencies, assist in keeping account on track, and identify potential concerns early.

2. **Is this information available on the HR Plus platform today?**
   Yes, this information is available in the platform under Payroll<Settings<Taxes (Federal & State) tab. This report is just a consolidated view of the same information with additional details and easy access.

3. **What fields are included in the report?**
   The report will introduce a set of new fields that are critical for clients to understand their tax setup and identify pending actions. These include:
   - Status: Indicates whether the account is active or inactive
   - Account Type: the type of the jurisdiction account
     - SIT: State Income Tax
     - SUTA: State Unemployment Tax
     - COMP: Workers' Compensation Tax
   - Account Number: The tax account identifier
   - SUTA Rate: The state unemployment insurance tax rate
   - Deposit Schedule: Frequency of tax deposits (e.g., Monthly, Quarterly)
   - Filing Type: Whether TriNet or the client is responsible for filing
   - Effective Date: The date when the tax jurisdiction account switched to **TriNet Filed** status (meaning TriNet now administers tax filings on your behalf so long as all required information has been provided to TriNet)

4. **What other features will the report include?**
   The report will incorporate a standardized color-coded status system:
   - **Green – Full-Service:** All information is has been provided and TriNet will administer filing taxes
   - **Red – Calculate Only:** Client action required to move to Green (TriNet Filed). Until then, client is responsible for filing the taxes
   - **Gray – Inactive:** No attention needed.

5. **How do I access the report?**

The report will be accessible through the Admin Dashboard, Business Intelligence app in the TriNet HR Plus platform.

6. **What roles have access to this report?**
   Administrators with the correct permissions will have full access to Business Intelligence reports within TriNet.

   Access to Business Intelligence Reports is controlled by certain permissions related to whether someone is an employee (individual contributor), a manager, or a TriNet admin. Learn more about the access permissions that certain roles have for Business Intelligence.

7. **Where/How can I provide missing information for my tax jurisdiction accounts?**
   You can get in touch with HR Advisors (or PCM's based on package) to provide this information**.**

   You can also choose to update the information in the platform. Please refer to FAQs About Updating Tax Information in Payroll - YOURPEOPLE, INC. for additional details

8. **Who should I contact if I need assistance with accessing the report?**
   For assistance, please contact our On-Demand Support team.

This communication may contain hyperlinks to websites operated by parties other than TriNet.