Request Reports

Process

MONITOR LOCALITY AND SALES TAX DISTRIBUTIONS

Effective Date

08/16/2005

Purpose

The Request Reports task provides information and instructions for requesting reports from TAX that provides information that may impact your locality's Sales Tax Distribution. The Local Commissioner of Revenue/Director of Finance, upon approval of the submitted Memorandum of Understanding, may request the Local Gross Sales report and the Adjacent Locality Sales report. The Current Registration report may be requested by the Commissioner/Director if a MOU was not submitted to TAX. The locality would typically use this information to monitor information that could impact the locality financially.

Special Notes

- This task is performed by the Commissioner of Revenue/Director of Finance with a business need for the information being requested.
- The MOU for your locality must be completed and approved prior to requesting the following reports:
    - Local Gross Sales Report
    - Adjacent Locality Sales Report
- The Commissioner of Revenue/Director of Finance may request the Current Registration report if no MOU has been submitted.
- TAX provides the New/Updated Registration report to localities monthly, without request from the locality and regardless of whether a MOU was received. The report provides the new and updated customer and tax account information, including name and address information, for each locality.

Procedure

Responsibility
Commissioner of Revenue/Director of Finance

Steps

1. Establish the business need for the information in the report(s).
2. Determine the report(s) needed.
    - Approved MOU required
        - **Local Gross Sales** report provides the name, address, and External ID (SSN/FEIN) of all customers reporting gross sales information in your locality.
        - **Adjacent Locality Sales** report provides the name, address, and FIPS code of customer in the adjacent localities and may be requested for up to 5 localities.

- MOU not required
    - **Current Registration** report lists businesses in a locality by Tax Type, BLD, NAICS, Legal Business Name, and Trading as Name.

3. Complete the Report Request Document template in Word specifying the following information for each report needed.
    - Report Type
    - Report Parameters
    - Report Format
4. E-mail the completed Report Request Document(s), as an attachment, to TAX using Secure Messaging.

Published Date

04/23/2015