

RDS Interactive Online Reports Guide

With today's economy, it's more important than ever to know as much as possible about your revenue streams; the taxes and fees that keep your jurisdiction running and help provide services to your constituents. At RDS we take your revenue and the reporting of that revenue seriously.

Below is a brief explanation of each online report offered by RDS as a part of our Interactive Online Reporting portal. The RDS reporting portal is available 24/7 through our secure website. It allows for multiple, approved users to view, export and print each report. The reports can be exported into various formats, including Excel, Word, PDF, and CSV (comma delimited).

Within this portal you can also make changes to your personal user profile, change your password, email our Client Relations Team, or research taxpayers by account number or taxpayer business name.

Dashboard

The Dashboard is a graphic representation of your revenue by date range, including the net tax due history, a breakdown of tax sources, the top five taxpayers by business classifications, and the tax due history of your top five taxpayers. Like the dashboard of a car, this report shows you the highlights of your revenue in an easy to understand layout.

With a little notice the RDS staff can create this report with no specific taxpayer names included. This would allow you to share this report in an open meeting or with other staff members without breaching confidentiality.

Confidential Information

This report includes privileged and confidential information under the Taxpayer Bill of Rights. This report, as is, should not be shared with those other than the intended, authorized recipient.

History and Trends

The History and Trends report gives you the tools to compare tax revenue within a date range. You can compare current month to the prior month, current month to the same month last year, the last three months to the same three months last year, and the fiscal year to date to the same period last year. The date range is set by you. It can be one month or several years.

This report is a perfect barometer of your tax revenue trends. It will show you which taxes are increasing or decreasing and even break down by both individual tax rate types and rate codes, including general, police jurisdiction, manufacturing, etc.

Confidential Information

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Net Revenue Comparison Chart

This report is a classic from RDS. The Net Revenue Comparison chart is a snapshot of your revenue in comparison to previous months and years. This report can be run by date range and tax type.

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Reconciliation Detail and Summary

The **Reconciliation Detail** report provides a daily account of all tax monies received and disbursed. This report breaks down each tax type, including total taxes collected, administration fees, audit fees, net funds, the beneficiaries' percentage of revenue and distributed funds. This report can be viewed and exported according to which beneficiaries are chosen.

The **Reconciliation Summary** report contains the exact information as the Detail report but it summarizes the information into the date range selected.

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Audit Activity Report

If RDS provides compliance auditing services for your jurisdiction, the Audit Activity Report will offer a detailed dashboard of several key auditing components within a date range. These include a snapshot of the return on investment, a listing of the five audits completed within your jurisdiction having yielded the most revenue, those industries to be shown with the highest levels of noncompliance within your jurisdiction, and a breakdown of revenues from in-state and out-of-state taxpayers.

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New Taxpayers Report

The New Taxpayers Report provides a listing of every new taxpayer for the date range selected. Included beside each new taxpayer is the RDS taxpayer account number, address, FEIN, main contact, and any other contact information provided by the taxpayer at the time of registration. You will also see a listing of any transactions for the selected date range.

This report offers valuable information that could be shared between approved departments to insure any new taxpayer is included on other taxpayer rolls.

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Detail Payment Listing

The Detailed Payment Listing is a comprehensive listing of every taxpayer that remitted a form and/or tax within the date range selected. This report is divided by tax type and lists each taxpayer, period, taxable sales, gross tax, discounts and/or penalty, and the net tax due. Each tax type is summarized at the bottom of each tax type section. This report can be filtered by any or all tax types administered by RDS.

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Top Remitters, Top Remitters Increases, and Top Remitters Decreases

The Top Remitter Reports are delivered in three different formats – **Top Remitters**, **Top Remitters-Increases** and **Top Remitter-Decreases**. All three reports provide a listing of your top 5 – 100 tax remitters, increases or decreases for the date range selected. Each report contains taxpayer name, taxpayer dba name, NAICS code, tax type, rate code description, current year amount, prior year amount, the changed amount for the period and the over-all percent change. You can view this report filtered by net tax due or net sales.

These reports present a comprehensive picture of your top taxpayers that can help in delivering a strategic economic development plan or help better understand tax revenues and the business climate for your jurisdiction.

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Business License Detail and Summary Reports

If RDS provides the administration of your business license you will see this report included in the 13 reports presently on our interactive online reports. The **Business License Detail** report is a daily report of license activity. The **Business License Summary** is a synopsis of license activity pulled from a chosen date range.

Both reports offer an individual listing of taxpayers that have either submitted the appropriate paperwork and funds and have been approved to receive a business license or are lacking proper documentation or payment. This report can be filtered by Issued licenses, Not Issued licenses, or Both. This report can also be filtered by a date range, including license year.

Each report contains taxpayer account number, taxpayer name, dba name (if available), license number, issue date, license description, gross receipts reported, units reported, license fee, issuance fee, late fee, additional penalties (if applicable), and total paid.

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If you have any questions regarding the Interactive Online Reporting portal or need to register as an online reporting user please email our Client Relations Team at clientsupport@revds.com or give them a call at 800.556.7274 – select 2 for Government Entity.

Thanks again for partnering with RDS.