dayforce

Advanced Tax Services



Enhanced assistance with your payroll tax and compliance support needs*

Many organizations today face complex tax circumstances such as frequent acquisitions and mergers, remote workers, the loss of key administrators, or the challenge of unregistered jurisdictions. These complexities can potentially result in costly outcomes for organizations and require more than just basic tax filing assistance. When organizations require additional support to help them proactively manage their tax compliance footprint, Dayforce Advanced Tax Services is here to help.

With Dayforce Advanced Tax Services, you can rely on our team of dedicated professionals who will go beyond basic support by managing certain core tax requirements on your behalf. As a leader in global tax compliance, Dayforce will perform key responsibilities to help you mitigate risk for your organization and support your adherence to ever-changing compliance requirements. Plus, we will provide ongoing education and partnership via monthly health assessments and quarterly business reviews to best understand your company's needs and help ensure alignment with your strategic goals.



Reduce risk

Help reduce compliance risk by outsourcing certain tax requirements to our trusted professionals.



Streamline expenses

Help control costs and mitigate problem areas using insights from health assessments, comprehensive reports, and helpful tools.



Boost productivity

Increase efficiency by leveraging our in-house expertise to help you monitor and manage key tax filing requirements.

How we help you

Our enhanced level of assistance is designed to simplify your complex tax and compliance responsibilities. Our tenured tax professionals will gain a deeper understanding of your tax landscape to help you manage compliance challenges and reduce risk related to potential exposure, penalties, interest, liens, and levies. Working in partnership, we will establish defined roles and responsibilities to help optimize efficiency and simplify processes for your teams.

* Advanced Tax Services assists with filing compliance with tax agencies using the tax liability information from the source payroll system. Payroll tax questions and configurations related to the Dayforce software are supported by Dayforce Application Support / Managed Services.

Service Description	Dayforce Responsibility (unless specified otherwise)
General Filings	
Monitors quarter-end filings for timeliness and accuracy	✓
Monitors and assists to resolve filing rejections, or otherwise directly partners with you for resolution	✓
Manage the quarter-end edit process	✓
Be available for quarter-end and funding questions	Client
Tax Codes Not Set Up (Fallouts/Applied Fors)	
Monitors incoming liabilities for supported jurisdictions that are not setup and confirms validity with you	✓
Facilitates registration with those (new) jurisdictions with information provided by you on your behalf **	✓
Verifies the tax codes are subsequently set up for filing	✓
Submits any past-due original filings	✓
Proactively helps to gather all required Powers of Attorney (POA) or Third-Party Administrator (TPA) authorizations needed for any filing services	✓
Partner for signatures on POA/TPA	Client
Confirm if a fallout is valid	Client
Late Original Filings / Amendments	
Prepares and submits needed cases or reports for prior quarter adjustments or missed filings	✓
Monitors to deliver a 14-day service level agreement (SLA) for assignment	✓
Notify Dayforce Tax within 5 business days of prior-quarter adjustments	Client
Agency Notice Response/Research	
Audits rate/frequency changes at the start of each month for anything submitted in the prior month	✓
Monitors to deliver a 14-day service level agreement (SLA) assignment for notices needing research	✓
Dedicated oversight of service on critical or severity 1 level notices	✓
Matches agency notices to other open issues (e.g., past-due original filings not yet processed)	✓
Submit agency notices (rate/frequency changes, agency questions, etc.) using the Dayforce Community	Client
Restricted Stock Unit (RSU) Pre-Funding Process	
Monitors the beginning-to-end funding process	✓
Provide the RSU data	Client
Health Check Meetings	
Client-controlled meeting cadence to monitor overall progress, tax health, and answer any questions	✓
Quarterly business reviews that cover a tax health check-in, based on predefined metrics such as rejection percentages, research cycle times, and processed amendments cycle times. Also to identify major themes or trends identified or resolved in the previous quarter	✓
Any specific business needed agenda items needing to be covered	Client

** Advanced Tax Services will initiate an agency registration request with the Dayforce Tax Professional Services team and help facilitate the end-to-end process, from registration through filing missed returns. Projects fees will apply.

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