



Tax Solutions D-W8® product specifications

Allowing multinational companies to electronically collect and validate Forms W-8 and W-9

Form validation –Chapter 3 and Chapter 4 compliance

Electronic signature (E-SIGN) capabilities for Forms W-8 and W-9	✓
Integrated IRS Form instructions and context sensitive help for special IRS terms	✓
Realtime Form validation results, withholding tax rate and reporting parameters	✓
Change of circumstance logic	✓
IRS approved substantial presence test logic (to satisfy written explanation requirement for US indicia from a non-US individual)	✓
Rules engine that contemplates audit simplification, transparency and safe-guards for the electronic Forms W-8 and W-9, as well as corresponding amendments as the IRS updates the Forms	✓
Automated secure web services API for account data upload and validation result feed.	✓

Features and support

Support for IRS § 1441, § 6050W and §1471 (FATCA regulations), as applicable	✓
Multilingual support as customization	✓
Application hosted by IHS Markit at its SSAE 16 Type II hosting facility with disaster recovery and remote data backup functions. Industry standard security using encryption for data at storage and transmission	✓
Single instance of the software for multiple geographic locations; additional instances available for reduced fee	✓
40 hours of configuration support (incremental work/customizations billed at our standard hourly rate)	✓
Support services and maintenance (product enhancements/IRS regulatory updates). Optional support service by IHS Markit CTI's Outsourcing division for queue clearing and TIN matching	✓
Administrative console with queue management and reports (including resolicitation reports to assist renewal of expiring forms). On demand ability to create/print PDF version of Forms submitted electronically	✓
Application will be updated whenever the IRS releases new Forms W-8 and W-9	✓
Optional Excel based data upload and download functions	✓

Electronic questionnaire for IRS Forms:

Form W-8-BEN-E
Form W-8BEN (corporation, disregarded entity, individual partnership)
Form W-9

Manual Form Validation for IRS Forms:

Forms W-8 (Chapter 3 and Chapter 4 status)
Form W-9 (including TIN matching)
Form 8233

* The IRS does not have any exclusive arrangement with any specific developer of an electronic W-8/W-9 system. The IRS Memorandum of Understanding can be issued to withholding agents who create their own electronic W-8/W-9 tools and/or use other electronic W-8/W-9 products other than those created by IHS Markit | CTI.