

ONESOURCE TAX INFORMATION REPORTING

CREATING AND PRINTING CUSTOM DOCUMENTS

Document Version 2

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DOCUMENT HISTORY

VERSION NUMBER	VERSION DATE	SUMMARY
1	January 2017	Initial publication
2	January 2, 2018	Initial publication of new document format.

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ABOUT CREATING CUSTOM DOCUMENTS

A custom document is a tax form insert that is included with your print packages. Custom documents can include graphics and text, and there is no page (which is referred to as an image) limit. For custom documents with multiple images, you can indicate whether each image prints on one or both sides of a sheet of paper (referred to as simplex or duplex printing). Duplex printing requires a printer that supports duplex printing.

You can associate a custom document with one, multiple or all payers and form types. During the association process, you can also indicate that a custom document should be printed based on the recipient address state. This allows you to exclude the custom document from a print package when the state part of the recipient's address does not match a state that was selected during the association process.



ONESOURCE Tax Information Reporting does not currently support the ability to create custom documents that have variable data or that are associated with B Notices or Penalty Notices. Variable data and B Notice and Penalty Notice associations will be available in a future release.

TASKS

Complete the following tasks to create a custom document:

1. [Getting Started \(page 3\)](#) includes the user profile options that must be assigned before users can create custom documents as well as the requirements that must be met before custom documents can be created in ONESOURCE Tax Information Reporting.
2. [Creating Custom Documents \(page 5\)](#).
3. [Signing Off on an Uploaded Image \(page 9\)](#).



You are required to sign off on an image of your uploaded custom document before you can complete the association process, or print a print package that includes the custom document.

4. [Associating a Custom Document \(page 12\)](#) includes associating custom documents with payers and form types, and indicating that the custom document should be printed based on the recipient address state. [Removing an Association \(page 15\)](#) shows you how to remove custom document associations.
5. [Setting the Images of a Multi-Image Custom Document to Print Simplex or Duplex \(page 17\)](#) includes the print settings, which can be set on an association-by-association basis or for all of the custom document's associations.
6. [Updating Custom Documents \(page 19\)](#).

7. [Printing Custom Documents \(page 21\)](#).
8. [Exporting a Custom Document Report \(page 23\)](#).

GETTING STARTED

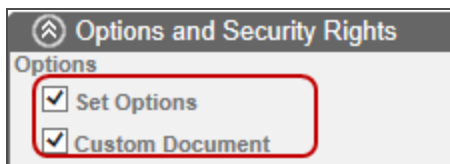
To get started with custom documents, assign the appropriate user profile options to the users who will create custom documents and ensure your custom documents meet the requirements for custom documents. See [Assigning User Profile Options \(page 3\)](#) and [Custom Document Requirements \(page 3\)](#).

ASSIGNING USER PROFILE OPTIONS

The ability to complete the following tasks in ONESOURCE Tax Information Reporting is controlled by the **Custom Document** user profile option:

- Create custom documents.
- Sign off on uploaded images.
- Associate custom documents with payers and form types, and indicate that the custom document should be printed based on the recipient address state.
- Set the images of a multi-image custom document to print simplex or duplex.
- Export custom document reports.

To assign this user profile option, your ONESOURCE Tax Information Reporting administrator must select the **Set Options** and **Custom Document** options for your user profile. These options are under the **Options and Security Rights** section on the User Profile page.



CUSTOM DOCUMENT REQUIREMENTS

ONESOURCE Tax Information Reporting allows you to upload only PDF files that do not exceed 3MB in size. The PDF version must also meet the following requirements:

- The image size must be 8.5" x 11". The image orientation can be portrait or layout.
- The bottom left and bottom right corners of each image must include a 1" x 1" blank area. ONESOURCE Tax Information Reporting reserves these areas for printing a document number and a print vendor bar code.

CREATING CUSTOM DOCUMENTS



Before creating custom documents in ONESOURCE Tax Information Reporting, ensure your PDF file meets the ONESOURCE Tax Information Reporting requirements. See [Custom Document Requirements \(page 3\)](#) for details.

To create and upload a custom document:

1. Click the **Options** module.
2. Click **Custom Documents** on the Side Menu. The Existing Documents page displays.
3. Click **Create Document**.

Custom Document ID	Document Name	Document Description	Version Number	Image Count	Associated	Manage Associations	Edit Document
6	test print	test	2	1	<input checked="" type="checkbox"/>	Associations	Edit
7	acme company	test inserts	3	1	<input type="checkbox"/>	Document Not Signed Off	Edit
8	KF insert	This is a test.	2	1	<input checked="" type="checkbox"/>	Associations	Edit
9	KF ACA insert	KF ACA insert	2	1	<input type="checkbox"/>	Associations	Edit
10	1099-AMSC insert	Print this with all 1099-AMSC forms.	4	2	<input checked="" type="checkbox"/>	Associations	Edit
11	test this 11212015	test inserts	2	1	<input checked="" type="checkbox"/>	Associations	Edit
12	1095-B insert	Print this with Form 1095-B.	1	1	<input type="checkbox"/>	Document Not Signed Off	Edit
13	1099-DIV insert	Print this with Form 1099-DIV, payer ABC.	2	2	<input checked="" type="checkbox"/>	Associations	Edit

4. On the Custom Document page, enter a unique name in the **Document Name** field, and enter a description in the **Document Description** box.



Duplicate document names are not allowed in the same tax year. Special characters are allowed in the **Document Name** field and **Document Description** box, but restrictive words, such as delete or insert, are not allowed in the **Document Description** box.

Document Name: 1099-DIV insert

Document Description: Print this insert with Form 1099-DIV, Payer ABC.

Steps to Upload Custom Document

1. Enter the Name and Description of the custom document
2. Click Upload to import the PDF. One or more images can be uploaded. (PDF page dimension must be 8x11, the file size must be 8 MB or less)
3. In the File Upload dialog box, click the Select Files button and browse to the drive that the file is saved. Then click the Upload button in the dialog box. Once the upload is complete, close the file upload window

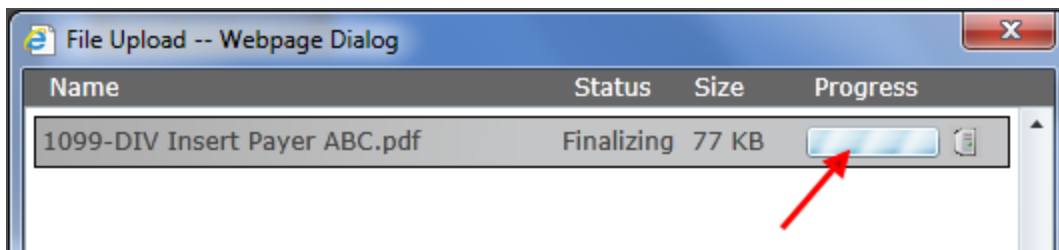
The user then has the following options:

[Create Document](#): This will refresh the page and allow the user to enter a new name/description and upload a new PDF



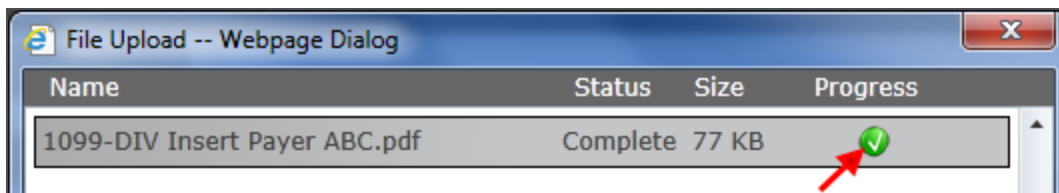
If you are not ready to upload the PDF version of your custom document, click **Save**.


5. Click **Upload** after ONESOURCE Tax Information Reporting saves your changes. The File Upload-Webpage Dialog page displays.
6. Click **Select Files** in the lower left corner of the File Upload-Webpage Dialog page.
7. Navigate to where the PDF version of your custom document is located, select it, then click **Open**. The File Upload-Webpage Dialog page redisplay and lists the file you selected to upload.
8. Click **Upload** to start the upload process. As the file is uploaded, the File Upload-Webpage Dialog page displays a **Progress** bar to track the progress of the upload process.



The upload process can take up to two minutes to complete. You cannot access other pages in ONESOURCE Tax Information Reporting until after the upload process completes.

After the upload process completes, the status shows as **Complete** and the **Progress** bar is replaced with a checkmark.



9. Click  on the File Upload-Webpage Dialog page. Your custom document is loaded and the Custom Document page redisplay. You can now:
 - Sign off on the uploaded image of your custom document. See [Signing Off on an Uploaded Image \(page 9\)](#).
 - Create a new custom document by clicking **New Document**.

- Update the custom document by replacing the uploaded version of the document or changing the name and description of the document. See [Updating Custom Documents \(page 19\)](#).

SIGNING OFF ON AN UPLOADED IMAGE



You are required to sign off on an image of your uploaded custom document before you can complete the association process, or print a print package that includes the custom document.

To sign off on an image of your uploaded custom document:

1. From the Custom Document page, click **Preview**.

If you moved away from the Custom Document page, click the **Edit** link on the Existing Documents page to access the custom document you want to sign off on.

Custom Document Id	Document Name	Document Description	Version Number	Image Count	Associated	Manage Associations	Edit Document
6	test print	test	2	1	<input checked="" type="checkbox"/>	Associations	Edit
7	some company	test inserts	3	1	<input type="checkbox"/>	Document Not Signed Off	Edit
8	KF insert	This is a test.	2	1	<input checked="" type="checkbox"/>	Associations	Edit
9	KF ACA insert	KF ACA insert	2	1	<input type="checkbox"/>	Associations	Edit
10	1099-MISC insert	Print this with all 1099-MISC forms.	4	2	<input checked="" type="checkbox"/>	Associations	Edit
11	test this 11212016	test inserts	2	1	<input checked="" type="checkbox"/>	Associations	Edit
12	1095-B insert	Print this with Form 1095-B.	1	1	<input type="checkbox"/>	Document Not Signed Off	Edit
13	1099-DIV insert	Print this with Form 1099-DIV, payer ABC.	2	2	<input checked="" type="checkbox"/>	Associations	Edit

The Existing Documents page includes key information about your existing custom documents. For example:

- The **Custom Document Id** column includes an identifier that is automatically generated by ONESOURCE Tax Information Reporting when a custom document is created.
- The **Document Name** and **Document Description** columns include the name and description you entered when you created the custom document.
- The **Version Number** column includes the version of the custom document that was uploaded. Odd number versions indicate that the uploaded image has not yet been signed-off. Even number versions indicate that the image sign-off process has been completed.
- The **Image Count** column includes the number of images included in the PDF of a custom document.
- The **Manage Associations** column includes one of three statuses:

- **No Document**-Indicates that a name and description were entered but no PDF was uploaded.
- **Document Not Signed Off**-Indicates that a PDF was uploaded but the uploaded image has not yet been signed-off.
- **Associations**-Provides a link that you can click to complete the association process, review associations, remove associations or update associations.

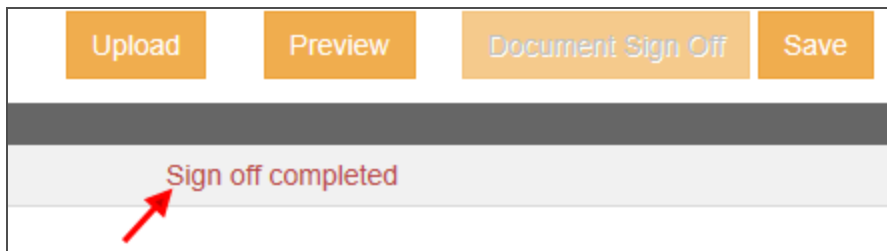
2. Review the image to ensure it is correct.



Pay particular attention to the 1" x 1" areas in the bottom left and bottom right of each image that are reserved by ONESOURCE Tax Information Reporting. If you determine that your text is printing in these areas, change your custom document so that the text is not in these areas.

Color graphics and text are displayed in black and white.

3. If the image is not correct, click **Upload** to upload a different version of your custom document, or a different custom document.
4. Click **Document Sign Off**.
5. Select **Yes** when the message asking you to confirm sign off on the custom document displays. As shown in the graphic below, the "Sign off completed" message displays in red text above the image of your custom document after your sign off is saved. You are now ready to complete the association process. See [About Working with Custom Document Associations \(page 11\)](#) for details.



ABOUT WORKING WITH CUSTOM DOCUMENT ASSOCIATIONS

Custom documents can be associated with one, multiple or all payers and form types. During the association process, you can indicate that a custom document should be printed based on the recipient address state. Indicating that a custom document should be printed based on the recipient address state allows you to exclude the custom document from a print package when the state part of the recipient's address does not match a state that was selected during the association process.

When a custom document is printed based on the recipient address state, it is excluded from a print package when:

- The state portion of the recipient's address state does not match an associated state. For example, the state portion of the recipient's address is Texas but California was selected during the association process.
- The state portion of the recipient's address is NULL.
- The recipient's address is a foreign address.



ONESOURCE Tax Information Reporting uses the recipient's resident state (not the state of the recipient's alternate address) to determine whether the custom document is included or excluded from the print package.

BEFORE YOU BEGIN

Before you begin the association process, it is important to understand how to associate your custom documents correctly, and how batch print options (such as form selections, security groups and distribution options) may affect your print packages.

Associating Custom Documents with Payers and Forms

When associating payers and forms with the same custom document, complete the association process separately for each payer. For example, Payer A wants to associate a custom document with Forms

1099-MISC and 1099-DIV, and Payer B wants to associate the same custom document with Form 1099-INT. To complete these associations:

1. Associate Payer A with Forms 1099-MISC and 1099-DIV. then click **Save**.
2. Associate Payer B with Form 1099-INT then click **Save**.

If you had associated Payer A and Payer B with Forms 1099-MISC, 1099-DIV and 1099-INT then clicked **Save**, six different payer-and-form combinations would exist. By saving each payer-and-form association individually, only three different payer-and-form combinations exist.

Batch Printing and Custom Document Associations

Form selections, security groups and distribution options available for selection when batch printing may affect your print packages. For example, Payer ABC has recipients who are assigned to two different security groups. Recipients in security group A will receive custom document 1 with Form 1099-MISC, and recipients in security group B will receive custom document 2 with Form 1099-MISC. To correctly batch print the print packages:

1. Complete the association process for Payer ABC and custom document 1, create a draft print file that includes some of the security group A recipients. Review the draft print output files to ensure the print is correct. If the draft print is correct, submit a batch print request for the security group A recipients only. After batch print completes, remove the association for Payer ABC and custom document 1.



To ensure your draft batch job completes in a reasonable time, ONESOURCE Tax Information Reporting recommends creating a draft print job that includes no more than 50 forms with custom documents. If the purpose for creating the draft print file is to review a large number of forms, do not include the custom document in your draft print.

2. Complete the association process for Payer ABC and custom document 2, create a draft print file that includes some of the the security group B recipients then review the draft print output files to ensure the print is correct. If the draft print is correct, submit a batch print request for the security group B recipients. After the batch print completes, remove the association for Payer ABC and custom document 2.

ASSOCIATING A CUSTOM DOCUMENT

To associate a custom document:

1. From the Existing Documents page, click the **Associations** link for the row that includes the custom document you want to associate.



If you see **Document Not Signed Off** rather than the **Associations** link, complete the steps listed in [Signing Off on an Uploaded Image \(page 9\)](#).

Custom Document Id	Document Name	Document Description	Version Number	Image Count	Associated	Manage Associations	Edit Document
6	test print	test	2	1	<input checked="" type="checkbox"/>	Associations	Edit
7	some company	test inserts	3	1	<input type="checkbox"/>	Document Not Signed Off	Edit
8	KF insert	This is a test.	2	1	<input checked="" type="checkbox"/>	Associations	Edit
9	KF ACA insert	KF ACA insert	2	1	<input type="checkbox"/>	Associations	Edit
10	1099-MISC insert	Print this with all 1099-MISC forms.	4	2	<input checked="" type="checkbox"/>	Associations	Edit
11	test this 11212016	test inserts	2	1	<input checked="" type="checkbox"/>	Associations	Edit
12	1095-B insert	Print this with Form 1095-B.	1	1	<input type="checkbox"/>	Document Not Signed Off	Edit
13	1099-DIV insert	Print this with Form 1099-DIV, payer ABC.	2	2	<input checked="" type="checkbox"/>	Associations	Edit

The Add Associations page displays. As shown in the graphic on the following page, the first grid lists all the payers in your account and the second grid lists each form type ONESOURCE Tax Information Reporting supports. **One Or More Payers** and **Select One Or More Forms** are selected by default so that the individual payers and forms are displayed and are available for selection.

Document Name: 1099-MISC Insert
Document Description: Print this with all 1099-MISC forms.

Check this box if this document needs to be printed according to the recipient address state.

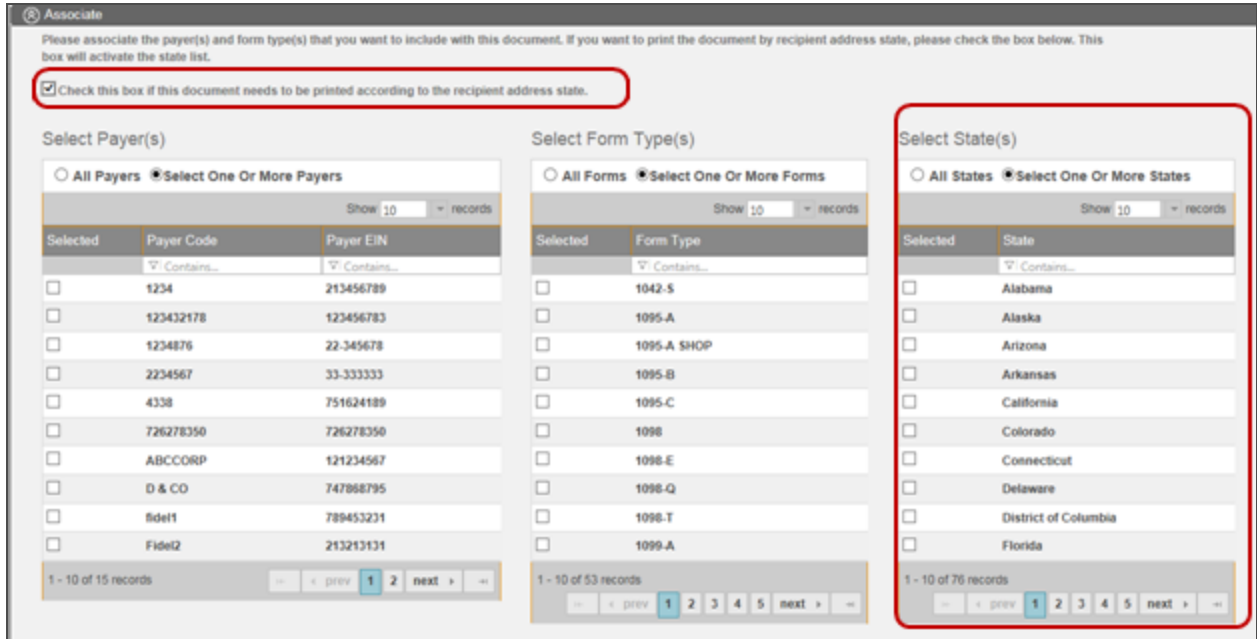
Select Payer(s)
 All Payers Select One Or More Payers

Selected	Payer Code	Payer EIN
<input type="checkbox"/>	126220160	126220160
<input type="checkbox"/>	1234	213456789
<input type="checkbox"/>	123432178	123456783
<input type="checkbox"/>	1234876	22-345678
<input type="checkbox"/>	2234567	33-333333
<input type="checkbox"/>	4338	75924189
<input type="checkbox"/>	726278350	726278350
<input type="checkbox"/>	ABCCORP	121234567
<input type="checkbox"/>	D & CO	747868795
<input type="checkbox"/>	8del1	789453231

Select Form Type(s)
 All Forms Select One Or More Forms

Selected	Form Type
<input type="checkbox"/>	1042-S
<input type="checkbox"/>	1095-A
<input type="checkbox"/>	1095-A SHOP
<input type="checkbox"/>	1095-B
<input type="checkbox"/>	1095-C
<input type="checkbox"/>	1095
<input type="checkbox"/>	1098-E
<input type="checkbox"/>	1098-Q
<input type="checkbox"/>	1098-T
<input type="checkbox"/>	1099-A

- Under the **Associate** section, select the **Check this box if this document needs to be printed according to the recipient address state** check box if you want to print the custom document based on the recipient address state. A state grid displays to the right of the forms grid.



3. In each grid, select the check box in the **Selected** column for each payer, form or state you want to associate with the custom document. Click the navigation icons below each grid to move through the payers, forms or states.



- Select **All Payers**, **All Forms** or **All States** at the top of the grids to associate all payers, forms or states with the custom document.
- If you have only one payer in your ONESOURCE Tax Information Reporting database, select **All Payers** so that **Save** becomes active after you select the forms and states to associate with the custom document.

4. Click **Save**.
5. Repeat steps 3 and 4 for each association you want to make.
6. Review your associations by clicking the **All Associations** breadcrumb in the breadcrumb trail.

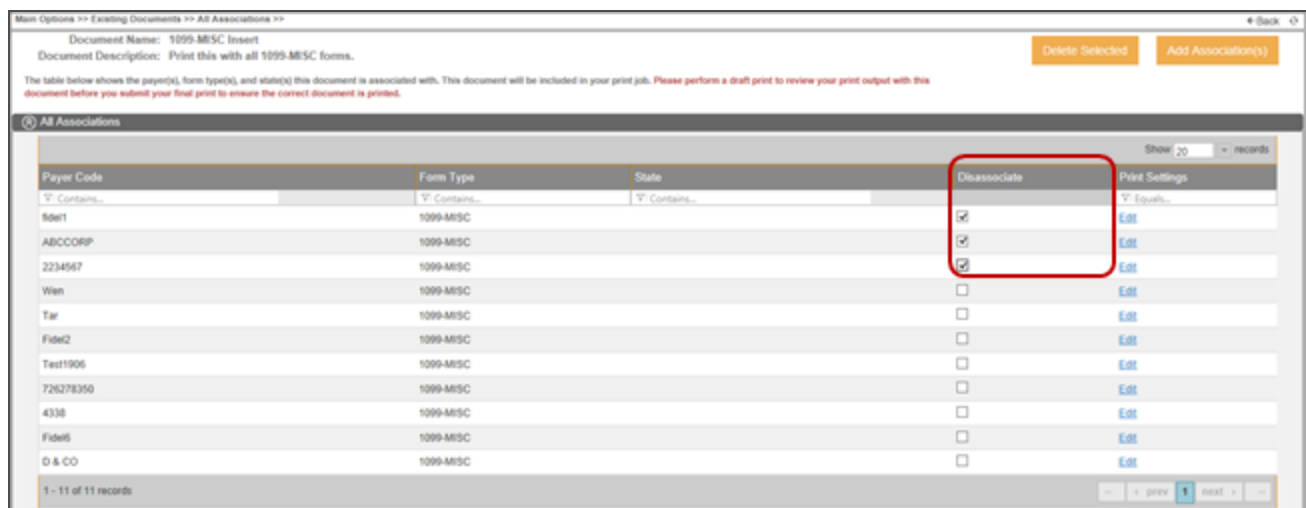


From the All Associations page, you can add additional associations, remove associations and set the images of a multi-image custom document to print simplex or duplex. See [Removing an Association \(page 15\)](#) and [Setting the Images of a Multi-Image Custom Document to Print Simplex or Duplex \(page 17\)](#) for details.

REMOVING AN ASSOCIATION

To remove an association:

1. From the Existing Documents page, click the **Associations** link for the row that includes the custom document you want to remove an association for.
2. Click the check box in the **Disassociate** column for each association you want to remove. In the following graphic, the check boxes for the first three combinations are selected:



Player Code	Form Type	State	Disassociate	Print Settings
50611	1099-MISC		<input checked="" type="checkbox"/>	Edit
ABCCORP	1099-MISC		<input checked="" type="checkbox"/>	Edit
2234567	1099-MISC		<input checked="" type="checkbox"/>	Edit
Wen	1099-MISC		<input type="checkbox"/>	Edit
Tar	1099-MISC		<input type="checkbox"/>	Edit
Fid62	1099-MISC		<input type="checkbox"/>	Edit
Test1906	1099-MISC		<input type="checkbox"/>	Edit
726278350	1099-MISC		<input type="checkbox"/>	Edit
4338	1099-MISC		<input type="checkbox"/>	Edit
Fid65	1099-MISC		<input type="checkbox"/>	Edit
D & CO	1099-MISC		<input type="checkbox"/>	Edit

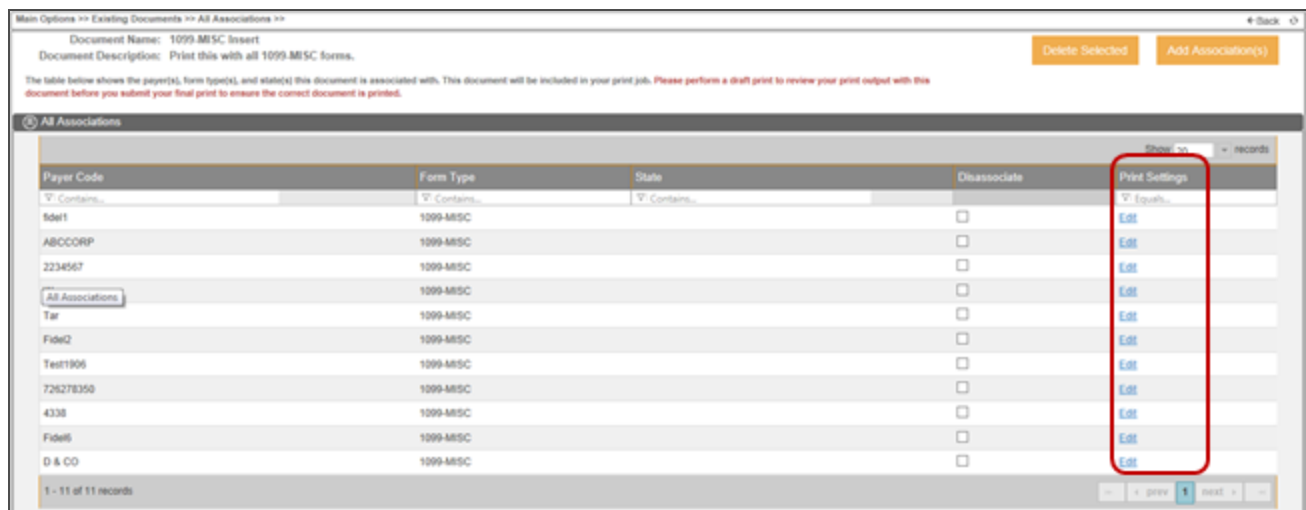
3. Click **Delete Selected**. After ONESOURCE Tax Information Reporting saves your deletions, the All Associations page is refreshed and the selected associations are no longer listed.

SETTING THE IMAGES OF A MULTI-IMAGE CUSTOM DOCUMENT TO PRINT SIMPLEX OR DUPLEX

ONESOURCE Tax Information Reporting defaults to printing each image of a multi-image custom document on one side of a sheet of paper (referred to as simplex printing). You can change the default for one or more of your images so that printing occurs on both sides of a sheet of paper (referred to as duplex printing). Duplex printing requires a printer that supports duplex printing. These print settings can be set on an association-by-association basis or for all of the custom document's associations.

To set the images of a multi-image custom document to print simplex or duplex:

1. From the Existing Documents page, click the **Associations** link for the row that includes the custom document you want to set the simplex or duplex print for.
2. Click the **Edit** link in the **Print Settings** column for an association.



The Print Settings page displays. The images in your custom document are listed under the **Print Simplex/Duplex** section in the same order as the images in the uploaded PDF file.

3. If you want to apply the print settings to all of the custom document associations, select the **Apply Changes to All Associations** check box. The following graphic shows the check box is selected:

Document Name: 1099-MISC Insert
 Document Description: Print this with all 1099-MISC forms.

Apply Changes to All Associations

Print Simplex/Duplex

Check Images to Print As Duplex

Show 10 records

Print on Front	Print on Back	Print Type	Image Number
<input checked="" type="radio"/>	<input type="radio"/>	Simplex	Image 1
<input checked="" type="radio"/>	<input type="radio"/>	Simplex	Image 2

1 - 2 of 2 records

Navigation: [Previous] [prev] 1 [next] [Next]

4. Under the **Print Simplex/Duplex** section, click the radio button in the **Print on Back** column for each image that you want printed on the back of a sheet of paper. The **Print Type** column changes from **Simplex** to **Duplex**.

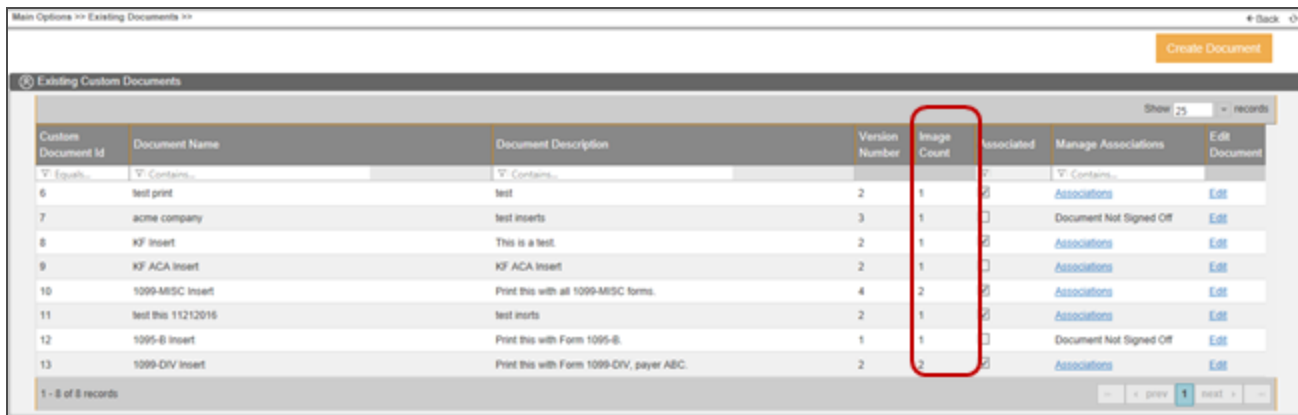
For example, you have a six-image custom insert and you want to duplex print the second and third and fifth and sixth images. The remaining images are simplex printed. To correctly print the custom document on four pieces of paper, select the radio buttons in the **Print on Back** column for **Image 3** and **Image 6**, and ensure that the radio buttons are selected in the **Print on Front** column for **Image 1**, **Image 2**, **Image 4** and **Image 5**. When the custom document is printed:

- **Image 1** prints on the front of the first sheet of paper.
- **Image 2** prints on the front and Image 3 prints on the back of the second sheet of paper.
- **Image 4** prints on the front of the third sheet of paper.
- **Image 5** prints on the front and Image 6 prints on the back of the fourth sheet of paper.

5. Click **Save**. The images in your multi-image custom document are now set to print simplex or duplex.

UPDATING CUSTOM DOCUMENTS

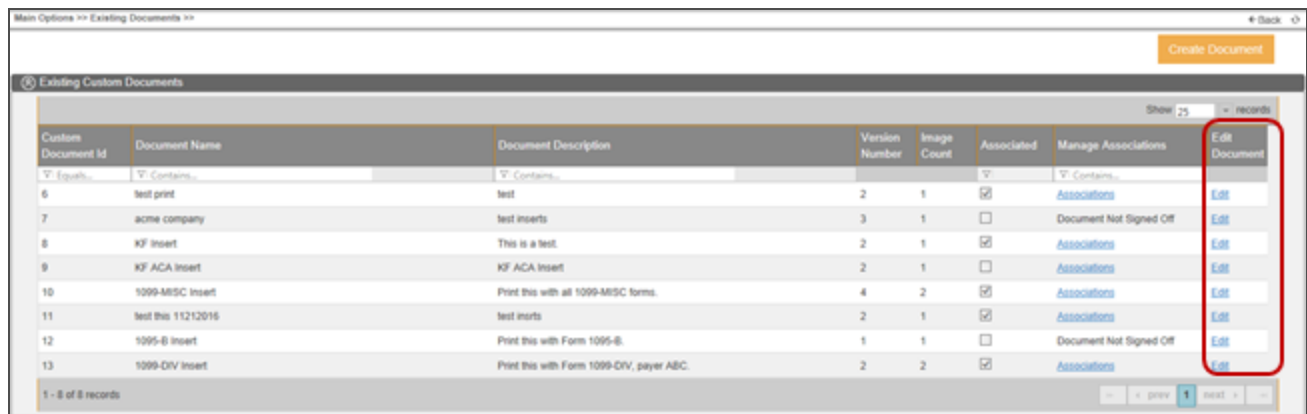
After your custom document is created, you can replace the uploaded version of the document and change the name and description of the custom document. When replacing an uploaded document, you will need to complete the image sign off process again. Additionally, after the new custom document is uploaded, the version number of the PDF is updated. You can view the version number in the **Version Number** column on the Existing Documents page.



Custom Document Id	Document Name	Document Description	Version Number	Image Count	Associated	Manage Associations	Edit Document
6	test print	test	2	1	<input checked="" type="checkbox"/>	Associations	Edit
7	acme company	test inserts	3	1	<input type="checkbox"/>	Document Not Signed Off	Edit
8	KF insert	This is a test.	2	1	<input checked="" type="checkbox"/>	Associations	Edit
9	KF ACA insert	KF ACA insert	2	1	<input type="checkbox"/>	Associations	Edit
10	1099-MISC insert	Print this with all 1099-MISC forms.	4	2	<input checked="" type="checkbox"/>	Associations	Edit
11	test this 11212015	test inserts	2	1	<input checked="" type="checkbox"/>	Associations	Edit
12	1095-B insert	Print this with Form 1095-B.	1	1	<input type="checkbox"/>	Document Not Signed Off	Edit
13	1099-DIV insert	Print this with Form 1099-DIV, payer ABC.	2	2	<input checked="" type="checkbox"/>	Associations	Edit

To update a custom document:

1. From the Existing Documents page, click the **Edit** link for the custom document you want to update.



Custom Document Id	Document Name	Document Description	Version Number	Image Count	Associated	Manage Associations	Edit Document
6	test print	test	2	1	<input checked="" type="checkbox"/>	Associations	Edit
7	acme company	test inserts	3	1	<input type="checkbox"/>	Document Not Signed Off	Edit
8	KF insert	This is a test.	2	1	<input checked="" type="checkbox"/>	Associations	Edit
9	KF ACA insert	KF ACA insert	2	1	<input type="checkbox"/>	Associations	Edit
10	1099-MISC insert	Print this with all 1099-MISC forms.	4	2	<input checked="" type="checkbox"/>	Associations	Edit
11	test this 11212015	test inserts	2	1	<input checked="" type="checkbox"/>	Associations	Edit
12	1095-B insert	Print this with Form 1095-B.	1	1	<input type="checkbox"/>	Document Not Signed Off	Edit
13	1099-DIV insert	Print this with Form 1099-DIV, payer ABC.	2	2	<input checked="" type="checkbox"/>	Associations	Edit

2. If necessary, update the document name and document description in the **Document Name** field and **Document Description** box.



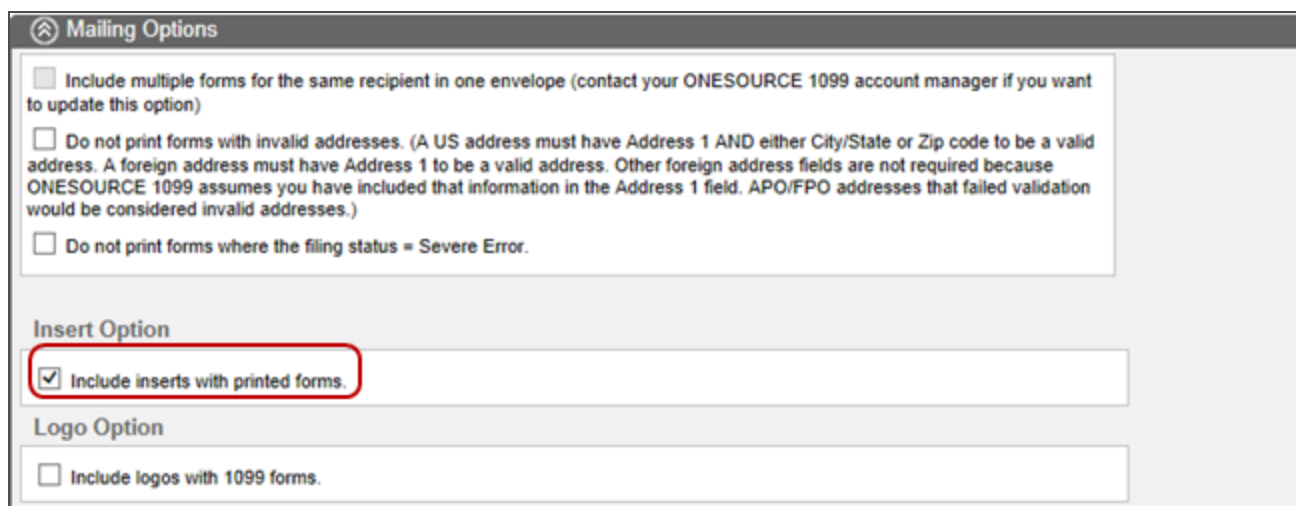
Duplicate document names are not allowed in the same tax year. Special characters are allowed in the **Document Name** field and **Document Description** box, but restrictive words, such as "delete" or "insert", are not allowed in the **Document Description** box.

3. Click **Save**.
4. Upload a new document. To upload a new document:
 - a. Click **Upload**.
 - b. Select **Yes** when the message asking if you want to continue displays.
 - c. Click **Select Files**.
 - d. Navigate to where the PDF version of the updated custom document is located, select it then click **Open**.
 - e. Click **Upload** to start the upload process then click **Close** after the upload process completes.
 - f. Sign off on an uploaded image. See [Signing Off on an Uploaded Image \(page 9\)](#).

PRINTING CUSTOM DOCUMENTS

The ability to include custom documents with forms when they are printed is controlled by a print profile option. To select this option:

1. Click the **Options** module.
2. Click **Print** on the Side Menu.
3. Under the **Print Profile Selections** section, click the **Print Profile Id** link for the print profile.
4. Under the **Mailing Options** section, select the **Include inserts with printed forms** check box.



5. Click **Save**.



- ONESOURCE Tax Information Reporting strongly recommends creating a draft print file before you batch print forms that include custom documents. Since a draft print file is not released to print (and the forms included in the draft print file are not marked as printed), you have the opportunity to review the print packages before they are printed.
- To ensure your draft batch job completes in a reasonable time, ONESOURCE Tax Information Reporting recommends creating a draft print job that includes no more than 50 forms with custom documents. If the purpose for creating the draft print file is to review a large number of forms, do not include the custom document in your draft print.

See [Before You Begin \(page 11\)](#) for details about how batch print options may affect your print packages.

EXPORTING CUSTOM DOCUMENT REPORTS

The **Views & Reports** module includes custom document reports that you can export and download. The reports are under the **Print/Filing Views** section on the Main Views & Reports page and include:

- **Custom Document Association History**-This report lists in descending order all current associations as well as any association updates or removals for a custom document. You can use this report to review the payer and form type association, the date and time the association was added or deleted, and whether the custom document is a tax form insert or a nondiscrimination notice. Nondiscrimination notices are identified during the association process when printing is based on the recipient address state. The **Status** column indicates whether the association is current or deleted.
- **Existing Custom Documents**-This report lists in descending order the versions for a custom document. You can use this report to review the dates and times when each version was created or updated, the user who signed off on the uploaded image and the association status. The association statuses include:
 - **No document**-Indicates that a name and description were entered but no PDF was uploaded.
 - **Document Not Signed Off**-Indicates that a PDF was uploaded but the uploaded image has not yet been signed off.
 - **Association Incomplete**-Indicates that the uploaded image was signed off, but the association process has not been completed.
 - **Association Complete**-Indicates that the custom document has been uploaded, the uploaded image has been signed off, and the association process is complete.

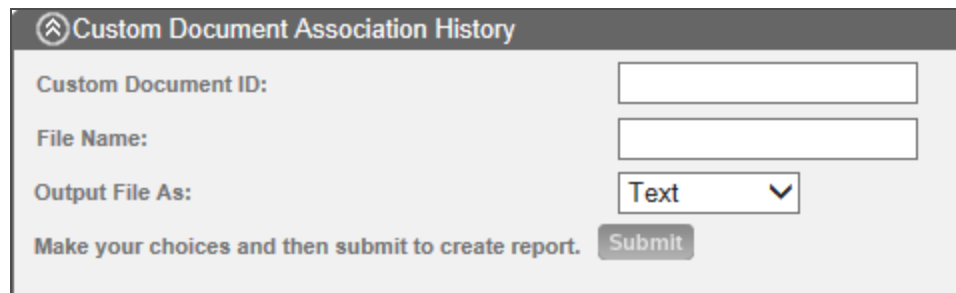


You are required to enter the custom document ID when exporting a custom document report. To find the custom document ID for a custom document, access the Existing Documents page by clicking the **Options** module then clicking **Custom Documents** from the Side Menu. The custom document ID for each of your custom documents is in the **Custom Document Id** column.

EXPORTING A CUSTOM DOCUMENT REPORT

To export a custom document report:

1. Click the **Views & Reports** module.
2. Click  for the report you want to export. The Custom Document Association History page displays.



The screenshot shows a web form titled "Custom Document Association History". It contains three input fields: "Custom Document ID:", "File Name:", and "Output File As:". The "Output File As:" field is a dropdown menu currently set to "Text". Below the fields is a "Submit" button and a note: "Make your choices and then submit to create report."

3. Enter the custom document ID of the custom document in the **Custom Document ID** field.
4. Enter a file name for the report in the **File Name** field. You can enter a maximum of 20 characters.
5. Select the format of the report from the **Output file as** drop-down list.
 - Select **Text** to export the report as a pipe-delimited text file.
 - Select **Excel 97** to export the report in the Microsoft® Excel® 97 file format.
 - Select **Excel 2007** to export the report in the Microsoft Excel 2007 file format.
6. Click **Submit**. The report is available for download from the Files Available for Download page after the batch completes.