

Mail Service FAQs

Q: How long does it take to send a 1099 or K-1 through Mail Service?

A: On average, it takes less than three days to print and transfer a 1099 or K-1 to the United States Postal Service (USPS).

Q: Are recipient packages printed single or double-sided?

A: Recipient packages are printed double-sided. Some forms, however, are forced to print on the front only to comply with the IRS standards for printed forms.

Q: How many pages fit into the envelopes?

A: Recipient packages are printed double-sided (duplex). Packages that have 16 pages or less are inserted into 6" x 9" envelopes. Packages that have more than 16 pages but less than 77 are inserted into a 9" x 12" envelope. Packages that have more than 77 pages are mailed in a box.

Q: Are the pages numbered?

A: Yes, each page of the recipient package is printed with a page number. The numbering is formatted as [page number] of [total pages]. For example, page 1 of a package that has 12 pages will print as 1 of 12.

Q: Why are the pages folded into separate groups within a 6" x 9" envelope?

A: The automated folding and inserting equipment uses a process known as *nesting*. Nesting requires the pages to be folded into groups of three pages then each group is inserted into the 6" x 9" envelope. The number of pages nested may vary slightly based on differing inserting equipment requirements.

Q: Can I use FedEx or UPS rather than the USPS for Mail Service?

A: No. Mail Service works with the USPS only.

Q: Is there a way to track a package through the USPS?

A: Currently, Mail Service does not provide tracking information for individual packages after they are delivered to the pre-sort vendor.

Q: What is a pre-sort vendor, and why is the pre-sort vendor necessary?

A: A pre-sort vendor works with the USPS to sort the mail by the nine-digit zip code. This streamlines the mailing process for the USPS and allows entities that use a pre-sort facility to take advantage of bulk postage rates. The pre-sort vendor is not affiliated with the print vendor.

Q: The status in ONESOURCE® Trust Tax shows that a recipient package was mailed 10 days ago, and my recipient just received it. Why does it take so long?

A: There are many factors that can contribute to the time it takes for a recipient to receive his or her recipient package. For example, weather, consolidation of USPS distribution facilities, or a large mailing volume during tax season, can affect how long it takes to receive a package.

Q: My client reported another date stamped or sprayed onto the envelope that appears to be a few days after the postmark. What does this date mean?

A: The postmark date is the date that the package was delivered to the pre-sort facility. The additional date is the actual date that the pre-sort vendor delivered the package to the USPS. The pre-sort vendor is required to deliver the package to the USPS within 48 hours of the postmark date.

Q: The date in ONESOURCE Trust Tax shows that a recipient package was shipped on February 1 but the letter the client received shows February 2 as the postmark. Why is there a discrepancy?

A: The date shown in ONESOURCE Trust Tax is the date when the recipient packages completed printing and were transferred to the pre-sort facility. The postmark stamped on the envelope by the print vendor is the next business day because recipient packages are collected by the pre-sort vendor each night.

Q: Where are the recipient packages printed?

A: In an effort to balance the work load, beginning with tax year 2015 returns, recipient packages will be printed at multiple locations. The location is determined by the print vendor.

Q: What do I need to do if my client or a recipient contacts me after receiving a recipient package in an unsealed or torn envelope?

A: Complete the following:

1. Determine if all of the pages are in the package.
2. Contact your Thomson Reuters Client Service Manager (CSM), and provide the following information:
 - The name and PAN of the client
 - The name of the recipient
 - The state the recipient lives in
 - The shipment number

Note: Generally, an unsealed or torn envelope is not considered a breach of privacy. Thomson Reuters will advise if further action is required.

Q: What do I need to do if a client contacts me about a recipient package that was received several days or weeks after the mailed date shown in ONESOURCE Trust Tax, or if the package has not been delivered after several weeks?

A: Complete the following:

1. Determine when the package was received by the recipient.
2. Obtain a scan or a photograph of the package, if possible.
3. Send the information to your Thomson Reuters CSM, and provide the following information:
 - The client PAN
 - The shipment number

Thomson Reuters will work with the print vendor to determine whether the package was shipped in accordance with the status shown in ONESOURCE Trust Tax. The print vendor can track the package only until it is delivered to the pre-sort vendor.