



DATAIR's 1099R Service Bureau

January is a hectic month for plan service providers, and 1099Rs play a major role. Would having an outside firm print, mail, and electronically file your 1099R's relieve you of some of that burden? If so, the DATAIR 1099R Service Bureau is the answer!

Let DATAIR free you from ordering and stocking special paper and envelopes; printing, folding and stuffing envelopes; and sealing, stamping, and mailing the forms. And, you can skip having to manually transmit the files to the IRS and verifying the filing status, and printing the red IRS copy of the forms too.

How does it work?

Just enter your 1099R data in DATAIR's Pension Reporter System. Then, with a press of a button, send the data off to DATAIR for processing. Once received, DATAIR will...

- print and mail recipient copies of the forms;
- electronically file them with the IRS;
- electronically file with states that participate in the combined state/federal filing program;
- generate a PDF of Copy D for each of your payers; and
- provide status information about filings each step of the way.

.... all at a price that's likely lower than doing it yourself!

What's the cost?

Effective 1/1/2017, the cost is \$2.00 per form for forms mailed to payees with a US mailing address. This includes all postage, handling, and materials. Unlike some competitors, we don't charge a batch or submission fee.

Sounds like the solution I've been looking for! Where can I get more information?

The attached Service Bureau Q&A may answer your questions. If not, please contact your DATAIR sales representative at (888) 328-2474 or sales@datair.com.

DATAIR 1099R Service Bureau Q&A

What's the deadline for submitting my data to the Service Bureau?

Forms, data must be received no later than 5 pm January 26 in order for us to meet the January 31st recipient copy mailing deadline. Forms submitted after that will be processed on a best-effort basis, however, no guarantee can be made that they will be mailed by the January 31st deadline.

Do I need to file all my 1099Rs at once?

No. You may send them to the Service Bureau in batches as you have them ready. However, we prefer that you combine multiple plans into a batch rather than submitting a batch for each plan.

How does the service work?

You will securely transmit your 1099R data to DATAIR using the Electronic filing wizard in Pension Reporter ("PR"). Upon receipt, we will begin processing your forms. Your monthly invoice will reflect the Service Bureau fees.

What will the Payee receive?

The recipient will receive a pressure sealed 1099R form with Copies A, B, and 2 and the IRS Recipient Instructions that meet all IRS requirements.

What happens if their forms are returned as undeliverable by the Post Office?

You have the option of specifying the Payer or the TPA name/address as the return address for the mailed forms. The specified party is then responsible for obtaining a corrected address and delivering the form.

What happens if a payee doesn't receive or loses their 1099?

You may request that we resend the form for an additional charge of \$1.00 per form. Alternately, you may print the form locally from PR and provide it to the participant yourself. No data changes are permitted for a re-send. If data changes are required, a corrected form should be prepared.

What happens if incorrect information is sent to DATAIR?

Once transmitted to DATAIR, the forms should be considered "filed". Thus, any changes should be submitted as a corrected form. An additional per-form fee is charged for corrected forms.

We don't currently use PR; can I still use the Service Bureau?

The Pension Reporter 1099R module is required to prepare your filings. If you do not currently license this module, please contact your sales representative for special pricing.

Will you file the 945 also?

The 945 requires the plan sponsor's signature; therefore we can not file it for you. However, it can be quickly and easily be printed from PR using the 1099R data entered.

What if my state doesn't participate in the combined State/Federal Electronic Filing program?

If your state requires filing of 1099R Copy 1, you can print the forms from PR and file them with the state directly.

What about foreign addresses?

We're unable to mail recipient copies of forms that will require anything other than USPS US First Class Postage. If you include 1099s foreign addresses in your Service Bureau filing, we will electronically file the form with the IRS, but will not mail the recipient copy.