



Tax Information Reporting 2019 Calendar



1	TU	
2	WE	
3	TH	
4	FR	
5	SA	
6	SU	
7	MO	
8	TU	
9	WE	
10	TH	
11	FR	
12	SA	
13	SU	
14	MO	
15	TU	
16	WE	
17	TH	
18	FR	


19	SA	
20	SU	
21	MO	
22	TU	
23	WE	
24	TH	
25	FR	
26	SA	
27	SU	
28	MO	
29	TU	
30	WE	
31	TH	<ul style="list-style-type: none"> • Furnish forms 1095*, 1098, 1099 and W-2 to recipients • File W-2 and 1099-MISC Box 7 (NEC) • Furnish MA 1099-HC to recipients • File MA 1099-HC • Print and File PR 480.7A and PR 499R-2 by January 31 • File State Filings as required <p><small>*IRS has granted an automatic 30 day extension</small></p>

MONTHLY ACTIVITY CHECKLIST

- | | | |
|--|--------------------------------|--------------------------------|
| <input type="checkbox"/> Import year-end tax data into ONESOURCE Tax Information Reporting | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Review reconciliation and management reports | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Fair Market Value (FMV) statement | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> File prior year fourth quarter state reporting as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> File state ICR as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | |

NOTE: Calendar shows certain but not all Federal, Puerto Rico and Canadian tax furnishing and filing deadlines.

1	FR
2	SA
3	SU
4	MO
5	TU
6	WE
7	TH
8	FR
9	SA
10	SU
11	MO
12	TU
13	WE
14	TH 

15	FR	Furnish forms 1099-B, 1099-S to recipients
16	SA	
17	SU	
18	MO	
19	TU	
20	WE	
21	TH	
22	FR	
23	SA	
24	SU	
25	MO	
26	TU	
27	WE	
28	TH	<ul style="list-style-type: none"> • File T4A, T5 and T5008 • Print and File PR 480.6A, 480.6B, and 480.6D • File State Filings as required

MONTHLY ACTIVITY CHECKLIST

- | | | |
|--|--------------------------------|--------------------------------|
| <input type="checkbox"/> Receive recipient inquiries and enter corrections | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Send corrected recipient statements | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> File state ICR as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

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1	FR
2	SA
3	SU
4	MO
5	TU
6	WE
7	TH
8	FR
9	SA
10	SU
11	MO
12	TU
13	WE
14	TH
15	FR

- Furnish Forms 1095 to recipients
- File 1099-MISC (NEC) corrected forms
- Furnish 1042-S to recipients
- File 1042-S
- File 1042-S filing extension


16	SA
17	SU
18	MO
19	TU
20	WE
21	TH
22	FR
23	SA
24	SU
25	MO
26	TU
27	WE
28	TH
29	FR
30	SA
31	SU

MONTHLY ACTIVITY CHECKLIST

- | | | |
|---|--------------------------------|--------------------------------|
| <input type="checkbox"/> File State Filings as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> File state ICR as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

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1	MO	<ul style="list-style-type: none"> File forms 1095, 1098, 1099 File forms 1095, 1098, 1099 filing extension Print and file Canada NR-4 statements
2	TU	
3	WE	
4	TH	
5	FR	
6	SA	
7	SU	
8	MO	
9	TU	
10	WE	
11	TH	
12	FR	
13	SA	
14	SU	
15	MO	File 1042-S if extension was received


16	TU	
17	WE	
18	TH	
19	FR	
20	SA	
21	SU	
22	MO	
23	TU	
24	WE	
25	TH	
26	FR	
27	SA	
28	SU	
29	MO	
30	TU	<ul style="list-style-type: none"> File forms 1095, 1098, 1099 if extension was received Furnish 5498-ESA to recipients

MONTHLY ACTIVITY CHECKLIST

- | | | |
|--|--------------------------------|--------------------------------|
| <input type="checkbox"/> Late Original Filing (if no extension is requested) | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Receive and load B-Notice file for prior year | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> File current year first quarter state reporting as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> File state ICR as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | |

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2	TH
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4	SA
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6	MO
7	TU
8	WE
9	TH
10	FR
11	SA
12	SU 
13	MO
14	TU
15	WE
16	TH
17	FR

18	SA
19	SU
20	MO
21	TU
22	WE
23	TH
24	FR
25	SA
26	SU
27	MO 
28	TU
29	WE
30	TH
31	FR

- **Print and File form 5498**
- **File 5498 filing extension**
- **File forms 1095, 1098, 1099 corrections**

MONTHLY ACTIVITY CHECKLIST

- | | | |
|---|--------------------------------|--------------------------------|
| <input type="checkbox"/> Late Original Filing (if extension was received) | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> File state ICR as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

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9	SU
10	MO
11	TU
12	WE
13	TH
14	FR
15	SA

16	SU
17	MO
18	TU
19	WE
20	TH
21	FR
22	SA
23	SU
24	MO
25	TU
26	WE
27	TH
28	FR
29	SA
30	SU

MONTHLY ACTIVITY CHECKLIST

- | | | |
|---|--------------------------------|--------------------------------|
| <input type="checkbox"/> File state ICR as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

NOTE: Calendar shows certain but not all Federal, Puerto Rico and Canadian tax furnishing and filing deadlines.

1	MO	File form 5498 if extension was received
2	TU	
3	WE	
4	TH	
5	FR	
6	SA	
7	SU	
8	MO	
9	TU	
10	WE	
11	TH	
12	FR	
13	SA	
14	SU	
15	MO	
16	TU	

17	WE	
18	TH	
19	FR	
20	SA	
21	SU	
22	MO	
23	TU	
24	WE	
25	TH	
26	FR	
27	SA	
28	SU	
29	MO	
30	TU	
31	WE	<ul style="list-style-type: none"> • File 1099-MISC (NEC) corrections • File forms 1095, 1098, 1099 corrections

MONTHLY ACTIVITY CHECKLIST

- | | | |
|---|--------------------------------|--------------------------------|
| <input type="checkbox"/> File current year second quarter state reporting as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> File state ICR as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

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9	FR
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12	MO
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15	TH
16	FR

17	SA
18	SU
19	MO
20	TU
21	WE
22	TH
23	FR
24	SA
25	SU
26	MO
27	TU
28	WE
29	TH
30	FR
31	SA

MONTHLY ACTIVITY CHECKLIST

- | | | |
|--|--------------------------------|--------------------------------|
| <input type="checkbox"/> Receive and load TIN penalty notices (972-CG) | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> File state ICR as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

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12	TH
13	FR
14	SA
15	SU

16	MO
17	TU
18	WE
19	TH
20	FR
21	SA
22	SU
23	MO
24	TU
25	WE
26	TH
27	FR
28	SA
29	SU
30	MO

MONTHLY ACTIVITY CHECKLIST

- | | | |
|---|--------------------------------|--------------------------------|
| <input type="checkbox"/> File state ICR as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
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17	TH
18	FR
19	SA
20	SU
21	MO
22	TU
23	WE
24	TH
25	FR
26	SA
27	SU
28	MO
29	TU
30	WE
31	TH




MONTHLY ACTIVITY CHECKLIST

- | | | |
|--|--------------------------------|--------------------------------|
| <input type="checkbox"/> Receive and load B-Notice file for prior year | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Mail B-Notice letters and W-9s to recipients | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Begin backup withholding as appropriate | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> File current year third quarter state reporting as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> File state ICR as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | |

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7	TH
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9	SA
10	SU
11	MO
12	TU
13	WE
14	TH
15	FR
16	SA




17	SU
18	MO
19	TU
20	WE
21	TH
22	FR
23	SA
24	SU
25	MO
26	TU
27	WE
28	TH 
29	FR
30	SA

MONTHLY ACTIVITY CHECKLIST

- | | | |
|--|--------------------------------|--------------------------------|
| <input type="checkbox"/> Begin backup withholding as appropriate | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> File state ICR as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

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13	FR
14	SA
15	SU
16	MO

17	TU
18	WE
19	TH
20	FR
21	SA
22	SU 
23	MO
24	TU
25	WE 
26	TH 
27	FR
28	SA
29	SU
30	MO
31	TU

MONTHLY ACTIVITY CHECKLIST

- | | | |
|--|--------------------------------|--------------------------------|
| <input type="checkbox"/> Begin backup withholding as appropriate | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> File state ICR as required | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

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