THOMSON REUTERS **ONESOURCE** Tax Information Reporting 2019 Calendar



January 2019

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1	TU	19	SA	
2	WE	20	SU	
3	TH	21	МО	
4	FR	22	TU	
5	SA	23	WE	
6	SU	24	TH	
7	MO	25	FR	
8	TU	26	SA	
9	WE	27	SU	
10	TH	28	МО	
11	FR	29	TU	
12	SA	30	WE	
13	SU	31	TH	 Furnish forms 1095*, 1098, 1099 and W-2 to recipients
14	MO			File W-2 and 1099-MISC Box 7 (NEC)Furnish MA 1099-HC to recipients
15	TU			• File MA 1099-HC
16	WE		 Print and File PR 480.7A and PR 499R-2 by January 31 	
17	TH			• File State Filings as required *IDS has granted an automatic 30 day outons in
18	FR			*IRS has granted an automatic 30 day extension

MONTHLY ACTIVITY CHECKLIST ☐ Import year-end tax data into ONESOURCE Tax Information Reporting ☐ Review reconciliation and management reports ☐ Fair Market Value (FMV) statement ☐ File prior year fourth quarter state reporting as required ☐ File state ICR as required □ ______ NOTE: Calendar shows certain but not all Federal, Puerto Rico and Canadian tax furnishing and filing deadlines.

February 2019

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12	TU
13	WE
14	TH

15	FR	Furnish forms 1099-B, 1099-S to recipients
16	SA	
17	SU	
18	МО	9.5
19	TU	
20	WE	
21	TH	
22	FR	
23	SA	
24	SU	
25	МО	
26	TU	
27	WE	
28	TH	 File T4A, T5 and T5008 Print and File PR 480.6A, 480.6B, and 480.6D File State Filings as required

MONTHLY ACTIVITY CHECKLIST ☐ Receive recipient inquiries and enter corrections ☐ Send corrected recipient statements ☐ File state ICR as required □ ______ NOTE: Calendar shows certain but not all Federal, Puerto Rico and Canadian tax furnishing and filing deadlines.

March 2019

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1	FR	16	SA
2	SA	17	SU
3	SU	18	МО
4	• Furnish Forms 1095 to recipients	19	TU
	File 1099-MISC (NEC) corrected forms	20	WE
5	TU	21	TH
6	WE	22	FR
7	TH	23	SA
8	FR	24	SU
9	SA	25	МО
10	SU	26	TU
11	MO	27	WE
12	TU	28	TH
13	WE	29	FR
14	TH	30	SA
	• Furnish 1042-S to recipients	31	SU
15	FR • File 1042-S		
	File 1042-S filing extension		

16	SA
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21	ТН
22	FR
23	SA
24	SU
25	MO
26	TU
27	WE
28	TH
29	FR
30	SA
	SU

☐ File State Filings as required	
☐ File state ICR as required	
	NOTE: Calendar shows certain but not all Federal, Puerto Rico and Canadian tax furnishing and filing deadlines.

April 2019

1	MO • File forms 1095, 1098, 1099	16	TU
	• File forms 1095, 1098, 1099 filing extension	17	WE
	Print and file Canada NR-4 statements	18	TH
2	TU	19	FR
3	WE	20	SA
4	TH		
5	FR		SU
6	SA	22	MO
7	SU	23	TU
-		24	WE
8	МО	25	TH
9	TU		
10	WE		FR
11	TH	27	SA
12	FR	28	SU
		29	MO
13	SA	30	TU • File forms 1095, 1098, 1099 if extension was received
14	SU	30	• Furnish 5498-ESA to recipients
15	MO File 1042-S if extension was received		

MONTHLY ACTIVITY CHECKLIST					
☐ Late Original Filing (if no extension is requested)					
☐ Receive and load B-Notice file for prior year					
☐ File current year first quarter state reporting as required					
☐ File state ICR as required	П	П			
		NOTE: Calendar shows certain but not all Federal, Puerto Rico			
		and Canadian tax furnishing and filing deadlines.			

May 2019

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22	WE
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28	TU
29	WE
30	TH
31	 FR • Print and File form 5498 • File 5498 filing extension • File forms 1095, 1098, 1099 corrections

☐ Late Original Filing (if extension was received)	
☐ File state ICR as required	
	NOTE: Calendar shows certain but not all Federal, Puerto Rico

June 2019

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ONESOURCE

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9	SU	24 MO
10	MO	25 TU
11	TU	26 WE
12	WE	27 TH
13	TH	28 FR
14	FR	29 SA
15	SA	30 SU

MONTHLY ACTIVITY CHECKLIST		
☐ File state ICR as required		
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		NOTE: Calendar shows certain but not all Federal, Puerto Rico
	🗆	and Canadian tax furnishing and filing deadlines.

July 2019

1	MO File form 5498 if extension was received	17 WE
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3	WE	19 FR
4	TH *\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	20 SA
5	FR	21 SU
6	SA	22 MO
7	SU	23 TU
8	МО	24 WE
9	TU	25 TH
10	WE	26 FR
11	TH	27 SA
12	FR	28 SU
13	SA	29 MO
14	SU	30 TU
15	МО	• File 1099-MISC (NEC) corrections
16	TU	• File forms 1095, 1098, 1099 corrections

MONTHLY ACTIVITY CHECKLIST				
☐ File current year second quarter state reporting as required ☐ ☐				
☐ File state ICR as required				
		NOTE: Calendar shows certain but not all Federal, Puerto Rico		
		and Canadian tax furnishing and filing deadlines.		

August 2019



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14	WE	30	FR
15	TH	31	SA
16	FR		

MONTHLY ACTIVITY CHECKLIST					
☐ Receive and load TIN penalty notices (972-CG)		. 🗆			
☐ File state ICR as required		. 🗆			
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		and Canadian tax furnishing and filing deadlines.			

September 2019

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MONTHLY ACTIVITY CHECKLIST				
☐ File state ICR as required				
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		and Canadian tax furnishing and filing deadlines. –		

October 2019

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	MO	30	WE
15	TU	31	TH
16	WE		

MONTHLY ACTIVITY CHECKLIST		
☐ Receive and load B-Notice file for prior year		
☐ Mail B-Notice letters and W-9s to recipients		
☐ Begin backup withholding as appropriate		
$\hfill \Box$ File current year third quarter state reporting as required		
☐ File state ICR as required		
		NOTE: Calendar shows certain but not all Federal, Puerto Rico
П	П	and Canadian tax furnishing and filing deadlines.

November 2019

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☐ Begin backup withholding as appropriate	
☐ File state ICR as required	
	NOTE: Calendar shows certain but not all Federal, Puerto Rico and Canadian tax furnishing and filing deadlines.

December 2019

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☐ Begin backup withholding as appropriate	
☐ File state ICR as required	
	NOTE: Calendar shows certain but not all Federal, Puerto Rico and Canadian tax furnishing and filing deadlines.