



W1 QSL BUREAU

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Letter Sorter Procedure

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Introduction

This document describes the process for the Letter Sorters. Variations to this common practice will likely exist as this document is introduced. This document enables the W1 QSL Bureau management to understand those differences and have a common terminology for managing the Letter Sorting process.

For the purposes of this document, the term "Bureau Program" refers to the Windows based QSL Bureau Accounting Program.

Overview of the Letter Sorting Process

The Letter Sorter is responsible for sorting and delivering the QSL cards for their assigned letter. The assigned letter refers to the first letter of the suffix of the call sign.

The basic steps for Letter Sorting are as follows:

- 1 – Update the Bureau Program with any credits for funds received and address changes from the client Hams. Ongoing activity
- 2 – Backup transactions to the Cloud so that the account status is available on the Web.
- 3 – Receive a shipment of cards for their letter from the Letter Sort Manager. An accounting summary and if applicable, a check, from the Administration Manager will be included.
- 4 – Sort the cards into bundles for each client Ham.
- 5 – Ship the cards and their account balance information to the client Hams using the Bureau Program.
- 6 – Send notifications to Hams who have cards but with insufficient or no funds.

Shipping Cards

After sorting the cards, the next step is to determine the shipping. Any unshipped cards from previous sorts should also be included in the consideration.

Shipments should be made to client Hams that have sufficient funds in their account.

For each shipment, you should also include a notice indicating their account balance.

If the client ham as sufficient funds, cards should not be held for longer than 6 months.

If the client Ham has a newly funded account, they should get a first shipment when the account is funded. This includes if they were notified of a low balance and have cards waiting.

If a client Ham has a multiple ounce shipment but not enough funds for the shipment, ship what you can with the remaining funds and include a notice to send more funds. If it is a regular client Ham, it is ok to go slightly negative to get the shipment done. You can use your own judgment on this. Be sure that they get a notice to send more funds.

With the higher cost of 'packages' in some cases it may be more efficient to send two 'letter' rate shipments instead of one 'package' rate shipment. Use the program to deduct the amount for each letter shipment but you will need to hand address the second letter since the program will only generate one label.

Backup the shipping transactions to the Cloud.

Notify

The Bureau Program handles sending notifications to Hams when they have cards but to not have an account or have insufficient funds. Notifications may be done by Email or postcard. A sample set of postcards is available on the [W1 QSL Bureau Sorters](#) web page.

If cards are received but the Ham does not have an account or enough funds, they should receive a notification. First verify that it is a valid call and also that it is a plausible QSO. For example, if it is a 20M QSO but the Ham holds a Technician license, it is probably a busted QSO. Remember that Technicians have CW privileges on 80M, 40M and 15M and CW/SSB/Data on 10M.

They should be notified if they have 5 or more cards. You may notify at fewer than 5 cards at your discretion.

If they continue to receive cards, a second notification should be sent. Before you destroy cards, it is recommended that the second or final notice be done by postcard unless you have confidence that the email message was received by the Ham.

If after sending a notification you receive a message from the Administration Manager that they sent in funds, send the cards to them. Be sure the status label shows the new balance including the funds they just sent in.

Unclaimed cards can be disposed of locally 90 days after the second notification has been sent.

"No Bureau" Accounts

Some Hams do not want to receive cards from the Bureau. The Administration Manager receives and verifies the requests. The information is then forwarded to the appropriate Letter Sorter and the calls are published on our web page. When receiving these notices, you should change their Account Status to 'No Buro' and let the Administration Manager know if the Ham has any account balances. Any cards received for these Hams can be destroyed.

Silent Key and Inactive Accounts

Special handling of Silent Key and Inactive accounts is required to ensure the tracking of funds.

Within the Bureau Program you should create two administrative X accounts using the following as the call signs: X*1SK and X*1INA where * is the letter that you are sorting.

For example the A Letter Sorter would establish accounts XA1SK and XA1INA.

Periodically, the funds in these accounts will be transferred to accounts in the bureau operations.

Remember to go into both the Ham's account and the X account to record the transfer when using the Bureau Program. For example, if you are transferring \$2.00 from W1ABC to the Inactive account, first go into the W1ABC account and Transfer **OUT** \$2.00 **TO** XA1INA, then go into the XA1INA account and Transfer **IN** \$2.00 **FROM** W1ABC.

Silent Keys

When you receive notice that a Ham is a silent key, or find the call listed as SK in QST, you should change the status of the account to "SK" in the Bureau Program. Also enter the approximate End Date so you will have it in case the call is reissued. If the account has sufficient funds, you should continue to send cards since a family member or Ham friend may still be handing the cards. The family may respond with further instructions. The exception is if the account has sufficient funds but there has not been a mailing for 3 years and the balance is less than \$25.00, then transfer the funds to the X*1SK account.

If a mailing is returned as undeliverable then transfer the funds to the X*1SK account.

In all cases, first contact the Administration Manager first if the remaining funds are over \$25.00.

We do not return SK cards to the DX station.

Inactive Calls

For accounts that are still active calls in the FCC database but have had no activity, no cards received, no funds received, or no special instructions, for a period of at least 15 years, the account is determined to be "Inactive". If the call shows in the FCC database as Cancelled or Expired then the inactivity period criteria is 5 years. Any remaining funds from that account should be transferred to the X*1INA account. Contact the Administration Manager first if the remaining funds are over \$25.00.

If, at a later date the Ham notifies us that they want to activate their account, the funds can be reinstated to their account using the records in the Account History function of the Bureau Program.

If the call was changed, some or all of the funds are generally transferred to the new call. See next section on Changed Calls.

Changed Calls

When a Ham changes their call, the account for the old call should be updated to show that status as "Changed". Indicate the New Call and the End Date. Watch for reissues of the old call. The account for the new call should show the Start Date and the Old Call.

Depending on the activity of the old call, the old call account may remain funded and continue to be used to ship cards. The Administration Manager may transfer some or all of the funds to the new call. If the old call account no longer has funds, then any old call cards should be sent to the Letter Sort Manager marked with the new call.

If the old call and the new call are with the same Letter Sort then transfer all funds to the new call account and ship all cards from the new call account.

Missorts

Missorts are cards you receive that are not for your W1 letter, for another US Bureau, or for a DX call sign. They can be bundled up and returned to the Letter Sort Manager, who will resort them to the proper destination. This case would include a call like KH2/K1KP that has a forward to a call sign in Japan. Missorts may also be sent to our PO Box address.

Cards for bad calls can be tossed. This includes calls that do not or never had an account and no longer show in QRZ.com. Also cards for calls that are Technician or Novice licenses and the QSO is not valid for their band/mode. Those were probably busted calls.

FINANCE

Introduction

This section describes the methods for managing the bureau funds that are handled by the Letter Sorters

Overview of Transactions

The Letter Sorter manages their funds with two separate systems:

1 – The Bureau Program for tracking the accounts of each individual client Ham. This tracks the individual Ham's credits and the deductions to cover the shipment of cards. It also tracks transfers in and out of their accounts.

2- The Letter Sorter Operating Account tracks the funds received by the sorter and the expenses made by the sorter. There is no formal program for tracking these expenses. It is left to the individual Letter Sorter. It can be done with a simple Excel spreadsheet, a paper ledger, or other tools. A sample Excel spreadsheet is available on our web. If the Letter Sorter is managing more than one letter, the finances of each letter must be kept separate and reported separately.

The Administration Manager receives funds from individual Hams for crediting to their Bureau account. These credits are communicated by email to the Letter Sorters as received and then the actual funds are sent to the Letter Sorters every few months. The Letter Sorter records the funds received from the individual Hams into the Bureau Program. A cloud backup of the data is then done so the Ham will know it have been received.

The Letter Sorter receives the funds into their Letter Sorter Operating Account. When the Letter Sorter ships cards to the client Hams, the transaction is recorded in the Bureau Program. The expense of buying stamps, supplies, and mailings at the Post Office are recorded in the Letter Sorter Operating Account.

Receiving Funds

As the Administration Manager receives funds from the individual Hams (s)he sends an email to the appropriate Letter Sorter with the amount of the payment and any other information received, for example the Ham's address. When the payment is received using PayPal, the amount of the credit will be the amount after the PayPal fees are deducted.

The Letter Sorter records this credit in the Bureau Program. If the funds received are for a Ham that was sent a "Notify" message or for a new account that has cards on hand, then the cards should be sent to the Ham right away. Backup the transaction to the Cloud.

About every four months, the Administration Manager will send the Letter Sorter a check with the accumulated credits and transfers for each letter account. Included will be a summary accounting slip showing the individual Hams and the amounts to be credited or debited from their individual accounts. These credits and debits should be verified that they are properly recorded in the Bureau Program.

Expenses

The Letter Sorter records their expenses in the Letter Sorter Operating Account. Expenses include the following:

- Purchase of stamps used for mailing QSL cards and other correspondence
- Purchase of postage at the post office for mailings
- Purchase of supplies including envelopes and labels

Receipts shall be kept for all expense. The purchase of larger items such as scales should be approved by the Letter Sort Manager prior to purchase.

Central Funds

The Letter Sorter Operating Account is intended to be at a funding level sufficient to allow the Letter Sorter to cover normal operating expenses. Excess funds are held by the Administration Manager in an account called "Central Funds". Central Funds is also used to cover the operating costs of the Bureau that are not funded by the ARRL.

The target amount for each sorter to have in their Letter Sorter Operating Account is \$300.00.

Some sorters do a bulk purchase of postage stamps and in this case the total of stamps and cash target is \$400.00.

These are target numbers. Variations plus and minus \$100.00 from them are normal.

Excess funds should be sent back to the Administration Manager for crediting to the individual letter Central Funds account. If funds are needed by the Letter Sorter, then the Administration Manager will send a check from Central Funds to the Letter Sorter.

If a sorter manages more than one letter and wants to send funds for multiple letters, one check can be sent indicating the amounts to be credited for each letter.

When the balance at the Letter Sorter is high, the Administration Manager may choose to have the amount of the periodic funds payment credited to Central Funds instead of issuing a check to the Letter Sorter. This transaction will be recorded in the accounting slip is normally sent with the check.

Reporting

At the end of each calendar year, each Letter Sorter sends a summary report for each letter they manage to the Administration Manager. The report should contain the following items:

1 – The cash balance of the Letter Sorter Operating Account. This is the actual cash amount held by the Letter Sorter independent of the Bureau Program report.

2 – The total value of the stamps held by the sorter

A cloud backup of the letter data should be done at the end of the calendar year.

References

[W1 QSL Bureau Web](#)

[QSL Bureau Accounting Program Documentation](#)

[QSL Bureau Accounting Program Manual](#)

Revision History

Revision	Description of Change
6-Jan-2021	Rewrite- combine 3 documents into 1
5-Dec-2022	Minor updates including requiring receipts
26-Jun-2024	Set 6 month max card hold