**JICMAIL LEVY**

**OPT-OUT REFUND CLAIM FORM**

The purpose of this standard form is for you to Opt-Out of the JICMAIL Levy Scheme and recover payments made. The levy is a small fraction of one-per-cent (0.3% or £3 per £1000) that is added to the relevant postage costs in mailing billed by your mailing provider at source and is subject to a Cap maximum of £5,000 for 2023.

The levy supports JICMAIL which collects valuable data on behalf of the industry about the impact and effect of your advertising from mail. It will provide you with data and insights for your mailing activity and how mail works with other marketing channels to support your activity working as effectively as possible for your business.

Before you complete and sign this form please be aware that JICMAIL is an industry asset, owned by the industry to support best data and insight practice. It has taken several years to develop and now, through the levy, the research data generated by JICMAIL is free to access across the entire UK marketing industry.

The JICMAIL Levy funds a JICMAIL training resource that will help you access, understand, and utilise the research data to underpin your mailing campaigns. This support is provided free of charge.

Please contact Tara on [tara@jicmail.org.uk](mailto:tara@jicmail.org.uk) to find out more.

Please read the GUIDANCE NOTES below before completing this form.

|  |  |
| --- | --- |
|  |  |
| Company Name |  |
| Company Address |  |
| Company House Registration Number |  |
| Name of Postal/Access Carrier(s) |  |
| Contact and Address of Postal/Access Carrier(s) |  |
| The relevant UCIDs\* used for mail between 1st January 2023 – 31st Dec 2023 that carried the JICMAIL Levy |  |
| Reason(s) for not supporting this important industry initiative. |  |
| Total JICMAIL Levy paid per schedule |  |
| To enable us to make a repayment of the JICMAIL Levy we will ask your Postal/Access Carrier(s) to provide a schedule with the following information:  Invoice Date  Invoice Number  Mail Levy Amount  Date Paid |  |
| Your bank details:  (required for any repayment) |  |
| Bank name |  |
| Sort code |  |
| Account number |  |
| Signed by:  (Customer board director - senior or responsible officer) | Please sign |
| Name |  |
| Position |  |
| Date |  |

**\***Your UCID is the unique, identifying number assigned by an Access Operator for your mailings. You are likely to have multiple UCIDs if you post from more than one site and/or post under more than one postage account.

**NEXT STEPS:**

Email this form to tara@jicmail.org.uk

Together with:

* JICMAIL Mailing Agent Authorisation Form(s) (your instruction to your agents empowering them to provide billing data to JICMAIL for verification purposes).
* As requested, please send copies of invoices as detailed in Point 7 below.

Providing we can validate the data in the schedule JICMAIL will settle your claim within 90 days of the date that the claim is received.

**GUIDANCE NOTES**

1. The JICMAIL Levy is collected on a calendar year basis.
2. The Opt-Out claim only applies to one calendar year.
3. You can send an Opt-Out claim up to three months after the end of the calendar year.
4. We rely on the support of your agents such as mailing agent/marketing agency or Postal / Access Carriers to record your payments and validate JICMAIL Levy amounts claimed.
5. We cannot process your claim without the JICMAIL Mailing Agent Authorisation Form. This is located on the JICMAIL website.
6. A JICMAIL Mailing Agent Authorisation Form is required for each Postal/ Access Carrier responsible for the distribution of your mailing (whom you receive invoices from) so that we can validate your claim with the supplier who invoiced you the charge.
7. You may purchase your mail services directly with Royal Mail, through a mailing agent (printer), marketing agency or Postal / Access Carrier which includes, for example, the Royal Mail Wholesale operators who hold an Access Letters Contract (Contract) with Royal Mail Group Limited and other intermediaries also receiving Royal Mail invoices across the advertising mail Retail, Wholesale and Door drop channels. As available, please email us copies of your invoices from your relevant agent so that we can work with your supplier to validate your claim.
8. The JICMAIL Levy is outside the scope of VAT and should not be included in your claim.
9. Response timelines are for guidance only and are not guaranteed.
10. Generally, whilst we recognise that there will need to be some time to adjust existing delivery systems across the supply chain, we support and encourage industry best practice standards and as such we encourage all agents to:
    1. Specify the specific levy cost on all plans/proposals and detail as a VAT exempt item on invoices.
    2. Monitor levy contributions for their Originating Customers as appropriate.

**LEGAL NOTE**

There is no legal relationship or contract between you and JICMAIL.

There is no supply of data or service to you by JICMAIL through the operation of the Mail Levy.

JICMAIL accepts no liability to you and does not make any warranty to you under this opt-out process.

**Version 1 – 30th November 2023**