Preparing your 1099-NEC & 1099-MISC for printing and mailing

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Preparing your 1099-NEC & 1099-MISC forms for printing and mailing

Verify Agency's Profile

- Your agency TIN
- Your Agency NAME
- Your Agency Address
- Your Agency Contact Person for 1099-NEC & 1099-MISC: Name, Phone Number, and Email address

Please email the OFM Help Desk at <u>HereToHelp@ofm.wa.gov</u> of any changes to your Agency's Profile information. OFM will update your agency profile so your agency contact information shows correctly on the 1099-NEC & 1099-MISC forms.

Verify Recipient's Profile

Please **navigate** through each 1099-NEC & 1099-MISC forms and ensure that the Recipient profile exist and valid:

- o TIN
- o NAME
- TAX TYPE
- o Address
- o Zip code

If any part of the Recipient profile is incorrect, please **correct** the 1099-NEC & 1099-MISC records in Account Ability.

Verify Amounts

Verify that each 1099-NEC & 1099-MISC forms has the correct Amount and populated in the appropriate IRS Box:

- Correct Dollar Amount?
- Appropriate IRS Box?

Taking into account Electronic Funds Transfer (EFT) payments processed on last two-business day of the calendar?

Refer to user guide: <u>Determining the Correct 1099 Reporting Year for EFT Payments.</u>

Manually track EFT reversals and make appropriate adjustment to current year's 1099-NEC & 1099-MISC

For example:

If you incorrectly paid vendor "A" \$5000 and later did an EFT reversal (within 3-4 business days from payment date) or EFT Returned of this \$5000, the 1099-NEC & 1099-MISC will show \$5000 paid to vendor "A".

You will need to remember that you did an EFT reversal or return and manually backed out this \$5000 EFT reversal/return, as vendor A should not be receiving a 1099-NEC or 1099-MISC form.

Browsing Returns

Q	Browsing Returns within a Client (Agency) – Browse mode is indicated by the browse icon appearing next to the reporting year on the tax forms.							
40	Browse Buttons: Navigation first, back, forward, last Moves to the first form in client's list of forms.							
*	Moves to the previous form in client's list of forms.							
	Moves to the next form in client's list of forms.							
	Moves to the last form in client's list of forms.							
	[1099-NEC & 1099-MISC] Locate a recipient [F5] – This function will allow you access to the Shared Recipient Database.							
-	[1099-NEC & 1099-MISC] Delete recipient (Ctrl+Del) (with confirmation)							
<u>å</u>	Client (Filer) Management							
	Active Forms o							
¢	Add a new recipient [Ins] (with automatic insert)							
~	[1099-NEC & 1099-MISC] Save Changes [F8]							
×	[1099-NEC & 1099-MISC] Cancel Change (Ctrl+F8, Esc)							

The following are navigation button for browsing through the returns.

Delete blank forms

Sometimes Account Ability creates blank 1099-NEC & 1099-MISC forms. Please navigate through each form to spot blank 1099-NEC or 1099-MISC form. Please **delete** the **blank 1099-NEC & 1099-MISC** forms from Account Ability.

VOID all forms with amount less than the dollar amount threshold

Tools Module Preferences Forms	١
Clear Print Indicators	l
Set Print Indicators	ŀ
Clear 1096 Indicators 🧳	
Set 1096 Indicators	ķ
Clear Efile Indicators	2
Set Efile Indicators	ľ
Clear Corrected Indicators	
Set Corrected (G) Indicators	ł
Set Corrected (C) Indicators	,
Print Window	
📆 Kill This File	
🧞 Filtering	ľ
🗈 Verify Ctrl+V	,
Address Verification Ctrl+Alt+V	
Assign Account Numbers	ł
Update Tamonatah re	

You will want to **VOID** all 1099-NEC & 1099-MISC that do not meet the dollar amount threshold. Please check with the Internal Revenue Service (IRS) on guidelines regarding category and amount threshold for 1099-NEC & 1099-MISC reporting.

- 1. Open up your Client Agency
- 2. Open the **1099-NEC & 1099-MISC** forms for your agency.
- 3. Click "Tools" and then "Filtering"

4. In the "Select a Currency Field" section of the Filtering tool, *Click* on an IRS type {for example Rents}

For example, the reportable amount for "**Rents**" is amount equal to or greater than \$600.

1099-MISC - INSTRUCT Filtering) Constraints		×
Select A Currency Field		0.00	
AttorneyFees Box15a Box15b CropInsurance ExcessGoldenPara Federal Fishing Medical Nonemployee Other Rents Rents Renties Stimelincome StatelIncomeTax		0.00	
State2Income 💌			
Clear <u>V</u> OID Indicators	G	<u>∧ B</u> egin	Cancel
and the second second second		and the second	and the second

In this example, you would select "Rents" in the "Select A Currency" Field section,

then in the operator section, select the "**less than**" operator **s** and enter "**600.00**" in the amount field.

Currency Fields		≥≥	600.00	
AttorneyFees	비미크드		000.00	\mathbf{r}
Box15a				_
Box15b				
CropInsurance				
ExcessGoldenPara				
Federal				
Fishing				
Medical				
Nonemployee				
Other				
Rents				
Royalties				
State1Income 🚽				
State1IncomeTax				
State2Income 🗾				
	B		K Begin	Canc
Clear <u>V</u> OID Indicators		-	K Degin	Canc

6. Continue amount threshold setting for the rest of the IRS type amount.

Select A Currency Field	 < ≤ <
AttorneyFees	
Box15a	
Box15b	Rents < \$600.00
CropInsurance	Royalties < \$10.00
ExcessGoldenPara	Other < \$600.00
Federal	Nonemployee < \$600.00
Fishing	
Medical	
Nonemployee	
Other	
Rents	
Royalties	
State1Income	
State1IncomeTax	
State2Income	
☐ Clear ⊻01D Indicators	ि <u>छि</u> egin Cancel

7. When you are done with all your amount filtering, *Click* Begin.



8. *Click* "**Yes**" to confirm filtered records to be marked **VOID** to confirm the filtered records to be marked VOID.



Delete VOIDED or BLANK 1099-NEC & 1099-MISC returns

You must delete the blank 1099-NEC & 1099-MISC returns. With the return that you want to delete in view, click on the [Delete] button.

€ ID # 4), GRB (G) file		[Delete]		
PAYER'S name, street address, city	, state, ZIF	^a code, ai	nd telepho	ne number		1 Rents		to delet		
AGENCY NAME AGENCY NAME LINE 2						\$50.0	-	or blank	return	
ADDRESS LINE 1						2 Royalties	- 20		Incol	
ADDRESS LINE 2 CITY WA 98504						\$0.0	1099-	MISC		
						3 Other income		come tax withheld		2
Telephone: 360-407-						\$0.0		\$0.00		
PAYER'S Federal ID Number 01-2345679	TIN Type			NT'S ID Nun 3834710		5 Fishing boat proceeds		id health care \$0.00	1	
RECIPIENT'S name				0034710		7 Nonemployee compensati				
TRINH RENT TRAIN VI	ENDOR	4			CTRL			payments		
17554 N LONESOME D	OVE TR	AIL				\$0.0	00	\$0.00	1	
Street address					APT.	9 Payer made direct sales o	of 10 Crop insu	urance proceeds	_ 1	
						\$5000 or more of consum		\$0.00	- d	
						products to a buyer (recipient) for resale =>		20.00	1 2	
City			State	Zip Code	Zip Ext.	11	12			
SURPRISE			AZ	85374					B-Notice	3
Account number		Foreign	CFSP	USPS DP		13 Excess golden pararchut	e 14 Gross pr	oceeds to attorney		
						\$0.0	00	\$0.00	₫ ₽₹	
15a Section 409A deferrals	15b Se	ction 409.	Aincome		State 1	17 State #1 ID number	16 State 1 tax w		te 1 income 🧹	
\$0.00			e	0.00				\$0.00	\$0.00	
\$0.00			9	0.00	State 2	17 State #2 ID number	16 State 2 tax w		te 2 income	
								\$0.00	\$0.0 <u>6</u>	

You do not have to delete the returns that have been marked **Void**. When a return that has been marked Void, the return will automatically **not print**, even if the Printed flag is unchecked. However, if you would like to delete the VOID return to clean up your returns, you can delete the VOID returns.

Clear PRINTED flag



You will want to **Clear Printed** flag for all 1099-NEC & 1099-MISC that you want OFM to print and mail to your recipients on your behalf.

- 1. Open up your Client Agency
- 2. Open the **1099-NEC & 1099-MISC** forms for your agency.
- 3. Click "Tools" and then "Clear Print Indicators"
- 4. Select Filter to retrieve data. For example, ID Number

ear "Print")	ndicators (1099-MISC - INSTRUCT)	
Select Filter	ID Number	▼ Retrie <u>v</u> e
	ID Number	
	Account Number Recipient's Name	
	Taxpayer ID	
	Name Control Apartment Number	Range
	City	Trange
	State Zie Code	From
	Zip Code Email Address	
		Io ·
		- Break
		<u>R</u> eset
		<u>D</u> isplay
		Begin (
		Cancel
	amount of the second	in my

- 5. Click "Retrieve"
- 6. Highlight the ID Number to start, for example, "1" and click "From"
- 7. Using the arrow with a bar (locate at the bottom of the "Clear Print Indicator dialogue" to navigate to the last ID Number and highlight it, i.e. "21" and *click* "**To**"

8. Once the range of data to initiate action is selected, *click* "Begin"

Clear "Print" Indicato	rs (1099-MISC	- INSTRUCT)		×
Select Filter ID Num	ber	-	-	Retrie <u>v</u> e
			2	
			4	
			5	Range
			7	<u>F</u> rom
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1		1	2	<u>D</u> isplay
		1	4	
		1	6	
•		1		Begin
		1		Cancel
		2	1 -	Cancer
	4 44	< > > > > > > > > > > > > > > > > > > >	1	

9. Click "Yes" to confirm Clear "Print" Indicators



10. Make a note of **Printed flag unchecked**

🖳 ID#1			-	_		0RR (<u>C</u>)	🔽 <u>E</u> file	-	- '	<u> </u>		
PAYER'S name, street address, ci	ty, state, Z	P code, a	nd telepho	ne number		1 Rents			OMB No. 1	545 04		
AGENCY NAME						\$1	12,544.	88				
AGENCY NAME LINE 2	2					2 Royalties			- 20	Print	۱ امط	an
ADDRESS LINE 1 ADDRESS LINE 2						2 Noyanes	\$0.	~				
CITY WA 98504							şU.	00	1099-	unch	ieck	ed
CIII @A 20001						3 Other incon	ne	4	Federal inc			
Telephone: 360-407	7-8011						\$0.	00		\$1	0.00	L.
PAYER'S Federal ID Number	TIN Type		RECIPIE	NT'S ID Num	nber	5 Fishing boa	t proceeds	6	i Medical an	d health ca	re	-
01-2345679	SSN 🗸		04	1375812	1		\$0.	00		\$1	0.00	
RECIPIENT'S name		-			NAME	7 Nonemploy	ree compensa	ation 8	Substitute	payments.		-
TRINH RENT TRAIN	VENDOR	1			CTRL		\$0.	00		s	0.00	
6416 PACIFIC HWY	Ξ						40.	⁰⁰		4.	0.00	
Street address					APT.	9 Payer made			D Crop insu	irance proc	eeds	-
						\$5000 or m products to	ore of consur	mer		s	0.00	
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City			State	Zip Code	Zip Ext.	11		1	2			i i
FIFE			WA	98424	1561							B-Notice
Account number		Foreign	CFSP	USPS DP	2nd TIN	13 Excess go	olden pararchu	ute 1	4 Gross pro	oceeds to a	ttomey	
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15a Section 409A deferrals	15b S	ection 409	Aincome		State 1	17 State #1 I	D number	16 St	ate 1 tax wi	thheld	18 State	1 income
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\$0.00			ş	0.00	State 2	17 State #2 I	D number	16 St	ate 2 tax wi	thheld	18 State	2 income
										\$0.00		\$0.0
			- #		1	1 _		-				Browsi

Check OFM/IRS Due Date Calendar

Please check OFM/IRS Due Date Calendar for 1099-NEC & 1099-MISC for date when OFM will start PRINTING & MAILING your agencies' 1099-NEC & 1099-MISC

- 1. OFM is responsible for printing and mailing of your 1099-NEC & 1099-MISC forms.
- Check the "1099-NEC & 1099-MISC Processing Schedule for Reporting Year 2022" calendar – Pay attention to the due date for making changes to 1099-NEC & 1099-MISC data in Account Ability.
- 3. Prior to cut-off date, Agency needs to make sure that the forms are ready for printing and mailing.
- How does Agency ensure that forms are ready for printing by cut-off date? Uncheck "Printed" flag is the key – these forms are ready for printing and mailing.
- 5. Agency can *uncheck* one by one through navigation of each form.
- 6. Agency can also use the Tools menu, *select* "Clear Print Indicators..." option to clear the Printed flag for all forms.



- 7. **Assumption**: the forms are ready for printing and mailing. Nothing more that you need to do to the forms.
- 8. OFM is responsible for printing and mailing of Agencies' 1099-NEC & 1099-MISC forms.

On print date, OFM will access Account Ability to extract all agencies' data and submit to the Printer for print. DES Consolidated Mail Services (CMS) will mail the 1099-NEC & 1099-MISC forms to the Recipient address on the 1099-NEC & 1099-MISC forms.

Please ensure that all Recipients' on the 1099-NEC or 1099-MISC forms have an address with a valid **zip code**.

Print a selected 1099-NEC & 1099-MISC form

- 1. Open up your **Client Agency**
- 2. Open the **1099-NEC & 1099-MISC** forms for your agency
- 3. Locate the 1099-NEC & 1099-MISC that you wish to print by using the navigation arrows from the toolbar (located to the right of your Account Ability session).



- 4. The "Printed" box at the top of the 1099 form needs to be **unchecked** and the selection **saved**.
- 5. *Click* on "**File**" to open up the dropdown menu

- 6. *Click* on **Print Forms for Selected Record** and you will receive the following message:
 - a. You are requesting to print forms for the selected recipient only. Okay to Proceed?
 - i. Yes allows you to proceed
 - ii. No returns you to the 1099-NEC & 1099-MISC forms

Click "Yes" to proceed.

Note if you are unable to select on any of the print options, please save any pending changes.

7. The **Print Setup** screen will be visible. From this screen, **locate your printer** in the NAME dropdown and *select* it.

CAREFUL CONSIDERATION – All printers in Agency's building will be in the NAME dropdown list. Please be careful in your selection of printer.

The printer names show up may look similar to your printer but may not actually be your printer.

Please be careful that you are **selecting your printer**. Selecting someone else's printer will result in your 1099-NEC or 1099-MISC forms printed at an un-intended printer.

OFM strongly suggests that you setup Print in Account Ability to print using **PDF Writer or Adobe PDF**. Selecting PDF will enable to save the form in a secure location (for example a secure network folder or your secure computer) and print the specific 1099-NEC & 1099-MISC form from that secure location.

Name: CutePDF Writer (from DESD7DSA0902) in : PDE print Status: Ready Iogged in Ability Type: Citrix Universal Printer Ability Where: Client:2:CutePDF Writer Client:2:CutePDF Writer	n Account
Status: Ready logged Type: Citrix Universal Printer Ability	n Account
Where: Client:2:CutePDF Writer	
Comment: Auto Created Client Printer DESD7DSA0902	edical and health car
Paper Orientation	\$0
Size: Letter Portrait	ubstitute payments
	\$0
Source: Automatically Select 🔽 C Landscape	Case in summers a second
	Crop insurance proce

Printing a form from the server has risk, as indicated above.

- 8. Click OK.
- 9. You now have the **GDI Print Options** screen displayed.

Please verify again that your **Printer** selection is CutePDF Writer or Adobe PDF



10. In the **Designated Forms**, select the type of form you wish to print.

For example, if you need to reprint a **Copy B for Recipient**, put a check mark in this selection box.

The required form for recipient would be COPY B FOR RECIPIENT. Agency has the option to choose Copy C for Payer to keep on file. Note: Do not select any of the other form.

ſ	GDI Print Opt	ions	? 7
	 Target Printe 		
	Printer:	4263_02_C on despsoly010 (i	fro NOT BATCHED
	Server:	LOCAL	Į
	Port:	Client:2:\\despsoly010\4263_	_02_C 👌
	Location:	Room 4263 4th Floor West	(NO CLIPPING
	Client Inform	ation	
	Client ID:	INSTRUCT	5
5	Name:	AGENCY NAME	3
1	Contact:	Contact Trinh Bui	2
F	Telephone:	360-407-8011	\geq
	- Designated I	Forms	{
"		ed 1099-MISC 🛛 🔽 Fed Copy A	∫ 0.00 0.0≷
	🔽 Сору <u>В</u>	for Recipient	☐ INSTRUCTIONS]
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	📃 <u>S</u> ummar		0.00 0.00
	<u> </u>	•	SSA Approved
_	∏ <u>T</u> runcat	e social security numbers	[SINGLE RECORD]
	– Messages –		5
			2
	0%	Prir	nt Close
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11.Click Print

If COPY B FOR RECIPIENT selected in the Designated Forms, the "**Copy B For Recipient**" would print. **12.** Make a note of the Messages and total returns printed.

Messages	_
-	
Total returns printed for each designated form: 1	

Click Close

Print "Copy C for Payer"

- 1. Open up your Client Agency
- 2. Open the 1099-NEC & 1099-MISC forms for your agency
- 3. *Click* on "**File**" to open up the dropdown menu.
- 4. Click "Print Forms"
- 5. The "**Print Setup**" dialogue box will be visible. From this screen, **locate your printer** in the NAME dropdown and *select* it.
- 6. Click "OK"
- 7. You now have the "GDI Print Options" dialogue box. Check "Copy C for Payer"



8. Click "Print" -

The Messages box will display 100% completion and total returns printed for each designated form: 21

Target Printer Printer: Client/OFM10999#///despsoly0 NOT BATCHED Server: LOCAL Port: Client\OFM10999#\/\despsoly010' Location: Room 4263 4th Floor West (NO CLIPPING) Client Information Client ID: INSTRUCT Name: AGENCY NAME Contact: Contact Trinh Bui Telephone: 360-407-8011 Designated Forms Preprinted 1099-MISC Fed Copy A 0.00 0.00 Copy B for Recipient INSTRUCTIONS INSTRUCTIONS N/A INSTRUCTIONS N/A Copy 2 for Payer INSTRUCTIONS N/A Pressure Seal Summary 1096 Info Copy 0.00 0.00 Mark as printed SSA Approved Truncate social security numbers SSA Approved Total returns printed for each designated form: 21 100% Help Print Close	GDI Print Options
Client ID: INSTRUCT Name: AGENCY NAME Contact: Contact Trinh Bui Telephone: 360-407-8011 Designated Forms Preprinted 1099-MISC Preprinted 1099-MISC Fed Copy A 0.00 Copy B for Recipient INSTRUCTIONS Copy C for Payer INSTRUCTIONS N/A INSTRUCTIONS Copy 1 for State Tax Department Copy 2 for Recipient's State Return N/A Pressure Seal Summary 1096 Info Copy 0.00 Mark as printed SSA Approved Truncate social security numbers Messages Total returns printed for each designated form: 21	Printer: Client/OFM10999#///despsoly0 NOT BATCHED Server: LOCAL Port: Client\OFM10999#\\\despsoly010'
Preprinted 1099-MISC ✓ Fed Copy A 0.00 0.00 Copy B for Recipient INSTRUCTIONS Copy C for Payer INSTRUCTIONS N/A INSTRUCTIONS Copy 1 for State Tax Department Copy 2 for Recipient's State Return N/A Pressure Seal Summary 1096 Info Copy 0.00 Mark as printed SSA Approved Truncate social security numbers Messages Total returns printed for each designated form: 21	Client ID: INSTRUCT Name: AGENCY NAME Contact: Contact Trinh Bui
Total returns printed for each designated form: 21	□ Preprinted 1099-MISC □ Fed Copy A 0.00 0.00 □ Copy B for Recipient □ INSTRUCTIONS □ Copy C for Payer □ INSTRUCTIONS □ N/A □ INSTRUCTIONS □ Copy 1 for State Tax Department □ Copy 2 for Recipient's State Return □ N/A □ Pressure Seal □ Summary 1096 □ Info Copy 0.00 □ Mark as printed □ SSA Approved
100% Print Close	
	100% Print Close

<u>Careful consideration</u>: Note that if 21 forms printed (as illustrated in the training examples). What this mean is that it is printing all forms created, even those that may not meet the dollar amount threshold.

If 16 forms were printed, this means that you have filtered the amount threshold and "VOID" those forms not meeting the dollar amount threshold.

GDI Print Options	1
Target Printer Printer: CutePDF Writer (from OFM10999 NOT BATCHED Server: LOCAL Port: Client:2:CutePDF Writer Location: (NO CLIPPING)	
Client Information Client ID: INSTRUCT Name: AGENCY NAME Contact: Contact Trinh Bui Telephone: 360-407-8011	
Designated Forms □ Preprinted 1099-MISC □ Fed Copy A 0.00 0.00 □ Copy B for Recipient □ INSTRUCTIONS □ Copy C for Payer □ INSTRUCTIONS □ N/A □ Copy 1 for State Tax Department	
Copy 2 for Recipient's State Return N/A. Pressure Seal Summary 1096 Info Copy 0.00 Mark as printed Info Copy SSA Approved Iruncate social security numbers	
Messages Total returns printed for each designated form: 16	ſ
100% Print Close	

				GDI Print Options
		NTS ID Num 4375812		Target Printer Printer: Adobe PDF Server: LOCAL Port: Documents*.pdf Location:
		es "Pre SC" lool		
	State	Zip Code	Zip Ext.	Designated Forms Preprinted 1099-MISC
xreign	WA CFSP	98424 USPS DP	1561 2nd TIN	Copy B for Recipient Copy C for Payer N/A
in 409/	A income Ş	0.00	State 1 State 2	Copy 1 for State Tax Department Copy 2 for Recipient's State Retur N/A Summary 1096 Mark as printed Iruncate social security numbers

sample of P	re-printed Form selection
AGENCY NAME AGENCY NAME LINE 02 ADDRESS LINE 1 ADDRESS LINE 2 CITY WA 98504	112544.88
Telephone: 360-407-8011	\langle
01-2345678 04-37	58121
TRINH TRAINING VENDOR 1	5
6416 PACIFIC HWY E	2
FIFE WA 98424-1561	
M. Amar Marine	and the second

Run the Print Summary 1096 Report

- 1. Open up your Client Agency
- 2. Open the 1099-NEC & 1099-MISC forms for your agency
- 3. *Click* on "**File**" to open up the dropdown menu.
- 4. Select "Print Forms"
- 5. The [Print Setup] dialogue will open up. Please select a PDF Writer option and click [Ok].

If you do not have a PDF Writer option, please contact your Agency IT staff to assist in installing a PDF Writer option.

If your computer does not have a PDF Writer option, please do not attempt to print any document from 1099 Account Ability that may have Recipient's confidential information.

int Setup - Printer			<u>?</u> ×
Name:	CutePDF Writer (from DESD7DSA09	02) in 🔽 🛛 F	Properties
Status:	Ready		
Туре:	Citrix Universal Printer		
Where:	Client:2:CutePDF Writer		
Comment	Auto Created Client Printer DESD7DS.	A0902	
Paper Size: Source:	Letter Automatically Select	Orientation	 Portrait Landscape
Network.		OK	Cancel

6. The [GDI Print Options] dialogue will open.



7. Put a checkmark on the "Summary 1096" to select this Designated Form".



8. Now click on [Print] –

You should be able to save the PDF print of "Form 1096 Annual Summary and Transmittal of U.S. Information Returns".

<u>If</u> amount threshold was not set to VOID those less than threshold amount, and you've "Rollup" records, you should have 21 returns.



If you have **VOID** the forms that has amount less than threshold, you should see **16** returns for your Client ID.



Run the Print Summary 1096 Report (Information copy)

This is another Summary 1096 version of the summary 1096.

9. Put a checkmark on the "**Summary 1096**" to select this Designated Form" and a checkmark next to "Info Copy".



If amount threshold was not set to VOID those less than threshold amount, and you've "Rollup" records, you should have 21 forms.

Form Department Internal Rev	096 of the Trea enue Servic	sury		Annu		nmary a Informa		ansmit leturns	tal of			YY	1545-0108 YY
AGENC ADDRE ADDRE	Y NAM	E E LINE NE 1 NE 2	02					IN	FORMATI	ON COPY	- DO NOT	FILE WIT	'H IRS
Name of p Conta Email addr	act Tr	ontact inh Bui	L			hone numb 360-4 umber	er 107–801	11					
	345678			urity numbe			1	Federal tax			7	d with this 9999999	
	1097-BTC	1098	1098-C	1098-E	1098-T	1099-A	1099-B	1099-C	1099-CAP		1099-G	1099-H	1099-INT
1099-K	1099-LTC	1099-MISC	1099-OID	1099-PATR	1099-Q	1099-R	1099-S	1099-SA	3921	3922	5498	5498-ESA	5498-SA
		\mathbf{X}											

If you have **VOID** the forms that has amount less than threshold, you should see 16 returns for your Client ID.

NFORMA	TION COP	Y - DO NO	OT FILE W	ITH IRS									
	096	surv		Annu				ransmi Returns				-	1545-0108
Internal Re	venue Servi	ce										_	
FILER'S	Name and	Address											
AGEN	CY NAM	E											
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	WA 98												
	person to o				Telep	hone numb							
		inh Bui	i.		-		107-80	11					
Email add	fress				Fax n	umber							
	yer ID num 2345678		Social see	curity numb	er 3 To	tal no. of fo	rms 1 16	Federal ta	x withheld	5 Tot		d with this 998943	
6 Enter	an "X" in or	nly one box	below to i	ndicate the	type of for	rm being fil	ed. 7	If this is y	our final ret	urn, enter	an "X" her	e	
W-2G	1097-BTC	1098	1098-C	1098-E	1098-T	1099-A	1099-B	1099-C	1099-CAP	1099-DIV	1099-G	1099-H	1099-INT
1099-K	1099-LTC	1099-MISC	1099-OID	1099-PATR	1099-Q	1099-R	1099-S	1099-SA	3921	3922	5498	5498-ESA	5498-SA
_													

Important NOTE: Please **do not** mail this Summary 1096 to the IRS. This is for your information only. OFM will electronically file your returns to the IRS on your behalf. For this reason, you do not need to mail a summary 1096 to the IRS.

Run the Print Control Report

"Print Control Report" list all the 1099-NEC & 1099-MISC forms for your agency.

- 1. Open up your **Client Agency**
- 2. Open the 1099-NEC & 1099-MISC forms for your agency
- 3. Click on "File" to open up the dropdown menu
- 4. Select "Control Report"
- 5. The [Print Setup] dialogue will open up. Please select a PDF Writer option and click [Ok].

If you do not have a PDF Writer option, please contact your Agency IT staff to assist in installing a PDF Writer option.

If your computer does not have a PDF Writer option, please do not attempt to print any document from 1099 Account Ability that may have Recipient's confidential information.

	Print Setup			? ×
	Printer			
oity, s	Name:	CutePDF Writer (from DESD7DSA090)2) in 💌	Properties
icot.	Status:	Ready		
E	Type:	Citrix Universal Printer		
	Where:	Client:2:CutePDF Writer		
	Comment:	Auto Created Client Printer DESD7DS/	\0902	
IN C	Paper		_ Orientation	
TT	Size:	Letter		Portrait
2	Source:	Automatically Select	Ă	C Landscape
M		,		
_	Network		OK	Cancel
		ductor	L buye	

6. Select your Control Report Preference

Preview (print optional)	OFM recommend that you select the "Preview (print optional)" first.
Control Report Preference OK C Preview (print optional) C Print now (no preview)	This option will give you an opportunity to validate that you have selected your printer.

You will have the option to check the box to truncate social security numbers.

<u>Reminder</u>: Please do not print from 1099 Account Ability if you do not have PDF Writer option on your computer.

7. Click OK

Page 1		1099-MISC Control AGENCY NAME (Taxpayer ID 01 Sorted by Natu	NSTRUCT 2345678		I	01/15/13 10:52:22 AM
Name	Name and Address	Taxpayer ID	Boxes	1-10, 13-15, Stat	te Income	and Withholding
	TRINH RENT TRAIN VENDOR 1	043-75-8121	Box 1	112,544.88	Box 7	0.00
	6416 PACIFIC HWY E		Box 2	0.00	Box 8	0.00
			Box 3	0.00	Box 10	0.00
	FIFE WA 98424-1561		Box 4	0.00	Box 13	0.00
			Box 5	0.00	Box 14	0.00
			Box 6		Box 9	
			Box 15a		Box 15b	0.00
				0.00		0.00
				0.00		0.00
	TRINH RENT TRAIN VENDOR 2	203-74-8058	Box 1	5,437,137.20	Box 7	0.00
	DBA MARTIN SELIG REAL ESTATE		Box 2		Box 8	0.00
	C/O NORTHERN TRUST BANK FSB	1	Box 3	0.00	Box 10	0.00
	1414 4TH AVE		Box 4	0.00	Box 13	0.00
	SEATTLE WA 98101-2202		Box 5	0.00	Box 14	0.00
			Box 6	0.00	Box 9	
			Box 15a		Box 15b	0.00
				0.00		0.00
				0.00		0.00
	TRINH RENT TRAIN VENDOR 3	270-08-0977	Box 1	18,683.90	Box 7	0.00
	1612 S MILDRED ST STE B		Box 2		Box 8	0.00
			Box 3	0.00	Box 10	0.00
	TACOMA WA 98406-0512		Box 4	0.00	Box 13	0.00
			Box 5	0.00	Box 14	0.00
			Box 6	0.00	Box 9	
			Box 15a	0.00	Box 15b	0.00
				0.00		0.00
				0.00		0.00
	TRINH RENT TRAIN VENDOR 4	388-34-7105	Box 1	50.00	Box 7	0.00
	17554 N LONESOME DOVE TRAIL		Box 2		Box 8	0.00
			Box 3	0.00	Box 10	0.00
	SURPRISE AZ 85374		Box 4	0.00	Box 13	0.00
			Box 5	0.00	Box 14	0.00
			Box 6	0.00	Box 9	
			Box 15a		Box 15b	0.00
				0.00		0.00
				0.00		0.00
	TRINH RENT TRAIN VENDOR 5	452-69-7705	Box 1	348,626.52	Box 7	0.00
	7711 MARTIN WAY E		Box 2		Box 8	0.00
			Box 3	0.00	Box 10	0.00
	OLYMPIA WA 98516-5622		Box 4	0.00	Box 13	0.00