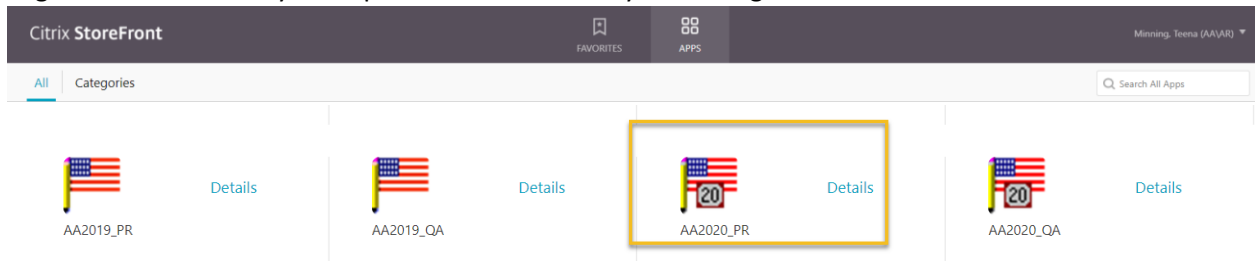


TIN Matching Requests for Non-Statewide Vendors

At times agencies may have a need to pay 1099 reportable money to a recipient that is **not** on the Statewide Vendor table. Prior to making these payments, it is recommended that the agency ensures the name and TIN match the IRS records.

Below are the steps for asking OFM to TIN match a recipient:

1. Log into Account Ability and open the most current year PR flag



2. Log into your agency's client for either the MISC form or the NEC form (does not matter which one)
3. Create a new form
 - a. Choose the TIN Type, then enter the Recipients TIN and the Recipients Name

The screenshot shows a software window titled '1099-MISC - 10502021'. At the top, there are search and action buttons: 'New...', 'VOID', 'CORR (G)', 'CORR (C)', 'Efile', '1096', and 'Printed'. The main form area is divided into several sections. On the left, there is a field for 'PAYER'S name, street address, city, state, ZIP code, and telephone number' containing 'OFFICE OF FINANCIAL MANAGEMENT'. Below this is the 'PAYER'S TIN' field with the value '91-6001089'. To the right of this is a 'TIN Type' dropdown menu set to 'SSN'. Further right is the 'RECIPIENT'S TIN' field with the value '123456789'. Below these is the 'RECIPIENT'S name' field with the value 'Mickey Mouse'. On the right side of the form, there are several tax-related fields: '1 Rents' (\$0.00), '2 Royalties' (\$0.00), '3 Other income' (\$0.00), '4 Federal income tax withheld' (\$0.00), '5 Fishing boat proceeds' (\$0.00), '6 Medical and health care...' (\$0.00), '7 Payer made direct sales of \$5000 or more of consumer products to a buyer (recipient) for resale:' (checkbox), and '8 Substitute payments in lieu of dividends or interest' (\$0.00). The form also displays 'OMB No. 1545-0115', the year '2020', and the category 'Miscellaneous Income'. A small green plus sign is visible next to the '4 Federal income tax withheld' field.

- Enter all other required fields so that you can save your form

1099-MISC - 10502021

ID # 1 VOID CORR (G) CORR (C) Efile 1096 Printed

PAYER'S name, street address, city, state, ZIP code, and telephone number
OFFICE OF FINANCIAL MANAGEMENT

1 Rents \$700.00 OMB No. 1545-0115
2020
Miscellaneous Income
1099-MISC

2 Royalties \$0.00
3 Other income \$0.00
4 Federal income tax withheld \$0.00

PAYER'S TIN 91-6001089 TIN Type SSN RECIPIENT'S TIN 123456789
5 Fishing boat proceeds \$0.00
6 Medical and health care... \$0.00

RECIPIENT'S name Mickey Mouse NAME CTRL
7 Payer made direct sales of \$5000 or more of consumer products to a buyer (recipient) for resale:

8 Substitue payments in lieu of dividends or interest \$0.00

Street address Test APT. 9 Crop insurance proceeds \$0.00
10 Gross proceeds paid to an attorney \$0.00

City Test State WA Zip Code 98501 Zip Ext. 11
12 Section 409A deferrals \$0.00

Account number FATCA Foreign CFSP USPS DP 2nd TIN 13 Excess golden parachute \$0.00
14 Nonqualified deferred comp. \$0.00

15 State #1 tax withheld \$0.00 16 State #1 ID number 17 State #1 income \$0.00
15 State #2 tax withheld \$0.00 16 State #2 ID number 17 State #2 income \$0.00

E-Mail: B-Notices

- Save the form

Client Management

Bulk Import Utility

Open a Form

New (Ins)

Save (F8)

Cancel (Esc)

- Send an email to HeretoHelp@ofm.wa.gov with the following information:
 - Subject: TIN matching request
 - Include the following in the body of the email:
 - Agency number: 1050
 - Form: 1099-MISC
 - Form ID#: 1
 - Recipient name: Mickey Mouse

7. The Systems Analyst will run the information through the IRS TIN matching website.
 - a. If it does not match, the SA will notify the customer, wait for updated information on the same form ID # to be entered into Account Ability and then check again on the IRS TIN matching site.
 - i. If it does not match again, repeat step a.
 - b. If it matches, the SA will notify the customer of the results and that the specified form ID(s) will be deleted from Account Ability.
8. SA will delete form from Account Ability and close/resolve the ticket.