

1099-T4A Cross Project Merge Guide

Updated 12-13-2023

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A. Introduction

This document is a supplement to the <u>1099-T4A User Guide to Generating Forms and eFiles</u>, and contains instructions on how to merge vendor 1099 payments from multiple PSL projects so your 1099 eFile and printed forms will be accurate.

You only need to merge vendor payments if you will be combining payment transactions (AP, PO, PC) to individual vendors from multiple shows and those payments came from the same production company / business entity as recognized by the IRS. Example: RC Carpets was paid \$2,000 each on 3 different shows from the same production company, so RC Carpets will need a single 1099 showing \$6,000 paid by that production company.

A.1 Determine merge method

- 1. If your shows are all saved on the same server, proceed to section "B. Merging from the same server"
 - If you can access all your shows by opening just 1 instance of PSL, then they are all saved on the same server
 - Your server name can be found in the top-right of the main PSL window (see example below):

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	SUPPORT SETTINGS OPEN LOGOUT

2. If you must open and log into different instances of PSL to see all the shows from a single production company, then your shows are saved on multiple servers, so proceed to section "C. Merging from different servers"

B. Merging from the same server

B.1 Printing 1099s merged from the same server

- Open Accounts Payable > 1099 & ICR Reports > Cross Project 1099 (cp1099) and ensure all yellow fields are filled in and all information is correct
- 2. Enter your *Transmitter Control Code* (also known as TCC)
 - a. If you have engaged Cast & Crew to eFile with the IRS on your behalf, contact PSL1099@castandcrew.com for your TCC
 - b. If you will be eFiling yourself, request your TCC from your company's tax professional
- 3. Click *Select Projects*

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4. Click the *Include* box for any shows you want to include in the merge, then click *Collect Data*; note the *Company TaxId* would be the same for all merging shows.

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5. Select the desired Paper or PDF form and click Generate

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6. Review your vendor and payment data before printing 1099 forms: select *Edit list*, check the box to *Use Federal and State Filing Limits*, and click *Generate*; utilize the resulting report to correct vendor payment errors

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- 7. Pick the form type
 - Copy A for IRS, which includes the recipient's full Tax ID (this form is not needed if you're eFiling) note that Copy A is required by the IRS to be printed on purchased forms due to the specialized ink on those forms
 - Copy B for Recipient (the vendor); this form masks the recipient's Tax ID
 - Copy C for Payee (your organization); this form masks the recipient's Tax ID

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- 8. Print
 - You can also select a PDF printer if you want to create a PDF file instead of printing

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B.2 Creating an IRS eFile merged from the same server

- Open Accounts Payable > 1099 & ICR Reports > Cross Project 1099 (cp1099) and ensure all information is correct as well as all yellow fields are filled in
- 2. Enter your *Transmitter Control Code* (TCC)

- a. If you have engaged Cast & Crew to eFile with the IRS on your behalf, contact <u>PSL1099@castandcrew.com</u> for your TCC
- b. If you will be eFiling yourself, request your TCC from your company's tax professional
- 3. Click Select Projects

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4. Click the *Include* box for any shows you want to include in the merge, then click *Collect Data*; note the *Company TaxID* needs to be the same for all shows you want to merge

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5. Review your vendor and payment data before printing 1099 forms: select *Edit list*, check the box to *Use Federal and State Filing Limits*, click *Generate*, then look for errors and make adjustments to vendors or payments as needed

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6. Select IRSTAX/Magnetic, click Generate, and save the file



- 7. Submit your eFile:
 - a. If you engaged Cast & Crew to eFile on your behalf, follow the directions here: <u>1099 Print and eFile Services</u>
 - b. If your company is eFiling directly to the IRS, consult with your tax professional or for self-service follow the current directions provided by the IRS: <u>www.IRS.gov</u>

C. Merging from different servers

C.1 Printing 1099s merged from different servers

- Open Accounts Payable > 1099 & ICR Reports > Cross Project 1099 (cp1099) and ensure all information is correct as well as all yellow fields are filled in
- 2. Enter your *Transmitter Control Code* (TCC)
 - a. If you have engaged Cast & Crew to eFile with the IRS on your behalf, contact <u>PSL1099@castandcrew.com</u> for your TCC
 - b. If you will be eFiling yourself, request your TCC from your company's tax professional
- 3. Click Select Projects

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- 4. Click the *Include* box for any shows you want to include in the merge, then click *Collect Data*
 - a. Note the *Company TaxId* would be the same for all merging shows
 - b. Do not ignore any errors or warnings that pop up; resolve any issues that are displayed, before proceeding

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- 5. Select Merge file, uncheck the box for Use Federal and State Filing Limits, and click Generate
 - 1. Do not ignore any errors or warnings that pop up; resolve any issues that are displayed, before proceeding



- 6. Close the current PSL, then open your other PSL attached to the different server
- Open Accounts Payable > 1099 & ICR Reports > 1099 Merge 1099 Tape Files (mrg1099) then select the form type to print, and click Select Files



8. Locate your file(s) to merge (hold SHIFT while clicking to select multiple files,) click Open, then Generate

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- 9. Review your vendor and payment data before printing 1099 forms: select *Edit list*, check the box to *Use Federal and State Filing Limits*, and click *Generate*
 - a. Look for errors or discrepancies and make any needed adjustments to your vendors or payments before proceeding

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10. Pick the form type

- Copy A This prints with an unmasked SSN/TIN and is meant to be mailed to the IRS (unless you are eFiling)
- Note that Copy A should only be printed on official, purchased forms which contain scannable ink; the IRS may penalize you for not using the official, purchased form
- Copy B is required to be sent to the recipient and Tax ID is masked
- Copy 1 and Copy 2 are for your records or other use; if you have questions about filing them, please consult your tax professional

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11. Print

- You can also select a PDF printer if you want to create a PDF file instead of printing
- If the printout is not aligned with the paper 1099 form see the printing troubleshooting steps found in this article: 1099-T4A User Guide Generating Forms and eFiles

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C.2 Creating an IRS eFile merged from different servers

Before creating your IRS eFile first determine if you want to eFile or are required to eFile by visiting <u>www.IRS.gov</u>.

- 1. Open *Accounts Payable > 1099 & ICR Reports > Cross Project 1099* (cp1099) and ensure all yellow fields are filled in and all information is correct
- 2. Enter your *Transmitter Control Code* (also known as TCC)
 - a. If you have engaged Cast & Crew to eFile with the IRS on your behalf, contact PSL1099@castandcrew.com for your TCC
 - b. If you will be eFiling yourself, request your TCC from your company's tax professional
- 3. Click Select Projects

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- 4. Click the *Include* box for any shows you want to include in the merge, then click *Collect Data*
 - a. Note the *Company TaxId* would be the same for all merging shows
 - b. Do not ignore any errors or warnings that pop up; resolve any issues that are displayed, before proceeding

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5. Select Merge file and click Generate

- 2. Uncheck the box for "Use Federal and State Filing Limits"
- 3. Do not ignore any errors or warnings that pop up; resolve any issues that are displayed, before proceeding
- 4. Save the file where you can locate it easily, with a descriptive name to easily identify it

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- 6. Close the current PSL, open your other PSL attached to the different server
- 7. Open Accounts Payable > 1099 & ICR Reports > 1099 Merge 1099 Tape Files, select IRSTAX/Magnetic, then click Select Files



8. Locate your file(s) to merge; hold [SHIFT] while clicking to select multiple files, click *Open*, then *Generate*

Setup Accounts Payable Vendor	Q - HOME 1 - A/P 2 - P/O 2 - J/E 4 - CHECKS 5 - PETTY CASH ENTRY 6 - PAYROLL Z - COST REPORT 8 - BIBLE REPORT 9 - Merge 1099 Files - - - - ×
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	Image Control Con

- 9. Return to Accounts Payable > 1099 & ICR Reports > Cross Project 1099 (cp1099) to review your vendor and payment data before printing 1099 forms: select Edit list, check the box to Use Federal and State Filing Limits, and click Generate and payments before proceeding.
 - a. Look for errors or discrepancies and make any needed adjustments to your vendors or payments before proceeding

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C Purchase Order	O Paper or PDF 1099-MISC print data with IRS form		
Journal Entry	Paper or PDF 1099-NEC print data only no form		
	O Paper or PDF 1099-NEC print data with IRS form		
G/L Checks	Corrected 1099-MISC with \$0.00		
Budget	Corrected 1099-NEC with \$0.00		
Cost	Viacom 1099-MISC Export		
Report	O Viacom 1099-NEC Export		
Support Menu Dest + Help	O Merge file		
PSL+ Help			

10. Submit your eFile:

- a. If you engaged Cast & Crew to eFile on your behalf, follow the directions here: 1099 Print and eFile Services
- b. If your company is eFiling directly to the IRS, consult with your tax professional or for self-service follow the current directions provided by the IRS: <u>www.IRS.gov</u>

D. Troubleshooting printing

D.1 Troubleshooting printing

If your printout is not matching the form, try the following:

- 1. Ensure your form (1099-MISC or 1099-NEC) matches the type you're printing
- 2. If the printout is not aligned with the paper 1099 form see the printing troubleshooting steps found in this article: <u>1099-T4A</u> <u>User Guide Generating Forms and eFiles</u>
- 3. Print directly from PSL instead of creating and printing from a PDF
- 4. If printing a PDF, in your print dialog box select "print actual size" or "no scaling" or otherwise indicate to not change the scale of the printed page (actual wording varies between print drivers)
 - a. If text is aligned correctly inside boxes at the top of the printed form but not in boxes at the bottom, you likely have *print scaling* or *fit to page* turned on in your print dialog box; it should be turned off

End