

# **1099-T4A User Guide Generating Forms and eFiles**

Updated 09-26-2023

## **Information about 1099s and T4As**

• Ensuring your team has access

#### Prep and review your 1099 data

- Step A: Verify accuracy of company information
- Step B: Verify vendor 1099 information
- Step C: Vendor 1099 tagging
- Step D: Summary Report
- Step E: Edit 1099 tagging

### **Printing your 1099s**

- Step F: Test your printer alignment
- Step G: Print paper or PDF 1099 forms
- Step H: Troubleshooting printing

#### **IRS eFiles**

- Creating an IRS eFile
- eFiling with the IRS

## **Information about 1099s and T4As**

The IRS requires companies to issue a Form 1099-NEC or Form 1099-MISC to individuals or contractors paid over \$600.00 during the year. Current IRS instructions and deadlines for these forms can be found at <u>www.IRS.gov</u>.

Update for Tax Year 2021 and later: Previously reported on Box 7 of the 1099-MISC, the new 1099-NEC will capture any payments to nonemployee service providers, such as independent contractors, freelancers, vendors, consultants, and other self-employed individuals (commonly referred to as 1099 workers.) For more information, see <u>www.IRS.gov</u>.

T4A (the Canadian equivalent of the US 1099-NEC / MISC forms) printing is available in PSL. In each section below, special information about using PSL for your T4As is noted with "*Additional T4A information*" You will find additional T4A information at the end of Steps D, E, and G. Text within this training referencing "1099" may also be true for T4As.

#### Ensuring your team has access

1. Have everyone on your team who will be assisting in printing 1099 and T4A forms read this help article to ensure they have access to printing: <u>Check if You Have Access to PSL 1099</u>

## Prep and review your 1099 data

## Step A: Verify accuracy of company information

Ensure your company information is accurate to avoid delays and possibly fines or penalties from the IRS for incorrect or late filings. The company information below is required by the IRS, and will be displayed as the PAYERS information on 1099 forms.

- 1. Open *Setup > Company Code* and locate the correct company to autofill the other fields
- 2. Verify or correct all information in the Company Entry window

PSL+	
PSL+	si
0 - HOME 1 - A/P 2 - P/O 3 - J/E	VE 4 - CHECKS 5 - PCARD 9 - PAYROLL 7 - COST REPORT 8 - BIBLE REPORT 9 - TRIAL BALANCE CONSOLIDATED
Banks (subank)	
Batch Maintenance (batchent)	- 🗆 X
Company Code (sucomp)	Options View Favorites Help
Currencies (sucur)	▋ @ Q & @ @ @ D @ % Q ≓ ₪ ⊕ 0
DataBase Info (sudbinfo) Default Accounts (suacct)	
Free Field1 (sufree1)	
Free Field2 (sufree2) Name	
Free Fields (suffrees)	
Free Fields (sufrees) Name on Reports	
Insurance (suins)	
Line Type Entry (sulntyp) Address	Tax Info
Link Pcard+ Account (Ipcardpa)	Federal Tax ID
Locations (suloc)	State Tax ID
1 Of Worknows Setup (powis)	
Account Configuration (accconf) Line 3 Productions (suprod)	Company Info
Series (suser)	Project ID
Sets (suser) Sets (suser) State Zip Cod	Code 🛛 🗹 Uploadable 🗹 Downloading
Control System (suctri)	
Chatas (sustats)	
Users (suuser)	
TB Report Group Entry (surpt) Contact Name	
Reports     Phone Number	
PosPay Maintenence (subankpp) - Email Address	
Account Default Entry (sugidef)	
Accounts Payable	
Purchase Order     Company Code     Company Code     Company Code	
Petty Cash     Durnal Entry	a

## Step B: Verify vendor 1099 information

Incorrect vendor 1099 information and tagging payments with a 1099 code are the most common barriers to successfully completing your 1099s.

- 1. Open *Accounts Payable > Vendor > Vendor Entry* and verify accuracy of all fields
- 2. For the *TIN Information* section:
  - a. *Name* will be the name printed on the 1099 form; if it is left blank in the TIN Information section, the *Name* from the Vendor Information section will be printed on the 1099 form
  - b. *Work State* is a required field
  - c. *Type* is not required but recommended options are available by clicking the field and pressing F2

PSL+	
	P-HOME         1 - AIP         2 - PIO         3 - JIE         3 - CHECKS         5 - PCARD         6 - PAYROLL         2 - COST REPORT         8 - BBLE REPORT         2 - TRAL BALANCE CONSOLIDATED           Image: Strate
Vendor Aquing (cond) Vendor Nendor Totals (accrt) Vendor Modification (accrt) Vendor Modification (accrt) Vendor Modification (accrt) Vendor Modification (accrt) Vendor Modification (accrt) Vendor Modification (accrt) Purchase Order Purchase Ord	Vendor Information     TN Information       Name     Tax ID #       Name 2     Type       Address     Type       Address 2     TN type       City     To Sole proprietor SN to 200 propri
Peport Menu     Oniversal     PSL+ Hep	Email Card # Car

d. The *1099* is not required but strongly recommended - options are available by clicking the field and pressing F2

PSL+																		
I OL																		
• •				1						1								
Setup	2	- HOME 1	- A/F	P <u>2</u> - P/O <u>3</u>	- J/E <u>4</u> - Ci	HECKS	- PCARD	<u>6</u> - I	PAYROLL	Z - COS	ST REF	PORT 8-	BIBLE	REPOR	T <u>9</u> -T	RIAL BAL	ANCE C	ONSOLIDA
Accounts Payable		🕂 Vendor E	Intry													_		$\times$
Vendor		File Edi	•	Programs	Options	View	Env	orite	s Hel	n								
Vendor Entry (apven) Vendor List (apvenp)	H							onte	s Hei		P	-	1	۲	_	-		•
Vendor List (apvenp) Vendor Inquiry (apving)		<u>«</u> <		> >>	🕘 (		Ø	$\sim$		$\otimes$	€		16	অ	₽		•	0
Vendor Analysis (apvena)	11	Vendor In	fon	mation ——				— I Г	TIN Info	ormatio	n —					_		Detail
Account/Vendor Totals (accvt)		Vendor ID							Name									
Vendor Modification Report (venm		Name							Tax ID #									
<ul> <li>A/P Entry</li> <li>Checks</li> </ul>		Name 2						=   ,	Туре				_					
1099 & ICR Reports		Address							1099		10		_					
Purchase Order		Address 2							Work Sta		4	1099 t	ype					
Petty Cash								- 11	work Sta	te	1	099 type	Des	cription	1			
🗅 Journal Entry 🗅 Payroli		City									1	oootype	Rent		•			
G/L		State, Zip						Г	Terms-		2			alties				
Checks		Country							Terms		3				ne/Prize		vards	
🛅 Budget		Contact							Other In	formati	io 4				withhel			
Cost		Phone #						- 1	Commen	t	5				t procee			
Closing		Fax #							Studio Ve	endor	6				nealth pa			
Support Menu		Email						<b>,</b>	Vendor T	vne	/				ee com			or interes
🗂 Universal		Card #						- 11		/	9				s of \$50			ormeres
D PSL+ Help		Sort #				_			Petty	Cash	A				ince pro			
									Petty		В				den Para		aymen	ts
		Account #							PCar		С		Proc	eeds p	aid to ar	n attorne	y	
		Hi Value #																
		ACH Rt #							ACH								ancel	

- e. Notes about the *1099* field:
  - i. Selecting a1099 type in this field will auto-tag all new payments to this vendor, so they will be calculated when you generate a 1099
  - ii. If you select a 1099 type *after* transactions have posted the 1099 type won't be retroactively applied; it will only be applied to new AP, PO, and PC transactions you create

## Step C: Transaction 1099 Tagging

The 1099 amounts for each vendor will be accurate only if every payment transaction (AP, PO, PC) has a 1099 tag.

As a shortcut to tagging each payment, you can give each vendor a default 1099 tag that will auto-populate with every **new** payment created. See "Notes about the *1099* field" above for more information.

- 1. Open Accounts Payable > AP Entry, or Purchase Order > PO Entry, or Petty Cash > PC Entry
- 2. Create a payment and ensure *State Worked* is filled in; it will be prepopulated with the default from the vendor setup screen
- 3. Click in the 9 column and press F2 to display options; this will not open unless you have *State Worked* and other required fields filled in first
  - a. If you are creating a **new** payment, this will be pre-populated with the default type entered into the *1099* field of the vendor setup screen; see "Notes about the 1099 field" above for more information.

A/P Transaction Entry - PSL+	
PSL+	
	9 - HOME 1 - A/P 2 - P/O 3 - J/E 4 - CHECKS 5 - PCARD 6 - PAYROLL 7 - COST REPORT 8 - BIBLE REPORT 9 - TRIAL BALANCE CONSOLIDATED
C Sotup	File Edit Programs Options View Favorites Help
Accounts Pavable	
AP Entry AP Entry (apte) AP Edit List (appost) AP Post (appost) AP Open Items Report (apopenp) Pending Items Report (pirpt)	Reference Information     Batch Information       Number     17843       Eff. Date     Description
Change Open Items into Manual C	Status U Unposted 1099 code X
Modify Open Items (apopmod) Defer Open Items (ckdef)	1099 code Description
Void Open Items (apvoid2)	Vendor Information
Import an Excel File (xlint) Checks	D 000001 State Worked CA Number 2 Royalties
1099 & ICR Reports	Name GRIP, INC. Date 7 7
<ul> <li>Purchase Order</li> <li>Petty Cash</li> </ul>	Due Date / / 5 Fishing boat proceeds Amount 6 Modifical & health payments
<ul> <li>Petty Cash</li> <li>Journal Entry</li> </ul>	Amount 6 Medical & health payments Discount 7 Nonemployee compensation
Payroll     G/L	Substitute pay in lieu of dividends or interest
G/L Checks	9 Direct sales of \$5000 or more
Budget	A Crop insurance proceeds ACH/EFT N Customer # B Excess Golden Parachute payments
Cost	PO Number Account Sers Locs Sets 9 C Proceeds paid to an attorney
Report	31-02 01 OK Cancel Help
<ul> <li>Support Menu</li> <li>Universal</li> </ul>	

### Step D: Review 1099 Reports

### How to review and download a summary report in PSL

Ensure all your 1099 vendors and their transactions are properly coded, so your 1099s will calculate correctly. The 1099 Forms and Report screen has several options to help confirm your data is accurate.

PSL+		
× ·	Print 1099 Forms or Audit	
Setup     Accounts Payable	File Edit Programs Options View Favorites Help	
Vendor	👁 🕞 🔳 🐐 🍳 🖶 🔾 🕘	
A/P Entry AP Entry (ape) AP Edit List (appost) AP Open Items Report (apopenp) Pending Items Report (pirpt) Change Open Items into Manual Che	Report Format       Sort by         • Format       • Tax ID         • O betail Report       • Tax ID         • Summary Report       • Vendor Name         • Blank Tax ID Report       • Unclude State Worked	<u>P</u> rint Pre <u>v</u> iew
Change Open terms into wandad Che Modify Open items (apopmod) Defer Open items (apvoid2) Import an Excel File (xlint) Checks CR Report (icr1099) 1099 Forms and Report (bd1099)	Duplicate Tax ID Report     Paper 1099-MISC Form     Paper 1099-NEC Form     Paper 1099-NEC Form     Orapret T4A Form     Spreadsheet (TAXPORT)	
1099 File Mater (1099) 1099 File Mater (1099) 1099 Merge 1099 Tape Files (mrg10 Putroase Order Detty Cash Dumai Entry Party File Mater (1099) Detty Cash Party Cash	Selection Criteria Start Date End Date Source Tax Year YYYY / / / /  Bank  Production	
G/L     G/L     Checks     Budget     Cost     Cosing     Report     Soport Menu	Company 001 State To From To Tax ID Include Only 3rd-Party 1099's Include Only USA Residents	
9 Duriversal 9 DPSL+ Help	Report       Multiple Currency         Include Withholding Taxes Only       Source Currency         T4 only       Source Currency         Use Federal Filing Limit       600         Include Non-1099able Items       Target Currency	Clear <u>A</u> ll <u>C</u> ancel E <u>X</u> it <u>H</u> elp
	bank code	

1. Open Accounts Payable > 1099 & ICR Reports > 1099 Forms and Report

#### 2. Click on Summary Report

- a. Before clicking on print or preview, make sure your selection criteria are accurate.
  - b. All fields in yellow are required.
- 3. Enter Tax Year
- 4. Enter *Company* 
  - a. If there are multiple companies within your project, please select the appropriate company.
- 5. Click Preview

A/P Transaction Entry - PSL+	Print 1099 Forms or Audit -	
PSL <sup>+</sup>	File Edit Programs Options View Favorites Help	
CRATER AP Transaction Entry APPROVAL REQUIRED!  Caseboard Caseboa	Ceport Format       Format         Format       O Detail Report         O Detail Report       O Tax ID         O Blank Tax ID Report       O Vendor Name         O Duplicate Tax ID Report       O Vendor Name         O Paper 1099-NBC Form       Include State Worked         O Paper 1099-NBC Form       O Paper 1099-NBC Form         O Paper 1099-NBC Form       O Spreadsheet (Tabbed txt)	<u>P</u> rint   Pre <u>v</u> lew
1099 Merge 1099 Tape Files (mrg10 Perthase Order Detty Cash Payroll Checks Budget Checks Cost Closing Disney Report Cost Disney Checks Disney Disney Checks Disney Disney	Selection Criteria Start Date End Date Source Tax Year Bank Production Company 001 State Tax ID Tax ID To	
D D PSL+ Help		Clear <u>A</u> ll <u>C</u> ancel E <u>X</u> it <u>H</u> elp

- a. Review all data before saving the file in adobe
- 6. If all data is correct, click *File > Save As*

ile Edit View Sign Window Help	
Open	Ctrl+O
Reopen PDFs from last session	
E Save	Ctrl+S
Save <u>A</u> s	Shift+Ctrl+S
Save as Ot <u>h</u> er	•
Share File	
Revert	
<u>C</u> lose File	Ctrl+W
Prop <u>e</u> rties	Ctrl+D

7. Title the file with "Show Name & Summary report"

Blank Tax ID shows any vendors without a Tax ID

Duplicate Tax ID shows any vendors having the same Tax ID as other vendors in the system

Include State Worked will add that information to your reports

Bank allows you to filter by different banks used for the 1099-tagged payments

Include Non-1099able Items adds all vendor payments not marked as 1099, to confirm accurate coding

#### Additional T4A information:

When generating T4A reports such as Summary, ensure you check the T4 Only box and Target Currency is set to CN

O Detail Re		Sort by Tax ID Vendor Nam		TIN Name	Prej
<ul> <li>Paper 10</li> <li>Paper T4</li> <li>Spreadsh</li> </ul>	99-MISC Form 99-NEC Form			State Worked	
Selection Criter Tax Year Production Company	PROD 01	Start Date	End Date	Source	
	From		То		
Tax ID					
Include C	nly 3rd-Party 1099 nly USA Residents	'S			
Include C		'S	Multiple Currency		Clea
Include C Include C Report Include V T4 only	nly USA Residents		- Multiple Currency Source Currency Target Currency	All source curre	ncy <u>C</u> a

### Step E: Edit 1099 tagging

Use the Posted Transaction Editor to correct missing or incorrect vendor 1099 tags.

- 1. Verify *State Worked* is entered if not, field 9 will be greyed out and not editable
- 2. Add the appropriate 1099 code to each distribution line within the 9 column then click the Accept icon to save changes
  - a. Note: if you need to split distribution lines and you don't have that ability, request "Full access" to the Posted Transaction Editor from your approver who will send a request to PSL Support.

AVP Transaction Entry - PSL+ PSL+	
Setup  Accounts Payable  Accounts Payable  Purchase Order  Poty Cash  Comparison Entry	Ordet Item Editor     File Edit Programs Options View Favorites Help
Journal City     Je Entry (rein)     Je Entry (rein)     Je Entry (rein)     Je Entry (rein)     Posted Transaction Entry (ntry)     Posted Transaction Entry     Posted Transaction Entry (ntry)     Posted	Reference Information Number 14929 Eff. Date Batch PK Description 0.4/15 CPENNAVY Reduction
Cost Cost Resort Support Menu Universal PSL+ Help	Vendor Name         1099 code         ×           J/E Number         1099 code         ×           Invoice Number         1099 code         Description           1         Rents         2           Account         Ser         Loc         Set         0           59-38         1820         01         0000         7         4         Federal tax withheld           6         Medical & Bealth payments         6         Medical & Bealth payments         6
	Medica's Reatin payments     A Monemplayee compensation     Substitute pay in lieu of dividends or interest     Direct sales of \$5000 or more     A Crop insurance proceeds     B Excess Golden Parachute payments     CK Cancel Help

#### Additional T4A information:

3. Ensure you have the T4A indicator in payments

PSL+	
▼   ▼	9 - HOME 1 - AIP 2 - PIO 3 - J/E 4 - CHECKS 5 - PCARD 6 - PAYROLL Z - COST REPORT 8 - BIBLE REPORT 9 - TRIAL BALANCE CONSOLIDAT
Counts Payable	File Edit Programs Options View Favorites Help
Vendor	≪ < > > ■ ● Q 2 ■ ● ⊗ E> ■ % @ ≓ □ ⊕ Ø
A/P Entry AP Entry (apte)	Reference Information
AP Edit List (appost)	Number 17844 Batch PK
AP Post (appost)	Eff. Date Production
AP Open Items Report (apopenp) Pending Items Report (pirpt)	Description Company 001
Change Open Items into Manual C	
Modify Open Items (apopmod)	Currency
Defer Open Items (ckdef) Void Open Items (apvoid2)	Vendor Information
Import an Excel File (xlint)	ID State Worked Number Type C Check
Checks	Name Date / / Combine 0 Hold
1099 & ICR Reports Purchase Order	
Putchase order	Amount 0.00 Date / /
Journal Entry	Discount 0.00 Amount 0.00
Payroll	Distrib 0.00
G/L	we we
🗅 Budget	ACH/EFT Customer #
Cost	
Closing	PO Number Account Sers Locs Sets 9 In FF1 FF2 Description

- a. If a T4A payee is missing "T" in the #9 field of an AP or other payment, PSL cannot generate the T4A reports and prints
- b. Email PSL.Support@castandcrew.com to request your tags are updated; send information to indicate what tags you used in Free Fields 1-4 to identify T4A payees in your database

## **Printing your 1099s**

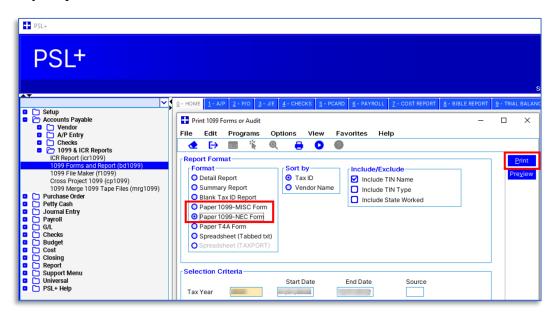
## Step F: Test your printer alignment

Test your printer alignment to ensure your printout matches the physical 1099 form. Important notes:

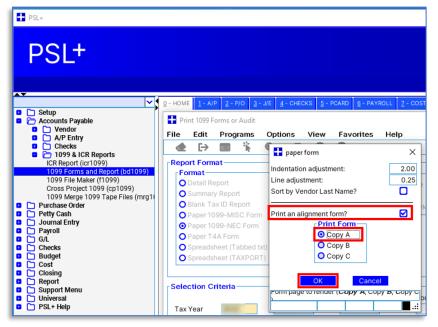
- PSL is compatible with certain printers using the <u>Universal Print Driver</u>, described here.
- 1. Insert a 1099 form into the printer and note its orientation and direction in the tray
- 2. Open Accounts Payable > 1099 & ICR Reports > 1099 Forms and Report



- 3. Select either Paper 1099-NEC form or Paper 1099-MISC Form and click Print
  - a. If these options are greyed out, you do not have permissions to print. Please have your approver request to update your permissions.



- 4. Check *Print an alignment form* and select *Copy A* then click *OK* this will print just 1 sample page to confirm it fits on the printed 1099 form
  - a. Notes: "Unknown" will show on every document in place of a blank Tax ID number
  - b. State income isn't included on the 1099 form



- 4.1 **Optional**: print layout adjustment
  - c. This dialog box has two fields, *Indentation adjustment* and *Line adjustment*, which allow you to move the printout location on the printed form if it doesn't match

₽SL+ PSL+	
Setup     Accounts Payable     Ave Counts Payable     Vendor     ArP Entry     Checks     Checks     Checks     Checks     Checks     Checks     Checks     Checks     Checks     ArP Entry     Checks     Checks     Checks     ArP Entry     Checks     ArP Entry     Checks     ArP Entry     Checks     Checks     Budget     Cost     Cost     Cost     Support Menu     Universal     Pept, Help	Q - HOME       1 - APP       2 - P/O       2 - JE       4 - CHECKS       5 - PCARD       9 - PAYROLL       Z - COST P         Image: Print 1099 Forms or Audit       File       Edit       Programs       Options       View       Favorites       Help         Image: Print 1099 Forms or Audit       File       Edit       Programs       Options       View       Favorites       Help         Image: Print Pormat       Image: Print Pormat       Image: Print Pormat       Image: Print Pormat       2.00         Obtail Report       Obtail Report       Ostrommary Report       Sort by Vendor Last Name?       Image: Print Pormat       Image: Print Pormat       Image: Print Pormat       Print an alignment form?       Image: Print Pormat       Image: Port Port Port Port Port Port Port Port

- d. Experiment by adjusting the numbers and printing another alignment form *Indentation adjustment* is distance from the side of the page, and *Line* is from the top; higher numbers are further away
- e. 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; see section "H: Troubleshooting printing"
- 5. Adjusting printout
  - a. If it printed upside down or the wrong side, change the orientation in the paper tray and repeat this process
  - b. If the printout is misaligned to the form's boxes, see 4.1 "Optional: print layout adjustment" above
  - c. See section "H: Troubleshooting printing" in this document for more printing help

#### Step G: Print paper or PDF 1099 forms

Before printing, determine:

- If you are printing for a single show, skip to #1 below
- If you have multiple productions in separate PSL databases and need to merge data to create your 1099s, follow the directions here: <u>Cross Project Merge 1099 / T4A</u>
- 1. Open Accounts Payable > 1099 & ICR Reports > 1099 Forms and Report
- 2. Select either Paper 1099-NEC Form or Paper 1099-MISC Form and confirm other fields are correct
- 3. Click *Preview* to review the printout as a PDF first, or *Print* to send to your printer
- 4. Note: if *Use Federal Filing Limit* is selected (this is standard) then only 1099s of 600.00 or greater will be printed (as of current, the IRS Federal Filing Limit is \$600; consult <u>www.IRS.gov</u> for more information)

Setup     Accounts Payable	2 - HOME 1 - AIP 2 - FIG 2 - JE 4 - CHECKS 2 - FCARD 4 - FAYROLL 2 - COST REPORT 4 - BIBLE REPORT 2 - TRAL BA
Vendor     A/P Entry	File Edit Programs Options View Favorites Help
Checks	
Cost     Cost	Report Format     Sort by <sup>format</sup> Sort by <sup>format</sup> Include/Exclude <sup>format</sup> Include TIN Name <sup>format</sup> Include State Worked <sup>format</sup> Include State Worked <sup>format</sup> Spreadheet (Tabbet txt) <sup>format</sup> Include Ton Tax Var <sup>format</sup> To <sup>format</sup> To <sup>format</sup> Include Only 3rd-Party 1099's <sup>fordatheets</sup>
	Include Withholding Taxes Only     T4 only     Source Currency     All source currency     Les Federal Filing Limit 600     Targer Currency     Lis Dollars     EXit
	Use Federal Filing Limit         600         Target Currency         US         US Dollars         EXit           Include Non-1099able Items         Help         Help

- 5. 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)
  - 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

🛨 paper form	×	
Indentation adjus Line adjustment: Sort by Vendor La	2.00 0.25	
0 0	Copy A Copy B Copy C	

- 6. Send to your printer
  - a. If the printout is not aligned with the paper 1099 form see Step F: Test your printer alignment, above
  - b. You can also select a PDF printer if you want to create a PDF file instead of printing

						w Fav	orites H	elp	
	€→		-	Q	- 🖶 🌔				
Repo	rt Forn	nat —							
Foi	mat-				Sort by —	r	Include/Ex	clude —	
0	Detail R	eport			Tax ID		Include	TIN Name	
0.	Summai	y Repo	rt 💶 F	rint (bd	1099)				
0	Blank T	ax ID Re			- i - i				
0	Paper 1	099-MI	SC Ger	neral P	age <u>S</u> etup	Appearance			
-		099-NE		rint Se	rvice				
0	Paper T	4A Forn	n	Name:	Microsoft	Print to PDI			Properties
		heet (T		Marrie.	MICIOSOILI				T Toberneam

c. Highly recommended that you include the form type within the file name (i.e., " - NEC Copy B")

#### Additional T4A information:

When printing T4A forms, ensure you check the T4 Only box and Target Currency is set to CN

File Edit Programs Options View Favo Report Format Format O Detail Report O Detail Report O Blank Tax ID Report O Paper 1099-MISC Form O Paper 1099-MISC Form O Paper 1099-MISC Form O Spreadsheet (TAXPORT) Selection Criteria	e Include/Exclude Include TIN Name Include TIN Type Include State Worked	Print Pre <u>v</u> iew
Start Date Tax Year Production Company 01 State From Tax ID Include Only 3rd-Party 1099's	End Date Source	
Include Only USA Residents  Report Include Withholding Taxes Only T4 only Use Federal Filing Limit Include Non-1099able Items	Source Currency Target Currency CN CANADIAN DOLLARS	Ciear <u>A</u> li <u>C</u> ancel E⊻it <u>H</u> elp

## **Step H: 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. Complete Step F: Test your printer alignment, above
- 3. Print directly from PSL instead of 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

## **IRS eFiles**

## **Creating an IRS eFile**

Before creating your IRS eFile, first complete Step A (Verify accuracy of company information,) then:

- Determine if you are required to eFile by visiting https://www.irs.gov/
- If you have engaged Cast & Crew to eFile with the IRS on your behalf, contact <u>PSL1099@castandcrew.com</u> for your TCC (Transmitter Control Code)
- If you will be eFiling yourself, locate your TCC from your company's tax professional
- 1. Open Accounts Payable > 1099 & ICR Reports > 1099 File Maker
- 2. Select your Company Code and other sections will auto-fill
- 3. Complete fields that have not auto-filled, including your TCC in the Transmitter Control Code field
- 4. Click *Create IRS File* and save to your desktop or other accessible location

9 - HOME 1 - AIP 2 - P/O 3 - JE 4 - CHECKS 5 - PCARD 5 - PAYROLL 7 - COST REPORT 8 - BIBLE REPORT 9 - TRIAL BALANCE -
Create 1999 IRSTAX File Create 1999 IRSTAX File File Edit Programs Options View Favorites Help File Edit Programs Options View Favorites Help File Info Pilor Year Data Year Create IRS File Create IRS File Correction F Correction F Correction F Correction F Company Code Company Info Company Name (cont) Company State Compa
ſ

- 5. Submit your eFile:
  - a. If you engaged Cast & Crew to eFile with the IRS on your behalf, review the directions at <u>1099 Print and</u> <u>eFile Services</u> or contact <u>PSL1099@castandcrew.com</u> and ask for instructions
  - b. If your company is eFiling directly to the IRS via their FIRE system, see the next section below

## eFiling directly with the IRS

The IRS uses the FIRE system (Filing Information Returns Electronically) for accepting eFiles, including 1099 reports.

Here are some important tips for eFiling with the IRS:

- Determine if you are required to eFile with the IRS: <u>https://www.irs.gov/</u>
- Ask your company's tax professional for your TCC (Transmitter Control Code); if your company does not have a TCC yet, follow the directions for applying for a TCC from the IRS: <u>https://www.irs.gov/</u>

## End