

The **Financial** Edge<sup>TM</sup>

1099 MISC Processing Guide

## **120914**

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1099MISCGuide-120914

# 1099 MISC Processing Guide



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Welcome to the *1099 MISC Processing* guide. Instead of processing your 1099s directly through *Mail* in **Accounts Payable**, you can now connect to *Aatrix*. The *Aatrix* integration combines your data with their content to populate the integrated reports in compliance with state and federal tax agency regulations. The 1099-MISC and W-2 eFiling solutions provide a range of choices from a complete full service eFiling option to a partial eFiling of just the federal forms, state forms or both.

While we recommend using the complete eFiling option as a best practice, you could skip the eFiling option altogether and print to paper tax forms. Please be aware, there are costs associated with eFiling. Also the new option to eFile 1099-MISC forms impacts your decision whether to purchase paper tax forms. To purchase compatible preprinted paper tax forms for paper or the partial eFiling options, please contact the Blackbaud Forms team at 866.422.3676 to speak to one of our trained tax forms specialists.

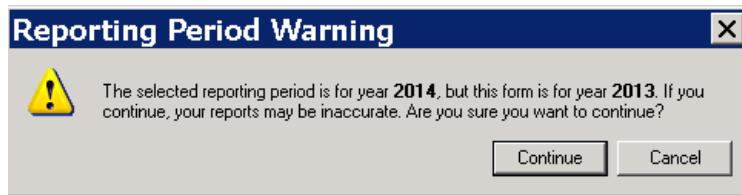
## 1099 MISC Processing

To get started processing 1099 MISC forms, you must log in to **The Financial Edge** with Supervisor rights.

1. From **Accounts Payable, Mail**, select **Forms, 1099 forms, New**.

2. Choose the date options to generate 1099s, and do not mark the **Corrected return** checkbox.
3. Mark **Include activity below minimums** if you want to include 1099 vendors that did not meet minimum box amounts.
4. Mark **Use an alternative payer/filer name** if a different name is needed than what is in *Configuration*.
5. Enter the required name, phone number and email address fields.
6. Mark **Create an output query of vendors** if desired. You can save and use an output query later for other mailings or reports.
7. Next select the **Filters** tab to create forms for specific vendors based on selected. For example, you may not be preparing 1099s for all vendors at one time. You can include only those vendors whose names begin with A through H.

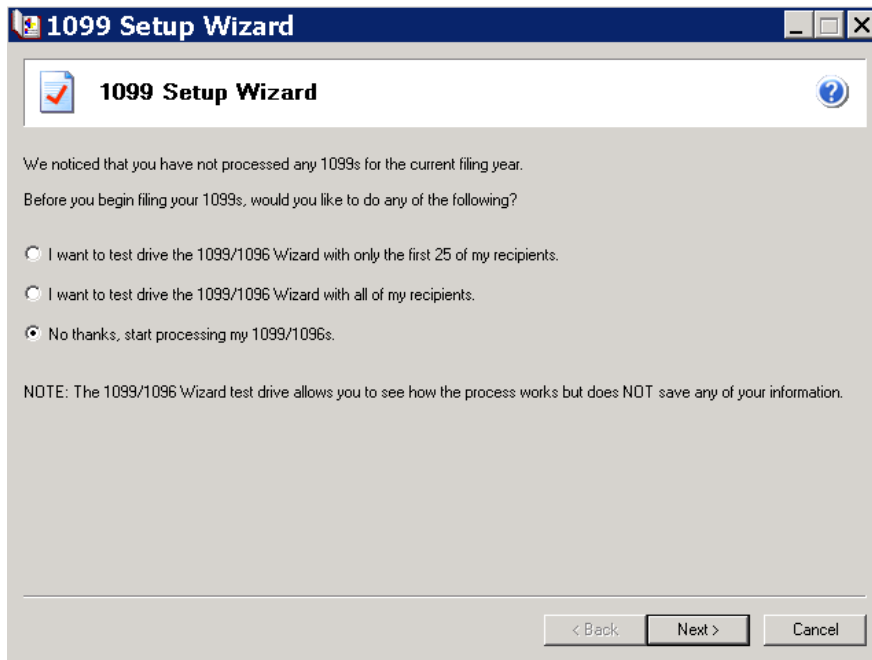
8. Click **Display Report**. If the reporting period is different than the current form year, the following message displays.



9. Click **Continue** to proceed, or **Cancel** to update the year for which the reports are created.

## 1099 Setup Wizard

When you access the 1099 Setup Wizard, options appear allowing you to test the Aatrix 1099 filing wizard, or begin processing the forms.

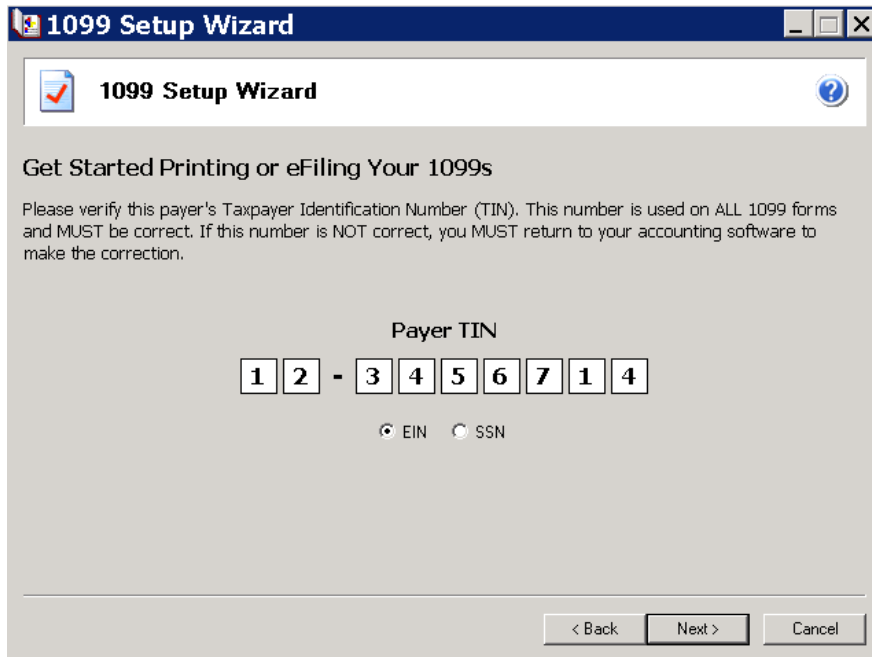


If you select to test drive the 1099/1096 Wizard, you will need to complete the steps again in processing mode to complete the filing. The 1099/1096 Wizard test drive does not save the information.

Select **Next**.

## Getting Started

The first step is to verify the Taxpayer Identification Number (TIN) for the organization that is filing the 1099 forms.



The TIN needs to be correct because it prints on all forms as it appears in the 1099 Setup Wizard. If the number is incorrect, click **Cancel**. You can update the TIN in *Configuration*. Simply update the on the **Federal ID #** field on the General tab.

Select **Next**.

## Payer Information

Enter the payer Information for the organization filing the 1099 forms.

The screenshot shows the '1099 Setup Wizard' window with the 'Payer Information' tab selected. The form contains the following fields:

- Company name:  Other name:
- First name:  Middle:  Last name:
- Country:
- Address line 1:
- Address line 2:
- City:  State:  ZIP code:
- Contact name:  Title:
- Phone:  Email:
- Fax:  Transfer agent:

Navigation buttons at the bottom: < Back, Next >, Cancel.

Select **Next**.

## Tax Preparer Type

The Tax Preparer Type screen allows you to select what type of filer you are. If you are filing for your own company or organization, select the first option. If you are a tax preparer agency or paid tax preparer, select the second option.

The screenshot shows the '1099 Setup Wizard' window with the 'Tax Preparer Type' tab selected. The form contains the following elements:

- Which type of filer are you?
  - I am filing for my company/employer.
  - I am a third-party, paid Tax Preparer, filing for one or multiple companies/EINs.
- If you have 10 or more companies, you may sign up for the Batch eFiling Service (fees apply). Visit <http://aatrix.com/batchefiling> to learn more.

Navigation buttons at the bottom: < Back, Next >, Cancel.

If you have 10 or more companies, contact Aatrix about the batch filing option.

Select **Next**.

## State and Local Tax Items

On this screen, you can verify, edit and add state and local tax items. If your organization does not withhold state tax, you can go to the next screen.

The screenshot shows a software window titled "1099 Setup Wizard" with a sub-header "State & Local Tax Items". Below the header is a warning message: "Properly formatted tax account numbers are required for 1099 reconciliation and year-end forms. Avoid rejected forms and eFiles! MOST filing errors are due to incorrectly formatted withholding or unemployment account numbers." The screen is divided into two sections: "State Tax Items" and "Local Tax Items". Each section contains a table with columns for tax details and buttons for "Add...", "Edit...", and "Remove". The "Local Tax Items" table has an additional column for "1099 N...". At the bottom of the window are navigation buttons: "< Back", "Next >", and "Cancel".

State	Tax Name	Tax Account ...	
			Add...
			Edit...
			Remove

State	Tax Name	1099 N...	Tax Type	Tax Account ...	
					Add...
					Edit...
					Remove

< Back   Next >   Cancel

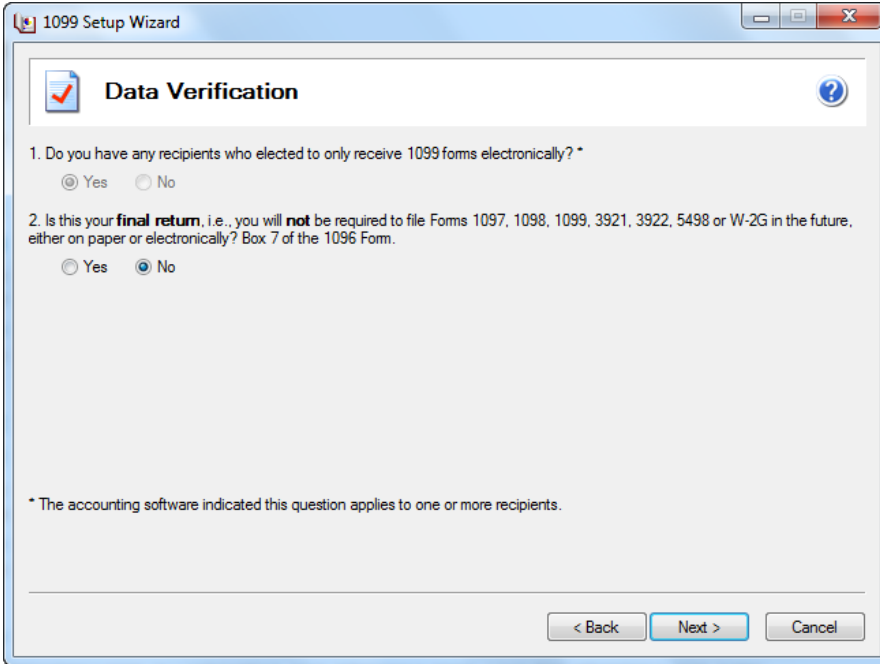
A valid tax account number is required for organizations that withhold state tax amounts. The tax account number will appear in box 17 on the 1099 MISC form.

Select **Next**.



## Data Verification

Some of your recipients may have elected to receive 1099 forms electronically. “Yes” will automatically be selected and is not able to be changed. By selecting “Yes” to verification 2, then box number 7 will be marked on the 1096 form indicating that you will no longer be required to file 1099 forms in the future.



The screenshot shows a window titled "1099 Setup Wizard" with a "Data Verification" header. It contains two questions with radio button options:

1. Do you have any recipients who elected to only receive 1099 forms electronically? \*  
 Yes  No
2. Is this your **final return**, i.e., you will **not** be required to file Forms 1097, 1098, 1099, 3921, 3922, 5498 or W-2G in the future, either on paper or electronically? Box 7 of the 1096 Form.  
 Yes  No

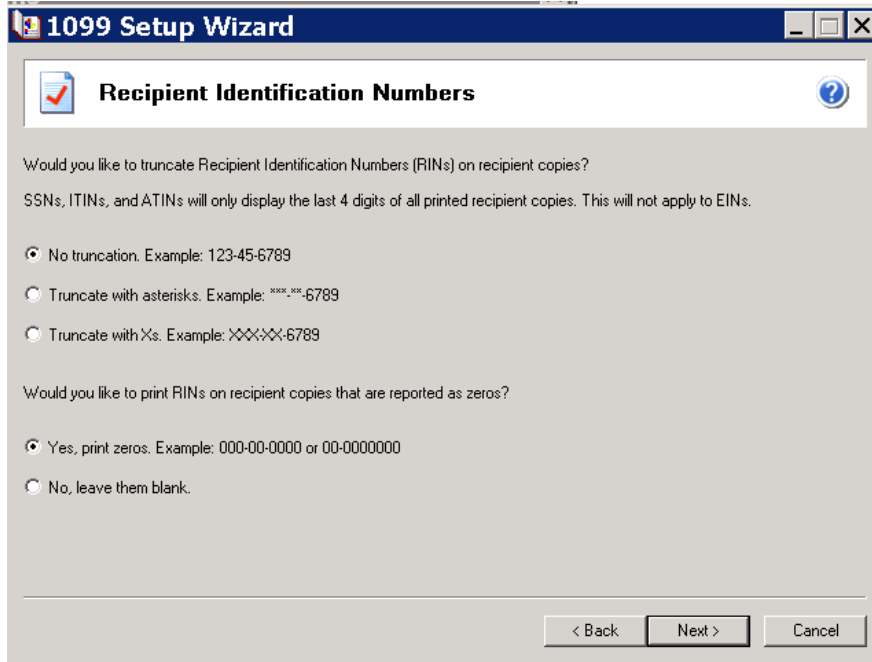
\* The accounting software indicated this question applies to one or more recipients.

At the bottom, there are three buttons: "< Back", "Next >" (highlighted), and "Cancel".

For information about verification 2, please refer to the 1096 instructions on the IRS website.  
Select **Next**.

## Recipient Identification Numbers

On this screen, choose the options for how the Recipient Identification Number will appear on the Recipient copies of the 1099 forms.



The screenshot shows a window titled "1099 Setup Wizard" with a sub-header "Recipient Identification Numbers". The main content area contains two questions with radio button options:

Would you like to truncate Recipient Identification Numbers (RINs) on recipient copies?  
SSNs, ITINs, and ATINs will only display the last 4 digits of all printed recipient copies. This will not apply to EINs.

- No truncation. Example: 123-45-6789
- Truncate with asterisks. Example: \*\*\*-\*\*-6789
- Truncate with Xs. Example: XXXXX-6789

Would you like to print RINs on recipient copies that are reported as zeros?

- Yes, print zeros. Example: 000-00-0000 or 00-0000000
- No, leave them blank.

At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

Select **Next**.

## Multiple 1099 Date Files

On this screen you specify whether you use multiple 1099 data files. If you select "Yes," the next step will take you to the Multiple 1099 Data Files Wizard and will allow you to work with a combined 1099 file.

Most **Financial Edge** users will select “No, I use a single 1099 data file for this EIN.” If you have additional files to import, they can be combined with **Financial Edge** information using the multiple 1099 data files option.

**1099 Setup Wizard**

**Multiple 1099 Data Files**

**Please Read Carefully**  
Answering incorrectly may require you to restart the filing process.

Do you use multiple 1099 data files for the **same federal EIN** ?

You may be using multiple 1099 data files in your accounting software to handle:

- multiple companies
- multiple departments
- multiple divisions
- multiple sites

all under the same federal EIN.

Yes, I use multiple 1099 data files for this EIN.

No, I use a single 1099 data file for this EIN.

< Back   Next >   Cancel

Select **Next** to access the 1099 Preparer grid.

# Verify the Preparers Grid Information

1. You must review each step of the 1099 preparer grid. On the first screen, verify recipient taxpayer identification numbers.

Recipient L...	Recipient F...	Recipient M...	Recipient TIN	Box 1	Box 2	Box 3	Box 4	Box 5	Box 6	Box 7	Box 8	Box 9	Box 10	Box 13	Box 14	Box 15a	Box 15b
Last Name	First Name	Middle Name	Taxpayer ID...	Rents	Royalties	Other Income	Federal Inc...	Fishing Boa...	Medical and...	Nonemploy...	Substitute P...	Payer Made...	Crop Insura...	Excess Gol...	Gross Proc...	Section 409...	Section 409...
			12-4456529							5000.00		<input type="checkbox"/>					
			85-9893324							2000.00		<input type="checkbox"/>					
										600.00		<input type="checkbox"/>					
<b>Totals</b>																	
<b>3 Recipient(s)</b>																<b>7600.00</b>	

2. Click **Next Step**.

3. Verify 'Check if FEIN' is checked if recipient's is a TIN . Unmark to enter SSN format.

Recipient TIN	TIN Flag	Recipient C.	Optional Na...	Box 1	Box 2	Box 3	Box 4	Box 5	Box 6	Box 7	Box 8	Box 9	Box 10	Box 13	Box 14	Box 15a	Box 15b
Taxpayer ID...	Check if FEIN	Company N...	Full Name	Rents	Royalties	Other Income	Federal Inc...	Fishing Boa...	Medical and...	Nonemploy...	Substitute P...	Payer Made...	Crop Insura...	Excess Gol...	Gross Proc...	Section 409...	Section 409...
1	<input checked="" type="checkbox"/>		Blanche Darb							5000.00		<input type="checkbox"/>					
2	<input checked="" type="checkbox"/>		David Case							2000.00		<input type="checkbox"/>					
3	<input checked="" type="checkbox"/>		Deborah Sam							600.00		<input type="checkbox"/>					
<b>Totals</b>										<b>7600.00</b>							

4. Click **Next Step**.

5. Verify Recipients' Names & Addresses.

Recipient L...	Recipient Fi...	Recipient Mi...	Recipient TIN	Box 1	Box 2	Box 3	Box 4	Box 5	Box 6	Box 7	Box 8	Box 9	Box 10	Box 13	Box 14	Box 15a	Box 15b
Last Name	First Name	Middle Name	Taxpayer ID...	Rents	Royalties	Other Income	Federal Inc...	Fishing Boa...	Medical and...	Nonemploy...	Substitute P...	Payer Made...	Crop Insura...	Excess Gol...	Gross Proc...	Section 409...	Section 409...
1			12-1221212							5000.00		<input type="checkbox"/>					
2			12-4456529							2000.00		<input type="checkbox"/>					
3			85-9893324							600.00		<input type="checkbox"/>					
<b>Totals</b>	<b>3 Recipient(s)</b>									<b>7600.00</b>							

6. Click **Next Step**.

7. Verify All Income Boxes.

Recipient L...	Recipient F...	Recipient M...	Recipient TIN	Box 1	Box 2	Box 3	Box 4	Box 5	Box 6	Box 7	Box 8	Box 9	Box 10	Box 13	Box 14	Box 15a	Box 15b		
Last Name	First Name	Middle Name	Taxpayer ID...	Rents	Royalties	Other Income	Federal Inc...	Fishing Boa...	Medical and...	Nonemploy...	Substitute P...	Payer Made...	Crop Insura...	Excess Gol...	Gross Proc...	Section 409...	Section 409...		
1			12-1221212							5000.00		<input type="checkbox"/>							
2			12-4456529							2000.00		<input type="checkbox"/>							
3			85-9893324							600.00		<input type="checkbox"/>							
<b>Totals</b>																<b>7600.00</b>			

8. Click **Next Step**.

9. Verify Amount of State Income and Withheld.

Recipient L...	Recipient F...	Recipient M...	Recipient TIN	Box 7	Box 8	Box 9	Box 10	Box 13	Box 14	Box 15a	Box 15b	Filing State	Box 12	Box 11	Box 18	Box 16			
Last Name	First Name	Middle Name	Taxpayer ID...	Nonemploy...	Substitute P...	Payer Made...	Crop Insura...	Excess Gol...	Gross Proc...	Section 409...	Section 409...	Filing State	Foreign Cou...	Foreign Tax...	SC Taxable	SC Tax Withheld			
1			12-1221212	5000.00		<input type="checkbox"/>						SC			5000.00				
2			12-4456529	2000.00		<input type="checkbox"/>						SC			2000.00				
3			85-9893324	600.00		<input type="checkbox"/>						SC			600.00				
<b>Totals</b>				<b>7600.00</b>												<b>7600.00</b>			

10. Click **Next Step**.

11. Verify Filing State is correct.

Recipient L...	Recipient F...	Recipient M...	Recipient TIN	Box 7	Box 8	Box 9	Box 10	Box 13	Box 14	Box 15a	Box 15b	Filing State	Box 12	Box 11	Box 18	Box 16
Last Name	First Name	Middle Name	Taxpayer ID...	Nonemploy...	Substitute P...	Payer Made...	Crop Insura...	Excess Gol...	Gross Proc...	Section 409...	Section 409...	Filing State	Foreign Cou...	Foreign Tax...	SC Taxable ...	SC Tax Withheld
1			12-1221212	5000.00		<input type="checkbox"/>						SC			5000.00	
2			12-4456529	2000.00		<input type="checkbox"/>						SC			2000.00	
3			85-9893324	600.00		<input type="checkbox"/>						SC			600.00	
<b>Totals</b>				<b>7600.00</b>											<b>7600.00</b>	

12. Click **Next Step**.

13. Verify all other data and the 1099 Printing and Filing Options screen appears.

Recipient L...	Recipient F...	Recipient M...	Recipient TIN	Box 7	Box 8	Box 9	Box 10	Box 13	Box 14	Box 15a	Box 15b	Filing State	Box 12	Box 11	Box 18	Box 16
Last Name	First Name	Middle Name	Taxpayer ID...	Nonemploy...	Substitute P...	Payer Made...	Crop Insura...	Excess Gol...	Gross Proc...	Section 409...	Section 409...	Filing State	Foreign Cou...	Foreign Tax...	SC Taxable ...	SC Tax Withheld
1			12-1221212	5000.00		<input type="checkbox"/>						SC			5000.00	
2			12-4456529	2000.00		<input type="checkbox"/>						SC			2000.00	
3			85-9893324	600.00		<input type="checkbox"/>						SC			600.00	
<b>Totals</b>				<b>7600.00</b>											<b>7600.00</b>	

**1099 MISC Printing and Filing Options**

Choose **Complete 1099, eFile Fed or eFile State** and pick your filing dates.  
 Corrections before due dates are FREE! [More info?](#)

	# Recipients	Price/Recip.	Subtotal
<b>Complete 1099 eFiling Service</b> <span style="color: red;">Next Business Day Mailing!</span>			
<input checked="" type="radio"/> <b>Complete 1099 eFiling Service</b>			
<i>The eFile Center will:</i>			
- Print and Mail Recipient Copies	3	\$1.95	\$5.85
- e1099 Only Recipient Copies <a href="#">What's This?</a>	0	\$0.99	\$0.00
- File your Federal 1099s and 1096		included	FREE
- File all applicable State 1099s and Reconciliation Forms		included	FREE
- e1099s Available for all Recipients		included	FREE
<b>Total Cost</b>		<b>Minimum</b>	<b>\$24.95</b>
<b>Other Options</b> <a href="#">Fed or State eFilers receive Free, Easy Corrections!</a>			
<input type="checkbox"/> Print my Recipient 1099 Copies			
<input type="checkbox"/> eFile Federal 1099s and 1096	3	\$0.49	\$0.00
<input type="checkbox"/> eFile State 1099s and Reconciliation Forms	3	\$0.69	\$0.00
<input type="checkbox"/> Print Federal 1099s and 1096			
<input type="checkbox"/> Print State 1099s and Reconciliation Forms			
<b>Total Cost</b>			\$ 0.00
<input checked="" type="checkbox"/> Print Payer 1099 Copies			

## 1099 MISC Printing and Filing Options

If you have less than 250 recipients, you can select **Other Options** and print the Recipient 1099 Copies, Federal 1099s, 1096, State 1099 and Reconciliation forms, as well as the Payer 1099 Copies free of charge.

For information about ordering 1099 forms contact Blackbaud Forms. If you would like to eFile or are required to eFile by the IRS, go to “Complete 1099 eFiling Service” on page 18.

**W2/1099 Preparer**

**1099 MISC Printing and Filing Options**

Choose **Complete 1099, eFile Fed or eFile State** and pick your filing dates.  
Corrections before due dates are FREE! [More info?](#)

	# Recipients	Price/Recip.	Subtotal
<b>Complete 1099 eFiling Service</b> <b>Next Business Day Mailing!</b>			
The eFile Center will:			
- Print and Mail Recipient Copies	3	\$1.95	\$ 0.00
- e1099 Only Recipient Copies <a href="#">What's This?</a>	0	\$0.99	\$ 0.00
- File your Federal 1099s and 1096		included	FREE
- File all applicable State 1099s and Reconciliation Forms		included	FREE
- e1099s Available for all Recipients		included	FREE
<b>Total Cost</b>		<b>Minimum</b>	<b>\$ 0.00</b>
<b>Other Options</b> <a href="#">Fed or State eFilers receive Free, Easy Corrections!</a>			
<input checked="" type="checkbox"/> Print my Recipient 1099 Copies			
<input type="checkbox"/> eFile Federal 1099s and 1096	3	\$0.49	\$ 0.00
<input type="checkbox"/> eFile State 1099s and Reconciliation Forms	3	\$0.69	\$ 0.00
<input checked="" type="checkbox"/> Print Federal 1099s and 1096 <a href="#">(Official Copy)</a>			
<input checked="" type="checkbox"/> Print State 1099s and Reconciliation Forms <a href="#">(Official Copy)</a>			
<b>Total Cost</b>			<b>\$ 0.00</b>
<input checked="" type="checkbox"/> Print Payer 1099 Copies			

< Back   Next >   Cancel

When you select **Other Options** and click Next, the Benefits of the Complete 1099 eFile Service screen appears.

**W2/1099 Preparer**

**Benefits of the Complete 1099 eFile Service**

- Have your recipient 1099s printed and mailed automatically**  
**Next Business Day Mailing!**
- Have your federal 1099s/1096 filed automatically**  
Select your filing dates and make any changes at no charge until that date. [learn more](#)
- Have your state 1099s & Reconciliation(s) filed automatically**  
Select your filing dates and make any changes at no charge until that date. [learn more](#)

Yes, I would like to continue with the Complete 1099 eFile Service

< Back   Next >   Cancel

Click **Next**.



Divider sheets are extra sheets that print in between the different 1099 forms and will print a sheet between the different form types. The divider sheet will not appear in the forms viewer.

The screenshot shows a dialog box titled "W2/1099 Preparer" with a close button (X) in the top right corner. The main heading is "Divider Sheets" with a question mark icon. Below the heading, the text reads: "Divider sheets provide important information about how to file your forms. Would you like to include a divider sheet to separate reports or forms?". There are two radio button options: "Yes, include divider sheets when printing" (which is unselected) and "No, do not include divider sheets" (which is selected). At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

This option will be "No" for most **Financial Edge** users.

Click **Next**.

Before the forms are displayed the selections can be reviewed. If the selections are correct then select **Next**, if they are not correct, choose **Back** and make required corrections.

The screenshot shows a dialog box titled "W2/1099 Preparer" with a close button (X) in the top right corner. The main heading is "Review Data" with a question mark icon. Below the heading, the text reads: "Based upon your selections, we need you to review data on the following forms:". A list of forms is displayed in a white box: "Federal" (Print Federal 1099-MISC, Print Federal 1096), "Recipient" (Print Recipient 1099-MISC, Print 1099-MISC Instructions), and "Payer" (Print Payer 1099-MISC). Below the list, the text reads: "If you would like a copy for your records of the actions that will be taken, click 'Print.'". There is a "Print" button. At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

Click **Next**.

The forms will be displayed and the Report name will appear at the top of the screen as well as the number of steps left to display. By choosing **Print Final**, this report will show as a completed action for the report parameter.

2014 1096 Federal Report - State and Federal Tax Reports  
 File Edit View Tools Help  
 Report 2 of 5: Federal 1096  
 1 page **Click Print Final, then click Next Step.** Print Draft Print Final Prev Step Next Step

Do Not Staple 6767 Auth: Rev. 9/22/14

Form <b>1096</b>	<b>Annual Summary and Transmittal of U.S. Information Returns</b>	OMB No. 1545-0108 <b>2014</b>
Department of the Treasury Internal Revenue Service		
FILER'S name <b>COMMUNITY SERVICES INC.</b>		
Street address (including room or suite number) <b>100 PEPPERWORTH WAY</b>		
City or town, state or province, county, and ZIP or foreign postal code <b>CHARLESTON SC 29492 US</b>		
Name of person to contact	Telephone number <b>800 444-5678</b>	<b>For Official Use Only</b> [Barcode]
Email address	Fax number	
1 Employer identification number <b>12-3456714</b>	2 Social security number	3 Total number of forms <b>3</b>
4 Federal income tax withheld <b>\$</b>		5 Total amount reported with this Form 1096 <b>\$ 7600.00</b>
8 Enter an "X" in only one box below to indicate the type of form being filed.		
<input type="checkbox"/> 1099-INT 32	<input type="checkbox"/> 1099-DIV 50	<input type="checkbox"/> 1099-C 81
<input type="checkbox"/> 1099-NEC 83	<input type="checkbox"/> 1099-RC 84	<input type="checkbox"/> 1099-RET 85
<input type="checkbox"/> 1099-DA 86	<input type="checkbox"/> 1099-FA 87	<input type="checkbox"/> 1099-SSA 88
<input type="checkbox"/> 1099-SEP 89	<input type="checkbox"/> 1099-SP 90	<input type="checkbox"/> 1099-TR 91
<input type="checkbox"/> 1099-UB 92	<input type="checkbox"/> 1099-UB 93	<input type="checkbox"/> 1099-UB 94
<input type="checkbox"/> 1099-UB 95	<input type="checkbox"/> 1099-UB 96	<input checked="" type="checkbox"/> 1099-UB 97
<input type="checkbox"/> 1099-UB 98	<input type="checkbox"/> 1099-UB 99	<input type="checkbox"/> 1099-UB 00

**Return this entire page to the Internal Revenue Service. Photocopies are not acceptable.**

Under penalties of perjury, I declare that I have examined this return and accompanying documents, and, to the best of my knowledge and belief, they are true, correct, and complete.

Signature \_\_\_\_\_ Title \_\_\_\_\_ Date **11/21/2014**

**Instructions**  
 Future developments. For the latest information about developments related to Form 1096, such as legislation enacted after its release, go to [www.irs.gov/form1096](http://www.irs.gov/form1096).

When to file. File Form 1096 as follows:  
 \*With Forms 1097, 1098, 1099, 3921, 3922, or W-2e, file by March 2, 2015.  
 \*With Forms 5498, file by June 1, 2015.

If the next step option is selected instead of print final, then you will be prompted to print the current form.

2014 1096 Federal Report - State and Federal Tax Reports  
 File Edit View Tools Help  
 Report 2 of 5: Federal 1096  
 1 page **Click Print Final, then click Next Step.** Print Draft Print Final Prev Step Next Step

Do Not Staple 6767 Auth: Rev. 9/22/14

Form <b>1096</b>	<b>Annual Summary and Transmittal of U.S. Information Returns</b>	OMB No. 1545-0108 <b>2014</b>
Department of the Treasury Internal Revenue Service		
FILER'S name <b>COMMUNITY SERVICES INC.</b>		
Street address (including room or suite number) <b>100 PEPPERWORTH WAY</b>		
City or town, state or province, county, and ZIP or foreign postal code <b>CHARLESTON SC 29492 US</b>		
Name of person to contact	Telephone number <b>800 444-5678</b>	<b>For Official Use Only</b> [Barcode]
Email address	Fax number	
1 Employer identification number <b>12-3456714</b>	2 Social security number	3 Total number of forms <b>3</b>
4 Federal income tax withheld <b>\$</b>		5 Total amount reported with this Form 1096 <b>\$ 7600.00</b>
8 Enter an "X" in only one box below to indicate the type of form being filed.		
<input type="checkbox"/> 1099-INT 32	<input type="checkbox"/> 1099-DIV 50	<input type="checkbox"/> 1099-C 81
<input type="checkbox"/> 1099-NEC 83	<input type="checkbox"/> 1099-RC 84	<input type="checkbox"/> 1099-RET 85
<input type="checkbox"/> 1099-DA 86	<input type="checkbox"/> 1099-FA 87	<input type="checkbox"/> 1099-SSA 88
<input type="checkbox"/> 1099-SEP 89	<input type="checkbox"/> 1099-SP 90	<input type="checkbox"/> 1099-TR 91
<input type="checkbox"/> 1099-UB 92	<input type="checkbox"/> 1099-UB 93	<input type="checkbox"/> 1099-UB 94
<input type="checkbox"/> 1099-UB 95	<input type="checkbox"/> 1099-UB 96	<input type="checkbox"/> 1099-UB 97
<input type="checkbox"/> 1099-UB 98	<input type="checkbox"/> 1099-UB 99	<input type="checkbox"/> 1099-UB 00

**Print Report**

Would you like to print the Federal 1096 now?  
 Yes No Cancel

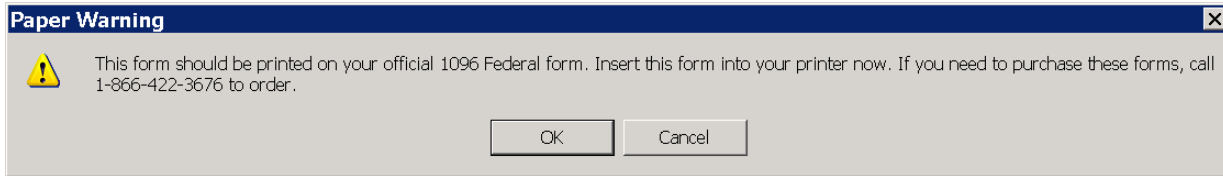
**Return this entire page to the Internal Revenue Service. Photocopies are not acceptable.**

Under penalties of perjury, I declare that I have examined this return and accompanying documents, and, to the best of my knowledge and belief, they are true, correct, and complete.

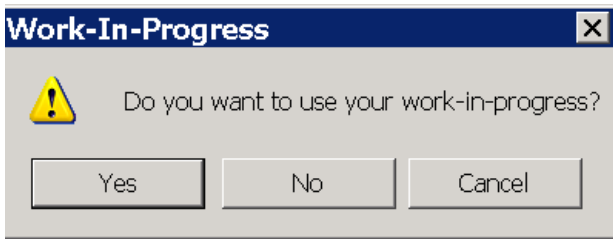
Signature \_\_\_\_\_ Title \_\_\_\_\_ Date **11/21/2014**

**Instructions**  
 When to file. File Form 1096 as follows:  
 \*With Forms 1097, 1098, 1099, 3921, 3922, or W-2e, file by March 2, 2015.  
 \*With Forms 5498, file by June 1, 2015.

Place the correct form in the printer and then select **OK** to the Paper Warning message.

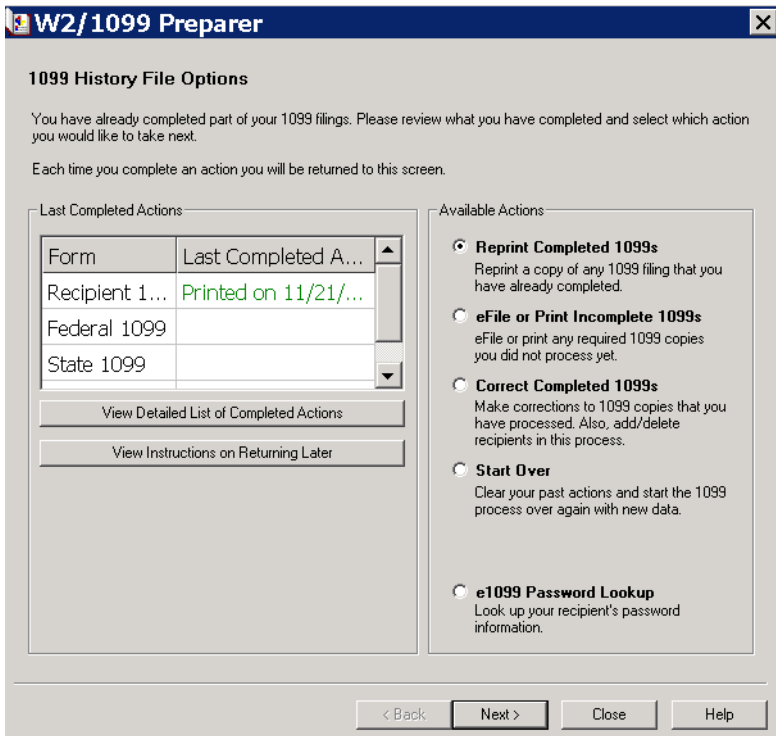


If the forms viewer is closed before all the final copies of the forms are printed, a prompt will appear to save your Work-In-Progress.



By choosing **Yes**, you will be able to access the information again. When the report 1099 parameter is displayed again, you will be prompted to use the Work-in-Progress.

If **No** is selected to the Work-in-Progress message, then the 1099 History File Options screen appears so that you can continue processing 1099 forms.



If you select **Yes** on the Work-in-Progress message, then the Preparer's grid will appear and the process will continue from this point.

**Community Services Inc. - W2/1099 Preparer**  
 File Edit View Help

Verify Recipient Taxpayer Identification Numbers **Next Step**

Recipient L...	Recipient Fi...	Recipient Mi...	Recipient TIN	Box 1	Box 2	Box 3	Box 4	Box 5	Box 6	Box 7	Box 8	Box 9	Box 10	
Last Name	First Name	Middle Name	Taxpayer ID...	Rents	Royalties	Other Income	Federal Inc...	Fishing Boa...	Medical and...	Nonemploy...	Substitute P...	Payer Made...	Crop Ins	
1			12-6656566							5000.00		<input type="checkbox"/>		
2			12-4456529							2000.00		<input type="checkbox"/>		
3			85-9893324							600.00		<input type="checkbox"/>		
<b>Totals</b>											<b>7600.00</b>			

### Complete 1099 eFiling Service

If you have more than 250 Recipients, the IRS requires you to efile the 1099 forms. The options for Complete 1099 eFiling Service are active, however the options for just the required eFiling are available under **Other Options**.

**W2/1099 Preparer** [X]

**1099 MISC Printing and Filing Options**

Choose **Complete 1099, eFile Fed or eFile State** and pick your filing dates.  
 Corrections before due dates are FREE! [More info?](#)

<input checked="" type="radio"/> <b>Complete 1099 eFiling Service</b>	<b>Next Business Day Mailing!</b>	<b># Recipients</b>	<b>Price/Recip.</b>	<b>Subtotal</b>
<i>The eFile Center will:</i>				
- Print and Mail Recipient Copies		3	\$1.95	\$5.85
- e1099 Only Recipient Copies	<a href="#">What's This?</a>	0	\$0.99	\$0.00
- File your Federal 1099s and 1096			included	FREE
- File all applicable State 1099s and Reconciliation Forms			included	FREE
- e1099s Available for all Recipients			included	FREE
<b>Total Cost</b>			<b>Minimum</b>	<b>\$24.95</b>

**Other Options** [Fed or State eFilers receive Free, Easy Corrections!](#)

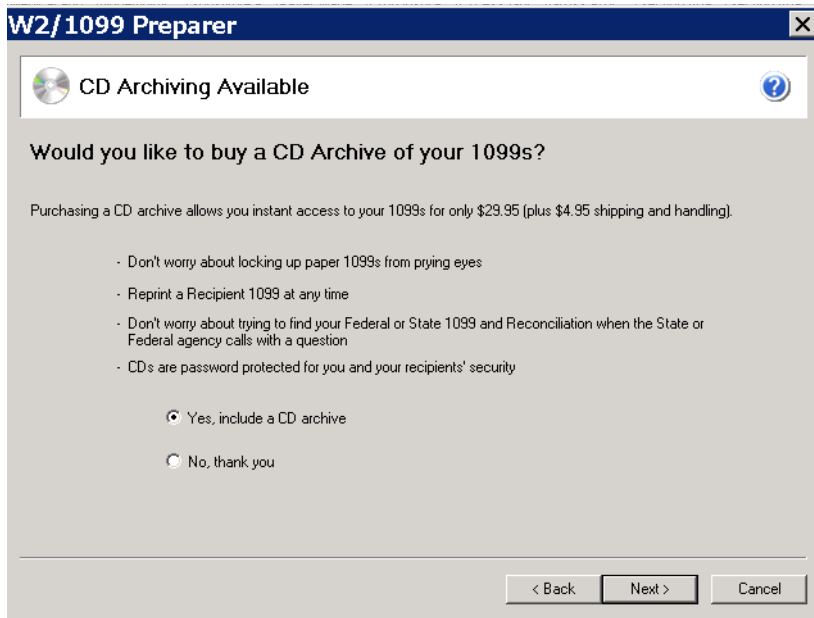
<input type="checkbox"/> Print my Recipient 1099 Copies				
<input type="checkbox"/> eFile Federal 1099s and 1096		3	\$0.49	\$ 0.00
<input type="checkbox"/> eFile State 1099s and Reconciliation Forms		3	\$0.69	\$ 0.00
<input type="checkbox"/> Print Federal 1099s and 1096				
<input type="checkbox"/> Print State 1099s and Reconciliation Forms				
<b>Total Cost</b>				<b>\$ 0.00</b>

Print Payer 1099 Copies

< Back    Next >    Cancel

Click **Next**.

Choose whether or not to include a CD archive.



The dialog box is titled "W2/1099 Preparer" and "CD Archiving Available". It contains the following text and options:

Would you like to buy a CD Archive of your 1099s?

Purchasing a CD archive allows you instant access to your 1099s for only \$29.95 (plus \$4.95 shipping and handling).

- Don't worry about locking up paper 1099s from prying eyes
- Reprint a Recipient 1099 at any time
- Don't worry about trying to find your Federal or State 1099 and Reconciliation when the State or Federal agency calls with a question
- CDs are password protected for you and your recipients' security

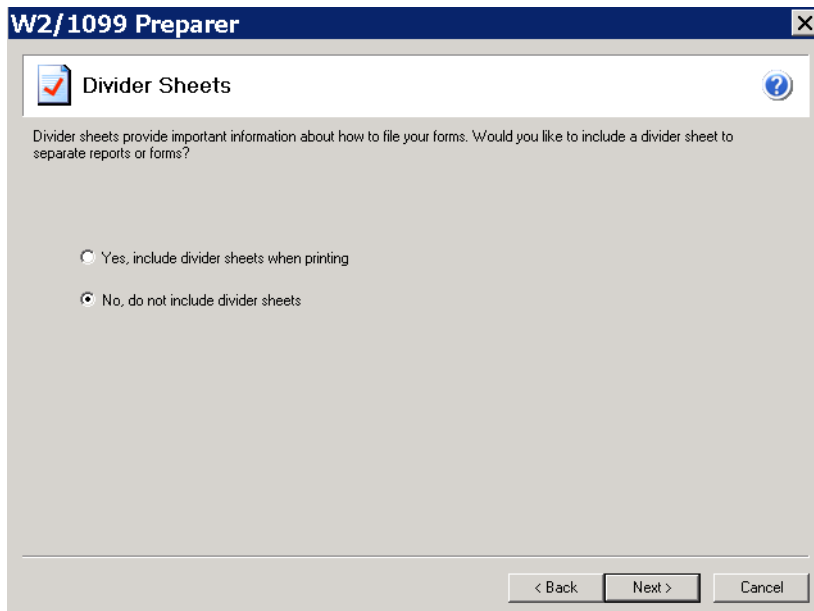
Yes, include a CD archive

No, thank you

< Back   Next >   Cancel

Click **Next**.

Divider sheets are extra sheets that print in between the different 1099 forms and will print a sheet between the different form types. The divider sheets will only print if you are printing copies of the forms. The divider sheet will not appear in the forms viewer.



The dialog box is titled "W2/1099 Preparer" and "Divider Sheets". It contains the following text and options:

Divider sheets provide important information about how to file your forms. Would you like to include a divider sheet to separate reports or forms?

Yes, include divider sheets when printing

No, do not include divider sheets

< Back   Next >   Cancel

This option will be "No" for most **Financial Edge** users.

Click **Next** to review the data.

**W2/1099 Preparer**

**Review Data**

Based upon your selections, we need you to review data on the following forms:

Federal  
eFile Federal 1099-MISC  
eFile Federal 1096  
Recipient  
Payer  
Print Payer 1099-MISC

You will not be able to view your recipient copies while in the Forms Viewer. If you would like to view your recipient 1099s, please choose to reprint in the 1099 History File Options screen at the end of the process.

If you would like a copy for your records of the actions that will be taken, click 'Print.'

Before the forms are displayed, the selections can be reviewed. If the selections are correct then select **Next**. If they are not correct, choose **Back** and make the required corrections. With the eFiling option selected, you can choose to print copies of all the forms.

**2014 1099-MISC - State and Federal Tax Reports**

File Edit View Tools Help

Report 1 of 3: Federal 1099-MISC

1  
2 pages
 **Click Print Copy for your copy, then click Next Step.**

9595  VOID  CORRECTED

PAYERS name, street address, city or town, state or province, country, ZIP or foreign postoffice, and telephone no.

COMMUNITY SERVICES INC.  
100 PEEPERWORTH WAY  
CHARLESTON SC 29492  
(800) 444-5678

PAYER'S federal identification number 12-3456714  
RECIPIENT'S identification number 12-6656566

RECIPIENT'S name  
BLANCH DARBY FLORIST

Street address (including apt. no.)  
3124 MAYBANK HIGHWAY

City or town, state or province, country, and ZIP or foreign postal code  
JAMES ISLAND SC 29412

Account number (see instructions)      2nd TIN not  
\$     

15a Section 409A deferrals      15b Section 409A income  
\$      \$

1 Rents  
\$

2 Royalties  
\$

3 Other income  
\$

5 Fishing boat proceeds  
\$

7 Nonemployee compensation  
\$ 5000.00

9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale   
\$

11 Elected golden parachute payments  
\$

16 State tax withheld  
\$

OMB No. 1545-0115

2014

Form 1099-MISC

**Miscellaneous Income**

**Copy A  
For  
Internal Revenue  
Service Center**

4 Federal income tax withheld  
\$

6 Medical and health care payments  
\$

8 Substitute payments in lieu of dividends or interest  
\$

10 Crop insurance proceeds  
\$

12  
\$

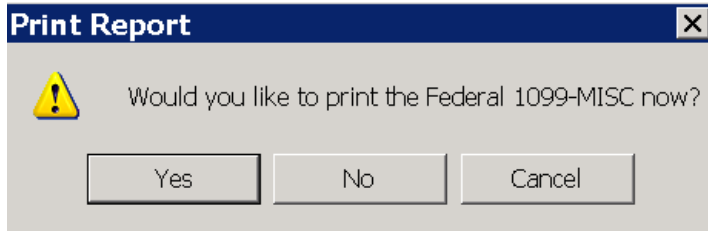
14 Gross proceeds paid to an attorney  
\$

17 State/Payer's state no. SC / SC180098-01

18 State income  
\$ 5000.00

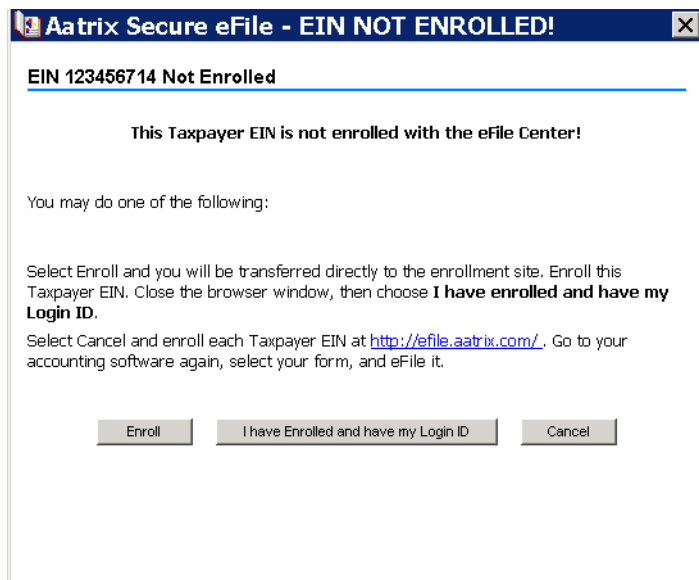
Form 1099-MISC 410852411 www.irs.gov/form1099misc Department of the Treasury - Internal Revenue Service  
**Do Not Cut or Separate Forms on This Page** — **Do Not Cut or Separate Forms on This Page**

Choosing **Next Step** will prompt to print the current form.



After the last form is completed, you are prompted to launch the Aatrix efile center.

If you have not enrolled, then select **Enroll**. If you already have a login, then choose **I have Enrolled and have my Login ID**.



If you need to enroll for eFiling, enter the login, account and contact information.

**AATRIX eFile** [Login](#) | [Enroll](#) | [Help](#)  
 Search our FAQs

## Enroll for eFiling

Create an eFile account to eFile reports from your accounting software to the eFile Center. You will also use this account to access this site to review filing history and status, maintain company information, set up and manage your calendar, and much more! To start today, follow the instructions below to create your account.

**REQUIRED.** A unique username is required when registering for eFiling. Your username should reference your company and not an individual as it cannot be changed once it is created. Usernames must be at least 8 characters long. The username is used to access this site and to eFile reports from your accounting software to the eFile Center.

**Login Information**

Create your company's username and password.

▶ Username:   
A username must be entered.

Password:

Verify Password:

**Account Information**

What type of filer are you?

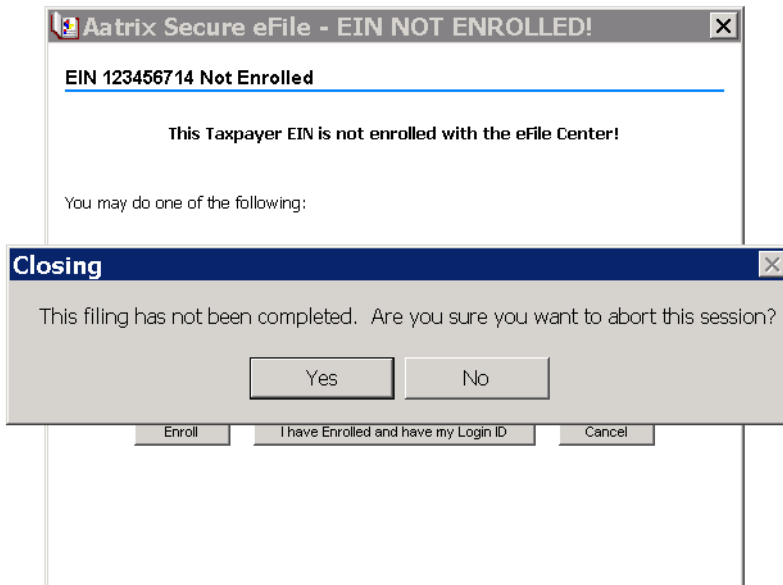
I am filing for my company/employer.

I am a third-party, paid Tax Preparer, filing for one or multiple companies/EINs.

Accounting Package:

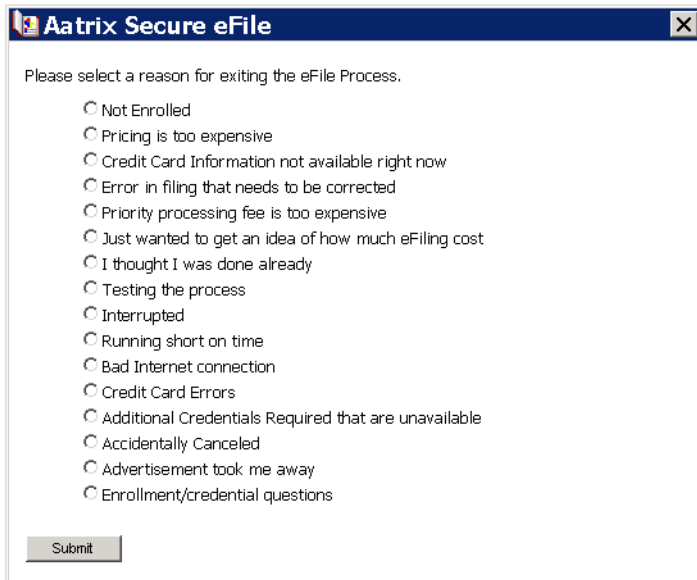
Software Vendor:

If the screen is canceled, a prompt will appear to verify this action.





Select **Yes**, and choose a reason for cancelling.



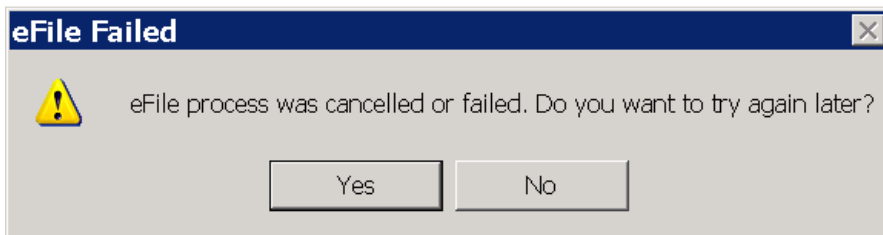
Aatrix Secure eFile

Please select a reason for exiting the eFile Process.


- Not Enrolled
- Pricing is too expensive
- Credit Card Information not available right now
- Error in filing that needs to be corrected
- Priority processing fee is too expensive
- Just wanted to get an idea of how much eFiling cost
- I thought I was done already
- Testing the process
- Interrupted
- Running short on time
- Bad Internet connection
- Credit Card Errors
- Additional Credentials Required that are unavailable
- Accidentally Canceled
- Advertisement took me away
- Enrollment/credential questions

Submit

When you receive the eFile Failed message, choose **Yes** to attempt this process again later, or **No** to start over again.



eFile Failed

 eFile process was cancelled or failed. Do you want to try again later?

Yes No

