

1099 Filing Instructions

Prepare 1099 forms by reviewing either the Vendor Audit report with date parameters of 01/01/XXXX to 12/31/XXXX or the Check Register in summary with date parameters of 01/01/XXXX to 12/31/XXXX.

Collect W9s as needed. Once updated:

1. Process
2. Other Processes
3. Calculate/Edit 1099-NEC
4. Reprocess All
5. Reports
6. Vendors
7. 1099 NEC Review – Verify Entity information is correct. Verify all SSNs/EINs are entered correctly and addresses are complete.

If you have less than 10 forms to file:

1. Reprocess All one final time
 - a. Process
 - b. Other Processes
 - c. Calculate/Edit 1099-NEC
 - d. Reprocess All
2. Reports
3. Vendors
4. 1096/1099 NEC forms
5. A box will pop up – if you have already recalculated one final time click OK
6. Form Name click on 1099-NEC 3-Up Preprinted.
7. Preview Report
8. Print the first page on regular blank paper to check alignment with the form – this will save wasting expensive forms.
9. To align forms, go back through steps 2-6. Go to Forms adjustments at the bottom of the page and adjust accordingly. NOTE- the adjustments are only 1/100 of an inch.
10. Verify which way the forms should be loaded in your specific printer.
11. Load one set of forms at a time, i.e., form A, form B, Copy 2, etc. Copy A is high speed paper with specific ink for the IRS – it may pull differently from the black forms.
12. Print each set.

To print 1096:

1. Reports
2. Vendors
3. 1096/1099 NEC forms
4. A box will pop up – if you have already recalculated one final time click OK
5. Form Name 1096 Preprinted
6. Preview Report
7. Print the page on paper to check alignment with the form – this will save wasting expensive forms.

8. To align form, go back through steps 2-6. Go to Forms adjustments at the bottom of the page and adjust accordingly. NOTE- the adjustments are only 1/100 of an inch.
9. Print the page on paper to check alignment with the form. If alignment is good go to next step.
10. Verify which way the forms should be loaded in your specific printer.
11. Load form. Print one for the IRS and one for the entity.
12. Have the Pastor sign and date both form 1096s.
13. One 1096 and all of Forms A are mailed to the IRS. Do not staple, paperclip, or fold these forms.
14. Mail recipients' copies to each vendor.

If you have 10 or more forms to file –1099 NEC e-file – there is a fee for each 1099 filed so be prepared to enter a credit card number.

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1. Process
2. Other Processes
3. Calculate/Edit 1099-NEC
4. Reprocess All
5. Reports
6. Vendors
7. 1099 NEC Review – Verify Entity information is correct. Verify all SSNs/EINs are entered correctly and address are complete.
8. Reprocess All one final time
 - a. Process
 - b. Other Processes
 - c. Calculate/Edit 1099-NEC
 - d. Reprocess All
9. Reports
10. Vendors
11. 1099-NEC E-file
12. A box will pop up – if you have already recalculated one final time click OK
13. Transmit 1099 NECs
14. If errors pop up, you must fix all errors prior to processing
15. Create ParishSOFT Accounting Account Log In if you have not already done so. This is NOT logging back into the normal G/L ParishSOFT.
16. Verify 1099 information on the screen is correct
17. Click the red arrow under Forms in Progress
18. Verify vendor info
19. Click next
20. Add any emails you want – if none click next
21. Add credit card information for payment
22. Pay and Submit
23. Print forms