

Welcome

We will begin at the top of the hour

- This session will be recorded and posted online
- If you haven't emailed Mike Creagh yet with your 1099 contact person, now is the time
michael.creagh@scouting.org





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IRS 1099 Vendor Processing Using Track1099



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Prepa

Home > Council Support > Financial Services > Council Financial Management > PeopleSoft Documents > Year End

Year End

Accounts Payable

[Accounts Payable Year-End](#) 

[Accounts Payable Year-End Presentation](#) 

[Track1099 User Guide for 2018 PeopleSoft 1099s's](#)  – updated 12/18/2018

[Webinar Slides for Track 1099 Instructions](#) 

[Recording of Track 1099 Webinar](#)  – November 27, 2018

Fundraising

[Fundraising Year-End Procedures](#) 

General Ledger

[General Ledger Year-End Procedures](#) 

[PeopleSoft Closing the Year](#) 

Membership

[Membership Year-End Close Procedures](#) 

Payroll

[Accountable Plan Compliance-Expense Reimbursements and Allowances](#) 

[Fringe Benefits- Employer-Provided Vehicles and Group-Term Life Insurance](#) 

SellWise

[SellWise Year-End Procedures](#) 



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Year End

Accounts Payable

[Accounts Payable Year-End](#) 

[Accounts Payable Year-End Presentations](#)

[Track1099 User Guide for 2018](#)

Fundraising

[Fundraising](#)

General

[General](#)

[PeopleSoft](#)

Memberships

[Memberships](#)

Payroll

[Accountable Plans](#)

[Fringe Benefits](#)

SellWise

[SellWise Year-End Presentations](#)

PeopleSoft to TRACK1099 User Guide

Processing your 1099's for 2018

For yearend 2018 we will be providing the TRACK1099 software for your council to use to create, email and e-File 1099's with the IRS. This third-party service has a great reputation and years of history working with not-for-profit organizations. You will still use the PeopleSoft Vendor records and Accounts Payable Vouchers to gather the correct amounts needed to be reported.

The TRACK1099 website is found at www.TRACK1099.com. We have a master account (called a team) set up with them called "TRACK1099BSA" and we will be emailing your council an invitation to join with a link for you to set up your council in the "team". The costs for processing, emailing and e-Filing will be covered by the National Service Center, any additional services you use will be up to you to pay.

Preparing to File 1099's

- I. Vendor Record Setup
- II. Voucher withholding flag and values
- III. Query output for TRACK1099
- IV. Setup you council in TRACK1099
- V. Uploading into TRACK1099 and filing

[Insurance](#) 



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What hasn't changed?

- Vendor records are still maintained in PeopleSoft AP
- Vouchers need to be flagged as Withholding vouchers
- IRS deadlines are still 1/31



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What has changed?

- Details will be exported out of PeopleSoft
- You can manually load details if needed
- Track1099 will facilitate email distribution
- Track1099 will complete your e-file to the IRS



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Where do I start?

Set up your Vendor Records

Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor

Summary | Identifying Information | Address | Contacts | Location | Custom

SetID:	L458		
Vendor ID:	75167		
Vendor Short Name:	DIPLOMAT T	DIPLOMAT T-001	
Vendor Name:	DIPLOMAT TRAVEL AGENCY		
Order:	DIPLOMAT T-001 8800 W HICKORY CHICAGO, IL 60656	Remit To:	DIPLOMAT T-001 8800 W HICKORY CHICAGO, IL 60656
Status:	Approved	Last Modified By:	MSCHLASH
Persistence:	Regular	Last modified date:	12/22/2016 9:00AM
Classification:	Outside Party	Created By:	WCHLASH
HCM Class:		Created Date/time:	12/22/2016 2:22PM
Open for Ordering:	Yes	Last Activity Date:	12/22/2016
Withholding:	Yes		

Save | Return to Search | Notify | Add | Update/Display | Include History | Correct History

Summary | Identifying Information | Address | Contacts | Location | Custom



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Where do I start?

Set up your Vendor Records

Home

Favorites Main Menu > Vendors > Vendor Information > Add/Update > Vendor

Summary Identifying Information Address Contacts Location Custom New

SetID:	L456	*Vendor Name 1:	DIPLOMAT TRAVEL AGENCY
Vendor ID:	75167	Vendor Name 2:	
*Vendor Short Name:	DIPLOMAT T	DIPLOMAT T-001	<input checked="" type="checkbox"/> Withholding
*Classification:	Outside Party	<input type="button" value="Check for Duplicate"/>	<input checked="" type="checkbox"/> Open For Ordering
HCM Class:			
*Persistence:	Regular		
*Vendor Status:	Approved		

Attachments (0)



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Where do I start?

Set up your Vendor Records

Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor

Summary | Identifying Information | Address | Contacts | **Location** | Custom

SetID: L-001
Vendor ID: 75167 Short Vendor Name: DIPLOMAT T-001 Name: DIPLOMAT TRAVEL AGENCY

A vendor location is a default set of rules which define how you conduct business with a vendor.

Location Find | View All | First 1 of 1 | Last

*Location: 01 **Default** [RTV Fees](#) [Attachments \(0\)](#) + -

Description:

Details Find | View All | First 1 of 1 | Last

*Effective Date: 01/08/2016 Effective Status: Active + -

Options: [Payables](#) [Procurement](#) [Sales/Use Tax](#) **1099**

▶ Additional ID Numbers
▶ Comments
▶ Internet Address
▶ VAT

Summary | Identifying Information | Address | Contacts | **Location** | Custom



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Where do I start?

Set up your Vendor Records

Favorites | Main Menu > Vendors > Vendor Information > Add/Update > Vendor

Withholding Vendor Information

SetID: L406 Location: 01
Vendor ID: 75167 Description:
Short Vendor Name: DIPLOMAT T DIPLOMAT T-001
Name: DIPLOMAT TRAVEL AGENCY

1099 Options

1099 Information Personalize | Find | View All | First 1 of 1 Last

Main Information Overrides Remit

*Entity	*Type	*Jurisdiction	Default Jurisdiction	*Default Class	*1099 Status	Withhold Type Description
IRS	1099	FED	<input checked="" type="checkbox"/>	07	RPT	Reporting Only

1099 Reporting Information

Personalize | Find | View All | First 1 of 1 Last

Main Information Additional Info

*Entity	*Address	TIN Type	Taxpayer Identification Number
IRS	1	F	ELJTW

OK Cancel



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Where do I start?

Set up your Vendor Records

LC_1099_VENDORS

SetID:

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (10 kb)

View All

First Last

	SetID	Vendor ID	Vendor Name	Withholding Applicable
1	L456	9030	2060 DIGITAL CHICAGO	Y
2	L456	5665	A&A TREE SERVICE	Y
3	L456	2184	A-FIRE EXTINGUISHER SALES AND SERVICE	Y
4	L456	6011	ABC PREFERRED PLUMBING	Y
5	L456	7088	AEROVISTA INNOVATIONS	Y
6	L456	0000000097	ALL AMERICAN CLASSICS	Y
7	L456	005470	ALL SEASONS MARINE & SERVICE	Y
8	L456	0092334	ARAMARK UNIFORM SERVICES	Y



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Vendors are good, now what?

Voucher Withholding Flag and Value

LC_1099_VENDORS_VOUCHERS

SetID:

From Acctg Date:

To Acctg Date:

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (64 kb)

View All

First 1-87 of 87

SetID	Voucher ID	Voucher Line Number	Vendor ID	Vendor Name	Amount	Vendor 1099 Flag	Voucher Withholding Flag	Acctg Date	More Info
1	LC02	00027745	1 0000002240	CARL BOU PHOTOGRAPHY	450.000	Y	N	05/31/2017	
2	LC02	00029034	1 0000004159	CASTROBONAFI, LLC	1250.000	Y	Y	08/15/2017	
3	LC02	00029818	1 0000004243	CHARLENE FLOWBETE	240.000	Y	Y	10/19/2017	
4	LC02	00030018	1 0000004243	CHARLENE FLOWBETE	480.000	Y	Y	10/31/2017	
5	LC02	00030102	1 0000004243	CHARLENE FLOWBETE	240.000	Y	Y	11/14/2017	
6	LC02	00030103	1 0000004243	CHARLENE FLOWBETE	160.000	Y	Y	11/14/2017	
7	LC02	00030578	2 0000004243	CHARLENE FLOWBETE	285.000	Y	Y	12/18/2017	
8	LC02	00030578	1 0000004243	CHARLENE FLOWBETE	435.000	Y	Y	12/18/2017	
9	LC02	00030658	1 0000004243	CHARLENE FLOWBETE	290.000	Y	N	12/27/2017	
10	LC02	00030658	2 0000004243	CHARLENE FLOWBETE	190.000	Y	N	12/27/2017	
11	LC02	00026784	1 0000003973	DONALD WETHERINGTON	1726.750	Y	Y	03/28/2017	



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Vendors are good, now what?

Voucher Withholding Flag and Value

Favorites Main Menu > Vendors > 1099/Global Withholding > Maintain > Update Vendor Withholdings

Withholding Vendor Update

Withholding Update ID
Withholding Update ID: UPDATE_VENDOR_WITHHOLDINGS

Vendor Selection
*Vendor SetID: [L] [Search]

Tax Reporting Year
*Start Date: 01/01/2012 [Calendar] *End Date: 12/31/2012 [Calendar]

Details Customize | Find | View All | First 1 of 1 Last

Vendor New Withhold Details

*Vendor ID	Location	Business Unit	Current Withhold		
1 0000000164 [Search]	1 [Search]	L [Search]	Y	[+]	[-]

To change the current withholding for vendor 0000000164 from "N" to "Y"

Save Return to Search Previous in List Next in List Notify Add Update/Display





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Vendors are good, now what?

Voucher Withholding Flag and Value

Favorites Main Menu > Vendors > 1099/Global Withholding > Maintain > Update Vendor Withholdings

Withholding Vendor Update

Withholding Update ID
Withholding Update ID: UPDATE_VENDOR_WITHHOLDINGS

Vendor Selection
*Vendor SetID:

Tax Reporting Year
*Start Date: *End Date:

Details Customize | Find | View All | First 1 of 1 Last

Vendor **New Withhold Details**

	*Vendor ID	Location	New Withhold	Entity	New Type	New Jur CD	New Class	Criteria		
1	<input type="text" value="000000016"/> <input type="button" value="Q"/>	<input type="text" value="1"/> <input type="button" value="Q"/>	<input type="text" value="Y"/> <input type="button" value="Q"/>	<input type="text" value="IRS"/> <input type="button" value="Q"/>	<input type="text" value="1099"/> <input type="button" value="Q"/>	<input type="text" value="FED"/> <input type="button" value="Q"/>	<input type="text" value="07"/> <input type="button" value="Q"/>		<input type="button" value="+"/>	<input type="button" value="-"/>



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Vendors are good, now what?

Run the Withhold Update Request

Favorites | Main Menu > Vendors > 1099/Global Withholding > Maintain > Update Withholdings

Withhold Update Request

Run Control ID: Update_Withholdings [Report Manager](#) [Process Monitor](#) **Run**

*Request ID: *Description:

*Process Frequency:

*Process Option:

Save Notify Add Update/Display





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How do I output this data?

Run the Withhold Transaction Post

Favorites Main Menu > Vendors > 1099/Global Withholding > Maintain > Post Withholdings

Withhold Transaction Post

Run Control ID: Post_Withholding [Report Manager](#) [Process Monitor](#)

*Request ID: Description:

*Process Frequency:

*Post Option:

*Through Date:

Business Units			Personalize Find View All First 1 of 1 Last	
Include	*Business Unit	Description		
<input checked="" type="checkbox"/>	<input type="text" value="L..."/>	<input type="text" value="Westchester Putnam"/>	<input type="button" value="+"/>	<input type="button" value="-"/>



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How do I output this data?

Run the “Withhold 1099 Report Job”

1099 Report Post/Report/Copy B

1099 Report Post / Report / Copy B

Run Control ID: withhold_1099_report_job Report Manager Process Monitor Run

Language: English

1099 Report Post

*Request ID: L192 Description: 1099 Prep

Process Frequency: Always Process

Report ID: US_REPORT

Report Date: 01/11/2019 Include Manual Overrides

*Control SetID: L192 *Control ID: 1

*Calendar SetID: SHARE *Calendar ID: 08

*Fiscal Year: 2018 Use Report Date For Vendor

*Period: 1 Period 1 - 2018-01-01

1099 Report

Type of File/Return: Test Replace

IRS Options

Has the 1099-MISC containing Box 7 Non Employee Compensation file been sent

IRS File Generate Option

All

Exclude Non Employee Compensation

Include Non Employee Compensation

1099 Report Copy B Sort

Withhold Type: All Vendor Select Option: Select All Vendors

Mask TIN AP 1099 sort order: Vendor Id Sort

Vendor Payees

Vendor ID
1

Look Up Calendar ID

Search Results

Calendar SetID	Calendar ID	Description
SHARE	01	Monthly
SHARE	02	2012 1099 Calendar
SHARE	03	2013 1099 Calendar
SHARE	04	2014 1099 Calendar
SHARE	05	2015 1099 Calendar
SHARE	06	2016 1099 Calendar
SHARE	07	2017 1099 Calendar
SHARE	08	2018 1099 Calendar

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How do I output this data?

Run the “Withhold 1099 Report Job”

Favorites | Main Menu > Vendors > 1099/Global Withholding > 1099 Reports > Withhold 1099 Report Job

1099 Report Post/Report/Copy B

1099 Report Post / Report / Copy B

Run Control ID: withhold_1099_report_job [Report Manager](#) [Process Monitor](#) **8** Run

Language: English

1099 Report Post

*Request ID: L192 Description: 1099 Prep
Process Frequency: Always Process
Report ID: US_REPORT
Report Date: 01/11/2019 Include Manual Overrides
*Control SetID: **1** L192 **2** Control ID: 1 Coronado Area Council, BSA
*Calendar SetID: **3** SHARE **4** Calendar ID: 08 2018 1099 Calendar
*Fiscal Year: **5** 2018 Use Report Date For Vendor
*Period: **6** 1 Period 1 - 2018-01-01

1099 Report

Type of File/Return: Test Replacement Character:

IRS Options

Has the 1099-MISC containing Box 7 Non Employee Compensation file been sent and accepted by the IRS?

IRS File Generate Option

All **i**
 Exclude Non Employee Compensation
 Include Non Employee Compensation

1099 Report Copy B Sort

Withhold Type: All Vendor Select Option: Select All Vendors
 Mask TIN AP 1099 sort order: Vendor Id Sort

Vendor Payees

Personalize | Find | View All | First 1 of 1 Last

Vendor ID
1

7

Save Return to Search Previous in List Next in List Notify Add Update/Display

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How do I output this data?

Run the “Withhold 1099 Report Job”

Favorites | Main Menu > Vendors > 1099/Global Withholding > 1099 Reports > Withhold 1099 Report Job

Process Scheduler Request

User ID MCREAGH Run Control ID withhold_1099_report_job

Server Name Run Date

Recurrence Run Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	1099 Report Post	1099_RPT_PST	Application Engine	Web	TXT	Distribution
<input type="checkbox"/>	Print 1099 Copy B	APCOPYB	PSJob	(None)	(None)	Distribution
<input type="checkbox"/>	XMLP:Withhold 1099 Report	APX1099	BI Publisher	Web	PDF	Distribution
<input type="checkbox"/>	XMLP: Withhold 1099G Report	APX1099G	BI Publisher	Web	PDF	Distribution
<input type="checkbox"/>	XMLP:Withhold 1099I Report	APX1099I	BI Publisher	Web	PDF	Distribution
<input type="checkbox"/>	1099-MISC Copy B	APY1099-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	1099-G Copy B	APY1099G	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	1099-INT Copy B	APY1099I	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	1099 Job	AP_1099	PSJob	(None)	(None)	Distribution
<input type="checkbox"/>	1099 Report	AP_APY1099	Application Engine	Web	TXT	Distribution
<input type="checkbox"/>	1099 Copy B Sort	AP_COPYB_RPT	Application Engine	Web	TXT	Distribution
<input type="checkbox"/>	1099 Post, Report, & CopyB Sor	RPT_1099	PSJob	(None)	(None)	Distribution



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How do I output this data?

Run the Withholding Control Report

Favorites | Main Menu > Vendors > 1099/Global Withholding > General Reports > Withhold Control Report

Withholding Control Report

Run Control ID: Withhold_Control_Report [Report Manager](#) [Process Monitor](#) **Run**

Report Request Parameters

Setid:

Control ID:

From Date:

Through Date:

Save Return to Search Previous in List Next in List Notify Add Update/Display





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How do I output this data?

LC_TRACK1099_EXPORT

Query Output for TRACK1099

Favorites | Main Menu > Reporting Tools > Query > Query Viewer

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
LC_TRACK1099_EXPORT	track1099 export template	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite



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How do I output this data?

LC_TRACK1099_EXPORT

Query Output for TRACK1099

LC_TRACK1099_EXPORT track1099 export template

Business Unit:

Year:

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (15 kb)

View All

First Last

	Payee Name	Type	Payee Tax ID	Payee Name	Payee Address 1	City	State	Zip Code	Email Address	Account	Office Code	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	Box 16	Box 16B	Box 17	Box 18	Box 18B	FATCA
1	Z...	2			DESIGNS CUSTOM E...	ALBANY	TX	75002				0.000	0.000	0.000	0.000	0.000	0.000	2300.000	0.000		0.000	0.000	0.000	0.000	0.000	0.000			0.000		
2	E...	2			201 ...	MEMPHIS	TX	75002				0.000	0.000	0.000	0.000	0.000	0.000	820.000	0.000		0.000	0.000	0.000	0.000	0.000	0.000			0.000		
3	M...	2			208 ...	FARM	TX	75002				0.000	0.000	0.000	0.000	0.000	0.000	726.350	0.000		0.000	0.000	0.000	0.000	0.000	0.000			0.000		
4	T...	2			PHYSICIAN'S ES PC	PC	TX	75002				0.000	0.000	0.000	0.000	0.000	0.000	2400.000	0.000		0.000	0.000	0.000	0.000	0.000	0.000			0.000		
5	R...	2			ALBANY VETERINARY SERVICES	ATLANTA	TX	75002				0.000	0.000	0.000	0.000	0.000	0.000	1817.000	0.000		0.000	0.000	0.000	0.000	0.000	0.000			0.000		
6	R...	2			ROBERT ...	MEMPHIS	TX	75002				0.000	0.000	0.000	0.000	0.000	0.000	2950.000	0.000		0.000	0.000	0.000	0.000	0.000	0.000			0.000		
7	L...	2			DAVE ...	STANFORDVILLE	VA	22080				0.000	0.000	0.000	0.000	0.000	0.000	1800.000	0.000		0.000	0.000	0.000	0.000	0.000	0.000			0.000		



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How do I output this data?

LC_TRACK1099_EXPORT

Query Output for TRACK1099

You can edit your details before you upload

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	Payee Name	Type	Payee Tax ID	Payee Name	Payee Address 1	City	State	Zip Code	Email Address	Account	Office Code	Box 1	Box 2	Box 3	Box 4	Box 5	Box 6	Box 7	Box 8	Box 9	Box 10
2	Bank of America	2	4814-814444	AMERICAN BANK	1000 BANK	ALBANY	TX	75002				0	0	0	0	0	0	2300	0		0
3	Bank of America	2	4814-814444	AMERICAN BANK	1000 BANK	MILWAUKEE	TX	75002				0	0	0	0	0	0	820	0		0
4	Bank of America	2	4814-814444	AMERICAN BANK	1000 BANK	FALL	TX	75002				0	0	0	0	0	0	726.35	0		0
5	Bank of America	2	4814-814444	AMERICAN BANK	1000 BANK	PUBLICO	TX	75002				0	0	0	0	0	0	2400	0		0
6	Bank of America	2	4814-814444	AMERICAN BANK	1000 BANK	ALBANY	TX	75002				0	0	0	0	0	0	1817	0		0
7	Bank of America	2	4814-814444	AMERICAN BANK	1000 BANK	MILWAUKEE	TX	75002				0	0	0	0	0	0	2950	0		0
8	Bank of America	2	4814-814444	AMERICAN BANK	1000 BANK	SHILOH VILLE	VA	20113				0	0	0	0	0	0	1800	0		0
9	Bank of America	1	91-123456	AMERICAN BANK	1000 BANK	ALBANY	OH	75002				0	0	0	0	0	0	2897.15	0		0
10	Bank of America	1	91-123456	AMERICAN BANK	1000 BANK	DALLAS	TX	75001				0	0	0	0	0	0	47400	0		0
11	Bank of America	1	91-123456	AMERICAN BANK	1000 BANK	GRAND	TX	75009				0	0	0	0	0	0	2750	0		0
12																					
13																					
14																					



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How do I get started in www.track1099.com?

Setup your council in TRACK1099

The screenshot shows an email interface. At the top left is a circular profile icon with the letter 'T'. To its right is the sender information: 'Track1099 1099 & W-2 <no-reply@track1099.com>' and a green checkmark next to the name 'Michael Creagh'. Below this is the subject line 'Invitation to join Track1099'. Further down, it says 'Retention Policy 3 Year Delete (3 years)' and 'Expires 10/16/2021'. An information icon (i) is followed by the text 'If there are problems with how this message is displayed, click here to view it in a web browser.' The main body of the email starts with 'Dear Colleague,' followed by a yellow highlighted line: 'BSA1099 Account has invited you to join their team's account at Track1099 for managing IRS 1099, W-2, W-4 and W-9 forms.' Below this is the instruction 'Please click on the link below and sign up using this email address.' A blue button with a red border is centered, containing the text 'Join BSA1099 Account's Team'. The email continues with 'You'll automatically be connected as a colleague associated with BSA1099 Account and may begin adding Payers and Recipients immediately.' and 'Please send us an email at support@track1099.com if you have any questions.' It ends with 'We look forward to working with you.' and a sign-off: 'Sincerely, The Team at Track1099, Stanford, CA, www.track1099.com'.



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How do I get started in www.track1099.com?

Setup your council in TRACK1099

The screenshot shows the Track1099 website interface. At the top left is the Track1099 logo, followed by navigation links: Sign Up, Pricing, How It Works, and Contact Us. A Sign In button is located in the top right corner. The main heading is "ONLINE 1099-MISC E-FILE", with subtext: "IRS approved, W-9, W-2, 1095-C, & More" and "Trusted by 100,000 businesses". Below this, it says "E-file until Dec. 3, 2018". On the right side of the page, there is a large image of a fighter jet in flight against a blue sky with clouds. The jet has "TRACK1099" and "1099" written on its fuselage and tail. On the left side, there is a "Sign Up Now" form with input fields for Name, Email, and Password. Below the form, there is a question "Who will use this account?" with two radio button options: "Only me" and "I lead a team". There is also a checkbox for "I have read and accept the terms". A green button labeled "TRY FOR FREE" is positioned below the form. At the bottom of the page, there is a navigation bar with links for FEATURES, 1099-SERIES, W-9, W-4 & W-8, SECURITY, and VIDEOS. On the right side of the navigation bar, there are two buttons: "Tax Pros & Enterprise" and "Small Business".



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How do I get started in www.track1099.com?

Setup your council in TRACK1099

Video Guides

[Easy 1099 E-file Overview](#)

[CSV Importing, all form types](#)

[Corrections](#)

[E-Delivery to Recipients](#)

[ACA/Obamacare E-file](#)

[QuickBooks Online Importing](#)

[Tax Pro Teams and Firms](#)

[Online W-9s](#)

[QuickBooks Desktop Importing](#)

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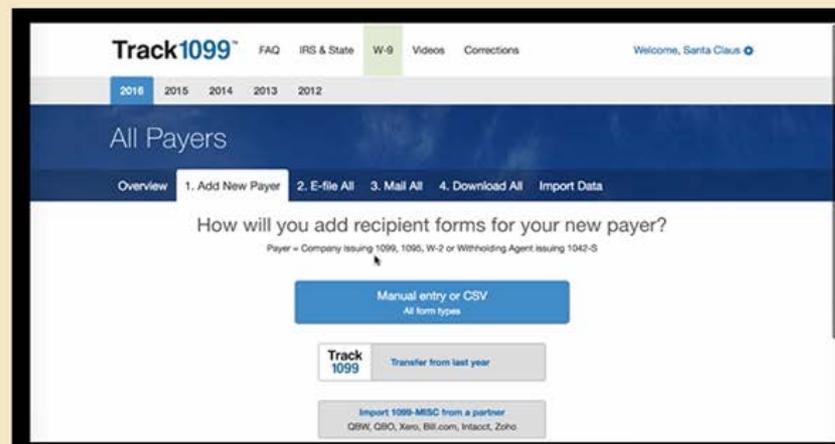
[Postal Mail](#)

[Xero Importing](#)

[IRS TIN Matching file](#)

[Fixing Many Recipients with Errors](#)

[Bill.com Importing](#)



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www.track1099.com

Setup your council in TRACK1099

Track1099[™]

Welcome, BSA1099 Account ⚙️

[FAQ](#) [IRS Info](#) [State Info](#) [W-9](#) [Videos](#) [Corrections](#)

Full Name

Michael O'neigh

Email

mike.o'neigh@gmail.com

Password

.....

Phone

714.333.3333

I have read and accept the [terms and conditions](#)

Sign Up

Already have an account? [Sign in](#)



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www.track1099.com?

Setup your council in TRACK1099

Track1099™

Welcome, [Michael Crough](#) ⚙️

FAQ

IRS Info

State Info

W-9

Videos

Corrections

New! Welcome to tax year 2018

Which form would you like to start using?

**Track
1099**

1099-series
W-2, 940
1095-C, 1042-S

**Track
W-9**

W-9
W-4
W-8BEN



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The screenshot shows the Track1099 website interface. At the top, there is a navigation menu with links for Track1099™, FAQ, IRS Info, State Info, W-9 (highlighted), Videos, Corrections, and a user profile for Michael Cr... with a settings gear icon. Below this is a year selection bar with 2018 selected. The main heading is "All Payers". Below the heading is a breadcrumb trail: Overview > 1. Add New Payer > 2. E-file All > 3. Mail All > 4. Download All > Import Data.

How will you add recipient forms for your new payer?

Payer = Company issuing 1099, 1095, W-2, 940 or Withholding Agent issuing 1042-S

Manual entry or CSV
All form types

Import 1099-MISC from a partner
QBO, QBW, Xero, Bill.com, Intacct

Add many payers at once via CSV
For tax pros



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Track1099™ [FAQ](#) [IRS Info](#) [State Info](#) **W-9** [Videos](#) [Corrections](#) Welcome, [User] ⚙️

2018 2017 2016 2015 2014

All Payers

Overview **1. Add New Payer** 2. E-file All 3. Mail All 4. Download All Import Data

Payer Name (Legal name, not DBA) Payer Federal ID Number

Payer Second Name (Optional, DBA name) Transfer Agent's Name (if applicable)

Foreign address Last year of filing for this payer

Address

City State Zip Code

Email for recipients' questions Phone



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Uploading into TRACK1099 and filing

The screenshot shows the Track1099 website interface. At the top, there is a navigation bar with the 'Track1099' logo and links for 'FAQ', 'IRS & State', 'W-9', 'Videos', and 'Corrections'. Below this is a year selection bar with '2016' highlighted. The main heading is 'All Payers'. A secondary navigation bar contains 'Overview', '1. Add New Payer', '2. E-file All', '3. Mail All', '4. Download All', and 'Import Data'. A green success message states: 'Payer information for Santa Claus Inc. has been saved!'. Below this, the text asks: 'Next: How would you like to add recipients?'. Two options are presented in boxes: 'Upload from CSV' (with the subtext 'Add many recipients at once.') and 'Manually' (with the subtext 'Type in recipients one by one.'). A yellow 'OR' box is positioned between the two options.



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Uploading into TRACK1099 and filing

The screenshot shows the Track1099 CSV upload tutorial interface for Millenium Salvage Inc. The page has a dark blue header with the company name and a navigation menu. The main content area is white and contains instructions for CSV import. The navigation menu includes: 1. Payer, 2. Add Recipient, 3. Forms Summary, 4. E-file, 5. Mail, 6. Download, and Import Data (which is currently selected). The CSV Import section includes a 'Select File' button and an 'Import CSV' button. The 'Import CSV' button is highlighted, and the text below it says 'These recipients will be added to Millenium Salvage Inc.'

Track1099 CSV upload tutorial
Millenium Salvage Inc.

MISC 0 ADD FORMS +

1. Payer 2. Add Recipient 3. Forms Summary 4. E-file 5. Mail 6. Download Import Data

CSV Import

If you can export a spreadsheet of Recipients/Employees from your accounting software, we can import it to Track1099.
Watch our [CSV video](#).
QB Desktop clients, please see our [QB export instructions](#).

First: Download the correct CSV template for your forms.

1099-MISC W-2 1095-C More Forms... ▾

Next: In your accounting software, create a 1099 or W-2 report and export it to CSV format.

Third: Copy and paste the data from your report to our CSV template. Do not rearrange the columns.

Fourth: Save the filled-in template as a CSV file, not xls. Check leading zeros in Zip Code.

Finally: Click Select File below, then Import CSV.

Select File None selected

Import CSV These recipients will be added to Millenium Salvage Inc.



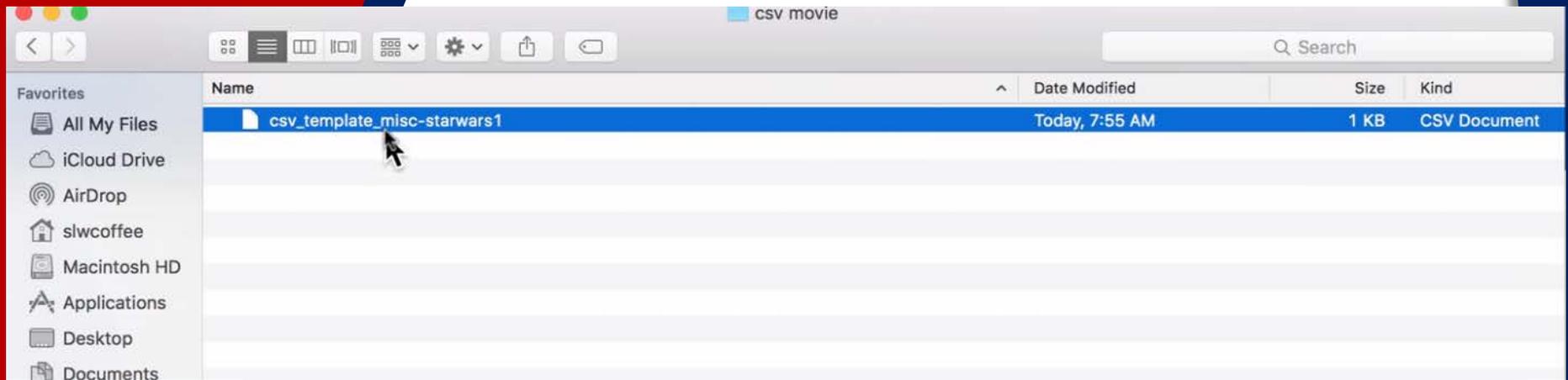
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Uploading into TRACK1099 and filing



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Uploading into TRACK1099 and filing

1. Payer 2. Add Recipient ▾ 3. Forms Summary 4. E-file 5. Mail 6. Download Import Data

CSV Import

If you can **export a spreadsheet of Recipients/Employees from your accounting software**, we can import it to Track1099.

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First: Download the correct CSV template for your forms.

1099-MISC

W-2

1095-C

More Forms... ▾

Next: In your accounting software, create a 1099 or W-2 report and export it to CSV format.

Third: Copy and paste the data from your report to our CSV template. Do not rearrange the columns.

Fourth: Save the filled-in template as a CSV file, not xls. Check leading zeros in Zip Code.

Finally: Click Select File below, then Import CSV.

Select File

csv_template_misc-starwars1.csv

Import CSV

These recipients will be added to Millenium Salvage Inc.



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Uploading into TRACK1099 and filing

Video upload tutorial

Track1099™

Welcome, Silver West ⚙️

← VIEW ALL PAYERS

Millenium S

MISC 4 ADD P

1. Payer 2. Add Recip

4 recipients success

2 Recipients have errors

2 Recipients are ready for e-file and e-delivery

Unscheduled Forms (4) Scheduled & Sent (0) Form Box Totals Type to Search

Next Step: Schedule E-file or (optionally) download your TIN Match file.

Recipient	Box 7	Other Boxes
Good OK for E-File, No Email Error Box Totals Report		
Darth Vader	\$0.00	\$3399.00
Yoda Master	\$0.00	\$4938.00

Duplicate Recipients detected

Notice: These Recipients have the same Tax ID number. This may be what you wish; please see them in Forms Summary and change as needed.

TIN	Name	Form	Added
...4022	Luke Skywalker	1099-MISC	2016-10-10
...4022	Luke Skywalker	1099-MISC	2016-10-10

Download List Close

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Uploading into TRACK1099 and filing

1. Payer 2. Add Recipient 3. Forms Summary 4. E-file 5. Mail 6. Download Import Data

4 recipients successfully imported!

- 2 Recipients have errors
- 2 Recipients are ready for e-file and e-delivery

Unscheduled Forms (4) Scheduled & Sent (0) Form Box Totals

Next Step: Schedule E-file or (optionally) download your TIN Match file.

Recipient	Box 7	Other Boxes
Good ⚠️ OK for E-File, No Email ❌ Error		Box Totals Report
❌ Darth Vader	\$0.00	\$3399.00
❌ Yoda Master	\$0.00	\$4938.00
✅ Luke Skywalker	\$49998.00	\$0.00
✅ Luke Skywalker	\$0.00	\$90088.00

Save Changes



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Uploading into TRACK1099 and filing

Millenium Salvage Inc.

MISC 4 [ADD FORMS +](#)

1. Payer 2. Add Recipient - 3. Forms Summary 4. E-file 5. Mail 6. Download Import Data

Neither 1096 nor W-3 are required when you e-file.

E-file to IRS ?	Schedule e-file date	QTY	Total
MISC (with box 7)	2017-01-19 (recommended)	1	--
MISC	2017-03-14 (recommended)	3	--
			\$13.96

E-deliver to Recipients	Schedule e-delivery date	QTY	Total
MISC	2017-01-02 (recommended)	3	Free

Postal Mail to Recipients	Mailing method	QTY	Total
MISC	<input type="radio"/> Print & mail yourself	1	\$1.49
	<input checked="" type="radio"/> We mail for you		



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Uploading into TRACK1099 and filing

E-deliver to Recipients

Schedule e-delivery date

MISC

2017-01-02 (recommended)

QTY

2

Total

Free

Postal Mail to Recipients

Mailing method

MISC

Print & mail yourself (free)

We mail for you (\$1.49)

QTY

1

Total

\$1.49

Total: \$13.46



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Uploading into TRACK1099 and filing

The screenshot shows the Track1099 website interface. At the top, there is a navigation bar with the Track1099 logo and links for FAQ, IRS & State, W-9 (highlighted), Videos, and Corrections. A user greeting 'Welcome, Santa Claus' with a settings gear icon is on the right. Below the navigation bar is a year selector with tabs for 2016, 2015, 2014, 2013, and 2012. The main heading is 'All Payers'. A secondary navigation bar contains 'Overview', '1. Add New Payer', '2. E-file All', '3. Mail All', '4. Download All', and 'Import Data'. A search bar labeled 'Recipients' is on the right. Below is a table with columns: Payer, Total Forms, IRS Status, Recipient E-Delivery, Recipient Postal Mail, and CSV. The first row shows 'Santa Claus Inc.' with 3 MISC forms, 3 Scheduled forms, 2 forms for E-Delivery, and 1 form for Postal Mail.

Payer	Total Forms	IRS Status	Recipient E-Delivery	Recipient Postal Mail	CSV
Santa Claus Inc.	MISC 3	Scheduled 3	Schedule 2	Scheduled 1	Download



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Uploading into TRACK1099 and filing

1. Payer 2. Add Recipient ▾ 3. Forms Summary 4. E-file 5. Mail 6. Download Import Data

Unscheduled Forms (0) Scheduled & Sent (3) Form Box Totals

Type to Search

Click a recipient for individual forms.
We e-file/e-deliver each day ~8pm PST

Recipient <input type="button" value="Delete..."/>	Postal Mail ?	E-Delivery ?	To IRS ?
⚠ Lucy Lizard	Mail Scheduled	Missing Email	<input type="text" value="2017-03-14"/>
✓ Perry Parrot		<input type="text" value="2017-01-02"/>	<input type="text" value="2017-01-18"/>
✓ Prancer Reindeer		<input type="text" value="2017-01-02"/>	<input type="text" value="2017-01-18"/>



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What does a e-delivered 1099 look like?

IRS 1099 & W-2 <no-reply@t1099.menlo-aero.com> 10:34 AM (0 minutes ago) ☆ ↶ ↷
to prancer ▾

Dear Prancer Reindeer,

...

Santa Claus Inc. has issued an IRS form 1099-MISC for you for tax year 2016 using Track1099, an IRS-approved vendor.

You may retrieve your form electronically by clicking on the blue button below. Doing so gives Santa Claus Inc. a record of e-delivery, which is required by the IRS. Unless you request it, you will not receive a paper copy in the mail.

[Retrieve Your 1099-MISC](#)

To validate your identity, you'll be asked to enter the last 4 digits of your Tax ID number.

By clicking on the secure link, you give permission to Santa Claus Inc. and Track1099 LLC to deliver your 1099-MISC electronically for tax year 2016. You may refuse or withdraw your consent by emailing red@track1099.com. Please include the name of the company, Santa Claus Inc., your name, last 4 of your SSN or EIN, your full mailing address and a request for paper. A paper copy will then be mailed to you.

This form may look a little different from the usual 1099-MISC, but is an acceptable substitute according to IRS Pub. 1179.

Your 1099-MISC will remain available via the secure link until October 15, 2016 at which time it will become inaccessible.

You may update your information by emailing red@track1099.com. Please include the company name, Santa Claus Inc., your name, and the last 4 of your SSN or EIN.

In order to access the document, you will need a suitable computer connected to the internet, running an internet browser that supports 256 bit SSL encryption that is able to view HTML pages and download a pdf file.

Sincerely,
The Team at Track1099
www.track1099.com



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What does a e-delivered 1099 look like?

 Download or Print

 Sign Out

Payer's Name:
Santa Claus Inc.
4847 Snow Way
Anchorage, AK 49998

2016 Form 1099-MISC Miscellaneous Income

OMB No. 1545-0115

Copy B For Recipient

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

For questions about this form, contact Santa Claus Inc. at 4449998883

Recipient's Name:
PRANCER REINDEER
3948 SNOW WAY
FAIRBANKS, AK 49998

Payer's federal
identification number:
48-3394448

Recipient's
identification number:
487333372

Box 7: Nonemployee compensation

\$58,478.00

Instructions for Recipient - 1099-MISC

Recipient's identification number. For your protection, this form may show only the last four digits of your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN). However, the issuer has reported your complete identification number to the IRS.

Account number. May show an account or other unique number the payer assigned to distinguish your account.

FATCA filing requirement. If the FATCA filing requirement box is checked, the payer is reporting on this Form 1099 to satisfy its chapter 4 account reporting requirement. You also may have a filing requirement. See the Instructions to Form 9938.

Amounts shown may be subject to self-employment (SE) tax. If your net income from self-employment is \$400 or more, you must file a return and compute your SE tax on Schedule SE (Form 1040). See Pub. 334 for more information. If no income or social security and Medicare taxes were withheld and you are still receiving these amounts, see Form 1040-ES (or Form 1040-ES/SE) for more information. Individuals must report these amounts as explained in the

Box 6. For individuals, report on Schedule C (Form 1040).

Box 7. Shows nonemployee compensation. If you are in the trade or business of catching fish, box 7 may show cash you received for the sale of fish. If the amount in this box is SE income, report it on Schedule C or F (Form 1040), and complete Schedule SE (Form 1040). You received this form instead of Form W-2 because the payer did not consider you an employee and did not withhold income tax or social security and Medicare tax. If you believe you are an employee and cannot get the payer to correct this form, report the amount from box 7 on Form 1040, line 7 (or Form 1040NR, line 8). You must also complete Form 8919 and attach it to your return. If you are not an employee but the amount in this box is not SE income (for example, it is income from a sporadic activity or a hobby), report it on Form 1040, line 21 (or Form 1040NR, line 21).

Box 8. Shows substitute payments in lieu of dividends or tax-exempt interest received by your broker on your behalf as a result of a loan of your securities. Report on the "Other income" line of Form 1040 (or Form 1040NR).

Box 9. If checked, \$5,000 or more of sales of consumer products was paid to you on a buy-sell, deposit-commission, or other basis. A dollar amount does not have to be shown. Generally, report any income from your sale of these



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What does a e-delivered 1099 look like?

Santa Claus Inc.

MISC

2

ADD FORMS +

1. Payer

2. Add Recipient ▾

3. Forms Summary

4. E-file

5. Mail

6. Download

Import Data

Unscheduled Forms (0)

Scheduled & Sent (2)

Form Box Totals

Type to Search

Click a recipient for individual forms.
We e-file/e-deliver each day ~8pm PST

Recipient

Delete...

Postal Mail ?

E-Delivery ?

To IRS ?

✓ [Comet Reindeer](#)

Emailed 10/25/16

2017-01-19

✓ [Prancer Reindeer](#)

Accepted 10/25/16

2017-01-19



Save Changes



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What does a e-delivered 1099 look like?

2016 2015 2014 2013 2012

All Payers

Overview 1. Add Payer 2. E-file 3. Mail 4. Download Import Data

Q Recipients

Payer	Total Forms	IRS Status	Recipient E-Delivery	Recipient Postal Mail	CSV	CPA
Cheddar Cheese Inc. Unscheduled Forms 1	H 2	Sent 1		Mailed 1		Assign
Santa Claus Inc.	MISC 2	Scheduled 2	Accepted 1 Email 1			Assign
Sombrero Hats LLC	1042-S 1	Sent 1		Mailed 1		Assign



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Video Guides

[Easy 1099 E-file Overview](#)

[CSV Importing, all form types](#)

[Corrections](#)

[E-Delivery to Recipients](#)

[ACA/Obamacare E-file](#)

[QuickBooks Online Importing](#)

[Tax Pro Teams and Firms](#)

[Online W-9s](#)

[QuickBooks Desktop Importing](#)

[Pricing](#)

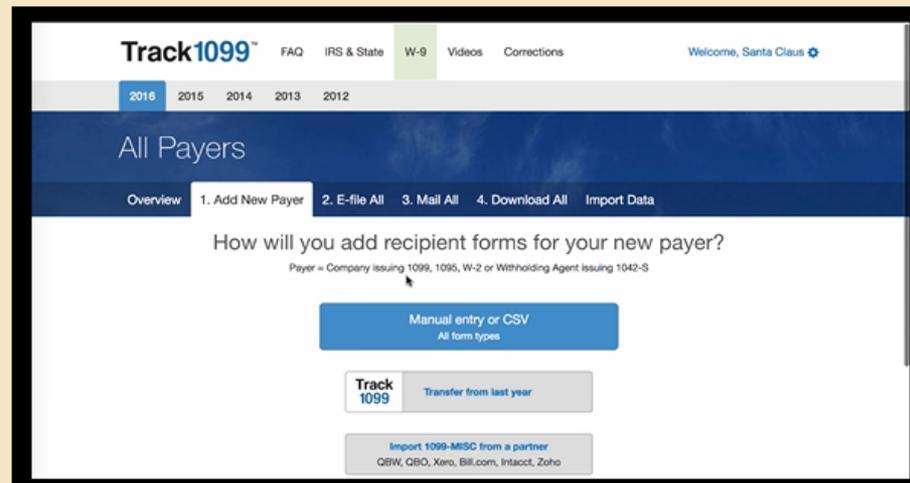
[Postal Mail](#)

[Xero Importing](#)

[IRS TIN Matching file](#)

[Fixing Many Recipients with Errors](#)

[Bill.com Importing](#)



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Questions?

michael.creagh@scouting.org



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