

Instructions to process IRS forms 1099 in PeopleSoft

Step 1. Identify vendors designated as 1099 vendors for reporting purposes. From the Query Viewer menu, run the query LC_1099_VENDORS.

Navigation: 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: Query Name begins with LC_1099

[Search](#) [Advanced Search](#)

Search Results

*Folder View: -- All Folders --

Query	Customize	Find	View All	First	1-5 of 5	Last		
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
LC_1099_VENDORS		Public		HTML	Excel	XML	Schedule	Favorite
LC_1099_VENDORS_VOUCHERS		Public		HTML	Excel	XML	Schedule	Favorite
LC_1099_VENDORS_WITH_VOUCHERS		Public		HTML	Excel	XML	Schedule	Favorite
LC_1099_VOUCHERS_WITHHOLD_INFO		Public		HTML	Excel	XML	Schedule	Favorite
LC_1099_WITHHOLD_INFORMATION		Public		HTML	Excel	XML	Schedule	Favorite

Enter council business unit and view results. This query identifies vendors configured as 1099 vendors as indicated by the “Y” in the Withholding column.

LC_1099_VENDORS

SetID: [View Results](#)

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All First 1-26 of 26 Last

	SetID	Vendor	Withholding
1	LC_1099	0000000096	Y
2	LC_1099	0000000164	Y
3	LC_1099	0000000177	Y
4	LC_1099	0000000190	Y
5	LC_1099	0000000219	Y
6	LC_1099	0000000220	Y
7	LC_1099	0000000230	Y
8	LC_1099	0000000236	Y
9	LC_1099	0000000242	Y
10	LC_1099	0000000264	Y
11	LC_1099	0000000269	Y
12	LC_1099	0000000279	Y
13	LC_1099	0000000282	Y
14	LC_1099	0000000293	Y
15	LC_1099	0000000317	Y
16	LC_1099	0000000321	Y
17	LC_1099	0000000397	Y
18	LC_1099	0000000457	Y
19	LC_1099	0000000778	Y
20	LC_1099	0000000801	Y
21	LC_1099	0000000910	Y
22	LC_1099	0000001114	Y
23	LC_1099	0000001152	Y
24	LC_1099	0000001431	Y
25	LC_1099	0000001486	Y
26	LC_1099	0000002123	Y

Review the output of the query to validate whether the vendors are applicable to 1099 reporting.

Step 2. Identify vouchers designated as 1099 applicable. Run the query LC_1099_WITHHOLD_INFORMATION. Review the voucher information, if the information is accurate; proceed to Step 6 to generate IRS 1099 Misc. forms and the electronic filing txt file.

LC_1099_WITHHOLD_INFORMATION

Unit:

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

View All

	Instance	Unit	Entity	Type	Jurisdiction	Class	Rule	Vndr SetID	Vendor	Location	Location	SetID	Bank	Account	Method	Payment	BU Tax ID	Tax ID	Currency	Rate Type	Multiplier	Divisor	Date	Posted	Declarat Date	Basis Amt	Org Withd Basis	Liability Amt	Amount	Description	
1		0	L556	IRS	1099	FED	07	RULE1	L556	0000000096		1				0000001.00		621754110	USD	CRRNT	1.00000000	1.00000000	09/15/2012	01/14/2013	09/15/2012	1000.000	0.000	0.000	1000.000	Correct 1099 Amount	
2		0	L556	IRS	1099	FED	07	RULE1	L556	0000000230	1	1				0000000577		439230837	USD	CRRNT	1.00000000	1.00000000	09/15/2012	01/14/2013	09/15/2012	1000.000	0.000	0.000	1000.000	Missing Voucher - Scoutnet	
3		0	L556	IRS	1099	FED	07	RULE1	L556	0000000230	1	1	L556	B001	CHKG	CHK	0000000194		439230837	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	1252.500	1252.500	0.000	0.000	Withhold Update
4		0	L556	IRS	1099	FED	07	RULE1	L556	0000000230	1	1	L556	B001	CHKG	CHK	0000000576		439230837	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	1848.750	1848.750	0.000	0.000	Withhold Update
5		0	L556	IRS	1099	FED	07	RULE1	L556	0000000778	1	1	L556	B001	CHKG	CHK	0000000067		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	45.990	45.990	0.000	0.000	Withhold Update
6		0	L556	IRS	1099	FED	07	RULE1	L556	0000000778	1	1	L556	B001	CHKG	CHK	0000000135		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	1177.310	1177.310	0.000	0.000	Withhold Update
7		0	L556	IRS	1099	FED	07	RULE1	L556	0000000778	1	1	L556	B001	CHKG	CHK	0000000221		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	350.600	350.600	0.000	0.000	Withhold Update
8		0	L556	IRS	1099	FED	07	RULE1	L556	0000000778	1	1	L556	B001	CHKG	CHK	0000000391		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	3.780	3.780	0.000	0.000	Withhold Update
9		0	L556	IRS	1099	FED	07	RULE1	L556	0000000778	1	1	L556	B001	CHKG	CHK	0000000498		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	76.360	76.360	0.000	0.000	Withhold Update
10		0	L556	IRS	1099	FED	07	RULE1	L556	0000000778	1	1	L556	B001	CHKG	CHK	0000000613		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	461.980	461.980	0.000	0.000	Withhold Update
11		0	L556	IRS	1099	FED	07	RULE1	L556	0000000778	1	1	L556	B002	CHKG	CHK	0000000020		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	126.500	126.500	0.000	0.000	Withhold Update
12		0	L556	IRS	1099	FED	07	RULE1	L556	0000000778	1	1	L556	B002	CHKG	CHK	0000000026		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	1533.040	1533.040	0.000	0.000	Withhold Update
13		0	L556	IRS	1099	FED	07	RULE1	L556	0000000778	1	1	L556	B002	CHKG	CHK	0000000032		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	405.000	405.000	0.000	0.000	Withhold Update

If there are vendors or vouchers missing or incorrect data in the output of the query, run the query LC_1099_VENDORS_VOUCHERS.

LC_1099_VENDORS_VOUCHERS

SetID:

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (11 kb)

View All

Vouchers with the 1099 Flag of "Y" will be included in 1099 totals. Vouchers with the 1099 Flag of "N" will not be included in 1099 totals.

SetID	Vendor	Vendor 1099 Flag	Voucher	Line	Vouchers with 1099 Flag	Acctg Date	Gross Amt	Base	Merchandise Amt	Merch Amt Base
1	L556	0000000164	Y	00002355	1 N	08/27/2012	1560.000	1560.000	1560.000	1560.000
2	L556	0000000778	Y	00002454	1 Y	04/04/2012	1177.310	1177.310	1177.310	1177.310
3	L556	0000000317	Y	00002494	1 N	04/13/2012	25000.000	25000.000	25000.000	25000.000
4	L556	0000000230	Y	00002558	1 Y	04/27/2012	1252.500	1252.500	1252.500	1252.500
5	L556	0000000177	Y	00002563	1 N	04/30/2012	750.000	750.000	750.000	750.000
6	L556	0000000910	Y	00002662	1 N	05/15/2012	1200.000	1200.000	1200.000	1200.000
7	L556	0000001486	Y	00002686	1 N	05/21/2012	645.260	645.260	645.260	645.260
8	L556	0000000317	Y	00002771	1 N	06/11/2012	4901.500	4901.500	4901.500	4901.500
9	L556	0000001114	Y	00002806	1 N	06/13/2012	1175.000	1175.000	1175.000	1175.000
10	L556	0000000317	Y	00002836	1 N	06/20/2012	27282.000	27282.000	27282.000	27282.000
11	L556	0000000397	Y	00002845	1 N	06/20/2012	2347.640	2347.640	2347.640	2347.640
12	L556	0000000317	Y	00002873	1 N	06/25/2012	28440.500	28440.500	28440.500	28440.500
13	L556	0000001114	Y	00002878	1 N	06/26/2012	2350.000	2350.000	2350.000	2350.000
14	L556	0000001114	Y	00002879	1 N	06/26/2012	1175.000	1175.000	1175.000	1175.000
15	L556	0000001114	Y	00002889	1 N	06/29/2012	5850.000	5850.000	5850.000	5850.000
16	L556	0000000317	Y	00002903	1 N	06/30/2012	29510.500	29510.500	29510.500	29510.500
17	L556	0000000317	Y	00002904	1 N	06/30/2012	1147.500	1147.500	1147.500	1147.500
18	L556	0000000317	Y	00002952	1 N	07/11/2012	19205.000	19205.000	19205.000	19205.000
19	L556	0000000317	Y	00002997	1 N	07/17/2012	28205.000	28205.000	28205.000	28205.000
20	L556	0000000317	Y	00002998	1 N	07/17/2012	1854.750	1854.750	1854.750	1854.750

This query identifies vendors with 1099 applicable vouchers. Review the Vouchers with 1099 Flag filed, vouchers marked "Y" are set up for 1099 processing. Vouchers marked "N" are not set up for 1099 processing. If vouchers flagged "N" should be "Y," proceed to step 3. Otherwise proceed to Step 6 to generate IRS 1099 Misc. forms and the electronic filing txt file.

Step 3. Select vouchers Flagged as “N” on the LC_1099_Vendors_Vouchers query as 1099 applicable. Navigate to Vendors>1099/Global Withholding>Maintain>Update Vendor Withholding

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

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

Details Customize | Find | View All | First 1 of 1 Last
Vendor New Withhold Details

	*Vendor ID	Location	Business Unit	Current Withhold		
1	0000000164	1	L	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

Vendors SetID: Enter the Business Unit

Start Date: 01/01/20XX

End Date: 12/31/20XX

Click on the Vendor Tab, enter the selected Vendor ID, Location and Business Unit, if applicable.

Click on the New Withhold Details Tab:

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

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

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

Vendor	*Vendor ID	Location	New Withhold	Entity	New Type	New Jur CD	New Class	Criteria
1	000000016	1	Y	IRS	1099	FED	07	

Save Return to Search Previous in List Next in List Notify Add

Vendor ID: Enter the Vendor ID number(s) selected from the query
LC_1099_VENDORS_VOUCHERS.

Location: Select the location.

New Withhold: Select “Y.”

Entity: Select IRS.

New Type: Select 1099.

New Jur CD: Select FED.

New Class: Select 07 – Non Employee Compensation.

Click Save.

Step 4. Update 1099 Withholding information. Navigate to Vendors>1099/Global Withholding>Maintain>Update Withholdings. Create a new run control if this is the first time running this process, otherwise search for the run control under the Find an Existing Value tab.

The image shows two screenshots of a web application interface. The top screenshot is titled 'Update Withholding' and shows a navigation breadcrumb: 'Favorites | Main Menu > Vendors > 1099/Global Withholding > Maintain > Update Withholdings'. Below the title, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is highlighted with a red rectangle. Below these buttons, the 'Run Control ID' is set to 'Update_Withholdings' in a yellow field. An 'Add' button is circled in red. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

The bottom screenshot is titled 'Withhold Update Request' and shows the same navigation breadcrumb. Below the title, the 'Run Control ID' is 'Update_Withholdings'. There are links for 'Report Manager' and 'Process Monitor', and a 'Run' button circled in red. Below these, there are three fields: '*Request ID:' with the value '1', '*Description:' with the value 'Update 1099 Withholding Info', '*Process Frequency:' with the value 'Always Process', and '*Process Option:' with the value 'Process Only Vendor Updates'. At the bottom left, there are 'Save' and 'Notify' buttons, with the 'Save' button circled in red. At the bottom right, there are 'Add' and 'Update/Display' buttons.

Request ID: Enter a value (e.g.1).

Description: Enter a description (e.g. Update 1099 Withholding Info).

Process Frequency: Select **Always Process**.

Process Options: **Select Process Only Vendor Updates**.

Click **Save** then Click **Run**.

[Favorites](#) | [Main Menu](#) > [Vendors](#) > [1099/Global Withholding](#) > [Maintain](#) > [Update Withholdings](#)

Process Scheduler Request

User ID: KSPANIER
 Server Name: **PSNT**
 Recurrence:
 Time Zone:

Run Control ID: Update_Withholdings
 Run Date: 01/03/2013
 Run Time: 8:53:41AM
[Reset to Current Date/Time](#)

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Withholding Update Process	AP_WTHD_UPDT	Application Engine	Web	TXT	Distribution

OK
Cancel

Server Name: Select **PSNT**
Check the box next to Withholding Update Process
 Click OK.

Step 5: Print the list of vendors with associated 1099 vouchers. From the Query Viewer menu, run the query LC_1099_WITHHOLD_INFORMATION. This query should list all the vouchers for the vendors ready to generate 1099 forms.

LC_1099_WITHHOLD_INFORMATION

Unit:

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (18 kb)

View All

Instance	Unit	Entity	Type	Jurisdiction	Class	Rule	Vndr SetID	Vendor	Location	Location	SetID	Bank	Account	Method	Payment	BU Tax ID	Tax ID	Currency	Rate Type	Multiplier	Divisor	Date	Posted	Declarat Date	Basis Amt	Org Withd Basis	Liability Amt	Amount	Description
1	0	IRS	1099	FED	07	RULE1	0000000096	1		1					0000001.00		621754110	USD	CRRNT	1.00000000	1.00000000	09/15/2012	01/14/2013	09/15/2012	1000.000	0.000	0.000	1000.000	Correct 1099 Amount
2	0	IRS	1099	FED	07	RULE1	0000000164	1		1	L556	B001	CHKG	CHK	0000000580		620937149	USD	CRRNT	1.00000000	1.00000000	12/31/2012	12/31/2012	12/31/2012	205.350	205.350	0.000	0.000	Withhold Update
3	0	IRS	1099	FED	07	RULE1	0000000164	1		1	L556	B001	CHKG	CHK	0000000829		620937149	USD	CRRNT	1.00000000	1.00000000	12/31/2012	12/31/2012	12/31/2012	259.000	259.000	0.000	0.000	Withhold Update
4	0	IRS	1099	FED	07	RULE1	0000000230	1		1					0000000577		439230837	USD	CRRNT	1.00000000	1.00000000	09/15/2012	01/14/2013	09/15/2012	1000.000	0.000	0.000	1000.000	Missing Voucher - Scoutnet
5	0	IRS	1099	FED	07	RULE1	0000000230	1		1	L556	B001	CHKG	CHK	0000000194		439230837	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	1252.500	1252.500	0.000	0.000	Withhold Update
6	0	IRS	1099	FED	07	RULE1	0000000230	1		1	L556	B001	CHKG	CHK	0000000576		439230837	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	1848.750	1848.750	0.000	0.000	Withhold Update
7	0	IRS	1099	FED	07	RULE1	0000000778	1		1	L556	B001	CHKG	CHK	0000000067		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	45.990	45.990	0.000	0.000	Withhold Update
8	0	IRS	1099	FED	07	RULE1	0000000778	1		1	L556	B001	CHKG	CHK	0000000135		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	1177.310	1177.310	0.000	0.000	Withhold Update
9	0	IRS	1099	FED	07	RULE1	0000000778	1		1	L556	B001	CHKG	CHK	0000000221		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	350.600	350.600	0.000	0.000	Withhold Update
10	0	IRS	1099	FED	07	RULE1	0000000778	1		1	L556	B001	CHKG	CHK	0000000391		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	3.780	3.780	0.000	0.000	Withhold Update
11	0	IRS	1099	FED	07	RULE1	0000000778	1		1	L556	B001	CHKG	CHK	0000000498		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	76.360	76.360	0.000	0.000	Withhold Update
12	0	IRS	1099	FED	07	RULE1	0000000778	1		1	L556	B001	CHKG	CHK	0000000613		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	461.980	461.980	0.000	0.000	Withhold Update
13	0	IRS	1099	FED	07	RULE1	0000000778	1		1	L556	B002	CHKG	CHK	0000000020		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	126.500	126.500	0.000	0.000	Withhold Update
14	0	IRS	1099	FED	07	RULE1	0000000778	1		1	L556	B002	CHKG	CHK	0000000026		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	1533.040	1533.040	0.000	0.000	Withhold Update
15	0	IRS	1099	FED	07	RULE1	0000000778	1		1	L556	B002	CHKG	CHK	0000000032		621776542	USD	CRRNT	1.00000000	1.00000000	12/13/2012	12/13/2012	12/13/2012	405.000	405.000	0.000	0.000	Withhold Update

Step 6. Generate the 1099 Misc. forms and the “Test” Electronic File for the IRS.

Navigate to Vendors>1099/Global Withholding>1099 Reports>Withhold 1099 Report Job
Create a new run control if this is the first time running this process, otherwise search for the run control under the Find an Existing Value tab.

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

Withhold 1099 Report Job

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID: Withhold_1099_Report_Job

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

[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](#) **Run** 17
 Language: [English](#)

1099 Report Post

*Request ID: 1 1099 Description: 1099 Processing 2

Process Frequency: 3 Always Process

Report ID: US_REPORT

Report Date: 01/08/2013 4 ☒ Include Manual Overrides

*Control SetID: 5 L144 *Control ID: 6 1 Boy Scouts of America

*Calendar SetID: 7 SHARE *Calendar ID: 8 02 2012 1099 Calendar

*Fiscal Year: 9 2012 10 ☒ Use Report Date For Vendor

*Period: 11 1 Period 1 - 2012-01-01

1099 Report

Type of File/Return: 12 Test Replacement Character: ☐

1099 Report Copy B Sort

Withhold Type: 13 All Vendor Select Option: 14 Select All Vendors

☐ Mask TIN AP 1099 sort order: 15 Vendor Id Sort

Vendor ID
1

Customize | Find | View All | First 1 of Last

16

Select Test until 1099 information is validated and finalized.
Select Original/Correction to run the final 1099 process

Optional - These fields can be left blank

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

1. Request ID: Enter a request ID, example – 1099.
2. Description: Enter a description, example – 1099 Processing.
3. Process Frequency: Select Always Process.
4. Include Manual Overrides: Check the block.
5. Control SetID: Enter Business Unit.
6. Control ID: Select 1, Boy Scouts of America
7. Calendar SetID: Select SHARE.
8. Calendar ID: Select Fiscal Year Calendar, example 02, 2012 1099 Calendar
9. Fiscal Year: Enter fiscal year, example – 2012
10. Use Report Date for Vendor: Check the block.
11. Period: Select 1, Period 1
12. Type of File/Return: Select **Test** until 1099 information is validated and final 1099s are ready to be produced. Select Original/Correction for final 1099 process.

13. Withhold Type: Select All.
14. Vendor Select Options: Default is blank or you can select all vendors or specify vendors.
15. AP 1099 sort order: Default is blank or you can select Name Sort, TIN Sort or Vendor ID sort.
16. Click Save.
17. Click Run.

The following screen will appear:

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

Process Scheduler Request

User ID: KSPANIER Run Control ID: Withhold_1099_Report_Job

Server Name: PSNT Run Date: 01/08/2013
 Recurrence: Time Zone: 11:33:27AM
[Reset to Current Date/Time](#)

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	XML Publisher	Web	PDF	Distribution
<input type="checkbox"/>	XMLP: Withhold 1099G Report	APX1099G	XML Publisher	Web	PDF	Distribution
<input type="checkbox"/>	XMLP:Withhold 1099I Report	APX1099I	XML 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 checked="" 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

[OK](#) [Cancel](#)

Check the box next to 1099 Job then click OK.

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** [Run](#)

Language: English Process Instance: 181893

1099 Report Post

*Request ID: 1099 Description: 1099 Processing

Process Frequency: Always Process

Report ID: US_REPORT

Report Date: 01/08/2013 ☒ Include Manual Overrides

*Control SetID: L144 *Control ID: 1 Boy Scouts of America

*Calendar SetID: SHARE *Calendar ID: 02 2012 1099 Calendar

*Fiscal Year: 2012 ☒ Use Report Date For Vendor

*Period: 1 Period 1 - 2012-01-01

1099 Report

Type of File/Return: Test Replacement Character: ☐

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

Vendor ID
1

After submission of the job, check the process monitor for the status.

Process List **Server List**

View Process Request For

User ID: KSPANIER Type: Last 2 Days [Refresh](#)

Server: Name: Instance: to ☒ Save On Refresh

Run Status: Distribution Status: ☒ Save On Refresh

Process List Customize | Find | View All | First 1-24 of 24 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	181893		PSJob	AP_1099	KSPANIER	01/08/2013 11:33:27AM CST	Success	Posted	Details

Once the Run Status shows “Success” and the Distribution Status Shows “Posted,” navigate to Report Manager

[List](#)
[Explorer](#)
[Administration](#)
[Archives](#)

View Reports For

User ID:
 Type:
 Last Days

Status:
 Folder:
 Instance: to:

Report List Customize | Find | View All | 1-23 of 23 | First | Last

Select	Report ID	Prct Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	218425	181899	APX1099ICT - APX1099ICT.pdf	01/08/2013 11:43:20AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218423	181898	APX1099GCT - APX1099GCT.pdf	01/08/2013 11:43:04AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218421	181897	APX1099CT - APX1099CT.pdf	01/08/2013 11:42:48AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218412	181904	1099 Copy B Sort	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218411	181903	1099 Report	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218410	181902	1099 Report Post	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218409	181901	1099 Post Report & Copy B Sort	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218405	181896	1099-INT Copy B	01/08/2013 11:39:17AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218404	181895	1099-G Copy B	01/08/2013 11:39:17AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218403	181894	1099-MISC Copy B	01/08/2013 11:39:17AM	Acrobat (*.pdf)	Posted	Details

Click on the [1099-MISC Copy B](#) link to view and print the 1099 forms.

CORRECTED (if checked)		OMB No. 1545-0115		Miscellaneous Income
PAYER'S name, street address, city, state, ZIP code, and telephone no. BOY SCOUTS OF AMERICA 1111 ARABIAN LANE 1111 ARABIAN LANE 1111 ARABIAN LANE		1 Rents \$ 0.00	2012 Form 1099-MISC	
PAYER'S Federal identification number 1111 ARABIAN LANE		2 Royalties \$ 0.00	3 Other income \$ 0.00	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.
RECIPIENT'S identification number 1111 ARABIAN LANE		4 Federal income tax withheld \$ 0.00	5 Fishing boat proceeds \$ 0.00	
RECIPIENT'S name 1111 ARABIAN LANE Street address (including apt. no.) 1111 ARABIAN LANE City, state, and ZIP code 1111 ARABIAN LANE		6 Medical and health care payments \$ 0.00	7 Nonemployee compensation \$ 1,275.00	
Account number (see instructions) 0000000097		8 Substitute payments in lieu of dividends or interest \$ 0.00	9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale \$ 0.00	
15a Section 409A deferrals \$ 0.00		10 Crop insurance proceeds \$ 0.00	11 \$ 0.00	
15b Section 409A income \$ 0.00		12 \$ 0.00	13 Excess golden parachute payments \$ 0.00	
		14 Gross proceeds paid to an attorney \$ 0.00	16 State tax withheld \$ 0.00	
		17 State/Payer's state no. \$ 0.00	18 State income \$ 0.00	

Form 1099-MISC (Keep for your records) Department of the Treasury - Internal Revenue Service

Click on the [1099 Report](#) link to view the file to be sent to IRS.

List

Explorer

Administration

Archives

View Reports For

User ID:

KSPANIER

Type:

Last

1

Days

Refresh

Status:

Folder:

Instance:

to:

Report List

Customize

Find

View All

1-23 of 23

Last

Select	Report ID	Prcls Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	218425	181899	APX1099ICT - APX1099ICT.pdf	01/08/2013 11:43:20AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218423	181898	APX1099GCT - APX1099GCT.pdf	01/08/2013 11:43:04AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218421	181897	APX1099CT - APX1099CT.pdf	01/08/2013 11:42:48AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218412	181904	1099 Copy B Sort	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218411	181903	1099 Report	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218410	181902	1099 Report Post	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218409	181901	1099 Post, Report & CopyB Sort	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218405	181896	1099-INT Copy B	01/08/2013 11:39:17AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218404	181895	1099-G Copy B	01/08/2013 11:39:17AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218403	181894	1099-MISC Copy B	01/08/2013 11:39:17AM	Acrobat (*.pdf)	Posted	Details

The “**Test**” text file will look similar to the example below:

[illegible]

Click on the [1099 Report](#) Details link to get the “Test” txt file to electronically file with the IRS.

ListExplorerAdministrationArchives

View Reports For

User ID: KSPANIERType: Last 1 DaysStatus: Folder: Instance: to:

Report List

CustomizeFindView All1-23 of 23Last

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	218425	181899	APX1099ICT - APX1099ICT.pdf	01/08/2013 11:43:20AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218423	181898	APX1099GCT - APX1099GCT.pdf	01/08/2013 11:43:04AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218421	181897	APX1099CT - APX1099CT.pdf	01/08/2013 11:42:48AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218412	181904	1099 Copy B Sort	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218411	181903	1099 Report	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details

Click the details link to get the text file to upload to the IRS website.

Report Detail

Report

Report ID: 218411 Process Instance: 181903 [Message Log](#)
 Name: AP_APY1099 Process Type: Application Engine
 Run Status: Success

1099 Report

Distribution Details

Distribution Node: ReportNode Expiration Date: 02/07/2013 

File List

Name	File Size (bytes)	Datetime Created
AE AP APY1099 181903.stdout	303	01/08/2013 11:40:11.280000AM CST
IRS_001_1_181903.TXT	3,760	01/08/2013 11:40:11.280000AM CST

Distribute To
Distribution ID Type
User ▼

Open

Open in new tab

Open in new window

Save target as...

Print target

Cut

Copy

Copy shortcut

Paste

Add to favorites...

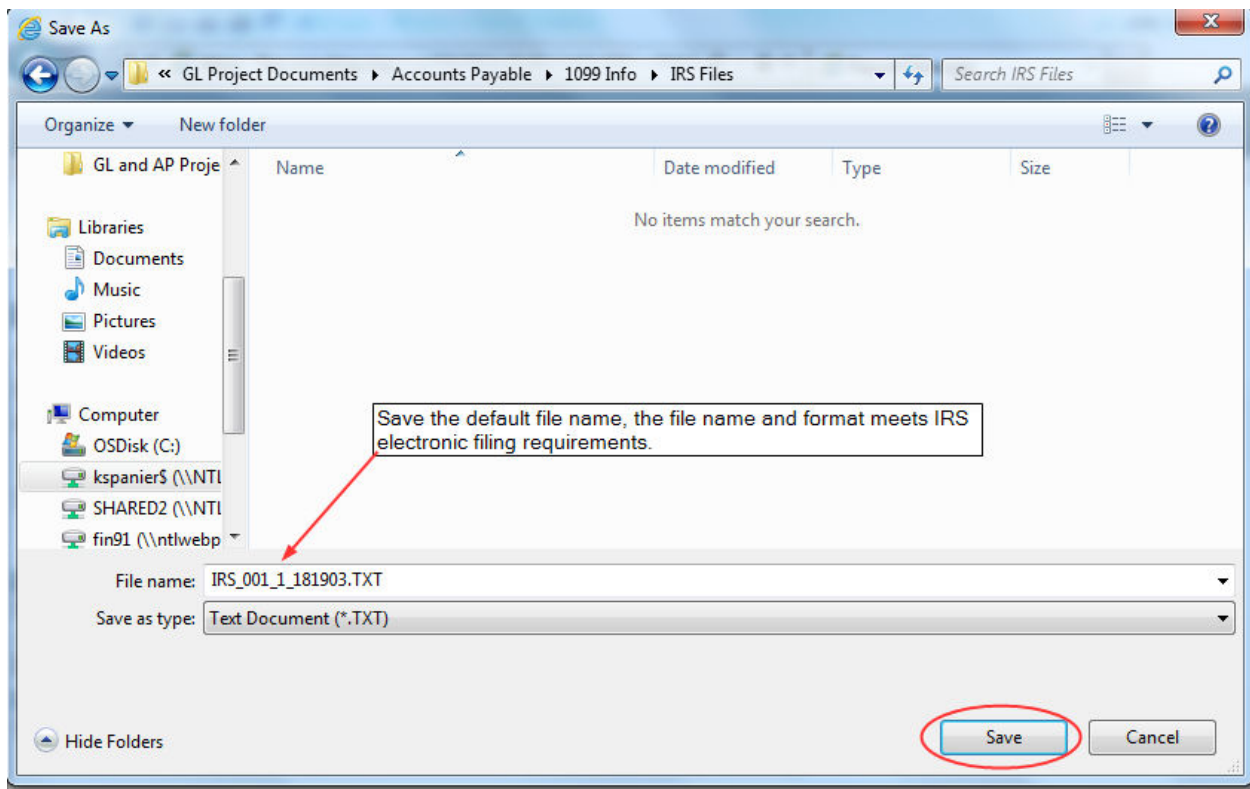
Send to OneNote

Properties

OK

Cancel

Move your mouse pointer over the IRS_001_1_XXXXXX.TXT link and press the right mouse button. A menu similar to the example above will appear, click the Save target as link to save the file to a file folder.



Save the file to a folder location that will be used when uploading the file to the IRS website.

Step 7. Generate the 1099 Misc. forms and the Electronic File for the IRS.

Navigate to Vendors>1099/Global Withholding>1099 Reports>Withhold 1099 Report Job
Create a new run control if this is the first time running this process, otherwise search for the run control under the Find an Existing Value tab.

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

Withhold 1099 Report Job

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

Find an Existing Value | Add a New Value

Limit the number of results to (up to 300):

Search by: Run Control ID begins with

☐ Case Sensitive

Search | [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

[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](#) **Run** 17

Language: [English](#)

1099 Report Post

*Request ID: 1 1099 Description: 1099 Processing 2
 Process Frequency: 3 Always Process
 Report ID: US_REPORT
 Report Date: 01/14/2013 4 ☒ Include Manual Overrides
 *Control SetID: 5 L144 *Control ID: 6 1 Boy Scouts of America
 *Calendar SetID: 7 SHARE *Calendar ID: 8 02 2012 1099 Calendar
 *Fiscal Year: 9 2012 10 ☒ Use Report Date For Vendor
 *Period: 11 1 Period 1 - 2012-01-01

1099 Report

Type of File/Return: 12 Original/Correction Replacement Character:

1099 Report Copy B Sort

Withhold Type: 13 All Vendor Select Option: 14 Select All Vendors
☐ Mask TIN AP 1099 sort order: 15 Vendor Id Sort

Vendor Payees		Customize	Find	View All	First	1 of 1	Last
Vendor ID							
1							

16

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)



1. Request ID: Enter a request ID, example – 1099.
2. Description: Enter a description, example – 1099 Processing.
3. Process Frequency: Select Always Process.
4. Include Manual Overrides: Check the block.
5. Control SetID: Enter Business Unit.
6. Control ID: Select 1, Boy Scouts of America
7. Calendar SetID: Select SHARE.
8. Calendar ID: Select Fiscal Year, example - 02, 2012 1099 Calendar
9. Fiscal Year: Enter fiscal year, example – 2012
10. Use Report Date for Vendor: Check the block.
11. Period: Select 1, Period 1
12. Type of File/Return: **Select Original/Correction for final 1099 process.**
13. Withhold Type: Select All.
14. Vendor Select Options: Default is blank or you can select all vendors or specify vendors.
15. AP 1099 sort order: Default is blank or you can select Name Sort, TIN Sort or Vendor ID sort.
16. Click Save.
17. Click Run.

The following screen will appear:

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

Process Scheduler Request

User ID: KSPANIER Run Control ID: Withhold_1099_Report_Job

Server Name: PSNT Run Date: 01/08/2013 
Recurrence: Run Time: 11:33:27AM [Reset to Current Date/Time](#)
Time Zone: 

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	XML Publisher	Web	PDF	Distribution
<input type="checkbox"/>	XMLP: Withhold 1099G Report	APX1099G	XML Publisher	Web	PDF	Distribution
<input type="checkbox"/>	XMLP:Withhold 1099I Report	APX1099I	XML 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 checked="" 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

[OK](#) [Cancel](#)

Check the box next to 1099 Job then click OK.

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](#) [Run](#)

Language: English Process Instance: 181893

1099 Report Post

*Request ID: 1099 Description: 1099 Processing

Process Frequency: Always Process

Report ID: US_REPORT

Report Date: 01/08/2013 ☒ Include Manual Overrides

*Control SetID: L144 *Control ID: 1 Boy Scouts of America

*Calendar SetID: SHARE *Calendar ID: 02 2012 1099 Calendar

*Fiscal Year: 2012 ☒ Use Report Date For Vendor

*Period: 1 Period 1 - 2012-01-01

1099 Report

Type of File/Return: Test Replacement Character: ☐

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

Vendor ID
1

After submission of the job, check the process monitor for the status.

Process List [Server List](#)

View Process Request For

User ID: KSPANIER Type: Last 2 Days [Refresh](#)

Server: Name: Instance: to ☐ Save On Refresh

Run Status: Distribution Status: ☒ Save On Refresh

Process List Customize | Find | View All | First 1-24 of 24 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	181893		PSJob	AP_1099	KSPANIER	01/08/2013 11:33:27AM CST	Success	Posted	Details

Once the Run Status shows “Success” and the Distribution Status Shows “Posted,” navigate to Report Manager

List Explorer Administration Archives

View Reports For

User ID: KSPANIER Type: Last 1 Days Refresh

Status: Folder: Instance: to:

Report List Customize Find View All First 1-23 of 23 Last

Select	Report ID	Prs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	218425	181899	APX1099ICT - APX1099ICT.pdf	01/08/2013 11:43:20AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218423	181898	APX1099GCT - APX1099GCT.pdf	01/08/2013 11:43:04AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218421	181897	APX1099CT - APX1099CT.pdf	01/08/2013 11:42:48AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218412	181904	1099 Copy B Sort	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218411	181903	1099 Report	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218410	181902	1099 Report Post	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218409	181901	1099 Post Report & Copy B Sort	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218405	181896	1099-INT Copy B	01/08/2013 11:39:17AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218404	181895	1099-G Copy B	01/08/2013 11:39:17AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218403	181894	1099-MISC Copy B	01/08/2013 11:39:17AM	Acrobat (*.pdf)	Posted	Details

Click on the [1099-MISC Copy B](#) link to view and print the 1099 forms.

☐ CORRECTED (if checked)

PAYER'S name, street address, city, state, ZIP code, and telephone no. BOY SCOUTS OF AMERICA 1111 ARABIAN LANE 1111 ARABIAN LANE 1111 ARABIAN LANE		1 Rents \$ 0.00	OMB No. 1545-0115 2012 Form 1099-MISC	Miscellaneous Income
PAYER'S Federal identification number 1111 ARABIAN LANE		2 Royalties \$ 0.00	3 Other income \$ 0.00	
RECIPIENT'S name 1111 ARABIAN LANE Street address (including apt. no.) 1111 ARABIAN LANE City, state, and ZIP code 1111 ARABIAN LANE		4 Fishing boat proceeds \$ 0.00	5 Federal income tax withheld \$ 0.00	Copy B For Recipient
Account number (see instructions) 0000000097		6 Nonemployee compensation \$ 1,275.00	7 Substitute payments in lieu of dividends or interest \$ 0.00	
15a Section 409A deferrals \$ 0.00		15b Section 409A income \$ 0.00	8 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale \$ 0.00	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.
16 State tax withheld \$ 0.00		17 State/Payer's state no. \$ 0.00	18 State income \$ 0.00	

Form 1099-MISC (Keep for your records) Department of the Treasury - Internal Revenue Service

Click on the [1099 Report](#) link to view the file to be sent to IRS.

List

Explorer

Administration

Archives

View Reports For

User ID: KSPANIER

Type:

Last 1

Days

Refresh

Status:

Folder:

Instance: to:

Report List

Customize | Find | View All | First 1-23 of 23 Last

Select	Report ID	Prcls Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	218425	181899	APX1099ICT - APX1099ICT.pdf	01/08/2013 11:43:20AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218423	181898	APX1099GCT - APX1099GCT.pdf	01/08/2013 11:43:04AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218421	181897	APX1099CT - APX1099CT.pdf	01/08/2013 11:42:48AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218412	181904	1099 Copy B Sort	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218411	181903	1099 Report	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218410	181902	1099 Report Post	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218409	181901	1099 Post, Report & Copy B Sort	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218405	181896	1099-INT Copy B	01/08/2013 11:39:17AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218404	181895	1099-G Copy B	01/08/2013 11:39:17AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218403	181894	1099-MISC Copy B	01/08/2013 11:39:17AM	Acrobat (*.pdf)	Posted	Details

The text file will look similar to the example below:

[illegible]

Click on the [1099 Report](#) Details link to get the file to electronically file with the IRS.

List Explorer Administration Archives

View Reports For

User ID: KSPANIER Type: Last 1 Days

Status: Folder: Instance: to:

Report List Customize Find View All First 1-23 of 23 Last

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	218425	181899	APX1099ICT - APX1099ICT.pdf	01/08/2013 11:43:20AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218423	181898	APX1099GCT - APX1099GCT.pdf	01/08/2013 11:43:04AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218421	181897	APX1099CT - APX1099CT.pdf	01/08/2013 11:42:48AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	218412	181904	1099 Copy B Sort	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	218411	181903	1099 Report	01/08/2013 11:39:17AM	Text Files (*.txt)	Posted	Details

Click the details link to get the text file to upload to the IRS website.

Report Detail

Report

Report ID: 218411 Process Instance: 181903 [Message Log](#)
 Name: AP_APY1099 Process Type: Application Engine
 Run Status: Success

1099 Report

Distribution Details

Distribution Node: ReportNode Expiration Date: 02/07/2013 

File List

Name	File Size (bytes)	Datetime Created
AE AP APY1099 181903.stdout	303	01/08/2013 11:40:11.280000AM CST
IRS_001_1_181903.TXT	3,760	01/08/2013 11:40:11.280000AM CST

Distribute To
Distribution ID Type
User ▼

OK

Cancel

Open

Open in new tab

Open in new window

Save target as...

Print target

Cut

Copy

Copy shortcut

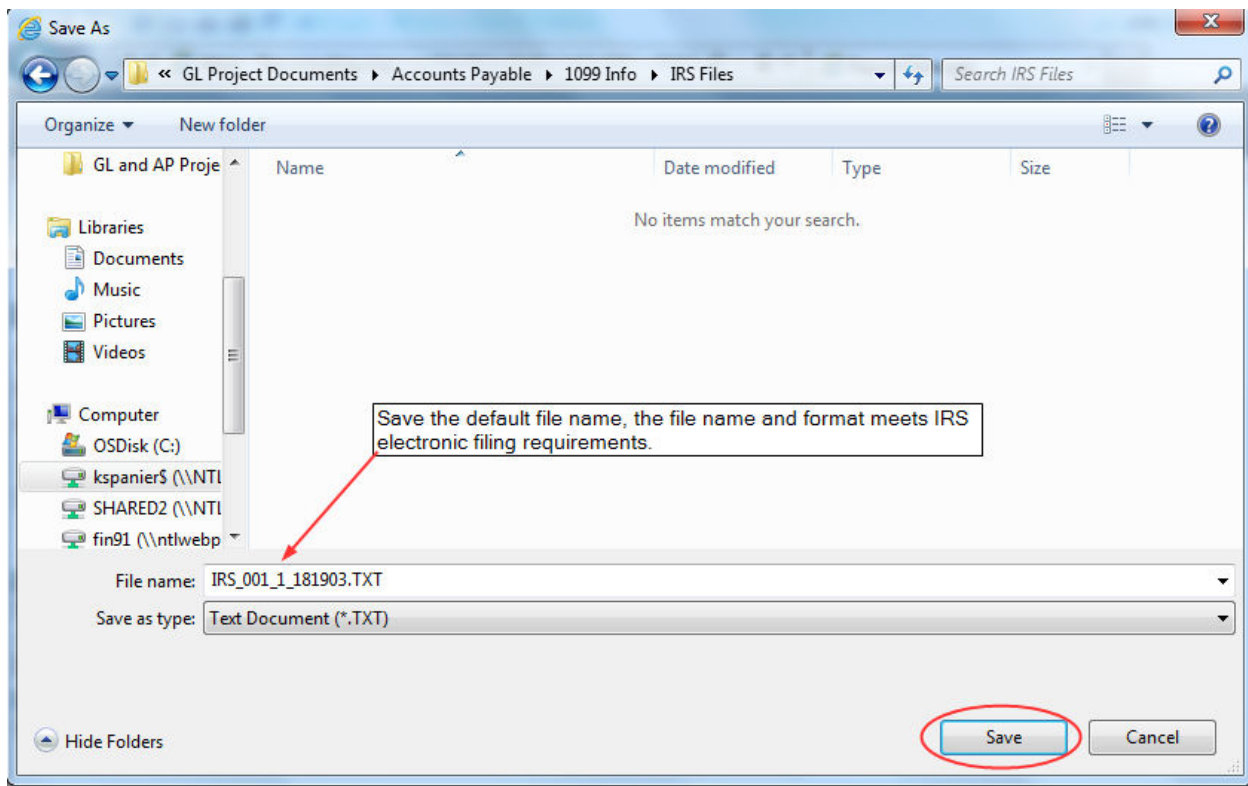
Paste

Add to favorites...

Send to OneNote

Properties

Move your mouse pointer over the [IRS_001_1_XXXXXX.TXT](#) link and press the right mouse button. A menu similar to the example above will appear, click the Save target as link to save the file to a file folder.



Save the file to a folder location that will be used when uploading the file to the IRS website.

IRS Website: <https://fire.irs.gov/firev1r/default.aspx>

