

2022 Aatrix 1099-NEC Filing Instructions

Before you Start:

- The printed Federal Copy a THREE part form vs the two part from previous years. If you print and file the Federal Copy of the NEC-01 it requires pre-printed red THREE part forms. All other forms can use the same paper as the 1099 MISC.
- The 1099 NEC form Box NEC-01 is now used to report data that was previously reported in the 1099 MISC box MISC-07 prior to 2020.
- You should be on Version 23.1 or later to process the 1099-NEC for 2022. This version contains the ability to pass first and last names to the 1099.

☐ CORRECTED (if checked)		
1 Nonemployee compensation		
\$		822.09
4 Federal income tax withheld		
\$		
PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		
NPS TRAINING ORGANIZATION		
10800 PECAN PARK BLVD		
SUITE 400		
AUSTIN TX 78750		
(512) 861-3000		
PAYER'S TIN		RECIPIENT'S TIN
74-4568488		74-9876543
RECIPIENT'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code		
ABC OFFICE SUPPLY		
161 NORTH LAMAR		
SUITE 200		
AUSTIN TX 78755		
Account number (see instructions)		
2 Payer made direct sales totaling \$5,000 or more of consumer products to recipient for resale ☐		
3		
5 State tax withheld	6 State/Payer's state no.	7 State income
\$	/	\$
\$	/	\$

2021 Form 1099-NEC

To be filed with recipient's federal income tax return, when required.

1099 NEC Quick Start Guide

This document is a quick walkthrough of the 1099-NEC process. If you have any questions on any of the steps please refer to the Complete Guide.

Step 1) Select Forms

- Go to Activities > Accounts Payable> Produce Vendor 1099's.
- Select Form Type: New
- Select Form: 2022 1099 NEC

NOTE: If you don't see 2022 Forms click the form update button to get them. Any time the button is available it should be clicked to get the latest forms.

Select Form

Form Type:

Form:

Year:

Form Description: [Annual] Use this to process 1099-NECs. After completing the process you can make corrections, reprint, or process additional copies.

Form Updates

Step 2) Enter or Confirm Organization Information

- Confirm your EIN number. If it is incorrect you must go to the Administration Module > Organization Information and correct it.

1099 Setup Wizard

Get Started Printing or eFiling Your 1099s

Please verify this payer's Taxpayer Identification Number (TIN). This number is used on ALL 1099 forms and MUST be correct. If this number is NOT correct, you MUST return to your accounting software to make the correction.

Payer TIN

7 4 - 4 5 6 8 4 8 9

☐ EIN ☐ SSN

Step 3) Multiple Databases

Unless you are filing from multiple databases with the same EIN choose NO.

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

Step 4) Verify or correct payer information and address.

1099 Setup Wizard

Payer Information

Company name: NPS Training Organization

First name: Middle: Last name:

Other name: Transfer agent:

Step 3) Electronic Disbursement of 1099 Option

If you are using the complete filing option and want to have vendors that ONLY receive electronic 1099's. This is not the same as eFiling.

1099 Setup Wizard

Data Verification

1. Do you have any recipients who elected to only receive 1099 forms electronically?

☐ Yes ☒ No

Step 4) Check and/or Add 'State & Local Tax Items'

- If you own the Payroll Module you may see payroll items pulled into this screen. This is because 1099's and W2's share program resources (tables). Be assured that only 1099 information will be inserted into the 1099 forms.

1099 Setup Wizard

State & Local Tax Items

Properly formatted tax account numbers are required for 1099 reconciliation and year-end forms. Avoid rejected forms and eFile! MOST filing errors are due to incorrectly formatted withholding or unemployment account numbers.

State	Tax Name	Tax Account Number
NM	State Unemployment	5655544
TX	State Unemployment	04-564564-6
NM	State Withholding	06-544554-005
NY	State Withholding	744568489

Local Tax Items

State	Tax Name	1099 Name	Tax Type	Tax Account Number
NV		NVLWT		

< Back Next > Cancel

Step 6) Tax ID Truncation on recipient copies

You have the option to mask tax numbers that print out. They will still show on screen but the final printouts will be masked.

1099 Setup Wizard

Recipient Identification Numbers

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 X. Example: XY-XX-6789

Step 8) Data Verification

A) Verify that all of your vendor information is correct. The values should match the totals of your cash journal and vendor adjustment reports.

B) Click Next Step to go through the verification wizard. If errors occur at this stage do not ignore them (see C below). Issues not addressed here will not go away!

Verify Recipient Taxpayer Identification Numbers (TIN)

Next Step

	Corrected (0)					\$35412.51
	Recipient TIN	TIN Flag	Recipient Company Name	Optional Name	Recipient Address	Box 1
	Taxpayer ID Number	Check if FEIN	Company Name	Full Name	Address	Nonemployee Compensation
1	74-9876543	☒	ABC Office Supply		161 N	1321.40
2	65-4646464	☒	Williams CPA		7100	26245.10
3	399-64-5545	☐	Bobs Best Pest Control	Bob Smith	9452	5987.23
4	456-55-4655	☐	Transportation Services Inc	Robert Lee	1200	1858.78

C) All error messages will include a description of the error. The fields that contain the errors will be highlighted in red in the data grid. All errors must be corrected before continuing. Errors can be corrected either by exiting the Aatrix® 1099 process and entering the correct information in MIP, or by typing the correct information directly into the (red) Aatrix® grid.

Error / Warning Description:

State cannot be blank and must be a valid two character state code [1 errors found]

Zipcode must be 5 or 10 characters in length and all characters must be numeric [3 errors found]

Recipient A...	Recipient A...	Recipient City	Recipient St...	Recipient Zi...	Recipient...
Address Li...	Address Li...	City	State	ZIP Code	Foreign...
100 Highwa		Austin	TX	78346-5744	
23 Elm Stree		Austin	TX	78777	
23 Elm		Austin	TX	78757	
5 Salsbury L		London	LO	EU1223	
121 West Gr		Austin	TX	78705-1111	
200 South C		Austin	TX	787046455	
747 Town	PO Box 3747	Austin	TX	78705-5445	

Step 9) Select Your Printing/Filing Options

IMPORTANT!

- A) Complete 1099 e-filing Service: This option provides complete e-filing as well as 1099 printing and mailing for \$2.04 per vendor.
- B) (B) Other Options:
- Federal 1099/1096 e-filing is free of charge.
 - State e-filing will cost \$0.69 per vendor.
 - Printed Recipient copies can be on either blank perforated 4 part forms or blank paper.
 - Printed Federal copies must be on red pre-printed forms only!
- NOTE: It is a good idea to print PDF copies for your records.

W-2/1099 Preparer

1099 Printing and Filing Options

eFile Services allow you to pick Filing Dates. FREE Corrections before selected Filing Dates. [More info?](#)

	Complete 1099 eFiling Service	Next Business Day Mailing!	# Recipients	Price/Recip.	Subtotal
The eFile Center will:					
- Print and Mail Recipient Copies			4	\$2.04	\$ 0.00
- e1099 Only Recipient Copies			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
			Total Cost	Minimum	\$ 0.00
Other Options	eFilers receive Free Corrections before selected Filing Dates				
☒ Print Recipient 1099 Copies					
☒ eFile Federal 1099s and 1096			4	\$0.00	\$0.00
☒ eFile State 1099s and Reconciliation Forms			4	\$0.69	\$2.76
☐ Print Federal 1099s and 1096					
☐ Print State 1099s and Reconciliation Forms					
			Total Cost	Minimum	\$24.95

Official Payer 1099s will display when Federal 1099s are selected

[< Back](#)
[Next >](#)
[Cancel](#)

Step 10) Choose a PDF archive

PDF Archiving Available

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

Purchasing a PDF archive allows you instant access to your 1099s for only \$34.95 (plus \$4.95 shipping and handling).

- Don't worry about locking up paper 1099s from prying eyes
- Reprint a Recipient 1099 at any time
- Easily find your Federal, State, Local 1099s, or Reconciliation(s) if the State or Federal Agency calls with a question
- PDFs are password protected for you and your recipients' security

☒ Yes, include a PDF archive
☐ No, thank you

Step 11) Review the summary of your filings and printing

Review Data

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

Federal

- eFile Federal 1099-NEC
- eFile Federal 1096

Recipient

- Print Recipient 1099-NEC
- Print 1099-NEC Instructions

Payer

- Print Payer 1099-NEC

Step 12) Printing your Aatrix® 1099's

Initiating the printing step brings up the form viewer. From the form viewer you can:

- 1) Review the individual vendors forms before printing.
- 2) Print the forms in final format.

The first screenshot shows 'Report 3 of 4: Recipient 1099-NEC'. It includes a progress bar, navigation buttons (Previous, Next, Print Draft, Print Final), and a table with the following data:

1 Nonemployee compensation	
\$	1321.40
4 Federal income tax withheld	
\$	
PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.	
NPS TRAINING ORGANIZATION 10800 PECAN PARK BLVD SUITE 400 (512) 861-3000	

The second screenshot shows 'Report 2 of 4: Federal 1099-NEC'. It includes a progress bar, navigation buttons, and a table with the following data:

7171	
PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.	
NPS TRAINING ORGANIZATION 10800 PECAN PARK BLVD SUITE 400 AUSTIN TX 78750 (512) 861-3000	
OMB No. 1545-0116	
2020	
Form 1099-NEC	
Nonemployee Compensation	
Copy A For Internal Revenue	
1 Nonemployee compensation	
\$	1321.40
2	

The third screenshot shows 'Report 1 of 4: Federal 1096'. It includes a progress bar, navigation buttons, and a table with the following data:

Do Not Staple 6969	
Aatrix Rev. 1/06/20	
Form 1096	
Annual Summary and Transmittal of U.S. Information Returns	
OMB No. 1545-0108	
2019	
Department of the Treasury Internal Revenue Service	
FILER'S name	
NPS TRAINING ORGANIZATION	

Print all of your various forms

Step 13) E-Filing your 1099's (optional)

If you have selected an e-file option:

- A) Log in to the Aatrix® 'Secure e-File Login' and complete your e-filing.
- B) First time users must create a new e-file account. To set up an account go to:
<https://e-file.aatrix.com/>

The 'Secure eFile Login' form includes a header with the text 'Secure eFile Login' and a unique identifier '191957322-12844af4-acc8-556208'. It features input fields for 'Username' and 'Password', a 'Forgot your login?' link, a 'Login' button, and a 'Remember Me' checkbox. The footer contains the copyright notice: 'Copyright © 2011 Aatrix Software. All rights reserved.'

FINISHED!

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WHAT IS THE 1099-NEC?

Starting January 1, 2020 the reporting of payments to vendors changed. Prior to that Payments for non-employee compensation over \$600 were to be reported in the MISC-07.

As of January 1, 2020 this changed. Payments of the type that were previously coded to MISC-07 are no longer reported on the 1099-MISC form. Other classes of payments that were also reported on the 1099-MISC remain unchanged and continue to be reported on the 1099-MISC.

The amounts that were previously reported to the MISC-07 are now to be reported on the form 1099-NEC. In most cases these amounts go to the Box NEC-01. NEC-01 also has additional boxes for other reporting.

Historical 1099 Data and Upgrades

During the v20.3 upgrade process information was migrated from 1099-MISC-07 to 1099 NEC form for 2020. Attempts to enter information into MISC-07 would generate a warning. No information should have been coded to MISC-07 after 1/1/2020.

SECTION 1 – PRODUCING 1099 NEC

Form Selection Box

To begin the process, go to Activities>Accounts Payable>Produce Vendor 1099's

This will bring up the 1099 form to make your selections.

The screenshot shows the 'Select Form' window. It has a 'Form Type' dropdown set to 'New' (callout 1: Choose New), a 'Form' dropdown set to '2020 1099-NEC' (callout 2: Choose 1099-NEC), and a 'Year' field set to '2020' (callout 3: Choose Proper Year). To the right is a 'Form Description' box and a 'Form Updates' button (callout: Click Form Update if Available). Below these are 'Filters' with an 'Available Filter' list (Vendor ID, Vendor Name, Vendor Class, Fund, Grant) and a 'Selected Filter' table. The table has columns: Selected Filter, Compares To, Criteria 1, and Criteria 2. The first row shows 'Total Amount' selected, compared to '>', with '599.99' in Criteria 1 (callout 4: Amount Filter).

Selected Filter	Compares To	Criteria 1	Criteria 2
Total Amount	>	599.99	

1 – Select New for the Form Type if you are processing a new filing and have not yet filed anything. If you have already filed see Section 6 – Corrections and Reprints.

2- Choose the 1099-NEC for the current year.

- If you do not see the current years 1099-NEC it is because you have not done the form updates. Run the form updates, get out of Aatrix and back in and you should see them.
- If you are unable to run the Aatrix updates (it is grayed out) see Form Updates Below

3- Choose the proper 1099 Year.

4- You may wish to filter to exclude 1099 Amounts less than \$600. This is optional.

5- Click OK at the bottom of the screen to bring the Aatrix process.

Form Updates-

Before you can process your 1099-NEC you must download the latest form updates. These updates are normally available around December 20th.

To download the updates, click on the form Updates button. This will take you to a wizard to download the updates. You should choose the Automatic Update option and follow the wizard. If the update button is grayed out, then you have either already applied the latest update or your security settings are preventing it from accessing the update folder or your windows account is not a local administrator on the machine.

Check to make sure your WINDOWS account (not MIP account) is a local administrator on the machine. If it is then you will need to have your IT resource resolve the security issue (browser security settings, firewall, proxy server, blocked ports etc) before you can get the update. Information on this can be found in KB 1336.

If you are unable to get the Automatic Update to install you can consider using the manual update. This may allow you to get the form installed but if you need to efile you will likely have similar issues.

After clicking OK Aatrix will begin a data collection process. Depending on the size of your database and the speed of your machine this may take some time. When it is done you will be in the Aatrix Setup Wizard.

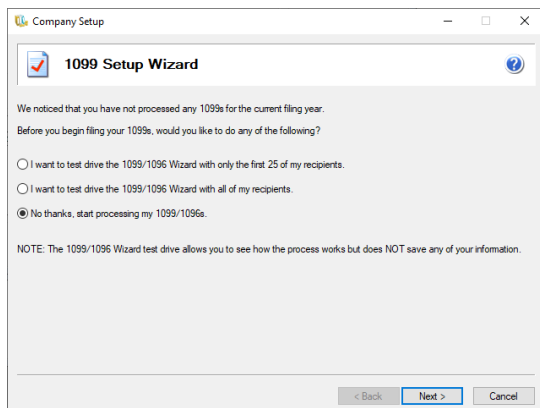
NOTE: Sometimes the wizard pops up BEHIND the program. If the program finishes collecting data and then appears to vanish look on your task bar for a second MIP icon or minimize everything and look for a hidden window.

Aatrix Setup Wizard

The Aatrix Setup Wizard will guide you through the Aatrix process.

Test Mode

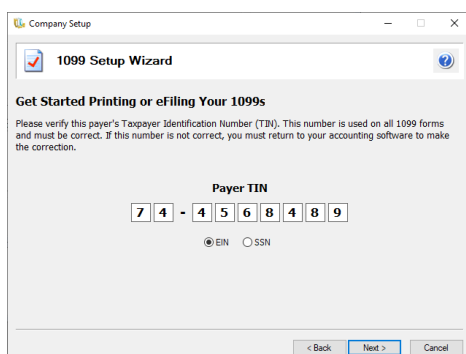
The first screen will ask if you want to run the process in Test Mode. This allows you to go test the process all the way through connecting to the efile server without having to file.



NOTE: Any changes you make in test mode will not be saved and will have to be made again. Any filings you do in this mode will not be recorded and will contain a DO NOT FILE watermark.

Confirm the TIN

This screen allows you to confirm your TIN Number. If your TIN Number is not correct it cannot be fixed at this point. To correct or change your TIN number go to Organization>Organization Information and change the Federal Tax Identification Number. Exit out of MIP and log back in again for this change to take effect.



Multiple 1099 Data Files

This allows you the option to create multiple 1099 Data files for one TIN number. Most users will select **NO** to this option. (*For detailed Instructions on filing multiple databases under one EIN see KB 7946. For instructions on filing for Multiple EIN's from ONE database see KB 12791*).

The screenshot shows the '1099 Setup Wizard' window within a 'Company Setup' application. The window has a title bar with standard Windows controls. Below the title bar is a header area with a checkmark icon and the text '1099 Setup Wizard'. The main content area is titled 'Get Started Printing or eFiling Your 1099s' and contains a paragraph of instructions: 'Please verify this payer's Taxpayer Identification Number (TIN). This number is used on all 1099 forms and must be correct. If this number is not correct, you must return to your accounting software to make the correction.' Below this text is a 'Payer TIN' section with a grid of input boxes containing the digits '7', '4', a hyphen, '4', '5', '6', '8', '4', '8', and '9'. Below the grid are two radio buttons: 'EIN' (which is selected) and 'SSN'. At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'.

Payer Information

This allows you to confirm or update information about your organization as it will appear on the Tax form.

The screenshot shows the 'Payer Information' window. It has a title bar and a header area with a checkmark icon and the text 'Payer Information'. The main content area contains several input fields: 'Company name' (filled with 'NPS Training Organization'), 'DBA name' (empty), 'First name' (empty), 'Middle' (empty), 'Last name' (empty), 'Country' (a dropdown menu showing 'USA (United States)'), 'Address line 1' (filled with '10800 Pecan Park Blvd'), 'Address line 2' (filled with 'Suite 400'), 'City' (filled with 'Austin'), 'State' (a dropdown menu showing 'TX'), 'ZIP code' (filled with '78750'), 'Contact name' (empty), 'Title' (empty), 'Phone' (filled with '(512) 861-3000'), 'Email' (empty), 'Fax' (empty), and 'Transfer agent' (empty). At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

Tax Preparer Type

Unless you are a CPA or Tax Preparer filing for someone else you should choose "I am filing for my company/employer".

The screenshot shows the 'Tax Preparer Type' window. It has a title bar and a header area with a checkmark icon and the text 'Tax Preparer Type'. The main content area is titled 'Which type of filer are you?' and contains two radio buttons: 'I am filing for my company/employer.' (which is selected) and 'I am a third-party, paid Tax Preparer, filing for one or multiple companies/EINs.' Below the radio buttons is a paragraph of text: '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.' At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

State and Local Tax Items

This allows you to add State and Local Tax items to the 1099's. In most cases this is not needed unless you are reporting tax withheld against vendor payments.

State	Tax Name	Tax Account Number
MA	State Unemployment	34-53453-5
CA	State Withholding	434-5345-3
CA	State Unemployment	343-2432-4

State	Tax Name	1099 Name	Tax Type	Tax Account Number
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NOTE- Because MIP Fund Accounting and Payroll modules share the same database you may see PAYROLL items in the Tax Items box. This is normal. This data will NOT be pulled into 1099 processing.

Data Verification

Use this only if you have vendors that want to only receive electronic copies of their 1099's. This refers to an electronic distribution of the VENDOR'S copy of the 1099. It does not affect eFiling or submitting forms to the government.

You must choose the Complete Filing Option to have the ability to distribute electronic copies.

1. Do you have any recipients who elected to only receive 1099 forms electronically?

☐ Yes ☒ No

Recipient Identification Numbers

This will allow you to Truncate or mask the Vendors Tax ID Numbers on the printouts. This will not affect how they show up on the form viewer screen in Aatrix, only how they print on the recipient copies.

1099 Setup Wizard

Recipient Identification Numbers

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: XXXX-XX-6789

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

☒ Yes, print zeros. Example: 000-00-0000 or 00-00000000

☐ No, leave them blank.

< Back Next > Cancel

SECTION 2 -THE PREPARER GRID

The preparer Grid allows you to review and, in some cases, make changes to the 1099 information before moving to the printing and filing.

	Recipient TIN	TIN Flag	Recipient Company Name	Optional Name	Recipient Address	\$51236.94	
	Taxpayer ID Number	Check if FEIN	Company Name	Full Name	Address Line 1	Nonemployee Compensation	Payer Made Direct S
1	74-9876543	☒	ABC Office Supply		161 North Lamar Suite 200	822.09	
2	65-4646464	☒	Williams Errickson CPAs		7100 Highway 360 South S	22353.93	
3	399-64-5545	☐	Mulberry Thompson Attorneys	Mulberry & Tho	2121 West Grand Parkway	26781.32	
4	565-85-3255	☐	Transportation Services	John Madisson	1200 South Congree Aveni	1279.60	

After you have loaded the grid you will need to go through several validations to assure your information has all the requirements to successfully file. You can click on “Next” or “Previous” to move forward or backward through the steps.

1 – Next Step Arrows – Click here to move through the validation process. Each step will check the data to make sure it is consistent with what is needed to file.

2 – This contains information about the vendor including SSN/FEIN and address. Review this is correct since this is the address the forms will be sent to.

3- This section contains the financial information on the vendor. The amounts and what box numbers they are in.

4 – Company Setup. Clicking this button will take you back through the Organization setup Wizard you went through when launching Aatrix. If you need to change any of those selections or modify information, click this button.

Verifying Data

The purpose of the grid is to go through and verify that the information is both correct and complete. To assist with this Aatrix has several verification steps that will check to make sure all the required information is in the grid for a successful filing (it does not check the accuracy of the info, just if it exists). As you click Next if Aatrix finds missing or incorrectly formatted data it will highlight it and give you the change to correct.

Aatrix will highlight the ROW and CELL that has a problem and give you information about the problem. You can click Go Back and Correct to address this issue

Making Corrections-

Any changes made on the preparer grid will NOT be reflected in MIP. If you exit out and get back in the changes will be lost. Reports that you run in MIP will not support the values on the grid.

If you need to change any information in the grid it is recommended that you

1 – Exit out of the Aatrix grid without saving changes

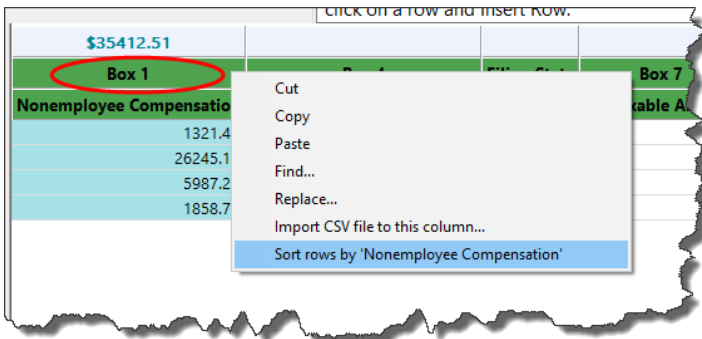
2 – Go back into MIP and make the corrections.

- If you need to correct Vendor information, go to Maintain>Vendors and update the vendor information.
- If you need to change the amounts in the 1099 Box go to Maintain>Vendors>1099 Information Tab. You can use the 1099 Adjustments box to increase/decrease the amount. Put in the difference between the value it had in the grid and the value it should be.

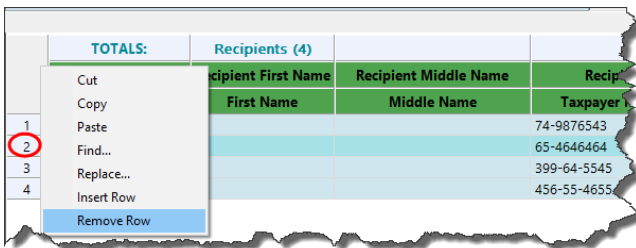
3- Start the Aatrix process again. If it asks if you want to use Work in Progress say no. This will pull the changes in.

SECTION 3 – SORTING AND GRID FUNCTIONS

Sorting – It is possible to sort information in the Aatrix Grid. To do so Right Click on the column header. This will give you several options including the ability to sort on that column.



Deleting – If you want to remove records from the grid (for example vendors that received less than \$600) highlight the Row and then Right Click and choose Remove Row.



Insert Rows – If you need to add an additional Row (A vendor that is not in MIP) you can either Right click on any Row and Choose “Insert Row” or go to the Edit Menu up top and Choose the “Insert Row” option. You must type in all information for that vendor.

Find and Replace – Aatrix can do a Find or Find and Replace. To use this feature, you must first make a selection of one or more Rows or Columns. The search will be limited to that data. You can use the SHIFT + CLICK to select multiple contiguous rows. Only one column at a time may be selected. Once selected Right click and use the Find or Replace Function. Or you can choose the options from the edit menu.

Copy/Paste – It is possible to Copy/Paste information to/from the Aatrix grid. However due to limitations of the Aatrix programming this functionality is limited to ONE row or column at a time. You cannot copy/paste multiple Rows/Columns simultaneously. If you need to copy/paste multiple Rows/Columns you will need to do them one at a time.

SECTION 4 – PRINTING AND FILING OPTIONS

Once you have completed all the validations Aatrix will take you to the printing and Filing options.

W-2/1099 Preparer

1099 Printing and Filing Options

eFile Services allow you to pick Filing Dates. FREE Corrections before selected Filing Dates. [More info?](#)

☐ **Complete 1099 eFiling Service** **Next Business Day Mailing!**

	# Recipients	Price/Recip.	Subtotal
- Print and Mail Recipient Copies	4	\$2.04	\$ 0.00
- e1099 Only Recipient Copies What's This?	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
Total Cost		Minimum	\$ 0.00

☒ **Other Options** [eFilers receive Free Corrections before selected Filing Dates](#)

☒ Print my Recipient 1099 Copies			
☐ eFile Federal 1099s and 1096	4	\$0.00	\$ 0.00
☐ eFile State 1099s and Reconciliation Forms	4	\$0.69	\$ 0.00
☒ Print Federal 1099s and 1096 (Official Copy)			
☐ Print State 1099s and Reconciliation Forms			
Total Cost			\$ 0.00

Official Payer 1099s will display when Federal 1099s are selected

< Back Next > Cancel

The options are:

The Complete Filing Option (Recommended) -

This option saves a lot of time effort and in many cases, money purchasing forms and postage. With the complete filing option Aatrix will:

- Print and mail 1099's to the Vendors. You do not need to buy paper or envelopes or postage.
- Electronically file Federal and State (if applicable) 1099's.
- Make e1099's available for all recipients.

The cost of this is a bit over \$2.00 per recipient with a \$24.95 minimum.

If you choose this option, you will still have the chance to print out record copies of all your forms.

Print Recipient 1099's-

This option allows you to manually print out and mail your Recipients 1099's. This will require that you have compatible paper and envelopes ([See Section 7 – Required 1099 forms](#)). Recipient copies are designed to go on blank 4-part perforated paper. Pre-printed forms of any type will not work for the Recipient copies.

Efile Federal 1099's-

This option allows you to electronically file your Federal 1099's. There is no charge for the FEDERAL Efiling of 1099's. It is included if you choose the complete filing option. You will still have the option to print record copies of your forms.

Efile State 1099's-

This option allows you to electronically file your State 1099's if required. There is a \$.69 per record charge with a \$24.95 minimum. This is included if you choose the complete filing option. You will still have the option to print record copies of your forms.

NOTE: To use any of the above options you must set up an account with Aatrix and have a credit card number on file, even if there will be no charge. When you set up an account the first time you

must fill out an authorization form and fax it in. All filings should be submitted at least 2 days prior to the deadline to guarantee on time filing.

Print Federal 1099 and 1096-

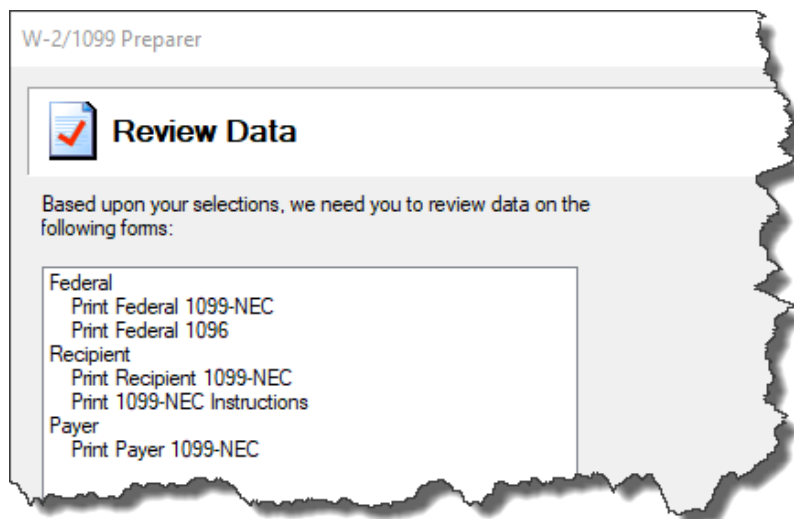
If you do not wish to do any type of efilg and instead want to print and mail your FEDERAL copy in choose this option. For the FEDERAL copy of the 1099-NEC it will require form that is pre-printed in RED ink and contains three parts. No other type of form will work for the Federal Copy of the 1099. See [Section 7 – Required 1099 forms](#).

Print State 1099s and Reconciliation Forms-

If you need to print and submit your STATE 1099 Copies, choose this option. This will print out your STATE 1099 Forms as well as any state specific reconciliation forms. The State forms are designed to go on Blank paper. You will still have the option to print record copies of your forms.

Review Data –

This screen lets you review what you plan on printing. Clicking PRINT on this screen is not necessary and will not print out your forms. You should click next.



W-2/1099 Preparer

 **Review Data**

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

- Federal
 - Print Federal 1099-NEC
 - Print Federal 1096
- Recipient
 - Print Recipient 1099-NEC
 - Print 1099-NEC Instructions
- Payer
 - Print Payer 1099-NEC

SECTION 5 – THE FORM VIEWER AND PRINTING

This section allows you to proof the final output of your forms and see what they will look like when printed. If you have chosen an electronic filing option, you will still see your forms here and have the option to print them, but they will have a Record Copy watermark.

The form viewer has several options to be aware of

File Edit View Tools Help

Report 2 of 5: Payer 1099-NEC

1 page

Click Print Final, then click Next Step.

Print Draft Print Final Prev Step Next Step

VOID CORRECTED

Nonemployee compensation \$ 1321.40

Federal income tax withheld \$

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

NPS TRAINING ORGANIZATION
10800 PECAN PARK BLVD
SUITE 400
AUSTIN TX 78750
(512) 861-3000

PAYER'S TIN 74-4568489

RECIPIENT'S TIN 74-9876543

RECIPIENT'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code

ABC OFFICE SUPPLY
161 NORTH LAMAR
SUITE 200
AUSTIN TX 74775

Account number (see instructions) FATCA filing requirements and TIN, not

VOID CORRECTED

Nonemployee compensation \$ 5987.23

Federal income tax withheld \$

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

NPS TRAINING ORGANIZATION
10800 PECAN PARK BLVD
SUITE 400
AUSTIN TX 78750
(512) 861-3000

PAYER'S TIN 74-4568489

RECIPIENT'S TIN 399-64-5545

RECIPIENT'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code

BOB SMITH
9455 WEST PEST CONTROL
9455 HARRY MAN ROAD
LEANDER TX 78575

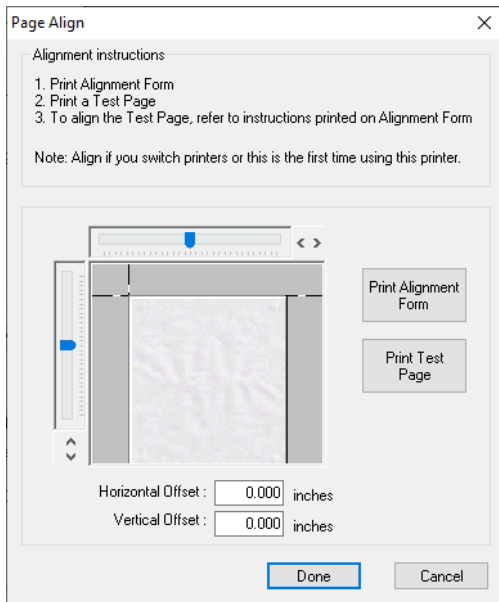
Account number (see instructions) FATCA filing requirements and TIN, not

- 1- This tells you the form you are looking at. This allows you to clarify what form you are reviewing and about to print.
- 2- Which page of the form you are looking at. If you have many recipients, you may have many pages.
- 3- This is the form information. Review this to make sure it is correct. If there is an error, you should exit out of the form viewer and correct it.
- 4- Print option – Depending on the type of form you are viewing and your filing options you will have the option to print Draft or Print Final. If you choose print final it will prompt you to load the appropriate type of paper for the form and record the form as having been printed.
- 5- Next Step – This allows you to move to the next form to review/print. After leaving a form you cannot go back without starting over.

NOTE: To register as having been printed all forms associated with a filing must be printed. If you print only the 1099 or 1096 Aatrix will not record the 1099 filing as having been completed and printed. If you go back to correct this filing it will not be available to correct. You will have to re-create it and print it.

Printing –

When you choose the print button you will have several options depending on the type of form. If this is the first time printing a form that requires perforated paper (Recipient Copies) or the Red Pre-printed stock (Federal Copies) it is a good idea to click the Page Align Button. This allows you to print alignment forms to make sure everything lines up and make any adjustments to alignment if needed. This can prevent you from wasting purchased forms.



Saving Electronic Copies

It is possible to print forms more than once before moving to the next form. To do so simply click the Print Button again. It is **HIGHLY** recommended that you print a copy of your forms to an electronic format (PDF or XPS) and save it for your records.

To do this Click the Print Button. Down in the “Printer” Section choose either a PDF or XPS document writer, then click ok. Aatrix will prompt you for the location and name of the file you wish to save. This can be very useful if someone asks for a extra copy of the form.

After you are done printing all copies of a form click NEXT and move on to the next form.

Efiling

Even if you have selected the Complete Filing option or only an eFiling option you will still have the opportunity to print your forms as record copies. After you have gone through that process you will be prompted to log into the Aatrix Efile server to transmit your information.

To use the eFiling you need to have set up an account with Aatrix and have faxed in an authorization letter. Your account number is usually your organizations Tax ID number. If you have forgotten your password, you can click on the link on the screen. If you do not know your account, password or have any questions about your Aatrix account (or questions on your filing status) contact Aatrix Support at:

701-746-6814 or email at helpme@aatrix.com

Abila Support cannot answer any questions about your Aatrix account or filings.

Once you have submitted your efilings you can log into the Aatrix efile website and check your filing status.

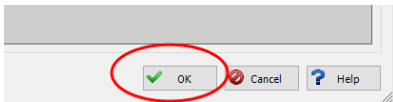
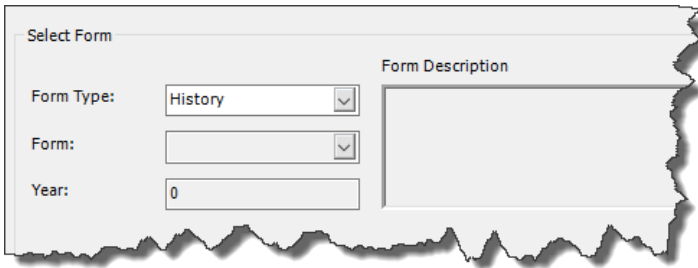
<https://efile.aatrix.com/>

You should receive messages there as well as email notifications about your filing status. Each filing will have a unique number called the AFID associated with it. If you are making inquiries to Aatrix about a filing having the AFID ready will speed things up.

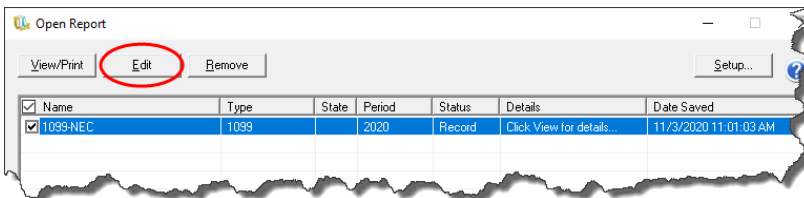
NOTE: For 1099's that have been submitted with the complete filing option or efiled it is normal for Aatrix to hold that filing until the last week of January. This is to allow you make any corrections without incurring additional filing fees.

SECTION 6 – CORRECTIONS AND REPRINTS

After you have completed an Aatrix filing you may need to go back in and make corrections or reprints. The best way to do this is to go back into Activities>Accounts Payable>Produce Vendor 1099's. Choose the History Option and then look to the bottom of the page and click OK.



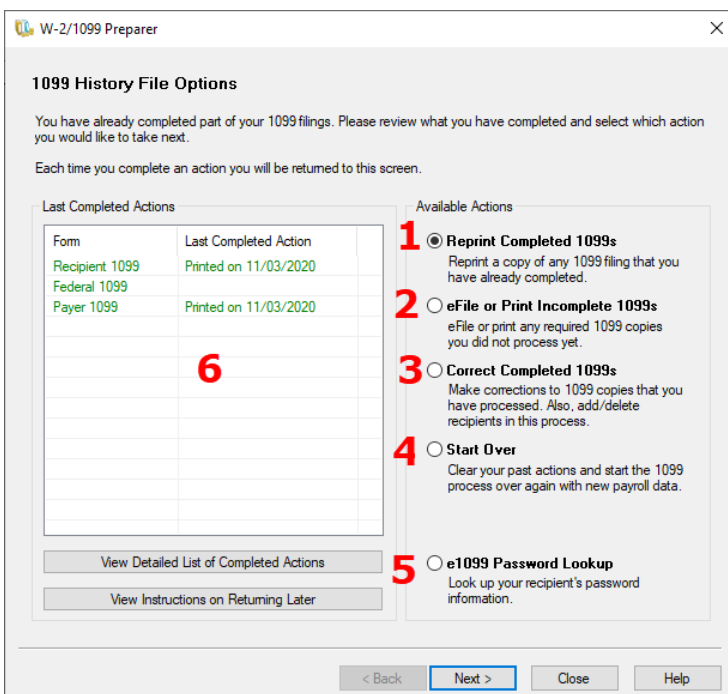
This will bring up the History Option Window. This will show all saved filings. If you do not see your filing here it is because it was not recorded as saved and it will have to be redone.



Name	Type	State	Period	Status	Details	Date Saved
1099-NEC	1099		2020	Record	Click View for details...	11/3/2020 11:01:03 AM

Select the filing you wish to use and click Edit. Clicking View/Print here only prints the list, not the filing.

This will bring up the History File Options. From these windows you can do several things.



1099 History File Options

You have already completed part of your 1099 filings. Please review what you have completed and select which action you would like to take next.

Each time you complete an action you will be returned to this screen.

Form	Last Completed Action
Recipient 1099	Printed on 11/03/2020
Federal 1099	
Payer 1099	Printed on 11/03/2020

Available Actions

- ☒ **Reprint Completed 1099s**
Reprint a copy of any 1099 filing that you have already completed.
- ☐ **eFile or Print Incomplete 1099s**
eFile or print any required 1099 copies you did not process yet.
- ☐ **Correct Completed 1099s**
Make corrections to 1099 copies that you have processed. Also, add/delete recipients in this process.
- ☐ **Start Over**
Clear your past actions and start the 1099 process over again with new payroll data.
- ☐ **e1099 Password Lookup**
Look up your recipient's password information.

6

View Detailed List of Completed Actions
View Instructions on Returning Later

< Back Next > Close Help

1- Reprint Completed 1099's.

If you need to reprint anything from a 1099 Filing this is the option, you would choose. This applies if you want to print 1 record or the entire filing. You can only Reprint items from a completed filing. If you look to the window on the left, you can see what filings have been completed.

2- eFile or Print Complete 1099's.

You can use this option to process any filings that remain. For example, if you have printed the Recipient but not the Federal Copies you would chose this option to print the federal copies. If you have printed a filing but then decide you want to do an eFiling instead this is the option you would use.

3- Correct Completed 1099's.

If you need to change the value of a record, add, or remove a record or update your company information you would use this option. This option will take you to the Aatrix grid and allow you to make your corrections there. After you have made your corrections you will go to print and filing. The system will determine if the corrections will be marked as a replacement or corrected filing based on the filings that have already happened.

4- Start Over

If you want to discard the existing data and pull fresh information in from MIP use this option. If you have successfully transmitted your eFiling or indicate that you have already sent out your federal filing this option will not be available. You would need to use Correct Completed instead.

5- e1099 Password Lookup

This only applies if you have chosen the complete filing option. It allows you to look up access passwords for your recipients.

6- Last Completed Actions

This is a list of all the possible filings and their last status. If you have printed/filed a form but it does not show that on this list it means that Aatrix has not recorded that filing. You will not be able to edit or correct the filing, instead you would use the "eFile or Print Incomplete 1099's" to complete that filing. There is no other way to recover or add that filing.

Reprinting 1099-

Choose this option to reprint some or all of your filing. Depending on what type of filing it is you will have different options.

W-2/1099 Preparer

Reprint Options

Select which copies of previously completed 1099s that you want to reprint and, if you are reprinting Federal and/or State copies, select which type of copy you require.

Any grayed out items have not been printed or eFiled. Click the Back button to return to the history options screen and select eFile or Print Incomplete to access those reports.

☒ Reprint Completed 1099s

☐ All Recipients

☐ Federal Copies ☒ Original ☐ With a Records Copy Watermark

☐ State Copies ☒ Original ☐ With a Records Copy Watermark

☐ Payer Copies

☐ Reprint Selected Recipients

Note: To avoid duplicate processing, eFiled copies will print with a record copy watermark.

Click Next and Aatrix will load the form Viewer to Review and Print.

Report 1 of 2: Recipient 1099-NEC

1 4 pages

Click Print Final, then click Next Step.

Print Draft Print Final Prev Step Next Step

☐ CORRECTED (if checked)

1 Nonemployee compensation \$ 1321.40

4 Federal income tax withheld \$

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

NPS TRAINING ORGANIZATION

1000 PERRY ST NW BLVD

If you selected to Reprint Selected Recipients, there will be a Reprint Options screen that lets you filter or choose specific records.

W-2/1099 Preparer

Reprint Recipient Options

Select which recipient copies you want to reprint

☐ All Recipients

☒ Selected Recipients

☐ Recipient Instructions Only

Selected Recipients Tool

TIN: Search

First Name: Clear

Last Name: A*

Company Name:

Search Results ☐ Select All/None Sort by: TIN

TIN	Last Name	First Name	Company Name	Full Name
☐ 399-64-5545			Bob's Best Pest Control	Bob Smith
☐ 456-55-4655			Transportation Servi...	Robert Lee
☐ 65-4646464			Williams CPA	
☐ 74-9876543			ABC Office Supply	

< Back Next > Close Help

If you reprint Federal or State copies you will have the option to reprint and original or print a record copy with a watermark. If you have efiled it will automatically print the record copy with the watermark to prevent duplicate filing.

eFile or Print Incomplete 1099s-

Choose this option to either complete a filing that has not been completed or to efile a filing that has only been printed. Choosing this option will take you back to the 1099 Printing and Filing Options. Here you can choose the type of Filing that you wish to complete and go through the process.

W-2/1099 Preparer

1099 Printing and Filing Options

eFile Services allow you to pick Filing Dates. FREE Corrections before selected Filing Dates. [More info?](#)

☐ **Complete 1099 eFiling Service** **Next Business Day Mailing!**

The eFile Center will:

- Print and Mail Recipient Copies
- e1099 Only Recipient Copies
- File your Federal 1099s and 1096
- File all applicable State 1099s and Reconciliation Forms
- e1099s Available for all Recipients

# Recipients	Price/Recip.	Subtotal
4	\$2.04	\$ 0.00
0	\$0.99	\$ 0.00
	included	FREE
	included	FREE
	included	FREE
Total Cost	Minimum	\$ 0.00

☒ **Other Options** [eFilers receive Free Corrections before selected Filing Dates](#)

☐ Print my Recipient 1099 Copies

# Recipients	Price/Recip.	Subtotal
4	\$0.00	\$ 0.00
4	\$0.69	\$ 0.00

☒ Print Federal 1099s and 1096 (Official Copy)

☐ Print State 1099s and Reconciliation Forms

Total Cost **\$ 0.00**

Official Payer 1099s will display when Federal 1099s are selected

< Back Next > Cancel

This will take you to the form viewer and allow you to complete printing and filing. Once you are done it will take you back to the history window and show the updated status after it is complete.

Correct Completed 1099's-

Choose this option if you need to update, add, or remove a record or change anything in the company information. Depending on what you have completed you may be asked if you have distributed any copies yet.

Correction Options

Have you distributed any of the following copies?

Form
☐ Recipient 1099
☐ Federal 1099

You should answer the question based on what you have done. If you have mailed or distributed a filing check the box, if you have not then do not check it. If you have distributed the filing, then the system will treat the corrections as a Corrected form and will check the corrected box. If not then the system will treat it as a replacement form of the original.

If you have completed and submitted an efile the system will know that and may not give you the option.

Verify Recipient Taxpayer Identification Numbers (TIN)				Next Step				  	
Corrected (2)								\$35591.11	
Recipient TIN	TIN Flag	Recipient Company Name	Optional Name	Recipient Address	Recipient Address	Recipient City	Box 1		
Taxpayer ID Number	Check if FEIN	Company Name	Full Name	Address Line 1	Address Line 2	City	Nonemployee Compensation		
1 74-9876543	☒	ABC Office Supply		161 North Lamar	Suite 200	Austin	1500.00		
2 65-4646464	☒	Williams CPA		7100 Highway 360		Austin	26245.10		
3 399-64-5545	☐	Bobs Best Pest Control	Bob Druman	9452 Harry Man Ro		Leandri	5967.23		
4 456-55-4655	☐	Transportation Services Inc	Robert Lee	1200 South Congre		Austin	1858.78		

NOTE: DO NOT delete any records from this grid unless the vendor was included in error. Deleting records will cause a correction for that vendor to be issued. If a vendor was issued a 1099 by mistake then select the row and right click and choose delete row. This will not delete the row, but it will zero out amounts.

If you need to make a correction to your company information, then click on the Company Setup button.

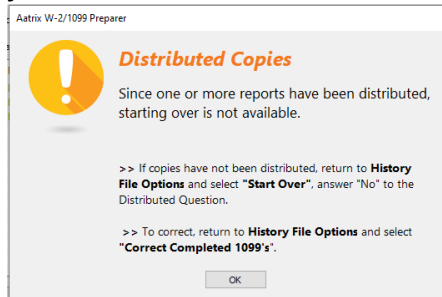


After you have made changes and corrections, the system will take you to the Forms Viewer where you can view and print your corrected forms. The system will choose which forms to print and file based on what you have previously efiled, printed or told it that you have disbursed. This option will also control if the printout is a replacement or if it is tagged as a correction.

NOTE: When you do a correction and then re-submit your efile it will REPLACE the existing efilings. All additional efilings replace, not add to or subject from the data that is submitted. Therefore, it is important to not delete records unless they are included in error.

Start Over-

If you have not disbursed any filings (efiled or mailed them out or given them to vendors) and you wish to pull the information in fresh from MIP then you can choose the start over option. If you choose this option, you will be asked if you have distributed any copies. If you have then you should use the correct completed option instead.



If you do start over it will go through the data collection process again. Anything that you have entered into the Aatrix grid will be lost.

NOTE: If you have submitted and eFiling Aatrix will know that and Start Over will be Disabled. You must use Correct Completed instead.

SECTION 7 – REQUIRED 1099 FORMS

1099 from Requirements

- The Federal copy of the 1099 forms (all) must be printed on a 3 part red pre-printed form with black ink.
- The Federal copy of the 1096 must be printed on a red pre-printed form with black ink.
- The Recipient Copy of the 1099 (all) should be printed on the blank 4-part perforated paper.
- The Payer Copy of the 1099 forms (all) be printed on plain copier paper, no forms needed.

Below is a list including the form numbers for MIP Checks and Forms.

To order call 1-844-857-2898 or log on to:

https://www.mipchecks.com/estore/TAX-FORMS/1099s-and-1096s/cat1820040_ctgy.c?networkId=Abila

Only these part numbers are compatible with MIP Fund Accounting

1099 NEC Forms

1099 Laser Federal Copy A (pre-printed) – Three vendors per page L99NECA (NEC)

For the Recipient Forms it uses the same Blank 4 Part Perforated Paper as the other Recipient 1099's

1099 Laser Blank 4-up (Vendor Copy B, C and State) – One vendor per page L99BLANK4 One Part

If you intend to mail the Recipient 1099's these are the compatible Envelopes.

Bundle 1099 Laser Package Set with Envelopes. Contains Blank 4 Part Perforated Paper and Envelopes

L99BK4DWS One Part

Other Federal 1099 forms you may need

L99A (MISC) One Part

L99IA (INT) One Part

L99DA (DIV) One Part

L99RA (R) One Part

1099 Forms have the following features

- For use with Laser or Inkjet printers
- One free 1096 Transmittal form with every 1099 order
- Compatible regular or self-seal envelopes available

Question

If I have forms left over from last year, can I use them?

Answer

The blank perforated stock does not change from year to year. Any unused blank stock from last year can be used this year. The pre-printed Federal Copy has the year marked on it and cannot be reused.

SECTION 8 – AUDITING 1099'S

It is a good idea to run a report to audit your 1099 amounts before submitting them. In MIP, the best way to do this is to set up and run a Cash Journal Report.

Go to Reports>Journals>**Cash Journal**> <1099 Detailed Vendor Total Report>

Change the dates to be the proper year.

Go to the Content Tab and Add the 1099 Adjustment Amount in the Selected Columns so you can view adjustments made in Maintain>Vendors>1099 Information>1099 Adjustments Tab.

Remove the Adjustments columns in the report body.

The report setup should look like this-

Selected Columns	Sort	Show Total	Width	Show
Name	Asc	☒	1.00	
ID	Asc	☐	0.70	
Vendor Tax ID Number	None	☐	0.70	
1099 Type-Box	None	☒	0.70	
Effective Date	None	☐	0.70	
Document Number	Asc	☐	0.70	
Disbursements	None	☐	0.90	
1099 Adjustment Amount	None	☐	1.00	

The output will look something like this

NPS Training Organization							
Cash Journal							
From 1/1/2020 Through 12/31/2020							
Name	ID	Tax ID	1099 Box	Effect Date	Doc Num	Disbursements	1099 Adjustments
Mulberry & Thom...	Mulberry	399-64-5545	NEC-01			0.00	4,523.00
Mulberry & Thom...		399-64-5545	NEC-01	11/3/2020	5544	983.00	0.00
			Total NEC-01			983.00	4,523.00
Mulberry & Thom...		399-64-5545	N/A	9/9/2020	reimburse	420.00	0.00
			Total N/A			420.00	0.00

Notice that this report shows activity that is coded to the 1099-NEC (1). It shows any 1099 Adjustments you have made under Vendor Information (2). It shows any amounts coded that did not have a 1099 Box associated with them (3). With this information you can find out where your 1099 Totals are coming from and correct them if needed.

Question

I have a 1099 vendor and I have run a cash journal and the total for the vendor is ok but the amounts in the 1099 boxes are not. Why is that?

Answer

The most common cause of incorrect amount in a 1099 box number is because the vendor was not properly set up or the information not properly entered at the time of posting.

In order for a transaction to affect the value in a 1099 box it must meet the following three conditions:

- 1) It must be coded to a CASH type GL account
- 2) It must be coded to a vendor that at the time of entry was flagged as a 1099 vendor.
- 3) In the data entry screen it must have a 1099 type associated with it and it must be coded to a 1099 box.

Many times a vendor will be initially set up and not all of the 1099 information will be available. Checks will be cut to this vendor and then later the 1099 information will be entered. The checks cut before the data was complete will not show in the 1099 box amounts, the checks cut afterward will.

Corrections

The best way to fix any incorrect amount is to go to Maintain>Vendors>1099 Information tab and there is a 1099 Adjustments form at the bottom of the page. You can do an adjustment to add or subtract amounts from the 1099 Total. You would want to adjust by the amount of the difference between what the total currently is and the desired total. For example, if the total is \$1000 and it should be \$1300 you would do a +\$300 adjustment.

1099 Adjustments				
	Year	Type	Box	Amount
▶	2020	NEC	NEC-01	300.00
*				

If you have an adjustment that is done improperly you can just select the row and delete it.