# PAYROLL FREE.COM 1099 Form Guide

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#### Introduction

The Payroll4Free.com software can be used to generate 1099-MISC forms that are prefilled by the system with relevant data for the appropriate reporting period. You will also be able to add amounts for boxes 4, 9, 15a, and 15b manually (see **Employee Supplemental Info Setup** beginning on page 14). If you need to generate 1099 forms other than 1099-MISC, you will need to use another means to do that.

If you have any questions about any forms that you need to file, please contact your accountant or tax advisor.

\*1099 forms are not considered to be payroll tax forms and will not be completed or submitted on your behalf regardless if you are a tax client or not. You are responsible for printing your own 1099 forms. If you use the Payroll4Free.com software to print your 1099-MISC forms, you must verify that the information contained on the forms is accurate.\*

Payroll4Free.com does not provide legal or tax advice and will not be held accountable for any tax related fines and/or penalties that you or your company may be subject to as a result of erroneous form filing or lack of filing, incorrect tax payments, and/or late deposits that were your responsibility and that may have been completed based on any advice or assistance from any Payroll4Free.com employee.

#### Verifying 1099 Recipient Settings

In order to be able to generate a 1099 form for an individual using the Payroll4Free.com software, you must make sure that their information is set up correctly in the Employee setup section.

1. To do that you will need to Select **Employee Setup**, then **Employees** from the **Company File Maintenance** section of the main menu.

Reports	
Earnings Reports	Tax Reports and Forms Other Reports
Company File Maint	enance
General Setup	Employee Setup
	Employees
	Employee Payroll Specifics
	Employee Withholding Info
	Employee Types

2. Once you are on the main **Employee** screen you will need to find and highlight each person who should be marked as a 1099 recipient. Next, you will need to click on the Edit button to the right of the screen.

Employee ID	Title	Employee Name	Email	Gender	SSN	Phone 1	Employee Type	Employment	Date Last Hired	Date Terminated	Primary Dep 🔺
		Contractor, General		M	321-65-4987		Default	F - Full Time	01/01/2014		100
		Franklin, Aretha		F	333-33-3333	783-366-3765	Default	F - Full Time	01/01/2013		100
	1	Freed, Alan		м	111-11-1111	216-555-7625	Default	F - Full Time	01/01/2013		100
		Holly, Buddy		м	444-44-4444	647-344-9783	Default	F - Full Time	01/01/2013		300
		Lee, Laser		М	666-66-6666		Default	F - Full Time	06/01/2014		300
		Lewis, Jerry L		м	555-55-5555	843-545-5370	Default	F - Full Time	01/01/2013		300
	1	Presley, Elvis A		м	222-22-2222	216-555-5464	Default	F - Full Time	01/01/2013		200

3. Once you are in Edit mode, please verify that this individual is set up to be a form 1099 recipient. This is identified by marking field F1099 with Yes. There are other 1099 form related fields available to be completed once this field is active (F1099 Account and 2<sup>nd</sup> TIN not). If they apply to your situation, please complete them as well. Once you are done, please click the Accept button on the right of the screen.

Payroll / Employe	ees 🛛 🛱 Cleveland Rocks, Inc.			
🗖 Master 📮 Det	tail   🔁 Custom Fields   🔁 Departments   🚇 Al	tachments		
Employee ID Title First Name Last Name Middle Name Gender SSN Date of Birth Contractor Address 1 Address 2 City	7 General Contractor M Q 321-65-4987 Q Yes ONO 12 Main Street Cleveland	Payment Settings Employment Date Hired Date Last Hired Employee Type Current Type Date Date Terminated F1099 F1099 Account 2nd TIN not Current Use	<ul> <li>Full Time</li> <li>Full Time</li></ul>	Part Time
State Phone 1 Phone 2 Phone 3 Fax E-mail User ID	OH     Q     ZIP     44111-			Save and go to Withholding Info

#### Verifying 1099 Payment Amounts

Before you try to print 1099 forms using the Payroll4Free.com software, please check the payment amounts that the system shows for each of your 1099 recipients.

1. To do so, you will need to go to the **Reports** section of the main menu, click on **Tax Reports** and Forms, and then select **1099 Vendor Report** from the list.

Reports	
Earnings Reports	Tax Reports and Forms Other Reports
Company File Mainto	Payroll Tax Report
	Payroll Tax Quarterly Report
4.0.0	Payroll Tax Annual Report
General Setup	Payroll Tax Summary Report
10	Payroll Tax Summary Quarterly Report
<u> </u>	Payroll Tax Summary Annual Report
	Print Form 1096
	Print Form 1099
	1099 Vendor Report
	Tax Forms

On the report options screen you will need to select the year for which you would like to verify data in the Period section (From Date of 20xx/01, To Date of 20xx/12). Then, in the 1099 Type section you should select Yes. Once you have those options selected, click Generate on the top right.

Uss vendor Report	🖀 Facility
Period From Date 2014/01 Q To Date 2014/12 Q	<u>G</u> enerat
Vendor Type Order by Order by Order Dreder Dreder Dreder Dreder Dreder Dreder Dreder Name	-
Employees	
Employees  Include All employees	
Employees Include All employees 🔹	
Employees Include All employees	

I

**3.** The resulting report will show you all individuals set up as 1099 recipients who have had any 1099 payments for the selected period, with the dates and amounts of each of these payments, as well as the 1099 Box where these payments will be reflected.

		All vendors	Cleveland Rocks, Inc. 1099 Vendor Report For Year 2014 ; All employees; 1099 = Yes; Order	by Vendor ID		
Vondor ID	Vendor	1099 Box	Box Desc.	Date	Trans No	Trans Amount Limit Met
venuor iD						
3	Franklin, Aretha	Box 7	Nonemployee Compensation	12/31/2014	1067	1,500.00
3	Franklin, Aretha	Box 7	Nonemployee Compensation	12/31/2014	1067	1,500.00 1,500.00 Yes
3 7	Franklin, Aretha Contractor, General	Box 7 Box 7	Nonemployee Compensation	12/31/2014 11/19/2014	1067 1068	1,500.00 1,500.00 1,500.00

You will notice on the right side of the report a column labeled **Limit Met**. This column will have the word **Yes** for every individual whose annual payments exceed the minimum required amount for that box, and **No** for those who have not exceeded it for the year. The Payroll4Free.com software will generate 1099 forms ONLY for individuals with **Yes** marked in this column. **The amounts that you see on this report are the same amounts that the system will include on the 1099 form for each individual listed.** 

If the limit for the year has not been met, but you wish to issue a 1099 form to an individual anyway, you will need to make a change in the 1099 Box Limits setup item (please see **Checking 1099 Box Limits** on the next page for more information).

If you believe that this report is not showing accurate information, please contact Payroll4Free.com customer support for help. Setup issues may exist that prevent the appropriate data from appearing on this report. A representative will be able to verify that and make any necessary corrections.

#### **Checking 1099 Box Limits**

The 1099 minimum payment amounts required to generate a 1099-MISC that are set by the IRS are defaulted in the Payroll4Free.com software. Those amounts can be accessed by clicking **Tax Forms Setup** in the **Company File Maintenance** section of the main menu and selecting **1099 Box Limits**.



Once you have the list of limits displayed, you can review them and make changes if you so desire. If you would like to lower a limit in order to show amounts on the 1099 form that would normally not be required to be reported, you may do so. Simply click on the dollar amount in the **Lower Limit** column of the line that you wish to adjust. You will be able to overtype the amount there. Once you have made a change, please make sure that you click on another line on the list to save your change (the **Post** button on the right side of the screen will become inactive).

1099 Box	Box Description	Lower Limit	A 1	CL
1099-MISC, Box 1	Rents	\$600.00		Liose
1099-MISC, Box 2	Royalties	\$10.00		
1099-MISC, Box 3	Other income	\$600.00		Edit
1099-MISC, Box 5	Fishing boat proceeds	\$0.00	31	- I
1099-MISC, Box 6	Medical and health care payments	\$600.00	1	Insert
1099-MISC, Box 7	Nonemployee compensation	\$600.00	1	Delete
1099-MISC, Box 8	Substitute payments in lieu of dividents orInt	\$10.00	<u></u>	Delete
1099-MISC, Box 9	Check box (Payer made direct sales)	\$5,000.00		Post
1099-MISC, Box 10	Crop insurance proceeds	\$600.00		
1099-MISC, Box 13	Excess golden parachute payments	\$0.00		Cancel
1099-MISC, Box 14	Gross proceeds paid to an attorney	\$0.00		
				Befresh

#### Setting Up 1099/1096 Form Layouts

Since all 1099 and 1096 summary forms must be printed on official red copy for IRS purposes, it is necessary to acquire those forms from either IRS or an alternate vendor. Many office supply stores, including Staples and Office Max, as well as various online stores, carry the forms. Since the layout of these forms varies depending on where they come from, the Payroll4Free.com software gives you the ability to make adjustments to the form layout to match your version of the form.

Those adjustments can be made by clicking **Tax Forms Setup** in the **Company File Maintenance** section of the main menu and selecting **Tax Form Layouts**.



The currently set up layouts will be displayed. Payroll4Free.com provides each client with a general layout of the form that most closely matched the IRS version.

1. Select one of the forms and click the **Edit** button on the right to view the currently selected layout and make adjustments.

Payro	oll / Tax Form Layouts	🛱 Cleveland Ro	:ks, Inc.	×
🗖 Ma	ister 🛛 🔁 Detail 📄			
Year	Tax Form	Page	Description	New
2014	1096	1		Edit
2014	1099-MISC	1		Clone
				Delete
				Close

2. In edit mode you will see a generic background image of the selected form and the system fields with a dashed blue outline. You will need to have a scanned in .jpg image of the form that you will be using available. Click on the **Select Background** button at the top of the form and select your form's .jpg image file. Your version of the form should now be displayed on the screen in the background.

1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -	in Layouts 🛛 🚇		ACKS, Inc.								
Master 🔁 Det	tail										
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Form	1096		Annua	Summary and T	ransmittal of		OMB No. 1545-01	08			
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Interna	al Revenue Service							_			
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E	FILER S name [[FACILITY_N	AME ]									
F	FILER S name [FACILITY N Street address (includ [ADDRESS1]	AME ]	umber)								
9 3 1	FILER S name [FACILITY N Street address (includ [ADDRESS1] [ADDRESS2]	AME ]	umber)							Ш	
S	FILER S name [FACILITY N Street address (incluc [ADDRESS1] [ADDRESS2] City or town, state or [[CITY]	AME ] ing room or suite nu province, country, a	umber) Ind ZIP or foreig [ST2]	n postal code (ZIP)	1					ш	
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S Name [P] Email	FLER Sname [FACILITY_N Street address (includ [ADDRESS1] [ADDRESS1] [ADDRESS2] City or town, state or [[CITY] e of person to contage REPARER] [ address	AME ] ing room or suite n province, county, a	umber) Ind ZIP or foreign	In postal code [ZIP] Telephone number [[PHONE1] Fax number		r Official Us	se Only	1		ш	
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Name ([P] Email ([F] 1 Emil	[FACILITY N Street address (ncluc [ADDRESS1] [ADDRESS1] [ADDRESS2] [CITY] address [CITY] [address [MAIL] oxyer loentflattor r. EDBRAL EIN]	AME ] ing room or suite nu province, country, a t	umber) and ZIP or foreign ESTX: crity number	n postal code [ZIP] Telephone number [PHONE1] Fax number [OFFICE_PAX] 3 Total number of forms 4 F [VENDOR_COUL \$	deral income tax withiled	F Official Us	se Only			ш	
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- **3.** Next you will need to place your cursor on each system field (one with a dashed blue outline) and drag it to the appropriate place where it should print on your form. Each field shows a description in brackets, so you should have no problem identifying it. You can also make each field longer or shorter by setting your cursor on the edge of the item and dragging it left or right (your cursor will show as a double-sided arrow to let you know that dragging will adjust the field size, versus adjusting position on the screen).
- **4.** Once all of your fields line up correctly in the appropriate boxes on the image of your form, click **Accept** on the right.
- 5. Repeat Steps 1.-4. for the other form.

#### Adding New Tax Form Layouts

In each subsequent year that you use the Payroll4Free.com software and need to print 1099 forms, you will need to add a new layout of each form for the new year.

1. Click Tax Forms Setup in the Company File Maintenance section of the main menu and select Tax Form Layouts.

Reports			
Earnings Reports	Tax Reports and Forms	Other Reports	
Company File Main	tenance		
General Setup	Employee Setup	Tax Forms Setup	
		Tax Form Layouts 1099 Employee Sup 1099 Box Limits	pplemental Info
		1000 DOX EITING	

**2.** The currently set up layouts will be displayed. Select one of the forms and click the **Edit** button on the right to view the currently selected layout.

Payr	oll / Tax Form Layouts	🛱 Cleveland Ro	cs, Inc.	×
🗖 Ma	ister 🛛 🔁 Detail 📔			
Year	Tax Form	Page	Description	New
2014	1096	1		Edit
2014	1099-MISC	1		 Clone
				Delete
				Close

**3.** In edit mode you will see the current form layout. Click **Export** at the top of the screen. You will be asked to save the layout. Please keep in mind the name and location of the saved file and click **Cancel** on the right to return to the list of layouts.

Tax Form	1096							Q												
Year	2014		F	Page	1															
Description																	•			
投 <u>N</u> ew Frame	<b>₽</b> <u>E</u> dit	Frame	x	Delete F	rame	t≣ E	eage Pro	operties.	250			Select <u>B</u>	ackgroun	1 CI	ear Backgr	ound	Export	🤌 Import		_
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Intern	al Revenue S	ervice															_			
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32	50	61	76	84	83	80	73	35	73	91	86	71	32 10	93	MISC	96	S.			
1096 PAT	9 1099-Q R 31	1099-R 98	1099-S 75	1099 SA 94	3921 25	3922 26	5496 20	5498 ES 72	A 5496 SA 37											
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97																				

- 4. Repeat Steps 2. and 3. for each form that you need to set up.
- **5.** Click New on the right of the screen.

Payre	oll / Tax Form Layouts 📗 🛊	🛱 Cleveland Rocks, I	nc.		×
🗖 Ma	aster 🛛 🔁 Detail 📔				
Year	Tax Form	Page Desc	ription	*	New
2014	1096	1			Edit
2014	1099-MISC	1			Clone
					Delete
					Close

# PAYROLL PAYROLL

6. You will see a blank layout page. Click the magnifying glass *Q* icon next to the **Tax Form** field to get a form selection box. In the box select the form you would like to set up and click **Select**.

Payroll / Tax Form	Layouts   🏥	Cleveland Rocks,	Inc.				
🗖 Master 📮 Detai	r ]						
Tax Form Year Description		Page [	<b>م</b> ۱				
New Frame	Edit Frame	X Delete Frame	Eage Properties         ax Form         Hard-Coded Lookup         1096         1099-MISC	Clear	Clear Background	Export	S Import

- 7. Next, click in the Year field box and type in the year to which the form applies.
- Then, click the Import button on the top of the form, and select the file that you exported in Step 3. that applies to the form you are setting up.

Payroll / Tax For	m Layouts 🛛 🏥	Cleveland Rocks, I	16.			
Tax Form Year Description	1096 2015	Page 1	٩			
New Frame	Edit Frame	🗶 Delete Frame	Î.age Properties	Select <u>B</u> ackground	Clear Background	🖶 Export 🛞 Import.

- 9. Once you see your imported form displayed, click Accept on the right.
- 10. Repeat Steps 5.-9. for all other forms you need to add.

#### **Employee Supplemental Info Setup**

 This setup will enable you to manually add amounts to boxes 4, 9, 15a, and 15b. To access this setup click Tax Forms Setup in the Company File Maintenance section of the main menu and select 1099 Employee Supplemental Info.

Reports			
Earnings Reports	Tax Reports and Forms	Other Reports	
Company File Main	tenance		
General Setup	Employee Setup	Tax Forms Setup	
		Tax Form Layouts	
		1099 Employee Su	pplemental Info
		1099 Box Limits	

2. On the detail screen you will then click **New Year** at the top and select the year for which you need to add this info in the box, then click **OK**.

Payroll / 1099 Er	mployee Supplemental Info	🛱 Cleveland Roc	ks, Inc.					
Select Year:	•				<u>N</u> ew Year	Delete Year	<u>R</u> eload	🐴 Facility
Employee ID	Employee Name	Box 4*	Box 9	Box 15a	Box 15b	Foreign Tax Paid	Foreign Country	
	6	New Data Year		x				
		Year 2014	T.					
		ОК	Cancel					
		-	-					
*Fields Description Box 4 - Federal	n: Ilncome Tax Withheld							
Box 9 - Payer N Box 15a - Secti	Made Direct Sales of \$5,000 or Mo on 409A Deferrals	re						
Box 15b - Section	on 409A Income							

**3.** You will now see all 1099 recipients who received payments in the selected year. You can manually add amounts to the boxes displayed by typing them into each box for each recipient. This data will then display on that recipients 1099-MISC form for that year. You will need to repeat this process for each year to which it applies.

Payroll / 1099 Employee Supplemental Info 🔰 🛱 Cleveland Rocks, Inc.	×
	1 1
Select Year: 2014   New Year	<u>D</u> elete Year <u>R</u> eload <u></u> ▲ Facility
Employee ID Employee Name Box 4* Box 9 Box 15a Box 15b Fore	eign Tax Paid Foreign Country
Contractor, General     F	
	3-2
*Fields Description:	
Box 4 - Federal Income Tax Wittheid Box 9 - Paver Made Direct Sales of \$5 000 or More	
Box 15a - Section 4094 Deferrals	
Box 15b - Section 409A Income	

#### Printing 1099 Forms

 From the Payroll Reports menu select the Tax Reports and Forms icon, then click Print Form 1099.

Reports	
Earnings Reports	Tax Reports and Forms Other Reports
Company File Maint	Payroll Tax Report
	Payroll Tax Quarterly Report
4.0.5	Payroll Tax Annual Report
General Setup	Payroll Tax Summary Report
10	Payroll Tax Summary Quarterly Report
<b>L</b>	Payroll Tax Summary Annual Report
	Print Form 1096
	Print Form 1099
	1099 Vendor Report
	Tax Forms

2. On the form options screen select the year for which you would like to print the 1099-MISC form in the For Year field, then click **Generate** on the right.

Payroll / F	Print Form 1099   🛱 Cleveland Ro	ocks, Inc.
Form 10 For Year — For Year	2014	▲ Facility ✓ <u>Generate</u>
Vendors -	No vendors 🔹	
Employees	All employees 🔹	
-		

Your 1099-MISC forms will display on the screen. There will be no background image of the form there, only the fields that need to print on your 1099-MISC form. Click Print or Print All at the top of the screen (Print will only print the current page; Print All will print all pages). Make sure that your official red copies of 1099-MISC forms are in your printer.

Payroll / Pr	rint Fo	orm 1	1099	l di	Cle	vela	nd Ro	cks, 1	Inc.													
Zoom 100%	•	<b>I</b> 4	<b>(</b> 1		•	<b>FI</b>	1	<b>A</b>	Pr	rint	🚺 Pri	nt All		A Se	etup	🕼 Expe	ort	👉 Bacl	to Opti	ons		
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If you feel that the data on the form(s) is not correct, please call Customer Care and they will be able to assist you.

If your form data does not line up correctly on your official form when printed, please review section **Setting Up 1099/1096 Form Layouts** starting on page 9 to make adjustments. You may want to make some copies of your official form to print a few test pages until you are satisfied with the layout.

**4.** Once you have printed the red Copy A of the form, you should also print the data onto remaining copies 1, B, 2, and/or C.

## PAYROLL PAYROLL

#### Printing 1096 Form

1. From the Payroll **Reports** menu select the **Tax Reports and Forms** icon, then click **Print** Form 1096.

Reports	
Earnings Reports	Tax Reports and Forms Other Reports
Company File Mainto	Payroll Tax Report
	Payroll Tax Quarterly Report
6 A.D.	Payroll Tax Annual Report
General Setup	Payroll Tax Summary Report
10	Payroll Tax Summary Quarterly Report
<u> </u>	Payroll Tax Summary Annual Report
	Print Form 1096
	Print Form 1099
	1099 Vendor Report
	Tax Forms

 On the form options screen select the year for which you would like to print the 1096 form in the For Year field and enter the name of the preparer in the Name field. Make sure that All Employees is selected in the Include field of the Employees section. Then, click Generate on the right.

Payroll / P	rint Form 1096	🛱 Clevelan	d Rocks, Inc.	
Form 10	96			🖀 Facility
For Year		Name of Pre	eparer	Generate
For Year	2014 🚔	Name	Preparer	
Vendors	No vendors	•]		
Employees				
Employees	(			

**3.** Your 1096 form will display on the screen. There will be no background image of the form there, only the fields that need to print on your 1096 form. Click **Print** at the top of the screen. Make sure that your official red copy of form 1096 is in your printer.

Payroll / Print Form 1096 🛛 🛱 Cleveland Rocks, Inc.			
Zoom 100% ▼  4 4 1	Print 🗍 Print All	i Setup 🔂 Export 🛛 🗇	Back to Options
Cleveland Rocks, Inc.			
1 Rock Center			
Cleveland	OH 44115-		
Preparer	(216) 555-1234		
34-1234567	1.		1,500.00
			×

The data that prints on this form will be based on 1099 data.

If your form data does not line up correctly on your official form when printed, please review section **Setting Up 1099/1096 Form Layouts** starting on page 9 to make adjustments. You may want to make some copies of your official form to print a few test pages until you are satisfied with the layout.