

SOVOS 1099^{PRO}

Paperless Delivery Solutions—Getting Started

Prepare your Data

Online Access Standard and E-Delivery uploads require valid recipient email addresses. 1099 Pro offers sample import files to help customers successfully import their data. An **RCP EMAIL** import field is provided to ensure that recipient email addresses are correctly mapped and imported into our software. See <https://wiki.1099pro.com/display/PDWA/Import+Field+Definitions+and+Data+Types>.

	A	B	C	F	H	I	J	M	P
1	Rcp TIN	Last Name/Company	First Name	Address Deliv/Street	City	State	Zip	Rcp Email	Box 1 Amount
9	555-22-1234	Tuna	Charlie	1000 Ocean St	Santa Monica	CA	90402	charlie.tuna@ocean.com	1464

Image 1—Include recipient email addresses in the RCP EMAIL field of your import file.

Submit Your Upload

It's important to create and submit the appropriate type of upload to the Service Bureau. Both Online Access Standard and E-Delivery uploads must contain a valid email address for each recipient. A valid email address matches the one used by the recipient to register on VIEWMYFORMS. If there is an email mismatch, the recipient cannot access their forms online. Once the Service Bureau approves your upload file for processing, the tax form data (including recipient email addresses) cannot be edited. The only recourse is to submit a new upload file, for a fee.

E-Delivery Uploads

Select "Electronic Delivery" only if your recipients have registered on VIEWMYFORMS and your upload includes recipient email addresses. Recipients who have not provided consent to electronic delivery, or who registered with an email address different than the one provided in your upload file, automatically receive a paper tax form in the mail (at the standard Print/Mail rate).

Select a TIN Masking Option

TIN masking (called TTIN - Truncated TIN by the IRS) helps to protect sensitive personal information on Recipient copies of tax forms by replacing the first 5 digits of the Recipient TIN with an "X".

Both SSN and EIN can be masked, for example:
XXX-XX-1234 for an SSN
XX-XXX1234 for an EIN

Select the Masking Option to Use

Use the default setting for each Filer

Mask all Recipient SSN and EIN

Do not mask any SSN and EIN

Image 2b—Verify TIN masking options.

Create Upload File Wizard

Create a Service Bureau Print/Mail Upload File

These options will help you create a file for printing and mailing your forms via the Service Bureau

Step	Options
1: Select Filers Specify which Filers should be processed	<input checked="" type="radio"/> All of my Filers <input type="radio"/> Select (Tag) Filers <input type="radio"/> Current: PCODE1
2: Form Types Select which tax forms will be included	<input type="radio"/> All Form Types <input type="radio"/> Select (Tag) Form Types <input checked="" type="radio"/> Current: 1099-MISC <input checked="" type="checkbox"/> Upload/Print Original forms <input type="checkbox"/> Upload/Print Corrections
3: Upload Action Select what the SB will do with the forms	<input type="radio"/> Print and Mail the forms <input type="radio"/> P&M with Online Access <input checked="" type="radio"/> Electronic delivery <input type="radio"/> Online Access Only <input checked="" type="checkbox"/> I request Immediate Filing with the IRS <input checked="" type="checkbox"/> Use CFS: For ALL Filers
4: Thresholds Filter tax forms based on dollar amounts	<input type="checkbox"/> Do not include forms with no dollar amounts
5: Contact Information Who should be contacted if there are questions?	<input checked="" type="button" value="Update Contact"/> Full Name: John Doe Phone: 888-776-1099 Email: laurar@1099pro.com
6: Printer For Totals & Instructions	<input type="button" value="Select a different Printer"/> Adobe PDF Documents (*.pdf) (winspool)

*** Extra Options**

TIN Masking: Default per Filer Extra Print Options Force Corrected "X":
Msg:

Error Scan: Not scanned Folder: C:\1099 Pro\Pro99T20\Uploads

Image 2a—Create an E-Delivery upload file.

Online Access Uploads

- Select “P&M with Online Access” for recipients to receive a paper form in the mail AND online tax form access via VIEWMYFORMS (or your website, if using Online Access API), OR
- Select “Online Access Only” for recipients to exclusively receive online tax form access via VIEWMYFORMS (or your website, if using Online Access API).

Advanced Options
Advanced Printing/Mailing/E-Delivery Options
 These options only apply to Printing and Mailing/E-Delivery process

Special Options for THIS run only

These special options apply to the current Printing and Mailing/E-Delivery process ONLY! If you need to use them for more than one upload process, you must set them again each time.

Optional message to be printed on all forms in this process
 Enter personalized message up to 100 characters/spaces or select a message from the drop-down list.

SERVICE BUREAU CUSTOMERS CAN INSERT A COMP

Override program controlled values for this process

Force an 'X' in the Corrected box on all forms

IMPORTANT: Checking this box does NOT create a valid correction. Please click on '? Help' for details.

Clear all options OK Cancel

Image 3b—Add an optional message.

Create Upload File Wizard
Create a Service Bureau Print/Mail Upload File
 These options will help you create a file for printing and mailing your forms via the Service Bureau

Step 1: Select Filers
 Specify which Filers should be processed
 All of my Filers Select (Tag) Filers
 Current: PCODE1

Step 2: Form Types
 Select which tax forms will be included
 All Form Types Select (Tag) Form Types Upload/Print Original forms
 Upload/Print Corrections

Step 3: Upload Action
 Select what the SB will do with the forms
 Print and Mail the forms P&M with Online Access I request Immediate Filing with the IRS
 Electronic delivery Online Access Only Use CFS: For ALL Filers

Step 4: Thresholds
 Filter tax forms based on dollar amounts
 Do not include forms with no dollar amounts

Step 5: Contact Information
 Who should be contacted if there are questions? Full Name: John Doe
 Phone: 888-776-1099 Email: laurar@1099pro.com

Step 6: Printer
 Select a different Printer Adobe PDF Documents*.pdf (winspool)

*** Extra Options**

TIN Masking: Default per File Extra Print Options Force Corrected 'X':
 Error Scan: Not scanned Folder: C:\1099 Pro\Pro99T20\Uploads Msg:

Online Access was previously known as Web Presentation

Image 3a—Create an E-Presentation upload file.

SERVICE BUREAU TIP # 1

Did you know? Service Bureau customers can insert a 100-character, standardized message on recipient forms. Use the Extra Print Options button (Images 3a & 3b) to enter your message, or select a pre-built one. This complimentary feature is available for both paper and online recipient tax forms.

*** SERVICE BUREAU CUSTOMERS CAN INSERT A COMPLIMENTARY, 100-CHARACTER MESSAGE PER UPLOAD ***

CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, county, ZIP or foreign postal code, and telephone no. 1099 PRO DUMMY FILER FILER NAME 2 ADDRESS LINE 1 ADDRESS LINE 2 Calabasas, CA 91302 (888) 776-1099		OMB No. 1545-0116 2020 Form 1099-NEC	
PAYER'S TIN 19-9999999	RECIPIENT'S TIN XXX-XX-1234	1 Nonemployee compensation \$ 500000.00	Nonemployee Compensation
RECIPIENT'S name Charlie Tuna Apt 2506 1000 Ocean St Greenfield, MN 55572		4 Federal income tax withheld \$ 10000.00	Copy B For Recipient This is important tax information and is being furnished to the IRS. 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.
Account number (see instructions)	FATCA filing requirement <input type="checkbox"/>	Optional Text Line 1 Field Optional Text Line 2 Field	5 State tax withheld \$
			6 State/Payer's state no. CA 99999999
			7 State income \$ 2500.00

Form 1099-NEC (keep for your records) www.irs.gov/Form1099NEC Department of the Treasury - Internal Revenue Service

Image 4—Sample 1099-NEC illustrates optional message field placement and Optional Text Lines 1/2.

VIEWMYFORMS—Corporate Account

After submitting your upload file, expect a *Service Bureau Upload Received* email with your unique Authorization Code and Activation Key. Use this information to create your VIEWMYFORMS corporate account.

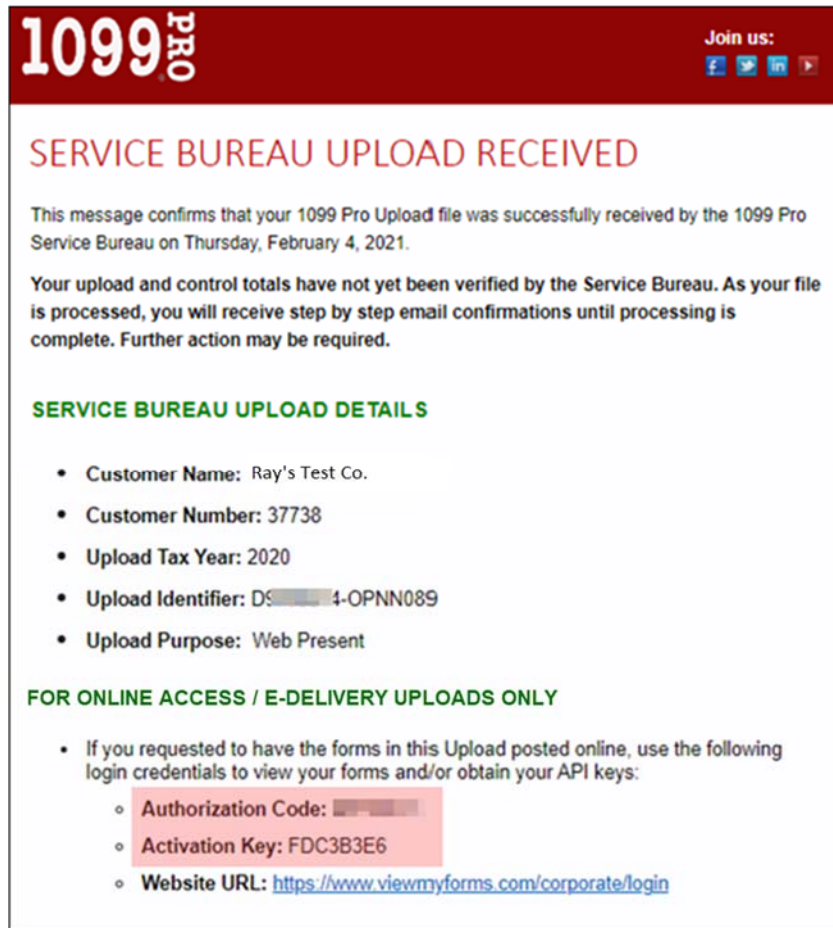


Image 5

Using Your Account

Go to the VIEWMYFORMS corporate portal at <https://www.viewmyforms.com/corporate/login> and activate your account.



Image 6

- Once logged into your corporate account, verify your name and email address. Create and save your login password.

View your unique API and Shared keys at your corporate account screen. These keys are important for Online Access (API) customers. Customers using standard Online Access should disregard the keys.

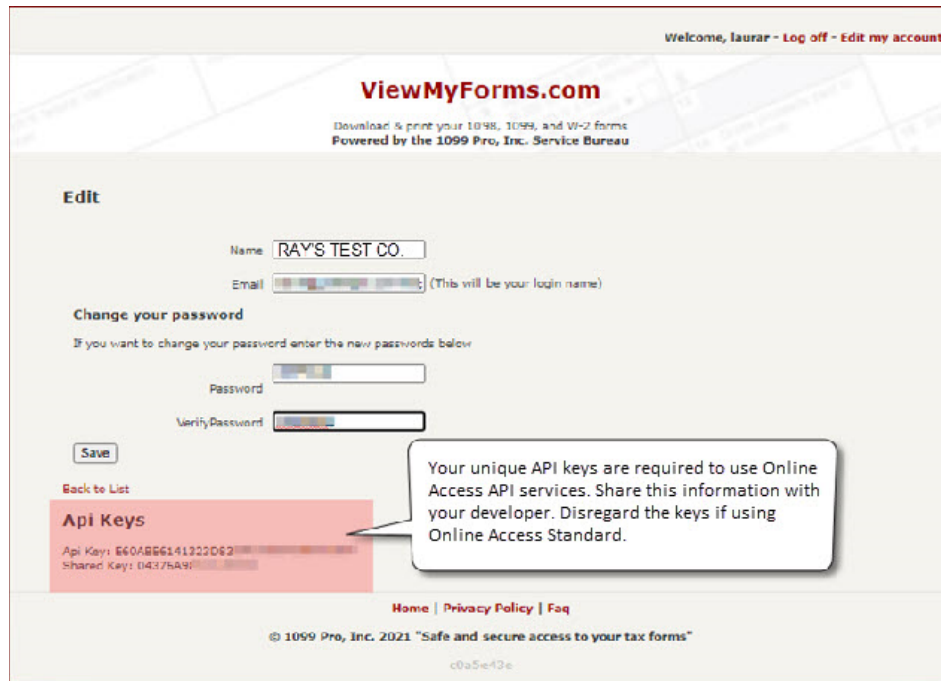


Image 7

- The My Uploads screen (Image 8) opens automatically after saving your corporate account password. This screen lists all upload files submitted to the Service Bureau for E-Delivery and Online Access services. Here you can sort and view uploads, determine their status, and download Control Totals Reports for active and cancelled uploads.

To view the individual tax forms associated with an upload, select the upload filename.

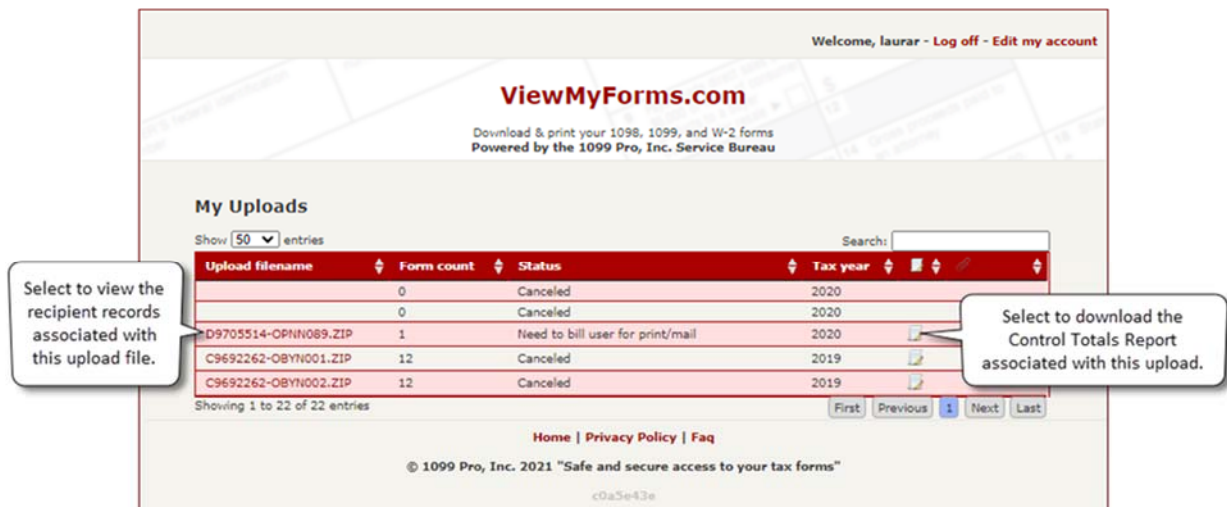


Image 8

4. View all forms associated with an upload file at the View Uploaded Forms screen (Image 9). At this screen you can:
 - Download individual PDF copies of recipient tax forms.
 - Determine recipients who opted IN/OUT of electronic delivery services.
 - View tax form print dates, as appropriate.
 - Export this spreadsheet in CSV format (Image 10). This CSV document contains individual recipient tax form URLs for E-Presentation API customers. Review E-Presentation API Specifications, later.

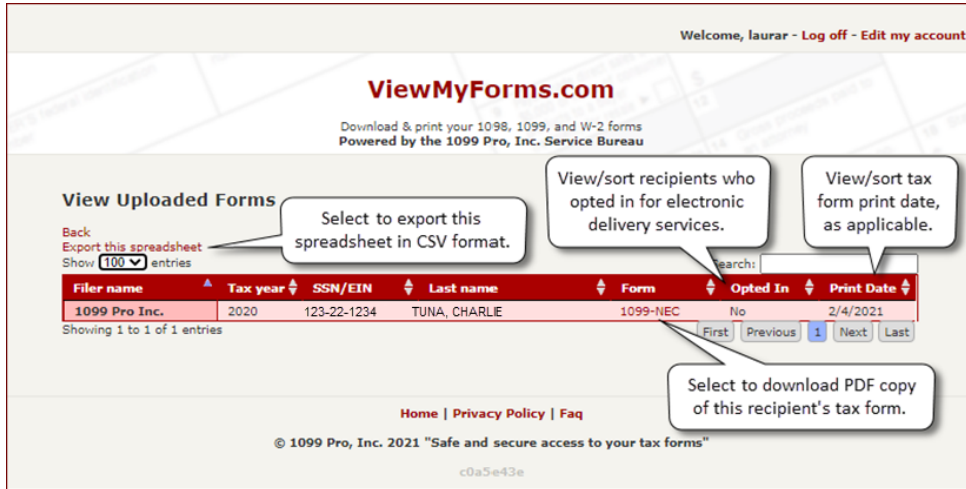


Image 9

Tin	First name	Last name	Email	Account	Url
123-22-1234	CHARLIE	TUNA	CHARLIE.TUNA@OCEAN.COM		https://www.viewmyforms.com/account/download/2020/d1976282-3d65-4f65-bcdb-8a5d467cc4bc

Image 10

5. When tax forms are available, eligible recipients receive an email or text message alert, per their registration selection (Image 12). Recipients who registered AFTER an upload file is submitted do not receive an alert.

VIEWMYFORMS — Recipient Account

Regardless of the VIEWMYFORMS service used, the recipient sign up process is identical. If a recipient attempts to sign up with an email address that is already associated with an account, VIEWMYFORMS automatically emails them a password reset link.



Image 11—New recipients register on VIEWMYFORMS.

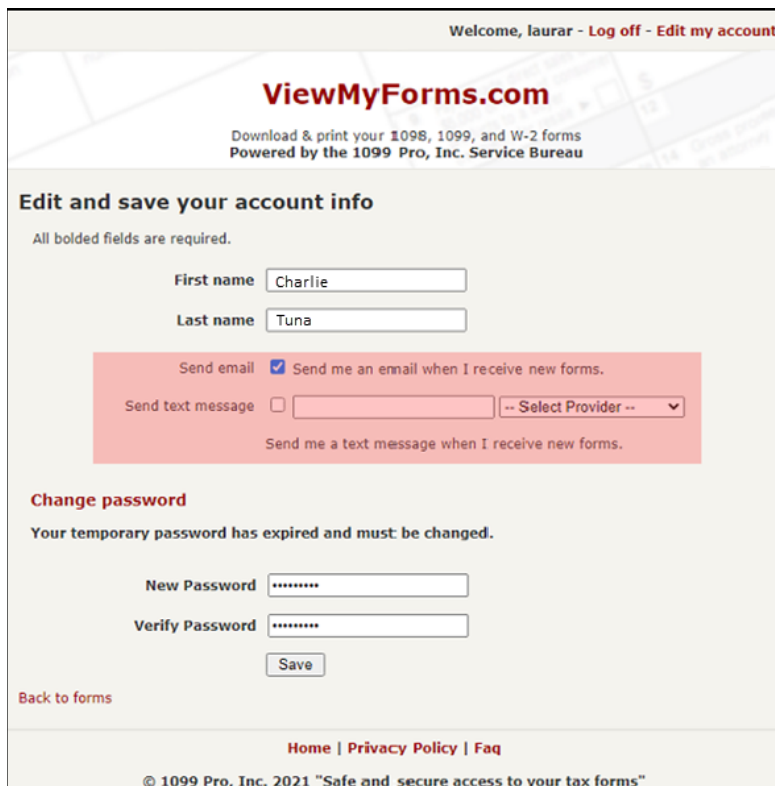


Image 12—Recipients create their VIEWMYFORMS account (or edit their existing account). This includes selecting their tax form alert preference; either via email or text message.

Recipients who register AFTER an upload is submitted automatically receive a paper form in the mail. Although recipients can still access their forms online, they will not receive a tax form alert notification from VIEWMYFORMS.

CONSENT FOR E-DELIVERY OF TAX FORMS

Thank you for completing the registration process and for using the ViewMyForms electronic delivery portal! Now all you have to do is wait until the company / institution, that is preparing your tax forms, makes them available online. You will receive an email notification when this occurs.

Please find the details of the electronic delivery (e-delivery) process below.

Consent to Electronic Delivery

- This email confirms that you have given Consent to receive your tax form(s) electronically.
- This consent is valid for the current Tax Year and all future Tax Years that a statement will be furnished to you.

Withdrawing Consent

- You may withdraw Consent to receive tax form(s) electronically at any time.
- Should you wish to withdraw Consent to receive your tax form(s) electronically, please notify the Company/Institution issuing your tax form(s) as soon as possible.
- You must withdraw your Consent in writing, either electronically or on paper.
- The Company/Institution issuing your tax form(s) will then confirm your withdrawal of Consent either electronically or on paper.

Viewing Tax Forms & Paper Delivery

- You may login and edit your Account information at any time.
- Please note if you are receiving this email on or after January 10th, a paper copy of your tax form may have already been mailed to you.
- Should you wish to have a paper copy mailed to you after receiving your tax form electronically, please contact the number listed at the top of your tax form.
- Requesting a paper copy be mailed to you does not constitute withdrawal of Consent to receive your tax form(s) electronically.

Questions or Concerns

- Please direct any questions concerning your tax form(s) to the company / institution listed at the top of your form.
- The phone number will be listed in the upper left-hand corner of the tax form.
- Your tax forms, for each Tax Year, will remain available until the end of the tax year, as required by the IRS.

Thank you and welcome to [ViewMyForms!](#)

Image 14—When tax forms are ready to access, VIEWMYFORMS sends eligible recipients the *Your Tax Form(s) Are Available Now* email or text alert.

Recipients can immediately log into VIEWMYFORMS and view, download, and print their tax forms.

Image 13—After successfully registering on VIEWMYFORMS, recipients receive a *Consent for E-Delivery of Tax Forms* email. This important email outlines consent, how to withdraw it, and other key information.

YOUR TAX FORM(S) ARE AVAILABLE NOW

Your tax form(s) are now available online! Please follow the steps below to access your tax forms and retrieve PDF copies.

How to Access Your Tax Form(s)

- Please login to: <https://www.viewmyforms.com/>
- Your tax forms will be immediately visible by Tax Year and Form Type.
- Click on the tax form to view and download a PDF copy of the form.
- You're all set!

Additional Information

- Your tax forms will remain available until October 15th of this year.
- Should you be unable to access your tax form(s) or have any questions concerning the information reported on your tax form(s), please contact the company / institution issuing your tax form.
- The contact phone number, for the company / institution issuing your tax form(s), will be listed in the upper left-hand corner of the tax form.

Thank you and we hope that you find this service useful!

ViewMyForms.com
Download & print your 1099, 1099, and W-2 forms
Powered by the 1099 Pro, Inc. Service Bureau

My Forms

Tax Year	Form Type	Company	Correction	Download
2020	1099-NEC	1099 Pro Inc.		Pdf - Image Archive

CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. 1099 Pro Inc. 23901 Calabasas Road Calabasas, CA 91302		OMB No. 1545-0046 2020 Form 1099-NEC Nonemployee Compensation Copy B For Recipient <small>This is required for information and is being furnished to the IRS. If you are required to file a return, a separate entry of other taxation may be required on this Form. Income is taxable and the IRS determines that it has not been reported.</small>
PAYER'S TIN 95-4185342	RECIPIENT'S TIN XXX-XX-1234	1 Nonemployee compensation 5000.00
RECIPIENT'S name CHARLIE TUNA	4 Federal income tax withheld	5 State tax withheld
Account number (see instructions) <input type="checkbox"/> FATCA filer required	6 State Payer's state no.	7 State income

Form 1099-NEC www.irs.gov/Form1099-NEC Department of the Treasury Internal Revenue Service

Instructions for Recipient - 1099-NEC (2020)

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

FATCA filing requirement. If the FATCA filing requirement box is checked, the payer is reporting on this Form 1099 to satisfy its chapter 4 account reporting requirement. You may also have a filing requirement. See the instructions for Form 9339.

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

Box 1. Shows nonemployee compensation and/or nonqualified deferred compensation (NQDC). If you are in the trade or business of catching fish, Box 1 may show cash you received for the sale of fish. If the amount in this box is self-employment (SE) income, report it on Schedule C or F (Form 1040 or 1040-SR), and complete Schedule SE (Form 1040 or 1040-SR). You received this form instead of Form W-2 because the payer did not consider you an employee and did not withhold income tax or social security and Medicare tax. If you believe you are an employee and cannot get the payer to correct this form, report this amount on the line for Wages, salaries, tips, etc. of Form 1040, 1040-SR, or 1040-ES.

Box 2. Reserved.

Box 3. Reserved.

Box 4. Shows backup withholding. A payer must backup withhold on certain payments if you did not give your TIN to the payer. See Form W-9, Request for Taxpayer Identification Number and Certification, for information on backup withholding. Include this amount on your income tax return as tax withheld.

Boxes 5-7. State income tax withheld reporting boxes.

Future developments. For the latest information about developments related to Form 1099-NEC and its instructions, such as legislation enacted after they were published, go to www.irs.gov/Form1099-NEC.

You must also complete Form 9919 and attach it to your return, if you are not an employee but the amount in this box is not SE income. For example, if it is income from a sporadic activity or a hobby, report this amount on the "Other income" line (on Schedule 1 (Form 1040 or 1040-SR)) or on Form 1040-NR).

The amounts being reported as NQDC are includable in gross income for failure to meet the requirements under section 408A. This amount is also reported on Form 1099-MISC for additional tax calculation. See the instructions for Forms 1040 and 1040-SR, or the instructions for Form 1040-NR.

Box 2. Reserved.

Box 3. Reserved.

Box 4. Shows backup withholding. A payer must backup withhold on certain payments if you did not give your TIN to the payer. See Form W-9, Request for Taxpayer Identification Number and Certification, for information on backup withholding. Include this amount on your income tax return as tax withheld.

Boxes 5-7. State income tax withheld reporting boxes.

Future developments. For the latest information about developments related to Form 1099-NEC and its instructions, such as legislation enacted after they were published, go to www.irs.gov/Form1099-NEC.

VOID CORRECTED

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. 1099 Pro Inc. 23901 Calabasas Road Calabasas, CA 91302		OMB No. 1545-0046 2020 Form 1099-NEC Nonemployee Compensation Copy 2 To be filed with recipient's state income tax return, when required.
PAYER'S TIN 95-4185342	RECIPIENT'S TIN XXX-XX-1234	1 Nonemployee compensation 5000.00
RECIPIENT'S name CHARLIE TUNA	4 Federal income tax withheld	5 State tax withheld
Account number (see instructions) <input type="checkbox"/> FATCA filer required	6 State Payer's state no.	7 State income

Form 1099-NEC www.irs.gov/Form1099-NEC Department of the Treasury Internal Revenue Service

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Image 15—Recipient logged into their VIEWMYFORMS account.

SERVICE BUREAU TIP # 2

Did you know? In 1099 Pro software, TIN Masking is enabled by default for all filers. Recipient TIN masking means that on recipient copies, only the last four digits of a recipient's TIN are visible, e.g., **XXX-XX-1234**.

To ensure TIN masking is enabled for your print upload, select the TIN Masking button when creating your Service Bureau Print/Mail Upload file (Images 2a & 2b).

Frequently Asked Questions

1. **How quickly are Service Bureau uploads approved?** Most uploads received by 5PM PT on business days are approved within a few hours. The Service Bureau does not process uploads on weekends or holidays.
2. **How quickly are forms posted to VIEWMYFORMS?** Once approved, forms are posted immediately.
3. **Can recipients immediately access their forms?** No, it may take several hours for forms to be accessible by recipients.
4. **How are recipients notified?** Recipients are notified by email or text alert when tax forms are available. This assumes that 1) the recipient registered on VIEWMYFORMS prior to the upload approval, and 2) the recipient registered with the identical email address used in the Service Bureau upload file.
5. **When do recipients receive tax form alerts?** Within a few hours of the upload approval.
6. **None of my recipients registered on VIEWMYFORMS, can they still access their forms?** Yes, but they will not be notified by VIEWMYFORMS that tax forms are available. Filers can directly contact their recipients and encourage them to register on VIEWMYFORMS to receive online access to the forms.
7. **How long are tax forms available on VIEWMYFORMS?** Forms are posted indefinitely, although the IRS only requires them to be available through October 15 of the calendar year first posted.
8. **Can I change the email address associated with a recipient?** Only by submitting a new upload file, for a fee.
9. **Who should recipients contact if they have questions about their form?** The recipient contacts the filer who issued the form. If a recipient contacts Sovos 1099 Pro with questions about their tax form, or for help accessing VIEWMYFORMS, they are redirected to the issuing filer.
10. **Does VIEWMYFORMS support corrected forms?** Yes, recipients can view/access all tax forms issued to them by the filer including originals and corrections for current and prior tax years.
11. **Can foreign recipients register on VIEWMYFORMS?** Yes. VIEWMYFORMS allows any recipient with a valid email address to register on our site.
12. **Can recipients reset their VIEWMYFORMS logon password?** Yes, a password reset option is available.
13. **I want to include a message (or insert) with my forms, is that available on VIEWMYFORMS?** Service Bureau customers can include a complimentary, 100-character message on forms (Images 3a & 3b). For details on insert pricing and requirements, email SB@1099pro.com.
14. **Can the Service Bureau delete uploads?** We cannot delete uploads posted to VIEWMYFORMS. For a nominal fee however, our programmers can hide an upload so that it is not visible to recipients.
15. **How is Online Access API implemented on my website?** Provide our Online Access API Specifications document to your programmers for guidance. Our programmers can answer additional developer questions.
16. **Where can I find help?** In any 1099 Pro software product, use <F1> on your keyboard to access context-sensitive help. Watch video tutorials of common tasks at <https://www.1099pro.com/videos.asp>.

Online Access (API) Specifications

1. Simple HTTP POST via SSL Encrypted Channel:

POST <https://www.viewmyforms.com/corporate/api/formsdirect>

POST Parameters:

- **apikey** = Required, Unique 32 character string assigned by 1099 Pro.
- **privatekey** = Required, Unique 16 character string assigned by 1099 Pro.
- **year** = Required, 4 character year.
- **output** = Optional, Specify output format as "html", "xml", or "csv", default is xml.

Additional Filtering:

- **tin** = Optional, 10-11 character string representing the recipients tin (must include dashes).
- **email** = Optional, 65 character string representing the recipients email address.
- **account** = Optional, 25 character string representing the recipient account number.
- **filer** = Optional, 10-11 character string representing the filers tin (must include dashes).
- **form** = Optional, if not passed then all form types will be returned. If passed, it must be one of the following: 1042-S, 1095-B, 1095-C, 1098, 1098-C, 1098-E, 1098-F, 1098-T, 1099-A, 1099-B, 1099-C, 1099-CAP, 1099-DIV, 1099-G, 1099-H, 1099-INT, 1099-K, 1099-LTC, 1099-MISC, 1099-NEC, 1099-OID, 1099-PATR, 1099-Q, 1099-R, 1099-S, 1099-SA, 3921, 3922, 5498, 5498-ESA, 5498-SA, W-2G, W-2, or W-2C.

2. Simple XML, HTML, or CSV Response with Form Links:

XML:

```
<?xml version="1.0" encoding="UTF-8" ?>
<response><results><result>
<url>https://www.viewmyforms.com/account/download/2010/713687b9-4bbb-48c5-9e9f-dfd0c2912b9b</url>
<form>1099-MISC</form>
<correction>true</correction>
<tin>555-22-1234</tin>
<email>charlie.tuna@ocean.com</email>
<account>AC-56</account>
</result></results></response>
```

HTML: (Can be output directly to your webpage with additional filtering)

```
<a href="https://www.viewmyforms.com/account/download/2010/713687b9-4bbb-48c5-9e9f-dfd0c2912b9b">2010-1099-MISC</a>
```

CSV:

```
"https://www.viewmyforms.com/account/download/2010/713687b9-4bbb-48c5-9e9f-dfd0c2912b9b","1099-MISC","false","555-22-1234","charlie.tuna@ocean.com","AC-56"
```

3. The direct link allows your recipients to View, Print, Download, and Save their form from your website:

