

Session Number: <b>4</b>	Tax Year: <b>2021</b>	Generated: <b>9/23/2022 1:49PM</b>	Filers/Form Types: <b>2</b>
File created in: <b>C:\1099 Pro\Pro99T21\Uploads\</b>		Filename: <b>E9728550-OFYN004.ZIP</b>	

<u>Log ID</u>	<u>Form Type</u>	<u>Count</u>	<u>Filer TIN</u>	<u>Payer Code</u>	<u>CFSFP</u>	<u>Filer Name</u>
5	1099-MISC	1	911111110	PCODE TEST	YES	DUMMY FILER NAME 1
6	1099-NEC	12	911111110	PCODE TEST	n/a	DUMMY FILER NAME 1
<b>Approval Required!</b>		<b>13</b>	<b>*** READ THESE INSTRUCTIONS CAREFULLY! ***</b>			

Please verify that the information shown above is correct. Things to look for include:

- 1) Are these Processing Instructions correct?** The forms are to be:  
**Filed with the IRS**
- 2) Are all of the Filers and Form types that you want to upload to 1099 Pro during this session listed above?  
For example, if you intend to process multiple Filers and or Form types, please ensure that they are all listed there.
- 3) For the eligible form types in the above summary, is the CFSFP marked correctly for each Filer?  
CFSFP is the Combined Federal/State Filing Program. See that topic in the online help for more information.  
**WARNING:** The Service Bureau does not include the 1099-NEC as part of the IRS CFSFP program.  
You must purchase the additional 1099-NEC state direct reporting service to include 1099-NEC state reporting (for supported states).
- 4) If the steps 1-3 are ALL correct, you need to check EVERY ONE of the following Control Total Reports to confirm that the number of records and the control totals (dollar amounts) for each of the boxes are correct.

The total number of Control Total Reports for you to examine and certify is: **2**

You may continue with the Upload Process. If not then cancel this process and Reset this session.

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### What to do next after you have examined the Summary and Control Totals Reports...

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- Complete Steps 2 - 5 then Click "Upload my File" to continue the service bureau upload process.
- If you've closed the upload wizard, return to the 1099 Pro Service Bureau Upload Center where you originally created your upload file.
- On the list, select any 'Pending' Log item that is part of this upload, i.e., that has a Session number of: **4**

#### If your Summary and Control Totals are Correct

- 1) Complete this transfer wizard. All of the logs that are part of that Upload Session will automatically be included in the upload.
- 2) Proceed through the wizard to upload your file and print the final set of instructions.

TIP: If you experience any problems using the built-in upload methods, try the following:

- Ensure that you have a valid, active connection to the Internet
- Check that you are not being blocked by a firewall (see your IT dept. or firewall documentation regarding FTP)
- If all else fails, select 'Manual' as the transfer method. Instructions on where to send the file will be printed.

#### If your Summary or Control Totals are NOT Correct

- 1) Cancel the wizard and click on the 'Reset (VOID) Upload' button to void the upload. All of the forms associated with any of the logs that were part of the Upload Session will be reset back to their original, pre-upload status.
- 2) Correct all problems you discovered while examining your Control Totals Reports, then return to the Upload Center and create a new Upload file.

Printed Date: 9/23/22  
Printed Time: 1:49PM

**1099 Pro Service Bureau Upload**  
Summary and Instructions

Page: 2 of 2

Session Number: <b>4</b>	Tax Year: <b>2021</b>	Generated: <b>9/23/2022 1:49PM</b>	Filers/Form Types: <b>2</b>
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If you need to contact Technical Support for assistance, you can do any of the following:

- Call 1-888-Pro-1099, Mon - Fri, 6 AM to 5 PM PST
- Email [support@1099pro.com](mailto:support@1099pro.com)

Notes:

**1099-MISC for 2021**  
**Upload Form Summary**

Sort: TIN, Last Name

Report Selection Criteria: **All forms in Upload Log 5**

**DUMMY FILER NAME 1**  
**DUMMY FILER NAME 2**  
**91-1111110 (PCODE TEST)**

Page: 1 of 1  
 Date: 9/23/2022  
 Time: 1:49PM

Recipient TIN	Account Number	Status	Box 1: Rents	Box 7: Direct sales indicator	Box 13: Excess golden parachute
Name/Company		Last Updated	Box 2: Royalties	Box 8: Substitute payments	Box 14: Nonqualified deferred
Address		Category/Source	Box 3: Other income	Box 9: Crop insurance proceeds	Box 15: State income tax w/h
		Optional text (2 lines)	Box 4: Federal income tax w/h	Box 10: Gross proceeds pd to Attny	Box 16: State/State ID number
		Department	Box 5: Fishing boat proceeds	Box 11: Fish purchased for resale	Box 17: State income
		2nd TIN notice	Box 6: Medical & health care	Box 12: Sect. 409A deferrals	

<b>Totals</b>	1099-MISC Count =	1	Box 1: Rents	1,114,111,111.11	Box 11: Fish purchased for resale	0.00
	Number of forms with:		Box 2: Royalties	0.00	Box 12: Section 409A for deferrals.	0.00
	2nd TIN notifications =	0	Box 3: Other income	0.00	Box 13: Excess golden parachute	0.00
	Missing TINs =	0	Box 4: Fed income tax w/h	0.00	Box 14: Nonqualified deferred comp.	0.00
	Box 7 Sales indicator =	0	Box 5: Fishing boat proceeds	0.00	Box 15: State income tax w/h	0.00
	FATCA filing requirement =	0	Box 6: Med & health care prmts.	0.00	Box 17: State income	0.00

**State Withholding Breakdown**

State	State ID	B17: Income	B15: Withheld	Form Count
(not specified in Box 16)		0.00	0.00	1

**Notes**

These Control Totals are associated with Upload Identifier: OFYN004  
 This is Report #1 of the 2 Control Total Reports required for this upload.  
 These forms are to be Filed with the IRS by the Service Bureau.  
 Upload file: C:\1099 Pro\Pro99T21\Uploads\E9728550-OFYN004.ZIP

**1099-NEC for 2021**  
**Upload Form Summary**

Sort: TIN, Last Name

Report Selection Criteria: **All forms in Upload Log 6**

**DUMMY FILER NAME 1**  
**DUMMY FILER NAME 2**  
**91-1111110 (PCODE TEST)**

Page: 1 of 1  
 Date: 9/23/2022  
 Time: 1:49PM

Recipient TIN Name/Company Address	Account Number	Status	Box 1: Nonemployee compensation			Box 2: Sales indicator		
			Box 4: Federal income tax withheld			Box 5: State withholding		
Last Updated Category/Source		Box 6: State abbreviation/ID No.		Box 7: State income				
Optional text (2 lines) Department		(Note: Box 3 is reserved/not used)						

<b>Totals</b>	1099-NEC Count =	12	Box 1: Nonemployee compensation	191,914.68	Box 5: State w/h (all states)	0.00
	Number of forms with:		Box 4: Federal income tax w/h	4,588.34	Box 7: State income (all states)	0.00
	2nd TIN notifications =	1				
	Missing TINs =	0				
	Box 2 Sales Indicator =	0				

**State Withholding Breakdown**

State	State ID	B7: Income	B5: Withheld	Form Count
(not specified)		0.00	0.00	12

**Notes**

These Control Totals are associated with Upload Identifier: OFYN004  
 This is Report #2 of the 2 Control Total Reports required for this upload.  
 These forms are to be Filed with the IRS by the Service Bureau.  
 Upload file: C:\1099 Pro\Pro99T21\Uploads\E9728550-OFYN004.ZIP