

W-9 / B Notice Mailings

The 1099 Pro Service Bureau offers W-9 and B Notice mailing services. 1099 Pro and Corporate Suite users can quickly generate information request PDFs and upload them to our secure FTP site for print services. Users track/close/escalate requests in 1099 Pro software, thus providing an invaluable tool in Recipient Name/TIN Management. Also see 1099 Pro's online CP2100 972CG Informational Brochure.

Service Bureau Rates

Service	Description	Rate*
Setup Fee	Per upload	\$300
W-9/B Notice Mailing	W-9/B Notice Mailing (six pages/duplexed per recipient)	\$2.10 ea.
Return Envelope 1	Add-on, include a return envelope with pre-printed requester address	+ \$0.55 ea.
Return Envelope 2	Add-on, include a return envelope with pre-printed requester address PLUS prepaid postage. (Requires customer's own USPS Prepaid Postage account and indicia.) <i>Not Available as of Sept 2022.</i>	N/A

**Rates are valid as of September 2022 and subject to change at any time. The Service Bureau offers Print/Mail/IRS Filing, NEC State Reporting, Bulk TIN Match and many other services, inquire at SB@1099pro.com. The 1099 Pro Service Bureau is a SOC I Type II secure facility.*

Create W-9/B Notice PDF for Service Bureau

Contact the Service Bureau prior to submitting your information request PDF to discuss scheduling, rates, and deposit and contract requirements.

- On the menu bar select Utilities > Issue W-9 and B Notice Forms.
- Select the "Print a New Batch of Information Request Forms" button.
- In the 1099 Pro Information Request Wizard, click "Next" to continue.
- Select **FIRST B NOTICE** as the Specific Type of Information Request to print, then click "Next" to continue.
 - First B Notice automatically includes Form W-9.
- Specify the Requester Name and Address mailing these information requests.
 - This name and address appears as the return mailing address on your forms.
 - One requester can issue a batch of forms on behalf of multiple filers.* For example, an accountant (the requester) may issue information requests on behalf of his or her clients (the filers).
- Confirm the default B Notice specifications. You must select inside each box to confirm settings:
 - B Notice 'Must Respond By' date (allow at least 30 days plus print facility processing time)
 - Backup Withholding Rate (24% rate per IRS)
- Determine how to select Recipients and click "Next".
 - Select **MANUAL SELECTION**
- Use the Tag buttons to select the recipients to receive forms (Image 1).
- Set Print Options for forms
 - Select whether to preview forms:
 - Yes, preview
 - Select WHEN forms should print:
 - NOW, AS SOON AS I CLICK FINISH**
- Select a PDF printer and verify settings including your return mailing address (Image 2).
- Click "Finish" to print. Save the PDF to your desktop.

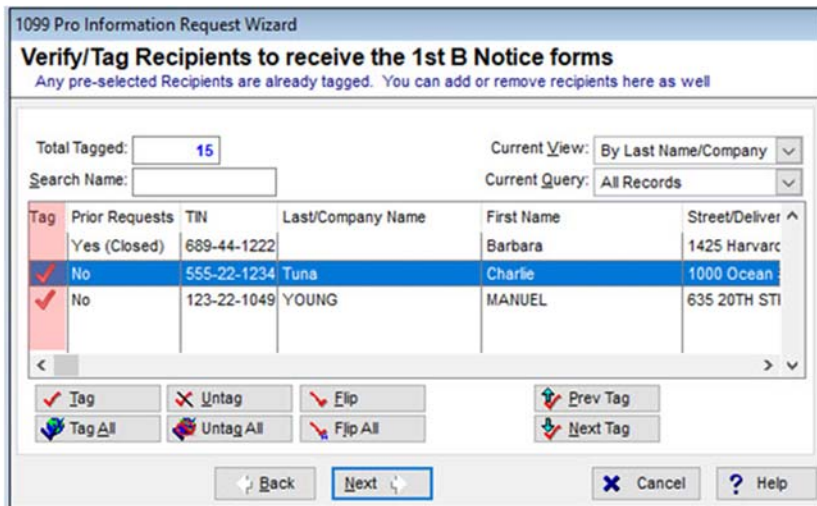
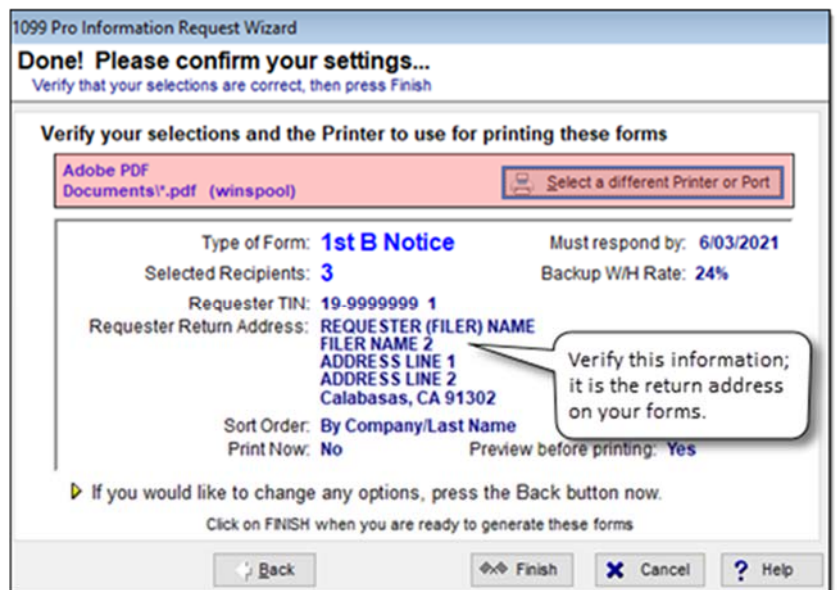


Image 1—Use the Tag and Tag All buttons to select recipients for inclusion in your information request mailing.

Reference the Prior Requests columns to determine if a request was previously issued to a recipient.

Image 2—Review the requester name and mailing address for accuracy. This address is printed on forms and the optional pre-printed envelopes.

If any settings are inaccurate, use the “Back” button to make changes, or “Cancel” to abort.



Submit PDF to Service Bureau

Preview your PDF document prior to submission to the Service Bureau. By submitting your PDF, you confirm that your W-9/B Notice forms contain accurate information and are ready to process.

- In your web browser go to <https://uploads.1099pro.com>.
 - **Login:** 1099upload
 - **Password:** 2004
- After login, click the “Upload” button and browse for your PDF file. Uploads are automatically pulled into our secure system from the FTP site.
- Email SB@1099pro.com the name of your PDF file. In the subject line enter “Service Bureau Information Request Upload”.
- The Service Bureau will email you upon receipt of your upload.

Direct questions to SB@1099pro.com or call 866-444-3559.

Information Request Responses

Upon receipt of a recipient's returned Form W-9, 1099 Pro and Corporate Suite users can edit individual records and update the status of any Open/Pending request. Records with a Closed, Escalated, or Voided status cannot be updated.

Update Recipient Record

1. On the menu bar select Utilities > Track W-9 and B Notice Requests OR File > Recipients List.
2. Locate and select the recipient, click the "Change" button.
3. Make changes to the TIN and/or Name (Image 3).
4. Update the status as appropriate.
5. Click "Save".

Changing a Recipients Record

Pending | Name/Address | Contact/Info | Issued | W-9/B Notices | Accounts

*** This recipient has an outstanding Information Request ***
W-9 issued 5/11/2020
Enter the corrected information or change the Request status

Original information as printed on the Information Request

SSN/EIN (TIN): 123-22-1234
First Name, M.I.: Charlie
Last Name: Tuna

Current information -- Enter the corrected Name information here

SSN/EIN (TIN): 123-22-5555
First Name, M.I.: Charlie
Last Name: Tuna

Update the status of the Information Request
Update the status here if you have received information back from the Recipient

Leave the Request as Open/Pending
 Close the Request -- corrected information was received
 Void the request, it should not have been issued
 Close and escalate to 1st B Notice (never responded)

Notes | Save | Cancel | Help

Image 3—Update the status of an information request. Use the printer icon to reprint the recipient's W-9.

Manage Information Requests

Quickly track, update, and reprint W-9s and 1st / 2nd B Notices. Select "View/Print Report" button to generate the Information Request Summary Report.

Manage Information Requests (W-9, B Notices, etc.)
From here you can track, update, print and view/reprint all previously issued Information Requests

Current View/Sort: By Last Name | Search Name: | BWH Date Filter: | Request Types to show: [Show All] | Request Status types to show: [Show All]

Request Type	SSN/EIN	Recipient/Company Name	Address (Street/Delivery)	City	ZIP/Postal	Date Created	Closed Date
W-9 Open/Pending	144-22-1027	OSAKI, JAMES % JANE OSAKI	2-1-2 KASU, CHIYODA-KU	TOKYO	100-8974	5/11/2020 9:57 AM	
W-9 Open/Pending	555-22-1234	Tuna, Charlie	1000 Ocean St Apt 2506	Santa Monica CA	90402	5/11/2020 9:57 AM	
W-9 Closed	123-22-1049	YOUNG, MANUEL	635 20TH STREET	CLINTON IL	61727	5/11/2020 9:57 AM	5/05/2021 12:23 PM

View/Print Report | View/Reprint Selected | Issue new Requests | Update Selected Request | Help | Close

Image 4—1099 Pro software screenshot. Corporate Suite has enhanced information request features.