Step 1: Creating a Duplicate Filer

• Create a new filer with the same credentials as the original filer except for the Payer Code and the Location Code.

🧱 1099 Pro for 2017 Enterprise Edit	tion - [Browse th	e Filers File]					-	
File Reports Forms IRS Utilities Help								
Current Filer: 55566 12-1234565	Filer/Empl This is where v	oyer/Paye ou can add nev	er Master List v Filers or update e:	t xisting Filer information				
DerbyTest 1		By Filer Name				Curre	nt Query: All Records	
Select Another Filer Manage	Search Name:						= -,	_
Current Form: 1099-MISC 💌	TIN	Location	Payer Code	Name 1	Name 2	Address 1	Address 2	City
1 Preparing My Forms 🛞	12-8551818 12-1234565		DEMO 55566	DEMO DerbyTest 1		TEST 1099 Pro		Los Angeles Calabasas
Work With My Tax Forms	12-1816151		TEST	Test 2		5218 Lindley Ave		Los Angeles
Import New Tax Forms	12-8484561		TEST 3	TIN TEST		123 TIN TEST Ave		Los Angeles
Form Totals Reports								
Form totals Reports								
Printing & Mailing 🔿								
Print/Mail Forms Myself								
Via the Service Bureau								
Export Forms for Print/Mail								
·								
Filing My Forms 🛞								
Filing on Paper (via 1096)								
Electronic Filing								
Via the Service Bureau								
Help & Extras								
Help and Tutorials								
Correcting Filed Forms								
About the Service Bureau								
IRS Pubs & Links								
Recipients List								
W-9/B Notices								
	<							3
	📇 Run File	r Report				_ 	▲ <u>C</u> hange	<u>D</u> elete
							Close	? Help
Browsing Records					Security: OFF	Monday, March	26, 2018	2:16PM

• Location and Payer code must be filled out and must be different from the original filers.

Adding	Adding a Filer Record 🥂					
	eneral State I.D. Number(s) 1099-K Options Extra Options					
	1: Filer TIN (required) 2: Payer Code (required)					
Filer EIN	Filer EIN or SSN: Payer Code or other UNIQUE Identifier:					
	(Optional)					
Addre	Address Information					
	Country: U.S.A. 👻					
	Filer Name:					
	Filer Name 2:					
Ad	Address Line 1:					
Ad	Idress Line 2:					
C	ity, State, Zip:					
Default	Default Dept Contact Phone Ext					
<u> </u>	Add <u>A</u> Change <u>Delete</u> (At least one contact/phone is required)					
Misce	Miscellaneous Information					
RTN:	RTN: Combined Federal/State Filer?					
Fax:						
D Note:	Notes					

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Step 2: Recreating Forms and Placing in a Filed Status

• Go to "Work with my Tax Forms" under the new filer -> Add. Fill this form out with the same information as the last form that was filed for this recipient.

Help & Extras (E) 1 Help and Tutorials Correcting Filed Forms C Correcting Filed Forms (E) (C) About the Service Bureau (E) (E) Help and Tutorials (E)				
	Quick-Print Form General Tax Form Print/View_Report General Custom Reports	Browse By Form	<u>∔ A</u> dd <u>A</u> Change → Close	<u>D</u> elete Help
Browsing Records		Security: OFF	Monday, March 26, 2018	2:24PM

• Go to "Via the Service Bureau" -> "Filing with the IRS Upload" and file as original.

🗱 1099 Pro for 2017 Enterprise Edition - [Service Bureau Upload Center] - 🗆 🗆						
File Reports Forms IRS Utilities Help						
Current Filer: 55566 12-1234565	Printing, Mailing, Filing, and Bulk Tin Matching via the 1099 Pro Service Bureau From here you can initiate a new Upload session, void a session or report on forms in past Upload sessions					
DerbyTest 1 Select Another Filer Manage Current Form: 1099-MISC 💌	Begin a new Service Bureau Upload Session The 1099 Pro Service Bureau can Print, Mail and/or File your forms for you! Click on the Help button for more information.					
Preparing My Forms (*)	Printing & Mailing or E-Delivery Upload	Bulk Tin Matching Upload				
Import New Tax Forms	Service Bureau Upload Sessions Use the options below to view, report, reprint or reset (void) prior completed Upload sessions.	Current Query: All sessions for this Filer	•			

• Select "Manual Transfer

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	Submit a Service Bureau Upload				
	These options allow you to certify your data and transmit your Upload file				
1: Review Totals Click the" View Control	If you do not agree with these Totals, Cancel this process be				
Totals Report'' button	Save Control Totals Report A9672071-0FYN015.PDF to Selected Location				
2: Confirm Totals Acknowledge Accuracy of Totals	Total forms in this upload: 15 Acknowledge the total by re-entering it here: 0				
3: Transfer Method Choose Transfer Method	Built-in HTTPS secure transfer (default/preferred method) O Built-in FTP using the Internet				
	O Manual Transfer				
4: Select Printer Select a Valid Printer	Manual Transfer Adobe PDF Documents*.pdf (winspool)				
	Adobe PDF				

Step 3: Creating Your Corrections

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• Finish the upload session. Ensure forms have a status of "SB Filing" or "SB Print/File".

Current Filer: 55566 12-1234565		MISC: Enter, Up can create new 1099-M	date and View ISC Forms or update exist	ing Forms (as	sterisk in status = warni
DerbyTest 1	Current Sort/View	+By TIN	•I>		
Select Another Filer Manage Current Form: 1099-MISC	<u>S</u> earch TIN	l:	TIP: Enter TIN digits without the dashes		
	Recipient TIN	Last Name/Company	First Name	Status	Account
1	123-22-1002	ADAM	LILLIAN	SB Filing	AC-05
Preparing My Forms 🛞	123-22-1002	Last Name 123456789 1	2 First Name 123456789 1	SB Filing	accountxxxxxxacco
1	123-22-1031	BASILE	ANTHONY	SB Filing	AC-06
🕉 Work With My Tax Forms	123-22-1031	BASILE	ANTHONY	SB Filing	AC-06
import New Tax Forms	123-22-1032	NORTON	DONALD G	SB Filing	AC-04
	123-22-1033	NORTON	WALLACE G	SB Filing	AC-01
Form Totals Reports	123-22-1033	NORTON	WALLACE G	SB Filing	123456
	123-22-1049	YOUNG	MANUEL	SB Filing	AC-07
	123-22-1050	BROWN	JAMES	SB Filing	AC-15
2 Printing & Mailing 🛞	144-22-1027	OSAKI	JAMES	SB Filing	AC-03
	555-22-1234	Tuna	Charlie	SB Filing	AC-56
Print/Mail Forms Myself	555-33-1234	Birch	Karen	SB Filing	AC-73
Via the Service Bureau	77-7441233	ACME Hardware, Inc.		SB Filing	AC-32
The second s	77-7441234	5-Star Software, Inc.		SB Filing	AC-38
Export Forms for Print/Mail	95-1234567	Action Investments		SB Filing	AC-02

• Find the form in question, double click on it, and select "Create Correction". Save your changes when done and you're set!

🚟 1099-MISC Protected Form Update Options					
This is a Protected Form Form Status: Uploaded to Service Bureau for Filing Recipient: DONALD G NORTON					
Form Options Because this form has been printed, filed or uploaded, it can no longer be updated.					
View the Form	View the form as orginally printed (the contents cannot be changed except for the Form Category field)				
Create Correction	<u>Create Correction</u> Use for TIN/Name/Address changes, amount changes, and so on.				
Filed <u>W</u> rong Form	M Use this option for special cases where the wrong form type was filed, e.g., you filed a 1099-INT when you should have used a 1098.				
Form History					
Imported on: JA Last changed: n/a Forms Printed: n/a		Filing Upld: MAR 26,2018 Filed via: Svc Bureau Date Voided: n/a			
Reprint this form					