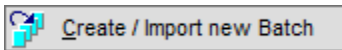


STEP 1: Import TIN matching results into 1099 Pro Corporate Suite

1. Click on IRS Batch Processing under TIN Management from the left menu.



2. Click on Create/Import new Batch at the top to begin the wizard.



3. Choose your Process Type and Batch Type then click Next.

The screenshot shows a wizard dialog box titled "1099 Pro Create/Import Batch Wizard" with the sub-header "Select Process and Batch Type". Below the sub-header is a note: "The wizard is being prepared for use." The main area contains two sections: "Process Type" and "Batch Type".

Process Type:

- Key-In IRS Data: Use this option if you have received a CP2100A, CP2100, 972CG or Bulk TIN Results on paper and it must be manually entered as a batch.
- Import IRS File: Use this option if you have received a CP2100, 972CG or Bulk TIN Results in a file and the batch can be automatically imported.

Batch Type:

- CP2100 or CP2100A (B-Notice)
- 972CG (Penalty)
- Bulk TIN Matching Results

At the bottom of the dialog are four buttons: "Back" (with left arrow), "Next" (with right arrow), "Cancel" (with X), and "Help" (with question mark).

4. Click Select the File to Import to browse for your TIN matching results file, select your file then click Next.
5. Specify the Requester information and Notice Date here, then click Next.

The screenshot shows a wizard dialog box titled "1099 Pro Create/Import Batch Wizard" with the sub-header "Select Requester Information for this Batch of Requests". Below the sub-header is a note: "All request batches must have a Requester associated to them".

Specify the initial Requester who will be issuing this batch

Generally the requester is listed on the first page of the notice. This requester will initially apply to all the requests created but can later be modified on each individual request. You may select a filer or enter the information from the first page of the notice.

Requester Taxpayer ID / EIN :

Requester Address Line 1:

(Lines 1-3 are required) 2:

3:

(Optional) 4:

5:

Notice Date is the Date you recieved the match results from the IRS

Notice Date:

At the bottom of the dialog are four buttons: "Back" (with left arrow), "Next" (with right arrow), "Cancel" (with X), and "Help" (with question mark).

6. Confirm your settings then click Finish. Once completed you will see your newly created batch.

STEP 2: Matching Batch with Recipient records

1. Highlight your batch and click the Auto-Match Process button at the bottom. This will match to existing recipient records in your Recipient master list.
 - Choose EIN Search Filter option then click OK.

EIN Search Option

Choose EIN Search Filter Option
Choose the options to use, then press OK to proceed

Select the Print Option

All Filers with Matching EIN
 Only Tagged Filers (PCode)

| Tag | TIN | Location | Payer Code | Name |
|-----|-----------|----------|------------|---------|
| | 551234567 | 1402 | 1402 | JH |
| | 551234567 | 1965 | 1965 | JH |
| | 551234567 | 1999 | 1999 | JH |
| | 551234567 | PRTR | P000002 | Filer2 |
| ✓ | 551234567 | TEST | P000001 | Filer1 |
| | 551234567 | TRNS | P000003 | Filer 3 |

<
>

✓ Tag
✗ Untag

✓ Tag All
✗ Untag All

✓ OK
✗ Cancel

- Choose Recipient Match options then click OK.

Set Recipient Match Options

Recipient Match Options
Choose the match options to use, then press OK to proceed

Match by TIN

Match by Name

Match by Tin Type

Match by Account

Set information request status to "Corrected" if a more recent tax form has an updated TIN for the same Name and Account. This option is only available for records with Account Numbers

Advanced TIN Matching

AND operator is used to combine criteria if more than one is selected

✓ OK
✗ Cancel

- Once you complete the auto-match process, you can browse your batch and see which requests auto-matched and which requests did not match. For the requests that did not match we will perform "Create/Link Recipients" see step 2. If all were auto-matched see step 3.

| Manage Information Requests - Batch No: 1 - Bulk TIN Imported - 551234567 | | | | | | |
|---|--------------------------------|----------------------------|--------------|--------------|-------------|-----------------------------------|
| From here you can track, update, print and view/reprint all previously issued Information Requests | | | | | | |
| Current View/Sort: By Last Name | | | | | | |
| Search Name: <input type="text"/> <input checked="" type="checkbox"/> Anywhere <input type="button" value="Clr"/> | | | | | | |
| Request Type | Status/Disposition | Request SSN/EIN | Match Status | Date Created | Closed Date | Result Code |
| Not Selected | Bulk TIN Imported InProcess | 77-7441234 Not Selected | Not Matched | 5/11/2016 | 12:02 PM | TIN and Name combination mat |
| Not Selected | Bulk TIN Imported InProcess | 77-7441233 Not Selected | Not Matched | 5/11/2016 | 12:02 PM | TIN not currently issued |
| W-9 | Bulk TIN Imported InProcess | 95-1234567 95-1234567 | Auto Matched | 5/11/2016 | 12:02 PM | TIN not currently issued |
| No Action | Bulk TIN Imported InProcess | 123-22-1031 123-22-1031 | Auto Matched | 5/11/2016 | 12:02 PM | TIN and Name combination mat |
| No Action | Bulk TIN Imported InProcess | 555-22-1234 555-22-1234 | Auto Matched | 5/11/2016 | 12:02 PM | TIN and Name combination mat |
| W-9 | Bulk TIN Imported InProcess | 123-22-1032 123-22-1032 | Auto Matched | 5/11/2016 | 12:02 PM | Invalid request (i.e., contains a |
| W-9 | Bulk TIN Imported InProcess | 123-22-1050 123-22-1050 | Auto Matched | 5/11/2016 | 12:02 PM | Duplicate request |
| W-9 | Bulk TIN Imported InProcess | 144-22-1027 144-22-1027 | Auto Matched | 5/11/2016 | 12:02 PM | Name/TIN combination does NC |
| W-9 | Bulk TIN Imported InProcess | 555-33-1234 555-33-1234 | Auto Matched | 5/11/2016 | 12:02 PM | Name/TIN combination does NC |
| W-9 | Bulk TIN Imported InProcess | 123-22-1002 123-22-1002 | Auto Matched | 5/11/2016 | 12:02 PM | Duplicate request |
| No Action | Bulk TIN Imported InProcess | 123-22-1049 123-22-1049 | Auto Matched | 5/11/2016 | 12:02 PM | TIN and Name combination mat |
| W-9 | Bulk TIN Imported InProcess | 123-22-1033 123-22-1033 | Auto Matched | 5/11/2016 | 12:02 PM | Missing TIN or TIN not 9-digit nu |

2. Highlight your batch and click Create / Link Recipients button at the bottom. NOTE: always try auto-match process first.

- Once you click the button you will see it flash on your screen.
- Once completed browse are batch and make sure the match status is either Created/Linked Recipient or Auto Matched.

STEP 3: Approve Batch by highlighting the batch and clicking Approve Batch button at the bottom. You will receive a popup message of how many forms were approved from the selected batch.

STEP 4: Print Information Requests

- To print out the batch, click on Browse Batches under TIN Management from the left menu. Highlight the batch, then click Reprint Batch at the bottom.



- To print out information requests individually, click on Browse All Requests from the left menu. Highlight the information requests, then click View/Reprint Selected at the bottom.



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 ▼ Current Query: All Records ▼

Search Name: Anywhere

| Request Type Status/Disposition | Request SSN/EIN Linked Recipient | Match Status Account | Date Created Closed Date | Result Code | Found In CY 2 In 3 Years | Attached Docs Barcode | Payer Code Filer Name |
|-------------------------------------|-------------------------------------|-------------------------|--|-----------------------------------|-----------------------------|--------------------------|--------------------------|
| W-9 Bulk TIN Import Open/Pending | 95-1234567 95-1234567 | Auto Matched | 5/11/2016 12:02 PM | TIN not currently issued | Y N | 0000000012 | P000001 Filer1 |
| No Action Bulk TIN Import Closed | 123-22-1031 123-22-1031 | Auto Matched | 5/11/2016 12:02 PM 5/11/2016 12:04 PM | TIN and Name combination mat | Y N | 0000000002 | P000001 Filer1 |
| No Action Bulk TIN Import Closed | 555-22-1234 555-22-1234 | Auto Matched | 5/11/2016 12:02 PM 5/11/2016 12:04 PM | TIN and Name combination mat | Y N | 0000000008 | P000001 Filer1 |
| W-9 Bulk TIN Import Open/Pending | 123-22-1032 123-22-1032 | Auto Matched | 5/11/2016 12:02 PM | Invalid request (i.e., contains a | Y N | 0000000003 | P000001 Filer1 |
| W-9 Bulk TIN Import Open/Pending | 123-22-1050 123-22-1050 | Auto Matched | 5/11/2016 12:02 PM | Duplicate request | Y N | 0000000006 | P000001 Filer1 |
| W-9 Bulk TIN Import Open/Pending | 144-22-1027 144-22-1027 | Auto Matched | 5/11/2016 12:02 PM | Name/TIN combination does NC | Y N | 0000000007 | P000001 Filer1 |
| W-9 Bulk TIN Import Open/Pending | 555-33-1234 555-33-1234 | Auto Matched | 5/11/2016 12:02 PM | Name/TIN combination does NC | Y N | 0000000009 | P000001 Filer1 |
| W-9 Bulk TIN Import Open/Pending | 123-22-1002 123-22-1002 | Auto Matched | 5/11/2016 12:02 PM | Duplicate request | Y N | 0000000001 | P000001 Filer1 |
| No Action Bulk TIN Import Closed | 123-22-1049 123-22-1049 | Auto Matched | 5/11/2016 12:02 PM 5/11/2016 12:04 PM | TIN and Name combination mat | Y N | 0000000005 | P000001 Filer1 |
| W-9 Bulk TIN Import Open/Pending | 123-22-1033 123-22-1033 | Auto Matched | 5/11/2016 12:02 PM | Missing TIN or TIN not 9-digit nu | Y N | 0000000004 | P000001 Filer1 |

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