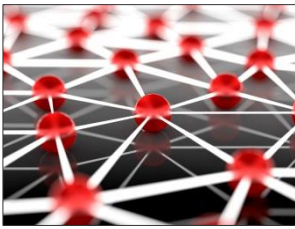


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## How to Use eFileMyForms.com



### **Technical Support**

Phone: (866) 498-1217

Fax: (800) 526-1040

### **Technical Support Hours**

*Normal Hours*

February 1 - December 31

Monday - Friday, 8am - 4pm PST

Saturday & Sunday - Closed

*Tax Season*

January 1 - January 31

Monday - Friday, 7am - 5pm PST

Saturday - Sunday, 8am - Noon PST

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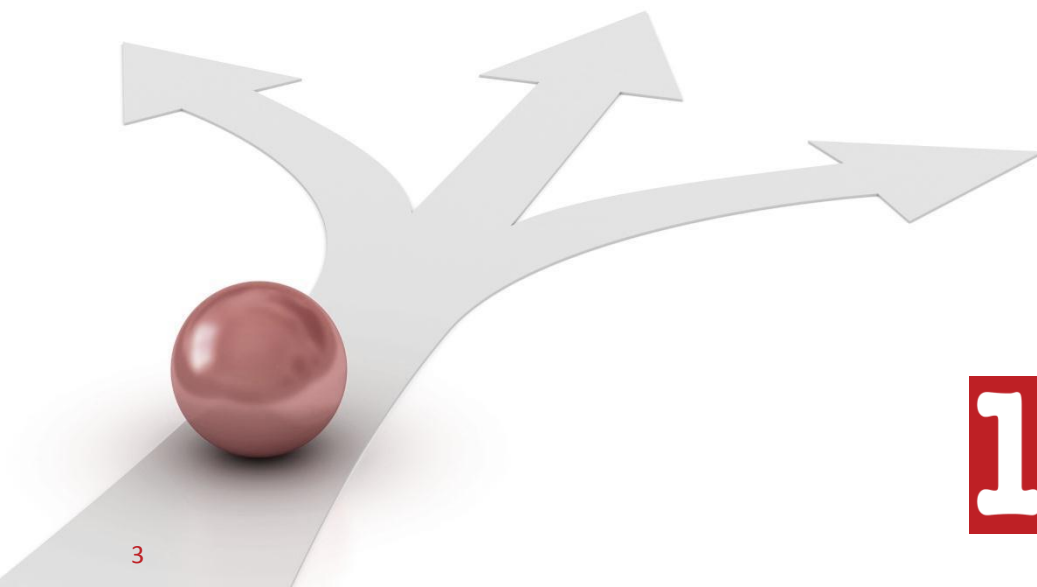
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**Getting Started**

Manual Form Entry

Importing Forms

Checkout & File



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# Getting Started

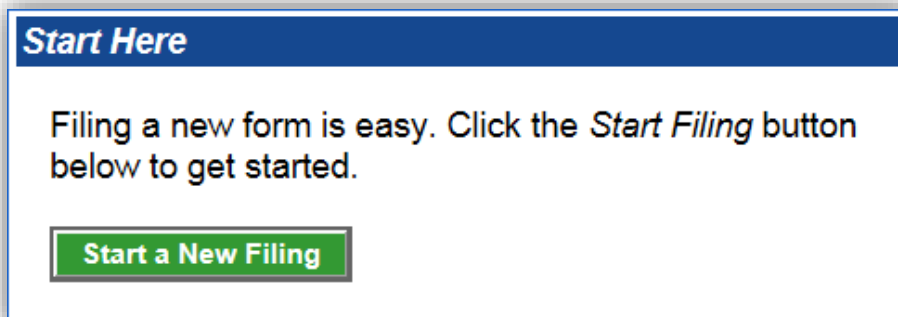
## 1. Sign-up / Login

Go to [www.efilemyforms.com](http://www.efilemyforms.com) and sign-up for a free account, or if you already have an account, click on **Customer Login** and enter the email address and password associated with your account.

## 2. Start a New Filing

Logging in will direct you to the Account Home screen. This screen contains helpful information and links for your reference.

To begin a new filing process, click **Start a New Filing** on the right side of the screen, under the section **Start Here**.



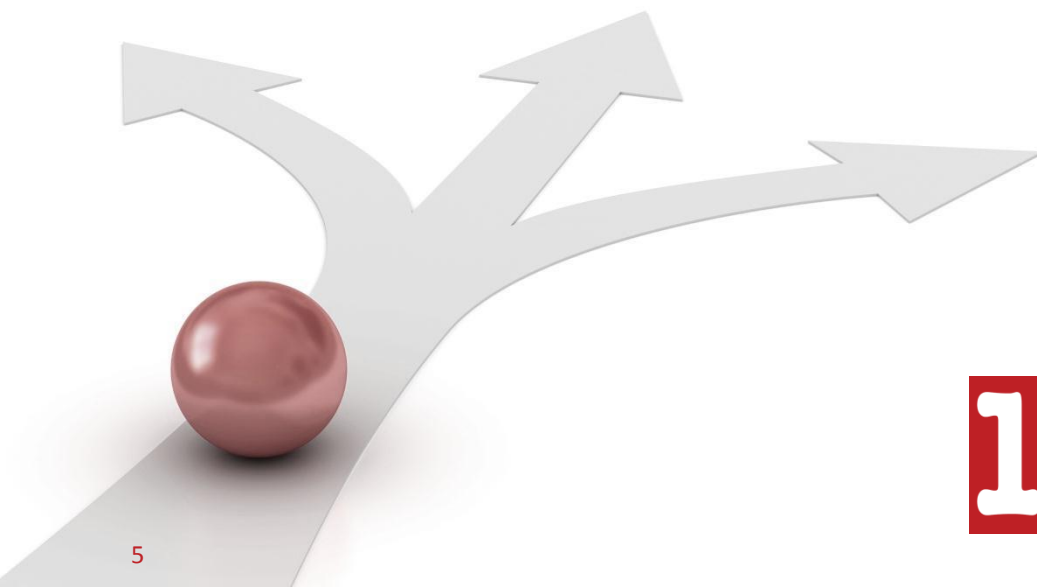
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Getting Started

**Manual Form Entry**

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# Manual Form Entry

## 1. Select A Form

Click on the form type that you are going to file. Currently, eFileMyForms offers printing, mailing, and electronic filing services for 20 form types from the current and some previous tax years.



## 2. Select a Filer

A Filer is the individual, company, or entity responsible for filing. The term filer, employer and payer are sometimes used interchangeably. Select a Filer, or create a new Filer by clicking on **Add New Filer**, and entering your Filer's information. Click **Save**, and continue with the filing process.

## 3. Select/Create Recipient

Select a Recipient, or create a new Recipient by clicking on **Add Recipient** and entering your Recipient's information. Click **Save**, and continue with the filing process.

# Manual Form Entry (continued)

## 4. Complete & Save Form

This screen will display a graphic representation of the form type you selected earlier, including your Filer and Recipient information. To complete the form, simply click in the box that you want to edit, and type in the value. When you are done, click **Save Form**. Your file has now been saved and can be accessed at any time on the **Browse Filings** screen. On the next screen, you can add the form to your cart for checkout, browse your filings, add additional filings, or return to the Account Home screen.

9595		<input type="checkbox"/> VOID <input type="checkbox"/> CORRECTED		OMB No. 1545-0115		<b>Miscellaneous Income</b>
PAYER'S name, street address, city, state, ZIP code, and telephone no.		<b>1 Rents</b>		Form <b>1099-MISC</b>		
Phone and Dept <input type="text"/>		\$ <input type="text" value="\$0.00"/>				
		<b>2 Royalties</b>				
		\$ <input type="text" value="\$0.00"/>				
PAYER'S Federal identification number		<b>3 Other income</b>		<b>4 Federal income tax withheld</b>		
RECIPIENT'S identification number		\$ <input type="text" value="\$0.00"/>		\$ <input type="text" value="\$0.00"/>		
		<b>5 Fishing boat proceeds</b>		<b>6 Medical &amp; health care payments</b>		
		\$ <input type="text" value="\$0.00"/>		\$ <input type="text" value="\$0.00"/>		
		<b>7 Nonemployee compensation</b>		<b>8 Substitute payments in lieu of dividends or interest</b>		
		\$ <input type="text" value="\$0.00"/>		\$ <input type="text" value="\$0.00"/>		
Account number (see instructions)		<b>9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale</b> <input type="checkbox"/>		<b>10 Crop insurance proceeds</b>		
<input type="text"/>				\$ <input type="text" value="\$0.00"/>		
2nd TIN notice <input type="checkbox"/>		<b>11</b>		<b>12</b>		
		<b>13 Excess golden parachute payments</b>		<b>14 Gross proceeds paid to an attorney</b>		
		\$ <input type="text" value="\$0.00"/>		\$ <input type="text" value="\$0.00"/>		
<b>15a Section 409A deferrals</b>		<b>15b Section 409A income</b>		<b>16 State tax withheld</b>		<b>17 State/Payer's state no.</b> (No State IDs for Filer)
\$ <input type="text" value="\$0.00"/>		\$ <input type="text" value="\$0.00"/>		\$ <input type="text" value="\$0.00"/>		<b>18 State income</b>
						\$ <input type="text" value="\$0.00"/>

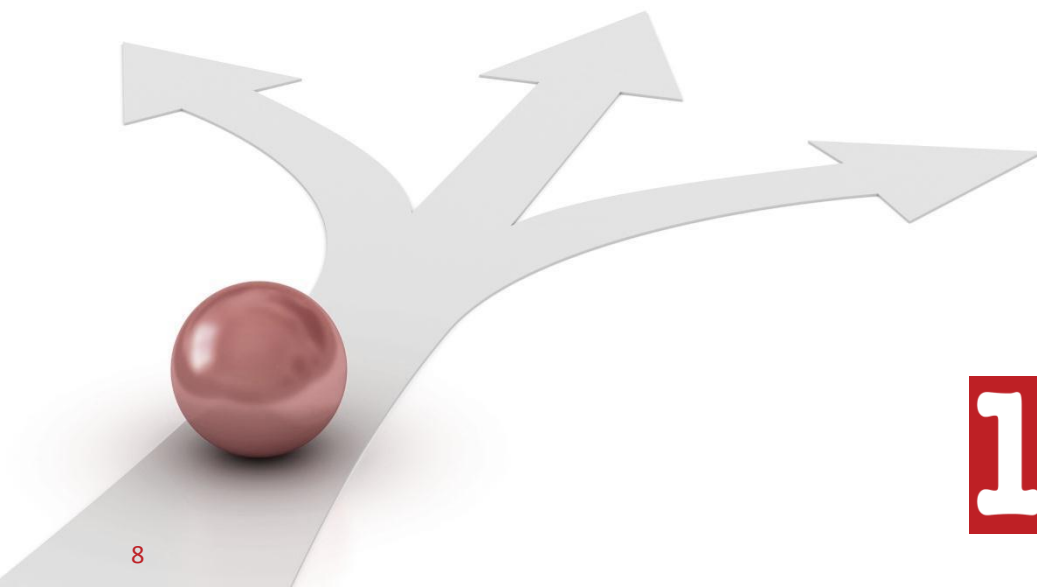
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Getting Started

Manual Form Entry

**Importing Forms**

Checkout & File



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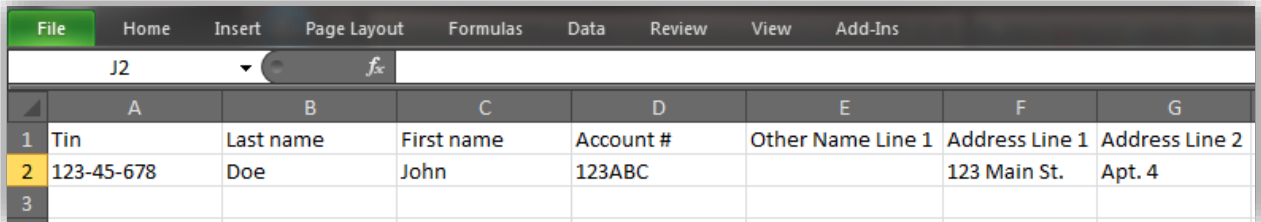
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# Importing Forms

## 1. Creating a Data File

To easily import up to 500 records, compile your information in a comma-delimited (.csv) or Excel (.xls, .xlsx) file containing a header row for each field you are importing. Enter your data under the appropriate column in the spreadsheet, then save the file.

[Sample Templates](#)



	A	B	C	D	E	F	G
1	Tin	Last name	First name	Account #	Other Name Line 1	Address Line 1	Address Line 2
2	123-45-678	Doe	John	123ABC		123 Main St.	Apt. 4
3							

## 2. Sign-up / Login

Go to [www.efilemyforms.com](http://www.efilemyforms.com) and sign-up for a free account, or if you already have an account, click on **Customer Login** and enter the email address and password associated with your account.

## 3. Create a Filer & Upload New Filings

Logging in will direct you to the Account Home screen. This screen contains helpful information and links.

If you have not created any Filers yet, create them now by clicking on **Manage Filers** under the **Quick Links** section. Alternatively, you can include Filer information in your data file to import with your recipient records.

To begin a new import, click **Upload New Filings**, located under the section titled **Quick Links**.

---

## Importing Forms (continued)

### 4. Select File to Upload

After reading the instructions, select the form type you are filing from the dropdown menu, then browse for your data file. If your data file contains Filer information, select **My Filer data is located in the file I'm uploading**. If your Filer information has already been saved, then select **Use the Filer I select below as the Filer for the forms I'm uploading**, and select your Filer from the dropdown menu. Name your upload session (optional), then click on **Upload File**.

### 5. Map Fields

The column on the left titled **Your Fields** lists the column headers from your data file. The column on the right titled **eFile Fields** lists the fields your data will import to. Simply use the drop-down menus to match fields from your import to the corresponding eFile fields, then click **Continue**. *Note: Not all fields need to be mapped. Fields that are not required may be left unmapped.*

Your Fields	eFile Fields
Rcp TIN	Recipient TIN ▼
Last Name/Company	Recipient Last Name ▼
First Name	Recipient First Name ▼
Name Line 2	- not mapped - ▼

### 6. Verify, Upload & Save

Review and verify your mapping, then click on **Import Forms**. Your upload has now been saved and can be accessed at any time on the **Browse Filings** screen. On the next screen, you can add the form to your cart for checkout, browse your filings, add additional filings, or return to the Account Home screen.

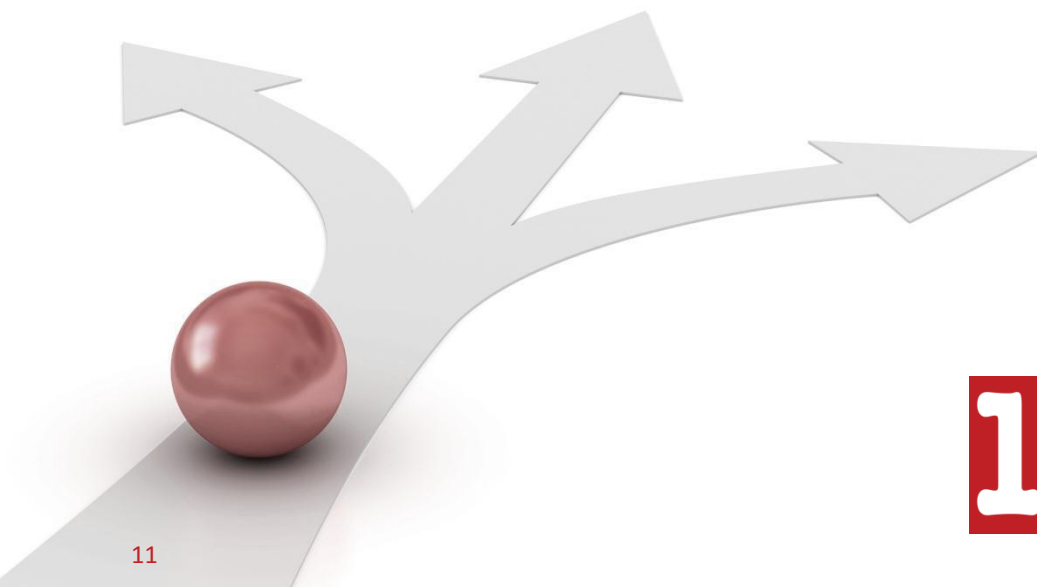
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Getting Started

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# Checkout & File

## 1. Add Forms to Cart

At the end of every form entry and import process, you have the option to add the forms to your cart. If you opted to save instead of add the forms to your cart, click on **Select forms for checkout** located under the **Filings** section of the toolbar. Here you can edit, delete, or add forms to your cart. When you are ready to file, add the forms to your cart by checking off the individual records and then clicking the shopping cart with the green plus on it, then click on **Go to Cart** located at the bottom right of the screen.

	Entered	Form Name	Tax Year	Rcp TIN	Recipient	Status	Del	Cart
<input type="checkbox"/>	1/9/2014	<a href="#">Form 1099-MISC</a>	2013	123-22-1002	ADAM, LILLIAN	Not In Cart	✗	
<input type="checkbox"/>	1/9/2014	<a href="#">Form 1099-MISC</a>	2013	123-22-1031	BASILE, ANTHONY	Not In Cart	✗	

## 2. Options & Checkout

In your cart, select which services you want performed from the dropdown menu in the **Services** column. The **Print/Mail/eFile** option will send copies of your forms to your recipient, as well as electronically file with the IRS/SSA. The **eFile Only** option will only file your forms with the IRS/SSA. At the bottom of the screen, you can view your totals report, view your summary report, or click on **Checkout** when you are ready to finalize your order and file your forms.

	Form Type	Tax Year	Rcp TIN	Recipient	Service	Cart
<input type="checkbox"/>	<a href="#">Form 1099-MISC</a>	2013	123-22-1002	ADAM, LILLIAN	Print/Mail/eFile ▾	
<input type="checkbox"/>	<a href="#">Form 1099-MISC</a>	2013	123-22-1031	BASILE, ANTHONY	Print/Mail/eFile ▾	

[Totals Report](#) [Summary Report](#) [Checkout>](#)

---

## Support & Services



For support or additional information about eFileMyForms.com:

### **Technical Support**

Phone: 866-598-1217

Fax: 800-526-1040

[www.efilemyforms.com](http://www.efilemyforms.com)

### **Technical Support Hours**

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Saturday & Sunday - Closed

#### *Tax Season*

January 1 - January 31

Monday - Friday, 6am - 5pm PST

Saturday, 7am - Noon PST

Sunday - Closed



For information about the software and services offered by 1099 Pro:

**1099 Pro, Inc:** 888-776-1099

**Sales:** 866-444-3559

**StateComply:** 818-737-2340

[sales@1099pro.com](mailto:sales@1099pro.com)

[www.1099pro.com](http://www.1099pro.com)