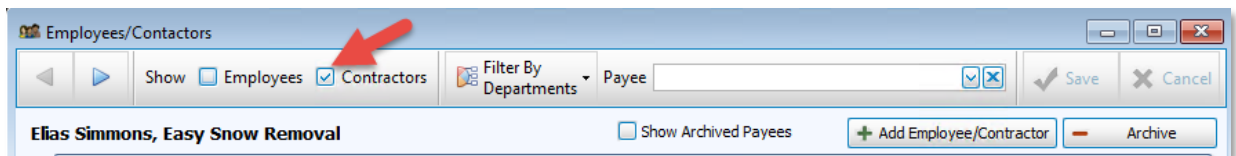


Whether you are paper filing or eFiling you will go through our third party tax company, Aatrix. Starting with 2023 returns, the IRS requires employers with ten or more returns, W-2s and 1099s, to file electronically. Below are the instructions for this process.

Before you begin the tax filing process, go to *Administration>Sys Info*, and fill in the *Tax ID* information.

You have options to create your 1099s in Payroll and/or Accounting, depending on how you pay your contractors. See page 3, on merging contractors together to file all at once.

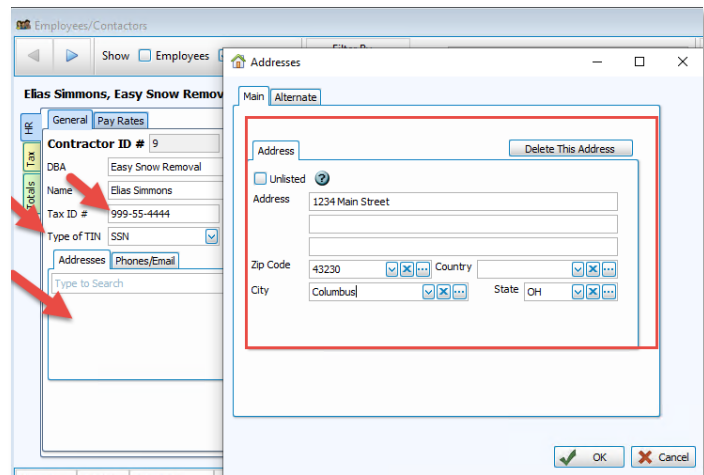
**First Option**, in Payroll verify the Contractors' information. Click the Employees/Contractors tab. Uncheck Employees and review the Contractors.



Check the Contractor's information, particularly the *Tax ID#*, *Type of TIN* and *Address*.

To add the address, click on the *Green +* under *Addresses*.

Click *OK* and *Save*.



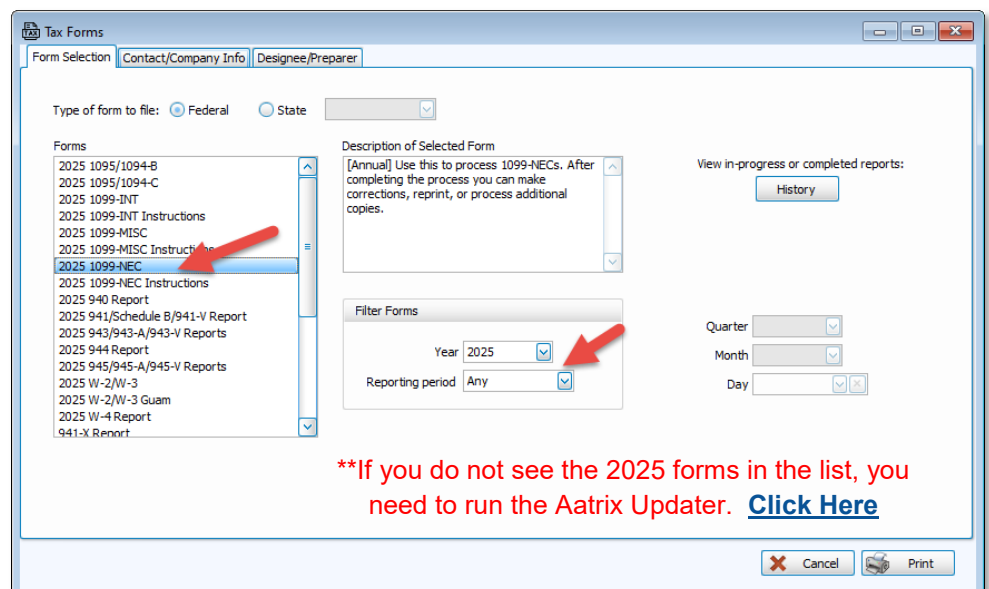
In Payroll, go to *Reports/Export* at the top of the screen.

- Select *Tax Reports>Tax Forms*.

Choose *2025 1099-NEC*, Year *2025*, Reporting Period *Any*

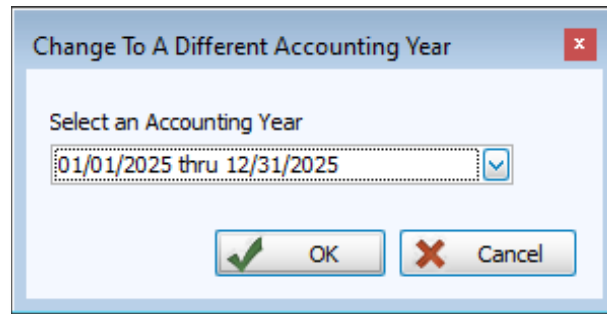
Click *Print*.

Go to **Page 3** to continue with the **1099 Setup Wizard**.



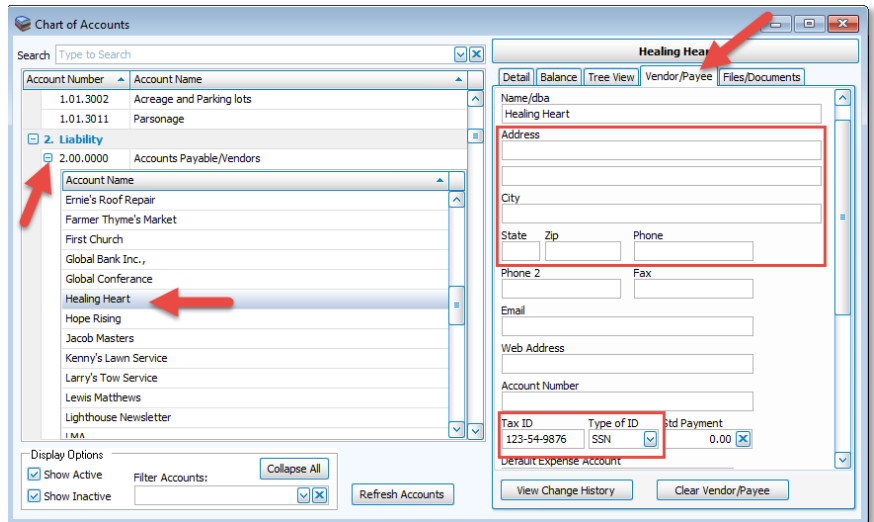
**\*\*If you do not see the 2025 forms in the list, you need to run the Aatrix Updater. [Click Here](#)**

**Second Option**, in Accounting Year 2025, verify the Contractor's information. Go to *Special Function>Manage Years>Change to another existing Accounting Year* to choose 2025, if you need to change the year.



Go to *Chart of Accounts>View>at Liability*, click to expand the *Accounts/Payable Vendors*. Highlight the Contractor and click on *Vendor/Payee*. Verify or fill in the *Address and Tax ID and Type of ID*.

Be sure to include dashes in the Social Security #.



In Accounting, go to *Reports/Export>Tax*

Choose the Contractors that require 1099s.

Verify the *Tax ID* and *Amount Paid*.

To adjust the amount, highlight and click in in the *Adjust Amount* column.

Click *OK*.

1099 Selections

Print?	Payee	Tax ID	Amount Paid	Adjusted Amount
<input type="checkbox"/>	Advent Mutual		4,575.87	
<input type="checkbox"/>	Baron HVAC		1,650.00	
<input type="checkbox"/>	Cardmember Services		1,746.74	
<input type="checkbox"/>	City Government		877.93	
<input type="checkbox"/>	Community Center		1,750.00	
<input type="checkbox"/>	Darcy, Mayfield, and Taylor		3,640.25	
<input type="checkbox"/>	Delancy's Flower Shoppe		636.00	
<input type="checkbox"/>	Ellsbeth's Organ Maintenance & Repair Services		1,400.00	
<input type="checkbox"/>	Global Conference		15,713.29	
<input checked="" type="checkbox"/>	Healing Heart	123-54-9876	750.00	
<input checked="" type="checkbox"/>	Hope Rising	321-65-7894	2,100.00	
<input type="checkbox"/>	Main Street Vending		0,020.41	
<input type="checkbox"/>	Mercy Ministries		625.00	
<input type="checkbox"/>	Paul Jones		1,027.50	
<input type="checkbox"/>	Southbend Distribution Center		1,308.00	
<input type="checkbox"/>	TechCrew IT Services		1,051.03	
<input type="checkbox"/>	United First		1,300.00	
<input type="checkbox"/>	Wordsmith Publishing		1,400.00	

Or to run a report of Vendors that may need 1099s, click [here](#). Or search Vendor in the Resource Center.

## 1099 Setup Wizard begins whether you are using Payroll or Accounting.

On the *1099 Setup Wizard*, choose whether you'd like to *Start Processing my 1099/1096s*, or *Test Drive the Wizard*. Click *Next* to continue.

Our example uses *Start Processing my 1099/1096s*. Click *Next*.

Verify your company's TIN, edit if necessary. Click *Next*.

## Multiple Payroll Data Files

If you have contractors in Accounting and Payroll, this is where you merge the datafiles.

For an instructional video, go to <https://churchwindows.com/2025/01/16/payroll-v25-1099-merge/>

Enter your information, click *Next*.

Indicate which type of filer you are.

**1099 Setup Wizard**

We noticed that you have not processed any 1099s for the current filing year. Before you begin filing your 1099s, would you like to do any of the following?

I want to test drive the 1099/1096 Wizard with only the first 25 of my recipients.

I want to test drive the 1099/1096 Wizard with all of my recipients.

No thanks, start processing my 1099/1096s.

**1099 Setup Wizard**

**Get Started Printing or eFiling Your 1099s**

Please verify this payer's Taxpayer Identification Number (TIN). This number is used on all 1099 forms and must be correct. If this number is not correct, you must return to your accounting software to make the correction.

**Payer TIN**

EIN     SSN

**Multiple Payroll Data Files**

**Please Read Carefully**

Answering incorrectly may affect your ability to submit all your information!

Do you use multiple data files for the **same Company**?

You may be using multiple datafiles with the same EIN/TIN in your accounting software to handle:

- multiple companies
- multiple departments
- multiple divisions
- multiple sites

Ensure ALL recipients for this form type & this Payer TIN are included. Do not combine different 1099-type (e.g., 1099-NEC with 1099-MISC) data files together. Each unique 1099 form type requires separate submissions.

YES. I use multiple datafiles for this company.

NO. I use a single datafile for this company.

**Payer Information**

Company name:  Trade name:

Address line 1:

Address line 2:

City:  State:  ZIP code:

Phone:  Ext:  Fax:

Contact first name:  Last name:

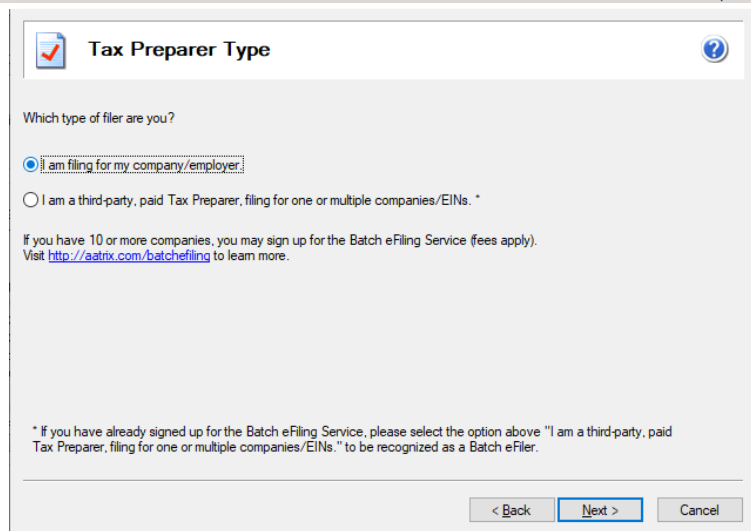
Title:  Email:

Contact phone:  Ext:

Contact address:

*I am filing for my company/employer is likely most relevant.*

Click *Next*.



**Tax Preparer Type**

Which type of filer are you?

I am filing for my company/employer.

I am a third-party, paid Tax Preparer, filing for one or multiple companies/EINs. \*

If you have 10 or more companies, you may sign up for the Batch eFiling Service (fees apply). Visit <http://aatrx.com/batchefiling> to learn more.

\* If you have already signed up for the Batch eFiling Service, please select the option above "I am a third-party, paid Tax Preparer, filing for one or multiple companies/EINs." to be recognized as a Batch eFiler.

< Back   Next >   Cancel

*Transfer Agent* - Indicate whether you are using a Transfer Agent or not.

The State Tax Items may need filled in.

Click *Add or Edit* (if prompted).

Fill in the *State, Tax name and Tax account number*.

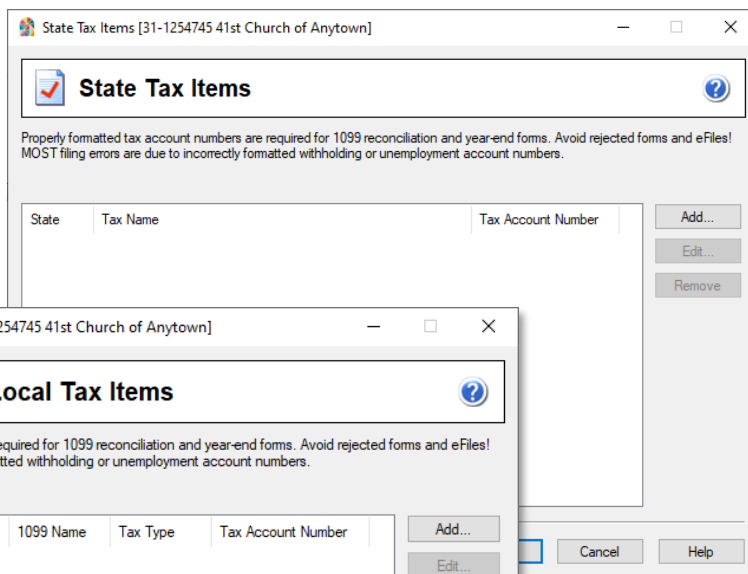
Click *OK* and *Next*.

The Special State & Local Tax Items may need filled in.

Click *Add or Edit* (if prompted).

Fill in the *required columns*.

Click *OK* and *Next*.



State Tax Items [31-1254745 41st Church of Anytown]

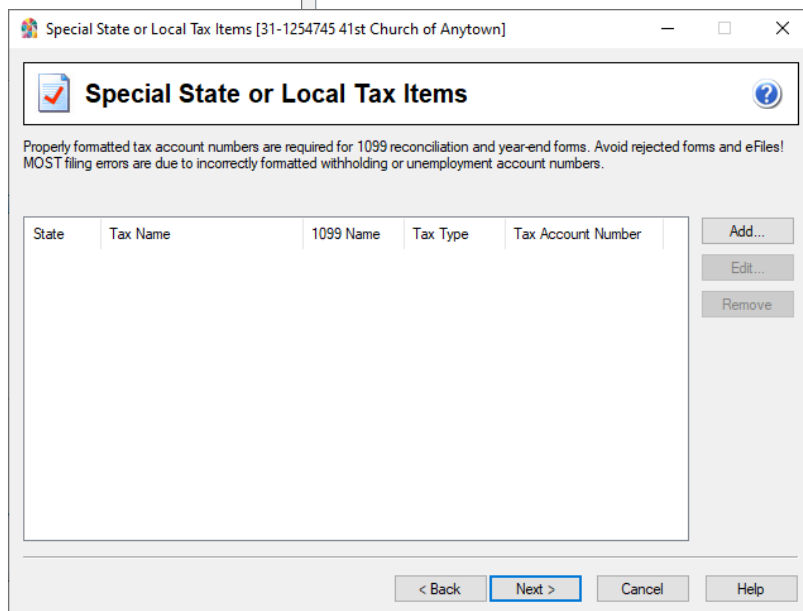
**State Tax Items**

Properly formatted tax account numbers are required for 1099 reconciliation and year-end forms. Avoid rejected forms and eFiles! MOST filing errors are due to incorrectly formatted withholding or unemployment account numbers.

State	Tax Name	Tax Account Number

Add... Edit... Remove

Cancel Help



Special State or Local Tax Items [31-1254745 41st Church of Anytown]

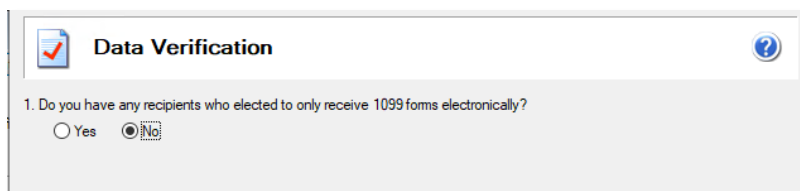
**Special State or Local Tax Items**

Properly formatted tax account numbers are required for 1099 reconciliation and year-end forms. Avoid rejected forms and eFiles! MOST filing errors are due to incorrectly formatted withholding or unemployment account numbers.

State	Tax Name	1099 Name	Tax Type	Tax Account Number

Add... Edit... Remove

< Back   Next >   Cancel   Help



**Data Verification**

1. Do you have any recipients who elected to only receive 1099 forms electronically?

Yes    No

Review and answer the *Data Verification* question.

Click *Next*.

Choose your preferences for displaying RIN numbers.

Click *Next*.

Choose if you want RINs on recipient

You will get a message about *Preparing Recipient Detail 1-3*.

Click OK.

**Recipient Identification Numbers**

Would you like to truncate Recipient Identification Numbers (RINs) on recipient copies?  
SSNs, ITINs, and ATINs will only display the last 4 digits on all printed recipient copies. This will not apply to EINs.

No truncation. Example: 123-45-6789  
 Truncate with asterisks. Example: \*\*\*-\*\*-6789  
 Truncate with Xs. Example: XXX-XX-6789

Would you like to print RINs on recipient copies that are reported as zeros?

Yes, print zeros. Example: 000-00-0000 or 00-0000000  
 No, leave them blank.

< Back
Next >
Cancel

Verify Recipient Taxpayer Identification Numbers (TIN)										
TOTALS:		Recipients (2)						\$8750.00		
Recipient Last Name	Recipient First Name	Recipient Middle Name	Recipient Suffix	Recipient TIN	TIN Flag	Recipient Company	Box 1	Box 2	Box 4	Filing State
Last Name	First Name	Middle Name	Suffix	Taxpayer ID Number	Check if FEIN	Company Name	Nonemployee Compensation	Payer Made Direct Sales of \$5,000 or More	Federal Income Tax Withheld	Filing State
1	Greenthumb	Joe		111-11-1111	<input type="checkbox"/>		3750.00	<input type="checkbox"/>		OH
2	Klein	Rachel		555-55-5555	<input type="checkbox"/>	Contractor	5000.00	<input type="checkbox"/>		OH

On the Re-

recipient *Taxpayer* screen, a list of the 1099s that will be printed appears. Review and click *Next* through the information to verify it is accurate. If the wizard believes there is something potentially wrong, it will notify you of the error and highlight it so that it can be easily corrected. Then click *Go Back and Correct*. Continue to click *Next* to complete the blue progress bar in the top left.

A scroll bar is at the bottom to access additional columns.

An *Important Notice* will open. Click *Agree* to move forward or *Double Check* to continue in the grid.

An *Aatrix* ad will appear. Click *Next* to continue or *Enroll*, if interested.

There are two **Printing and Filing Options** available. Complete *1099 eFiling Service* or *Other Options*.

**Other Options** eFilers receive Free Corrections before selected Filing Dates

Print Recipient 1099 Copies

eFile Federal 1099s and 1096 1 \$0.59 \$0.59

eFile State 1099s and Reconciliation Forms 1 \$0.81 \$0.81

**Discount for eFiling Federal & State together** 1 (\$0.21) (\$0.21)

Print Federal 1099s and 1096 (For an official copy, uncheck the eFile option)

Print State 1099s and Reconciliation Forms (For an official copy, uncheck the eFile option)

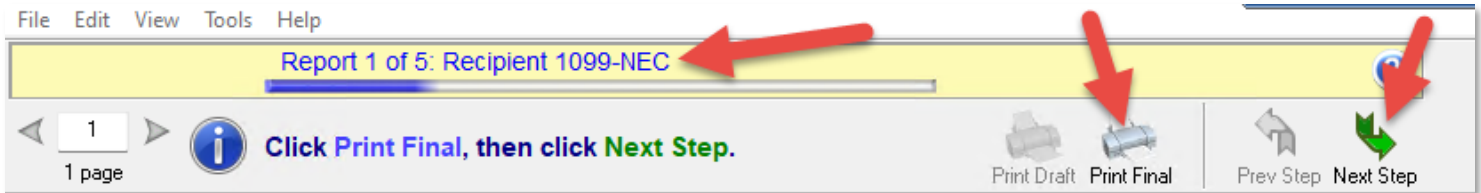
**Official Payer 1099s will display when any Federal 1099s are selected**
**Total Cost**
**Minimum**
**\$29.99**

Aatrix has two screens with different offers and products available. Select your preferences and click Next.

### Review Data-

Based on your selections. Aatrix will list the forms to print. Click Next.

Follow the yellow tool bar prompts to print each form.

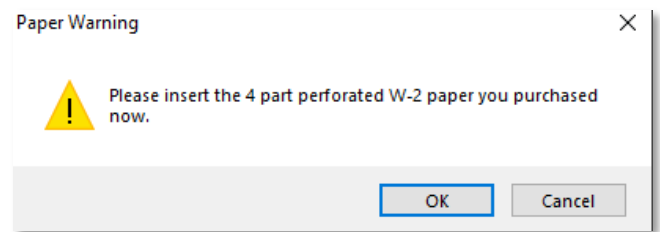


Our example shows, 1 of 5 forms to Print.

Use the left and right arrows to view other reports to print.

Click *Print Final* then *Next Step* after each form.

**NOTE:** A *Paper Warning* message appears to insert the 4 part perforated 1099 paper, click *OK*. *This paper is not needed.*



After each printed report, repeat the process. Each time clicking *Print Final* and *Next Step*.

**PLEASE NOTE:** Aatrix has permission from the SSA to submit Black & White copies of the W-3.

**If you are eFiling 1099s,** once the printing is complete, click *Next Step* and you will be redirected to **Aatrix Secure eFile**. Please carefully read the screens that appear. Aatrix provides lots of eFiling options. If you have eFiling questions, please contact Aatrix directly.

### Aatrix Windows Support

Mondays - Fridays from 8 am - 5 pm CST  
 Phone: 701-746-6814  
 Fax: 701-746-4393  
 Email: [helpme@aatrix.com](mailto:helpme@aatrix.com)

### Aatrix MAC Support

Mondays - Fridays from 8 am - 5 pm CST  
 Phone: 701-746-6017  
 Fax: 701-746-4393  
 Email: [macsupport@aatrix.com](mailto:macsupport@aatrix.com)

**Please Note:** It is important to read all screens carefully as they may be updated or changed by Aatrix. You may redo or restart the document processing at any time.