CHECKMARK ONLINE 1099 SETUP CHECKLIST

Starting with a new 1099 solution is both exciting and rewarding, but knowing where to begin can be a challenge. To help you get started, we are here to guide you through the process of setting up CheckMark Online 1099 with ease and simplicity.

This checklist covers the necessary steps, from entering your company and payer information to setting up 1099 recipients and preparing your forms for printing or e-filing.

	1. COMPANY INFORMATION
☐	Company Legal Name
☐	Trade Name (if applicable)
☐	Federal ID
☐	Phone Number
☐	Business Address
☐	City, State & ZIP Code
☐	Filing/Mailing Address
☐	Contact Information
	2. 1099 / PAYER INFORMATION
☐	Payer Type — Business or Individual
☐	Payer Name
☐	Contact Information
☐	Tax ID Type — EIN or SSN
☐	Combined Federal/State Filing Program (if applicable)
	3. 1099 RECIPIENTS
☐	Recipient Names
☐	Recipient Type / 1099 Form
☐	Mailing Address
☐	Taxpayer Identification Number (TIN)
☐	Payment Information
☐	Additional information required for the selected 1099 form
	4. PRINT 1099 FORMS
☐	Print recipient copies
☐	Print filing copies
☐	Print Form 1096
☐	Print mailing labels
	5. E-FILING 1099 FORMS
☐	Create & Download IRS-compatible CSV file
☐	Submit the CSV file through the IRS IRIS Taxpayer Portal

Congratulations! Your CheckMark Online 1099 setup has been successfully configured. This means you are now ready to prepare, print, or e-file 1099 forms for your recipients.

If you need any help setting up CheckMark Online 1099, please don't hesitate to call us at 970.225.0522 or e-mail sales@checkmark.com and our support team will be happy to answer any questions.

Wishing you continued success!