CHECKMARK ONLINE 1099

User Manual

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GETTING STARTED

CheckMark Online 1099 is a cloud-based solution that simplifies and centralizes your 1099 filing process. It enables you to print or electronically file (e-file) all major 1099 forms, including 1099-NEC, 1099-MISC, 1099-DIV, 1099-INT, 1099-S, and 1099-R.

The application supports printing forms on either preprinted 2-up forms or blank paper, providing flexibility to meet your filing needs.

Before setting up your company and recipients, we recommend reading this user manual. It provides information about the initial setup process, 1099 filing requirements, and the support resources available from CheckMark, Inc.

System Requirements

To use CheckMark Online 1099, ensure that you have the following:

- A current, supported web browser
- A stable internet connection
- Adobe Acrobat Reader or another compatible PDF viewer for viewing and printing forms
- A printer capable of printing the required 1099 forms

Getting Help

This manual covers the basic setup procedures and reporting features of CheckMark Online 1099. If your organization has unique filing requirements or you need additional assistance, CheckMark provides U.S.-based customer support to registered users through support tickets, email, and phone.

For faster assistance, have your customer number available and keep CheckMark Online 1099 open when contacting a support representative.

Contact CheckMark

If you have questions about CheckMark Online 1099, you can contact our Support team using one of the following methods:

- **Support Ticket** – Sign in to your My Account portal, navigate to Account Center > Support, and select Add Ticket. Complete the required information and submit your request. You will receive an email confirmation, and you can monitor the status of your request under Account Center > Support > Ticket History.
- **Phone** – 970.225.0522
- **Email** – support@checkmark.com

Feedback and Suggestions

We welcome your feedback and are continually working to improve CheckMark Online 1099. If you have suggestions for new features or enhancements, please send them to **sales@checkmark.com** or **support@checkmark.com**.

Chapter 1

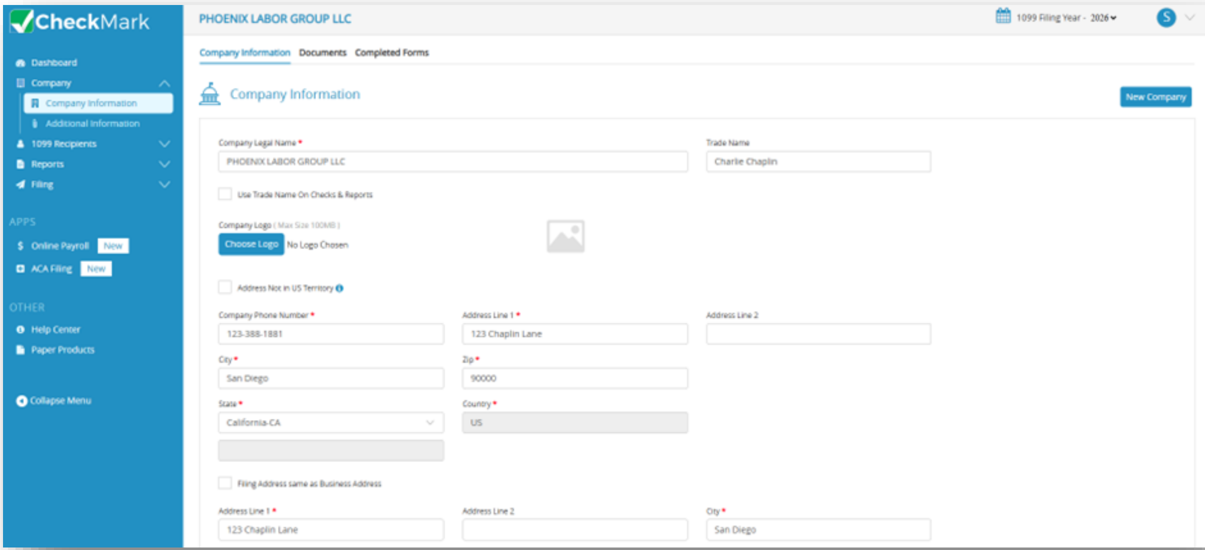
SETTING UP A COMPANY

Before you can create and file 1099 forms, you must set up your company information. This information is used throughout CheckMark Online 1099 to identify your business and automatically populate applicable 1099 forms and reports.

Complete your company setup before adding recipients or creating forms.

1.1 COMPANY INFORMATION

The Company Information page stores your business details, mailing address, and contact information. Once saved, this information is automatically used whenever you generate or file 1099 forms.



Entering Company Information

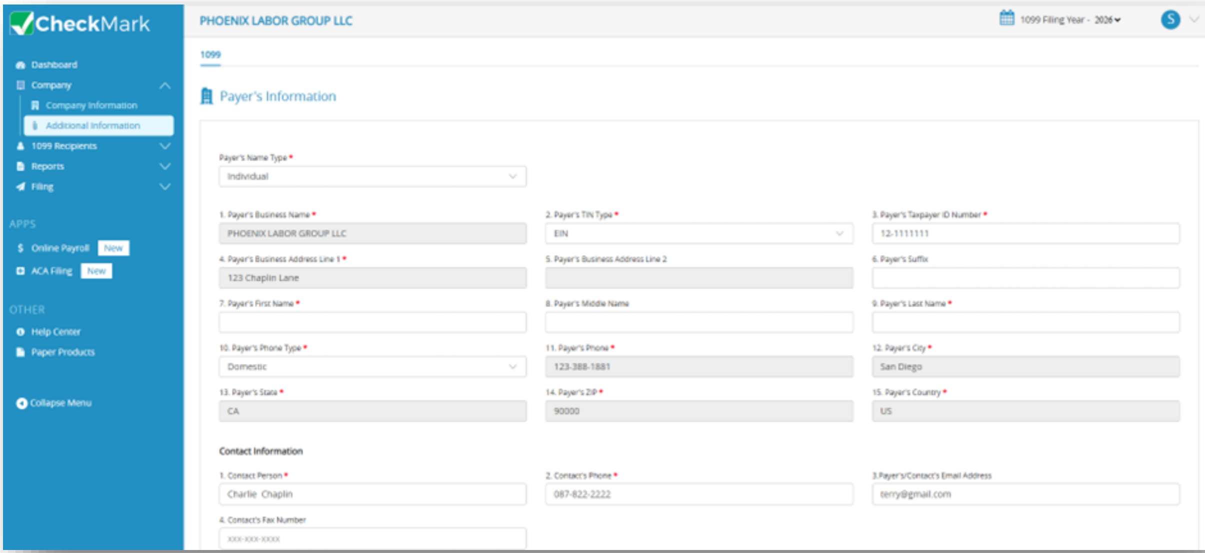
1. From the left navigation menu, select **Company**.
2. Click **Company Information**.
3. Enter your Company Legal Name and Trade Name (If Applicable).
4. (Optional) Click **Choose Logo** to upload your company logo.
5. Enter your company information:

    - Federal ID
    - Phone Number
    - Business Address
    - City
    - State
    - ZIP Code
6. If your mailing (filing) address is the same as your business address, select **Filing Address Same as Business Address**.
7. (Optional) Enter the appropriate contact information.
8. Click **Save**.

Your company information is now saved and will automatically populate applicable fields when you create and file 1099 forms.

1.2 ADDITIONAL INFORMATION

The Additional Information page contains the payer information that appears on your recipients' 1099 forms. Most fields are automatically populated from the information entered on the Company Information page, but you can review and update them as needed before creating your forms.



Setting Up Additional Information

1. From the left navigation menu, select **Company** > **Additional Information**.
2. Review the **Payer Information** displayed on the screen.
3. Select the appropriate **Payer Name Type**:
   - **Business** – Uses your business name as the payer name.
   - **Individual** – Enter the payer's **First Name**, **Middle Name** (optional), and **Last Name**. These fields are available only when **Individual** is selected.
4. Verify your business address and contact information. This information is automatically copied from the **Company Information** page. If any information is missing or incorrect, return to **Company Information**, update the details, and save your changes.
5. Complete any remaining fields as required.

6. If the payer's Tax ID is a Social Security Number (SSN), select **Tax ID is Social Security Number**.
7. If applicable, select **Combined Fed/State Filing Program**.

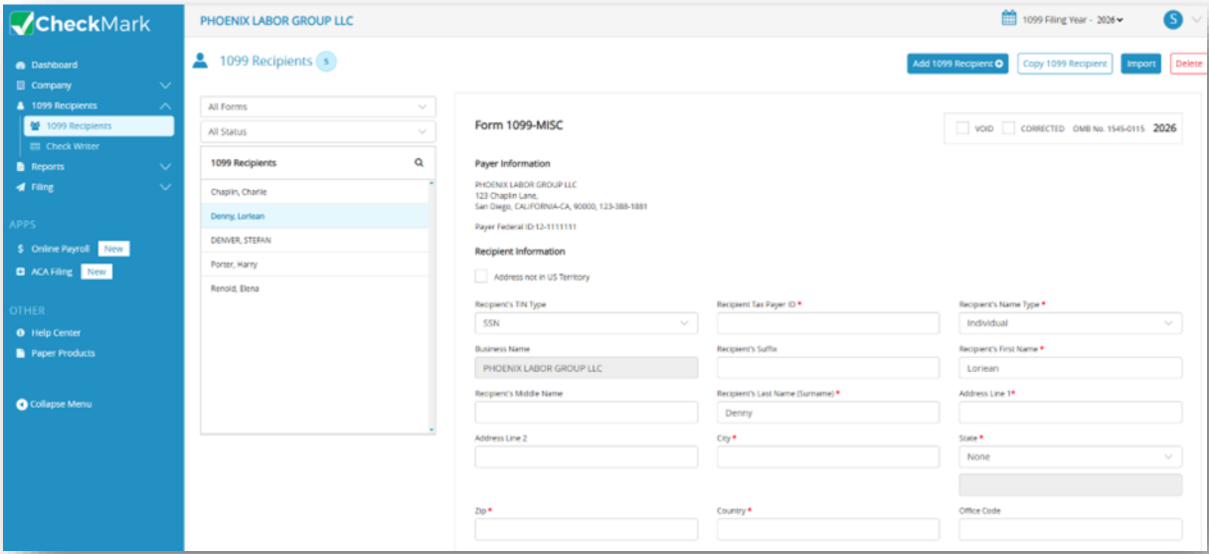
After you save your changes, the payer information will be used to populate the applicable fields on your recipients' 1099 forms.

Chapter 2

SETTING UP RECIPIENTS

Before you can print or e-file 1099 forms, you must create a recipient record for each individual or business that will receive a 1099. Each recipient record stores the information required to complete the selected 1099 form, such as the recipient's name, Taxpayer Identification Number (TIN), address, and payment details.

You can create multiple recipient records, and each record is available for future tax years, making it easy to manage recurring recipients.



2.1 Adding 1099 Recipients

Creating a New Recipient

1. From the left navigation menu, select **1099 Recipients**.
2. Click **Add 1099 Recipient** in the upper-right corner.
3. Enter the recipient's **First Name** and **Last Name**.
4. From the **Recipient Type** drop-down list, select the appropriate 1099 form:

    - 1099-NEC - Nonemployee compensation for independent contractors
    - 1099-MISC - Miscellaneous income and other payments
    - 1099-INT - Interest income from financial institutions.
    - 1099-DIV - Dividends and investment distributions received
    - 1099-R - Retirement, pension, and IRA distributions
    - 1099-S - Proceeds from real estate sales
5. Click **Save**.

The recipient is added to the **1099 Recipients** list. Select the recipient from the list to complete the remaining information. The fields displayed will vary depending on the 1099 form you selected. For example, if you selected **1099-NEC**, the screen displays the fields required for Form 1099-NEC.

Completing Recipient Information

1. Enter the recipient's mailing address, Taxpayer Identification Number (TIN), and any other required information.
2. If the recipient's address is outside the United States or its territories, select **Address Not in U.S. Territory**, and then enter the appropriate state or province (if applicable) and country.
3. Complete all remaining fields applicable to the selected 1099 form.
4. Click **Save** to save the recipient record.

Validating Recipient Information

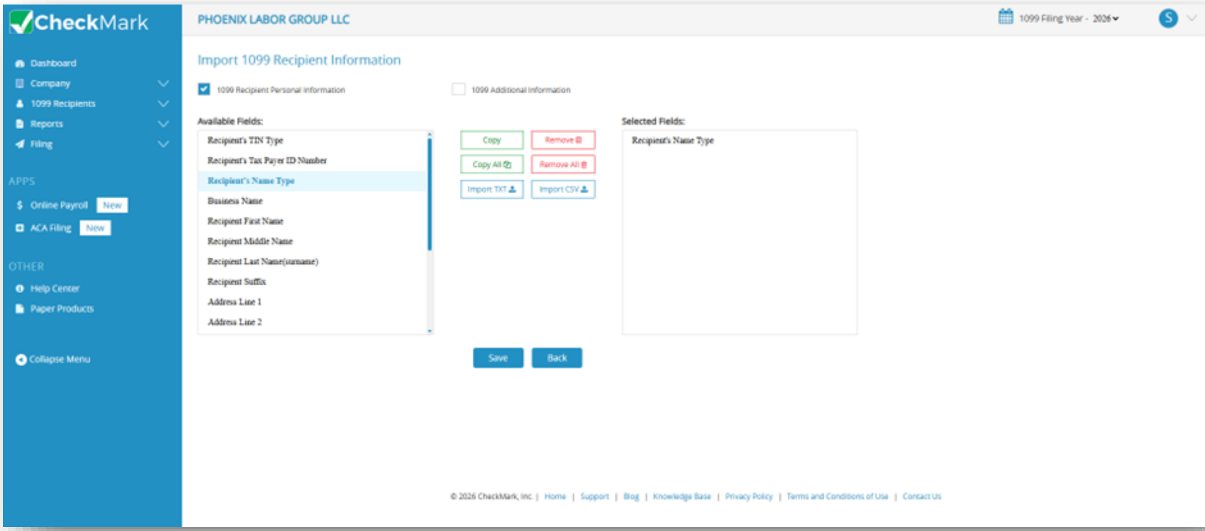
If any required information is missing or contains an invalid value, CheckMark Online 1099 displays a validation message.

- Click **Continue Anyway** to save the record with the current information.
- Click **Cancel** to return to the recipient record and make corrections.

Note: After the record is saved, fields containing invalid or incomplete information are highlighted in **red**. Some fields do not accept invalid values and will remain blank until valid information is entered. Correct any highlighted fields before printing or electronically filing your 1099 forms.

2.2 Importing Recipients

If you already have recipient information stored in another application or spreadsheet, you can import it into CheckMark Online 1099 using a **.txt** (tab-delimited) or **.csv** file. Importing recipients saves time and eliminates the need to enter records manually.



Importing Recipients

1. From the left navigation menu, select **1099 Recipients**.
2. Click **Import** in the upper-right corner.
3. Select the recipient information you want to import:
    - **1099 Recipients Personal Information**
    - **1099 Additional Information** (optional)
4. Select the fields to import. The available fields vary depending on the selected **1099 form type**.
5. Click **Browse** (or **Choose File**) and select the **.txt** or **.csv** file to import.
6. Click **Open**, then follow the prompts to complete the import.

Note: Select **Replace Existing Recipients** if you want the imported records to overwrite existing recipient information with matching records.

Import File Format

CheckMark Online 1099 supports importing recipient data from tab-delimited (.txt) files and comma-separated (.csv) files.

For tab-delimited (.txt) files:

- Each field must be separated by a Tab.
- Each recipient record must end with a Return (new line).
- The order of the fields in the file must match the order of the fields selected during the import process.

Example

Power[tab]Max[tab]44 Main ST[tab]"space"[tab]Fort Collins[tab]CO[tab]80525[tab]123- 45- 6789[return]

Empty Fields

If a field does not contain a value (for example, **Address Line 2**), you can:

- Leave the field empty by using two consecutive tabs.
- Or enter a blank space as a placeholder.

Both of the following formats are valid:

Power[tab]Max[tab]44 Main St[tab][tab]Fort Collins[tab]CO[tab]80525[tab]123-45- 6789[return]

Important: The selected import fields must appear in the same order as the columns in the import file. If the field order does not match, data may be imported into the wrong fields.

2.3 Updating a Recipient

You can update a recipient's information at any time before printing or filing your 1099 forms.

Updating a Recipient

1. From the **1099 Recipients** list, select the recipient you want to edit.
2. Update the recipient information as needed.
3. Click **Save**.

Note: Fields containing invalid or incomplete information are highlighted in **red**. Some fields do not accept invalid values and will remain blank until valid information is entered.

2.4 Marking a Recipient as Voided

If a previously filed 1099 was submitted in error, you can mark the recipient as **Voided** before generating a voided form. Refer to the applicable IRS instructions for requirements when filing a voided 1099.

Marking a Recipient as Voided

1. Select the recipient from the **1099 Recipients** list.
2. Select the **Voided** checkbox and click **Save**.

2.5 Marking a Recipient as Corrected

If a filed 1099 contains incorrect information, you must file a corrected 1099 with the IRS.

Creating a Corrected Recipient

1. Select the recipient from the **1099 Recipients** list.
2. Select the **Corrected** checkbox.
3. Update the recipient information as needed and click **Save**.

If you previously printed the original form, print a new copy showing the Corrected status and submit it to the IRS according to IRS filing requirements. For more information, see Printing 1099 Forms.

2.6 Deleting a Recipient

Delete a recipient only if the record is no longer needed.

Deleting a Recipient

1. Select the recipient from the **1099 Recipients** list.
2. Click **Delete Recipient**.
3. When prompted, click **Yes** to permanently delete the recipient or **No** to cancel.

Important: Deleted recipient records cannot be recovered.

2.7 Copying a Recipient

Copying a recipient saves time when the same recipient needs to be added to another company or requires an additional 1099 form type.

Copying a Recipient

1. Open the company containing the recipient.
2. Select the recipient you want to copy.
3. Click **Copy 1099 Recipient**.
4. Select the destination **1099 form type**.
5. Select the destination **company**.
6. Click **OK**.

A new recipient record is created using the copied information.

2.8 Searching Recipients

Use the Search feature to quickly locate recipients in the recipient list.

Searching Recipients

1. Enter all or part of the recipient's name in the **Search** box.
2. Click **Search**.

You can also use the asterisk (*) wildcard to broaden your search. For example:

- **N*** returns all recipients whose names begin with **N**.
- ***Inc** returns recipients whose names end with **Inc**.

Important: Select the appropriate **1099 form type** before Search. If **All Forms** is selected, the search includes all recipients in the company. If a specific form type (such as **1099-DIV**) is selected, only recipients assigned to that form are included in the search results.

2.9 Filtering Recipients

Use the Status drop-down list to filter recipients based on their current processing status. This helps you quickly identify recipients who are ready for the next step or require additional action.

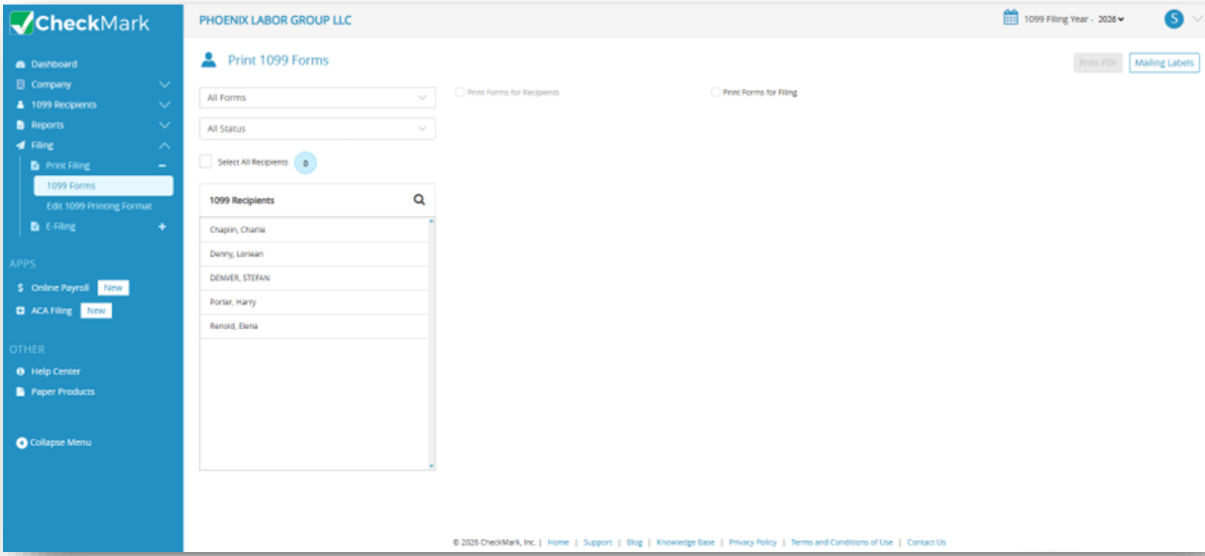
The available status filters include:

- **All Status** – Displays all recipients.
- **Voided** – Recipient is marked as voided.
- **Not Voided** – Recipient is not marked as voided.
- **Printed** – A 1099 form has been printed for the recipient.
- **Not Printed** – A 1099 form has not been printed for the recipient.
- **Completed** – Recipient information has been entered and saved.
- **Not Completed** – Recipient setup is incomplete or required information is missing.
- **Validated** – Recipient information has passed validation checks.
- **Not Validated** – Recipient information has not been validated or contains validation errors.
- **Corrected** – The recipient's 1099 has been marked as corrected.
- **Not Corrected** – The recipient's 1099 has not been marked as corrected.

Chapter 3

PRINTING 1099 FORMS

This chapter explains how to print recipient copies, filing copies, Form 1096, mailing labels, and summary reports.



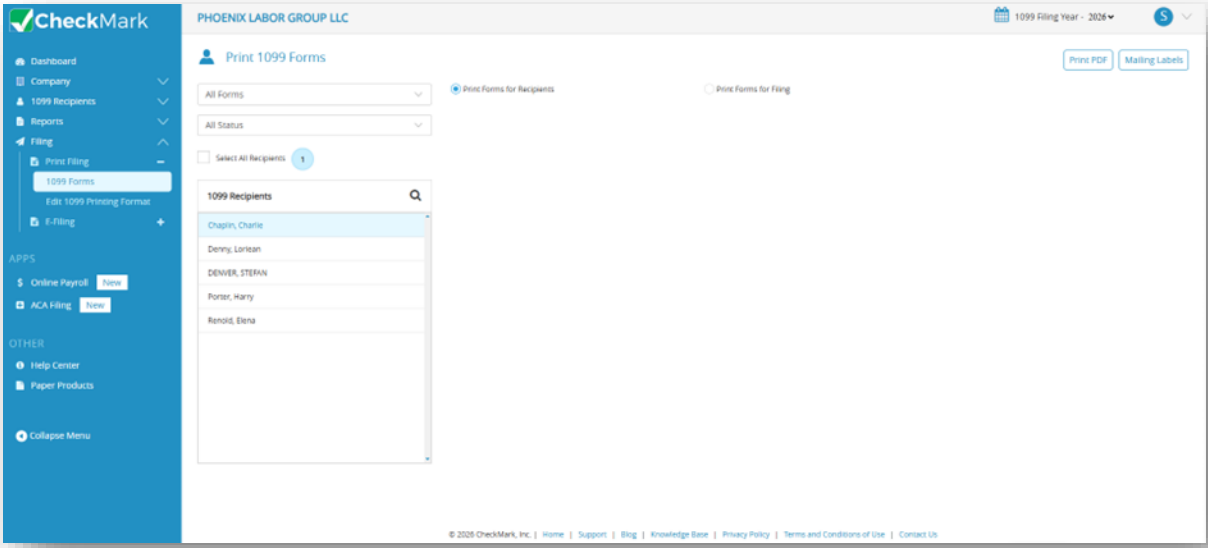
Before printing, verify that all recipient information has been completed and validated to avoid printing forms with missing or incorrect information.

Important

- Install the latest version of **Adobe Acrobat Reader** to view and print PDF forms correctly.
- Verify your printer alignment before printing on preprinted 1099 forms.
- Review all recipient information before printing or filing your forms.

3.1 Printing Forms for Recipients

Print recipient copies when you are ready to distribute 1099 forms to recipients.



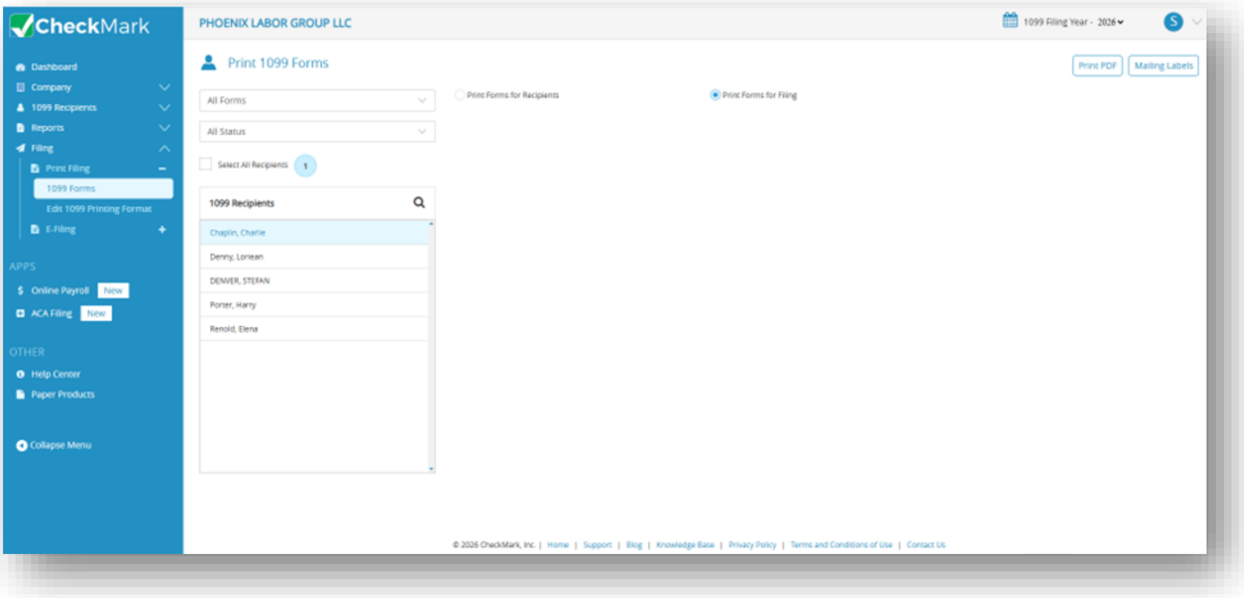
Printing Recipient Forms

1. Go to **Filing** from the left navigation menu and click **Print Filing**.
2. Click 1099 Forms
3. Select the appropriate **1099 form type** from the **All Forms** list:
    - 1099-NEC
    - 1099-MISC
    - 1099-INT
    - 1099-DIV
    - 1099-R
    - 1099-S
4. (Optional) Use the **Status** filter to display specific recipients.
5. Select one or more recipients and click **Print Forms for Recipients**. The **Print Options** window opens.
5. Select the appropriate print layout for your form.
    - **1099-NEC** – 3-up or 4-up
    - **1099-MISC** – 2-up or 4-up
    - **1099-INT** – 2-up or 4-up

6. Follow the on-screen prompts to load the appropriate forms into your printer.
7. Review the generated PDF, then print or save it.

3.2 Print 1099 Forms for Filing (Company)

Use this option to print the copies that will be filed with the IRS, including **Form 1096** when applicable.



Print Filing Copies

1. Go to **Filing** from the left navigation menu and click **Print Filing**.
2. Click 1099 Forms
3. Select the appropriate **1099 form type**.
4. (Optional) Filter recipients using the **Status** list.
5. Select the recipients to include.
6. Click **Print Forms for Filing**.

The application guides you through several print options.

Print Options

- **Printer Alignment** – Verify the alignment before printing on preprinted forms.
- **1096 Totals**
  - **Use all recipients for 1096 totals** (recommended for standard filings).
  - **Use selected recipients for 1096 totals** (recommended when filing corrected or voided forms).
- **Recipients to Print**
  - Print selected recipients.
  - Print all recipients.
- **Print Layout**
  - Choose the appropriate 2-up, 3-up, or 4-up format based on the selected 1099 form.
- **Calendar Year Format**
  - Select **Print "For Calendar Year" column as only "26"** to print the two-digit year.
  - Leave the option unchecked to print the full year (for example, **2026**).

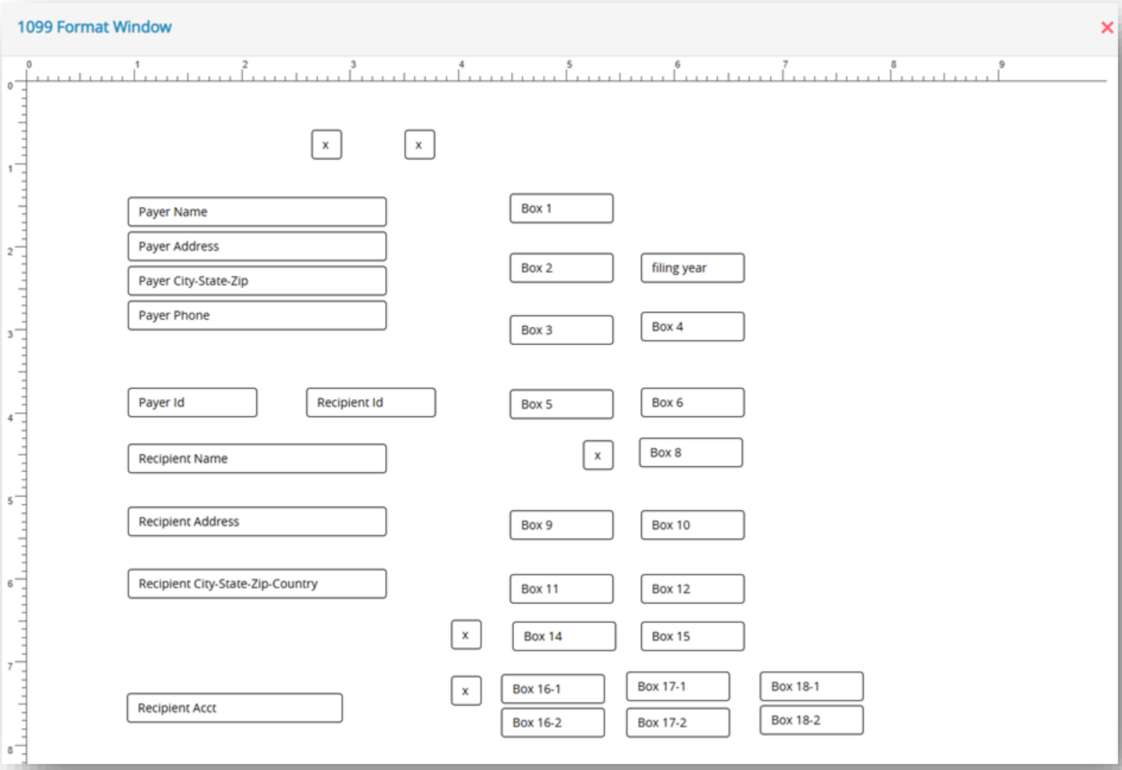
After confirming your selections, follow the prompts to load the appropriate forms into your printer.

A PDF copy of the forms opens in a new window. You can:

- Click **Save** icon, then select **Adobe Acrobat** from the dropdown to download the file
- Click **Printer** icon to automatically download the file in PDF format.

3.3 Customizing Print Alignment (Edit Format)

If printed information does not align correctly on preprinted forms, you can adjust the print positions.



Editing Print Format

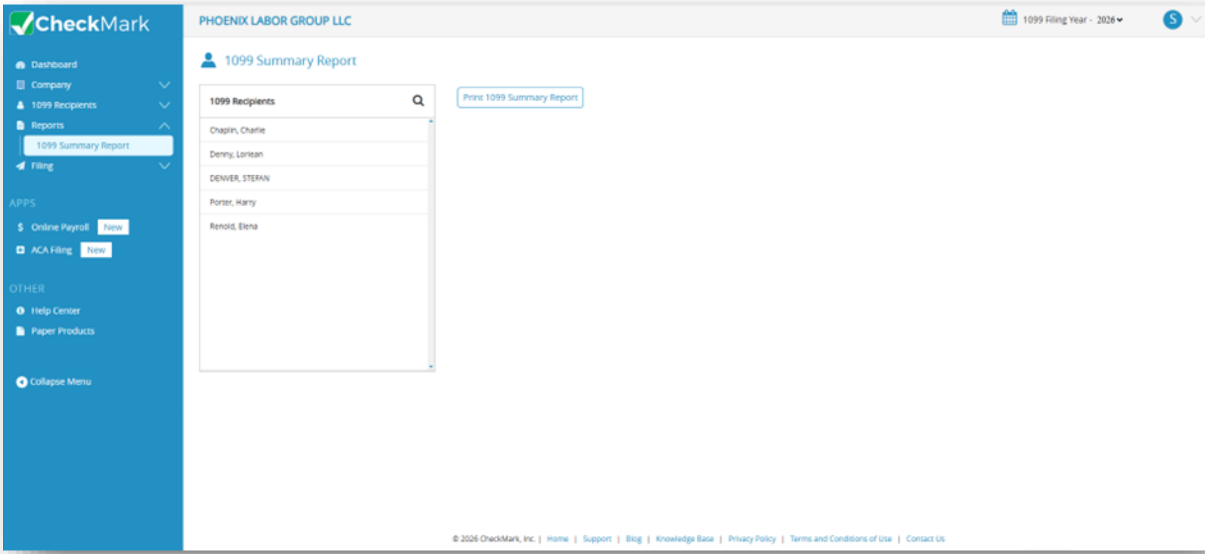
1. Select **Filing** > **Print Filing** > **Edit 1099 Printing Format**.
2. Select the form you want to customize.
3. Click **Edit Current Custom Format**.
4. Drag any field to adjust its position.
5. Click **Yes** to save your changes.

Restoring the Default Layout

1. Close the format editor.
2. Click **Reset Format**.
3. Click **Yes** to restore the default layout.

3.4 1099 Summary Report

The 1099 Summary Report summarizes recipient payments by 1099 form type. Use this report to verify totals before printing or filing.



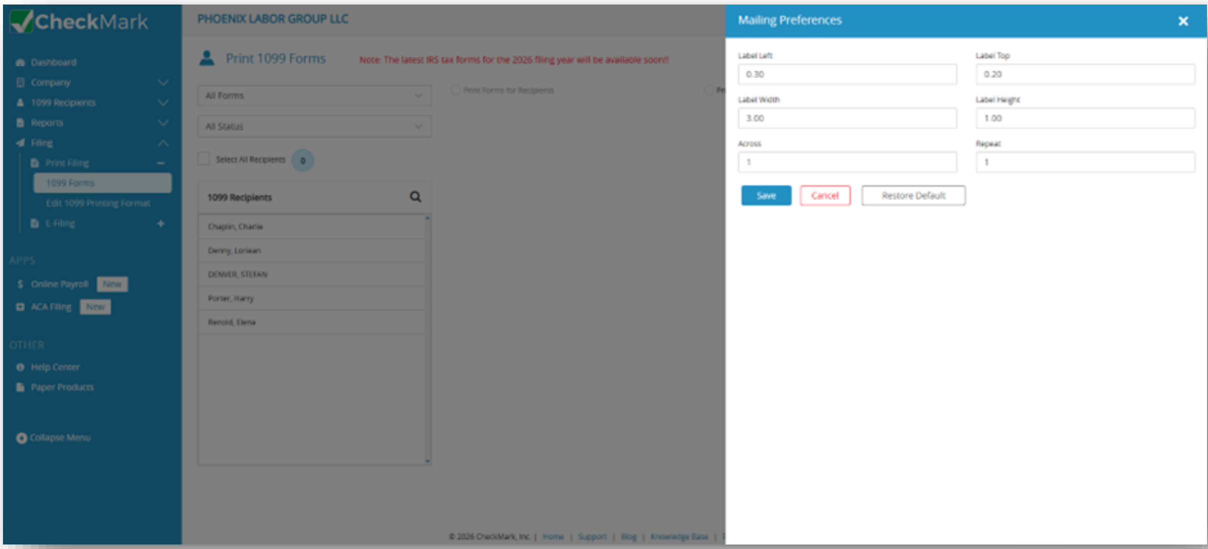
Generating the Summary Report

1. Go to **Reports** from the left navigation menu.
2. Select **1099 Summary Report**.
3. Click **Print 1099 Summary Report**.
4. The report will be generated in a new window.
5. Click the **Save** icon, then select **Adobe Acrobat** from the dropdown to download the file, or click the **Printer** icon to automatically download the file in PDF format.

Compare the totals with **Form 1096** to verify your filing information.

3.5 Printing Mailing Labels

Generate mailing labels for recipient copies of your 1099 forms.



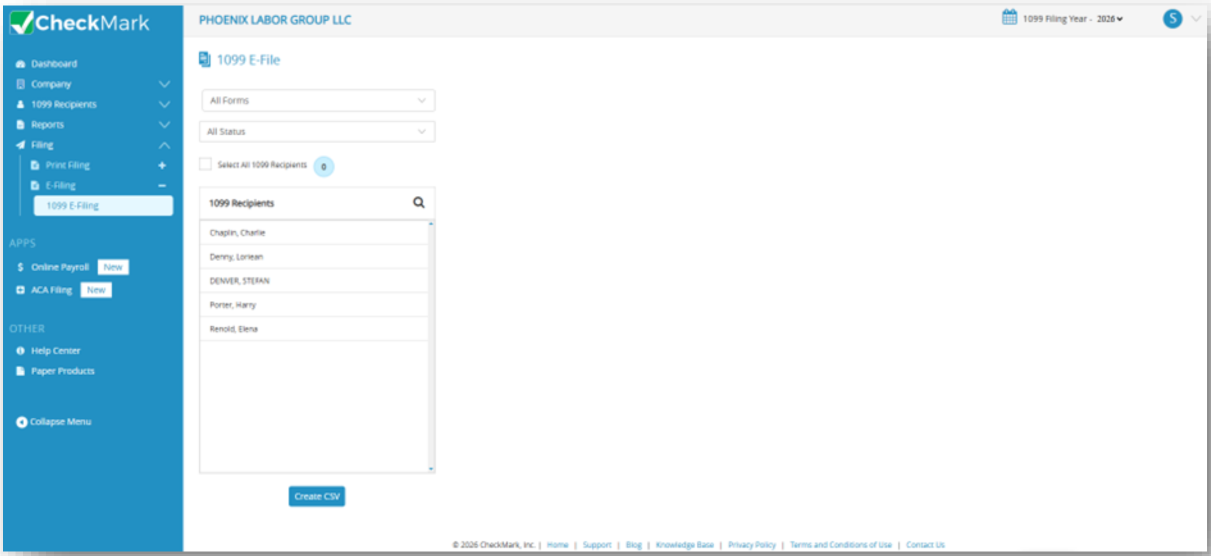
Printing Mailing Labels

1. Select **Filing** > **1099 Forms**.
2. Click **Mailing Labels**.
3. If prompted, update the mailing label settings, such as label width and height.
4. Click **Yes** to save the changes or **No** to continue using the current settings.
5. A PDF containing the mailing labels opens.
6. Print the labels or save the PDF for future use.

Chapter 4

E-FILING 1099 FORMS

CheckMark Online 1099 allows you to generate IRS-compatible CSV files for electronic filing through the **IRS IRIS Taxpayer Portal**. After creating the CSV file, upload it to the IRIS portal to complete your 1099 filing.



Before You Begin

- Verify that your company information is complete.
- Ensure all recipient information has been reviewed and validated.
- Confirm that you have selected the correct 1099 form type before generating the file.

4.1 Creating a CSV File for IRIS E-Filing

1. Select **Filing** > **E-Filing**.
2. Click **1099 E-Filing**.
3. From the **All Forms** drop-down list, select the appropriate 1099 form:
    - 1099-NEC
    - 1099-MISC
    - 1099-INT
    - 1099-DIV
    - 1099-R
    - 1099-S
4. (Optional) Use the **Status** filter to display recipients based on their filing status.
5. Select the recipients you want to include in the e-file.
6. Click **Create CSV**.
7. The application generates and downloads the CSV file to your computer.

Note: If your filing includes more than **100 recipients**, CheckMark Online 1099 automatically splits the data into multiple CSV files, with a maximum of **100 recipients per file**. Upload each generated file separately through the IRS IRIS Taxpayer Portal.

4.2 Submitting the CSV File

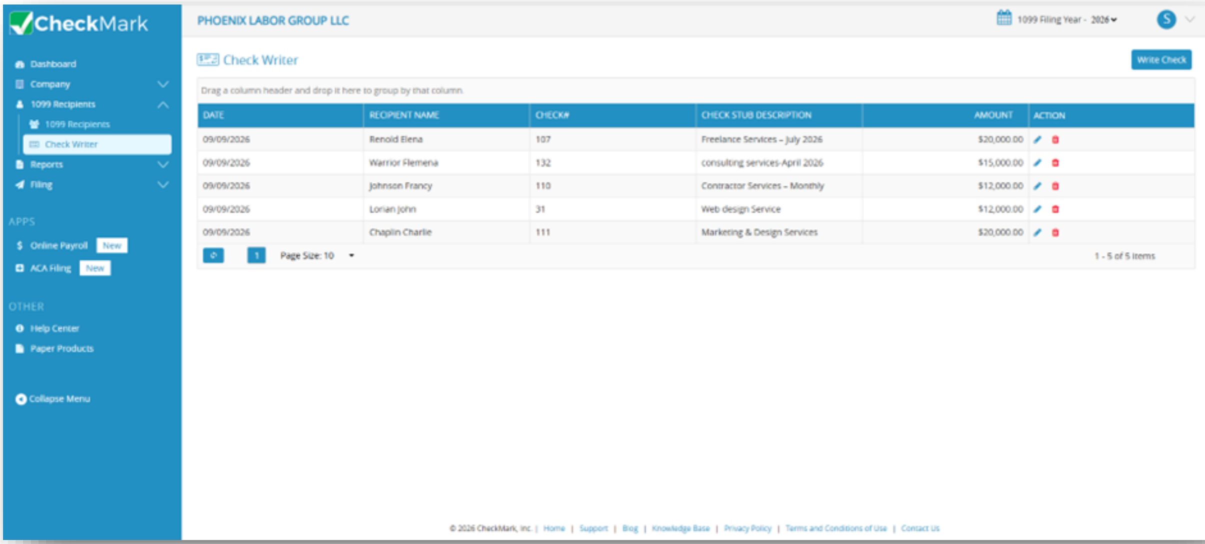
After the CSV file has been generated:

1. Sign in to the **IRS IRIS Taxpayer Portal**.
2. Upload the downloaded CSV file.
3. Follow the IRS instructions to validate and submit your filing.

Chapter 5

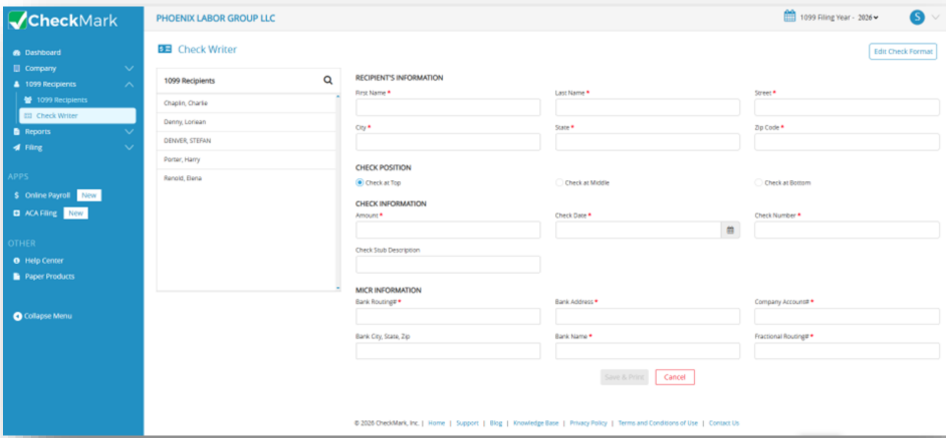
CHECK WRITER

The Check Writer feature allows you to create, save, and print checks for your 1099 recipients.



5.1 How to Write a Check

- Go to **1099 Recipient** in the menu.
- Click **Check Writer**.
- On this page, you can view your past checks by date, recipient name, check number, description, and amount. You can also edit or delete checks.
- Click the **Write Check** button to start a new check.



Recipient Details

- Select a recipient from the recipient list, or use the search box to search for an existing 1099 recipient.
- Once you select a recipient, their details will be automatically populated.
- **Note:** If you want to write a check for a recipient who is not in the list, do not select a recipient from the list. Instead, enter the recipient's first name, last name, and full address, including the street, city, state, and ZIP code.

Check Position

- Choose where you want the check to print on the paper: **top, middle, or bottom**.

Check Information

- Enter the payment amount, check date, check number, and check stub description.

MICR Information

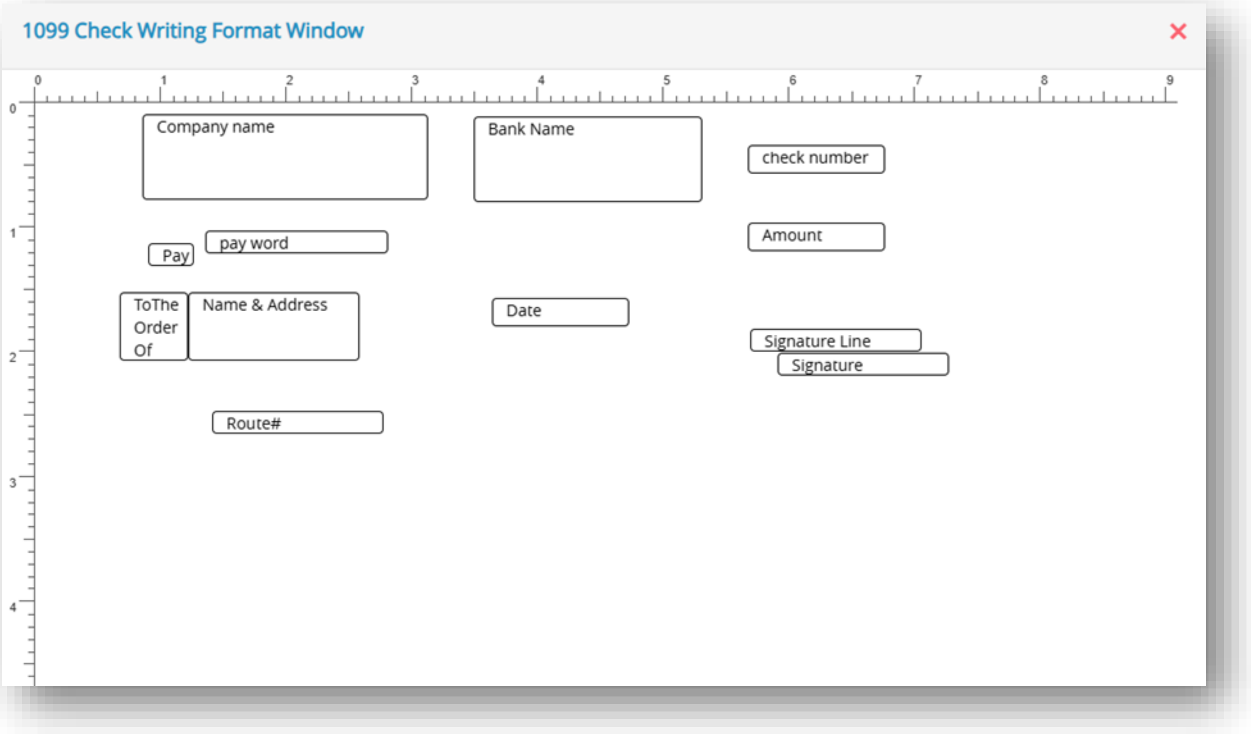
- Add recipient’s bank routing number, account number, bank name, and bank address.

Note: If you enter MICR information for a recipient for the first time, it will be saved and displayed automatically the next time. You do not need to enter it again.

Save and Print

- **Save and Print:** Click this button to save and print the check immediately.
- **Cancel:** Click this button to stop and return without saving.

5.2 How to Edit Check Format



- **Check Format:** Click **Edit Check Format** if you need to change the layout.
- You can adjust the items in the layout to make sure they print properly in the designated areas on the check.

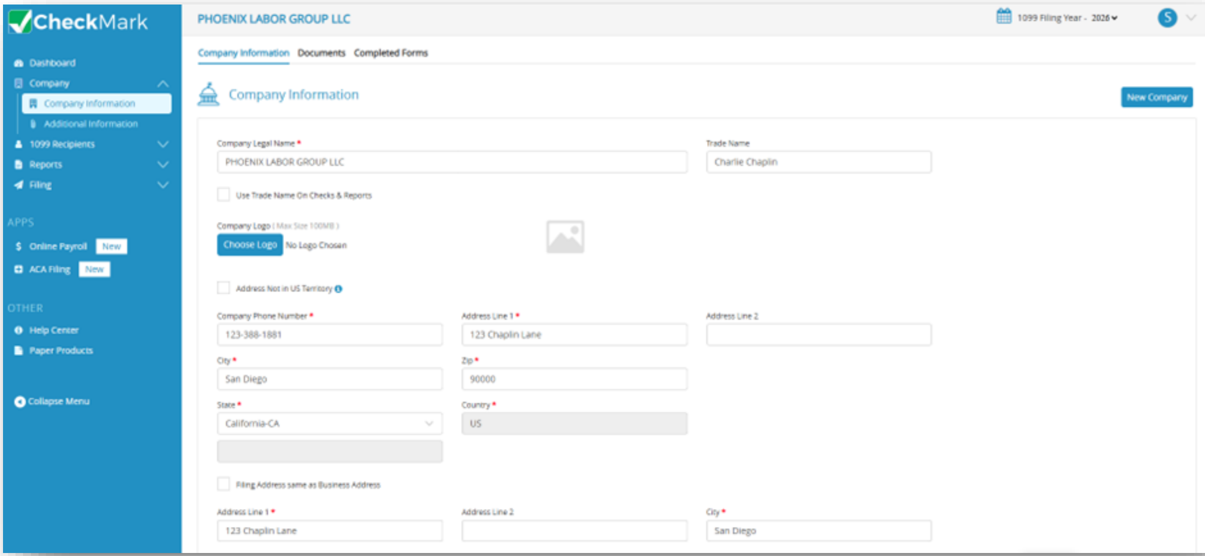
Chapter 6

MISCELLANEOUS

6.1 Adding an Additional Company

CheckMark Online 1099 allows you to manage multiple companies from a single account. Each company has its own subscription and maintains separate company information, recipients, forms, and filings.

You can add an unlimited number of companies to your account for $99 per company, and each company supports unlimited 1099 recipients.



Note: If your first company is subscribed to the **E-File** version, all additional companies must also use the **E-File** version. You cannot switch an additional company to the **Print** plan. The subscription fee is **$99 per company**, regardless of whether you use the Print or E-File version.

Adding an Additional Company

1. From the left navigation menu, select **Company** > **Company Information**.
2. Click **New Company** in the upper-right corner.
3. Enter the following information:
    - **Company Name**
    - **Trade Name** (optional)
4. Select the **1099** checkbox.
5. Click **Add New Company**. You will be redirected to the **Plan Selection** page.
6. Review the subscription details and cost.
7. Click **Proceed**.
8. Review your billing address and payment method. You can use your saved payment method or add a new one.
9. Click **Make Payment**. The payment process begins automatically. The transaction may take a few moments to complete. During this time:
    - Do not refresh the page.
    - Do not click the browser's Back button.
    - Do not close the payment window.
10. Once your payment is successfully processed:

- Your new company is added to your CheckMark Online 1099 account.
- The subscription for the new company becomes active immediately.
- A payment receipt is sent to your registered email address.

You can now begin setting up the new company by entering its company information, adding recipients, and creating or filing 1099 forms.