

1099 Forms - Prepare and Print and/or eFile for TurningPoint

Document #:	3043	Product:	TurningPoint
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This document describes how to prepare, print and/or eFile 1099 forms. You can print and eFile forms in any combination. For example, many people choose to eFile the Federal and State copies and then print the vendor/employee copies. An increasing number of people are using the complete eFile process in which Federal and State copies are eFiled and the vendor/employee copy is printed and mailed by Aatrix.

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Step A - Installation of Red Wing Tax Forms

Printing 1099s through TurningPoint requires that Red Wing Tax Forms is installed and registered.



Note: Red Wing Tax Forms needs to be installed only on the computer that will be doing 1099s (even if you have a network license for TurningPoint).

1. From an internet browser, enter www.redwingsoftware.com/home/rwtaxforms.
2. At the *Do you want to allow this app to make changes to your device?* prompt, click **Yes**.
3. On the **Application Requirements** screen, click **Next**.
4. On the **Welcome** screen, click **Next**.
5. On the **License Agreement** screen, select the **I accept the terms of the license agreement** check box and then click **Next**.
6. On the **Destination Folder** screen, click **Next**.
7. On the **Select Program Folder** screen, click **Next**.
8. On the **Completing** screen, click **Next**.
9. On the next **Completing** screen, click **Finish**.

Step B (Optional): Register Red Wing Tax Forms if not Previously Registered

Printing/eFiling 1099s through TurningPoint requires that Red Wing Tax Forms is registered. If you open Red Wing Tax Forms and receive a "This application has not been registered." message, continue with the Register Online steps below.

Register Online

1. From Red Wing Tax Forms, select **Help > Register...**
2. Click **Online**.
3. In the **Email Address** and **Password** boxes, type your email address and password for the Red Wing Software website. If you haven't registered on our website previously or forgot your password, see the Frequently Asked Questions section of this document for additional information about using the Red Wing Software website.
4. Click **Login**.
5. On the next **Registration** screen, your registration information will display, click **Next**.
6. Click **OK**.
7. On the next Registration screen, click **E-mail** to receive a copy of the information via your e-mail address. Save this email. Click **OK**. Then click **Close Form**.

Step C – Register Federal/State Tax Forms (Aatrix)

Printing/eFiling 1099s through TurningPoint requires that Federal/State Tax Forms (Aatrix) is registered. Register using one of the options below:

Option A: Register Online

1. From Red Wing Tax Forms, select **Help > Register Federal/State Tax Forms**.
2. Click **Online**.
3. In the **Email Address** and **Password** boxes, type your email address and password for the Red Wing Software website. If you haven't registered on our website previously or forgot your password, see the Frequently Asked Questions section of this document for additional information about using the Red Wing Software website.
4. Click **Login**.
5. On the **Aatrix Product Registration** screen, enter your **Primary Company EIN** and then click **Next**.
6. On the **Your Registration Information** screen, at the **Registration Successful** message, click **OK**.
7. If you wish to have your registration information sent to you via e-mail, click **Email**.
8. Close the Your Registration Information screen.
9. Your Aatrix software is registered through the last day of the month of your Customer Care Plan anniversary date.

Option B: Register Manually (use this option only if internet access is not available)

1. Call Red Wing Software at 1-800-732-9464 and request an Aatrix Registration code.
2. Open **Red Wing Tax Forms**
3. Select **Help > Register Federal/State Tax Forms**.
4. Click **Manual**.
5. In the **Aatrix Registration Key** box, enter the key you were given by Red Wing Software (do not enter the dashes.)
6. Click **Submit**.
7. At the **Registration Successful** message, click **OK**.
8. Click **Close**.
9. Your Aatrix software is registered through the last day of the month of your Customer Care Plan anniversary date.

Step D - Verify 1099 Information

1. From TurningPoint, use **Accounts Payable > Reports > 1099 Worksheet** to verify the 1099 information prior to printing the actual forms. This is also a good time to verify that all vendors have a Tax Payer Id assigned.
2. The **Vendor** and **1099 Types** fields can both stay at **All**. Select the appropriate **Year**.

3. We offer two report options in **Report Types**; the **Summary By Vendor** option shows one line (total dollar amount) per 1099 Form type for each vendor. The **Detail by Invoice** option shows each invoice that made up the total for each vendor/1099 type.
4. Click on **Preview** or **Print**.

Modify 1099 Information (If Applicable)

What if Vendors are Missing?

A vendor **MUST** be set up as a 1099 vendor on the Accounting tab in Setup > Vendors, to be listed on this report. If they are **NOT** set up as a 1099 vendor, they are not included, even if the invoice itself is marked as 1099.

What if an Invoice is Missing?

If an invoice is listed incorrectly or is not listed on this report (because it was not correctly marked as a 1099 invoice during entry), use **Accounts Payable > Transactions > Invoice Entry** to change it. This can be done even if the invoice has been paid and/or posted to the general ledger.

To view all invoices for a vendor, change the **Status** field at the bottom of the Invoice Entry screen to **All**. Then select the appropriate **Vendor** at the bottom of the screen also.

Edit the missing invoice to put a check mark in the **1099 Invoice** field. The opposite can be done if an invoice was inadvertently marked as a 1099.

Step E – Import TurningPoint 1099 Information into Red Wing Tax Forms

1. Open **Red Wing Tax Forms**.
2. Select **File > Data > TurningPoint Import**.

2. In the **Data Folder**, click the ... button, select the location (path) where your TurningPoint data is stored.
3. In the **Year** box, select **2023**.
4. In the **Company** box, select the company you want to process 1099 forms for.
5. Click **Import**.
6. At the Import Complete prompt, click **OK**.
7. The payer that was just imported will automatically open (to select a different payer, click the **Payers** icon on the toolbar, select the payer you want to print 1099s for, and then click **Open**) or if you are performing this section of the document immediately after opening Red Wing Tax Forms, on the Open Payer screen select the Payer that you want to print 1099s for and then click **Open**.



Note: You can also search for the payer by entering a portion of the payer name to find the first match or a portion of the payer name with * to perform partial searches into the **Search** box

8. Select **Forms** and then select one of the tax forms **1099-MISC**, **1099-NEC**, **1099-INT**, **1099-DIV**, **1099-PATR**, or **1099-R** or click the form icon from the toolbar. In the example below, the 1099-NEC form was selected for the Abigail Acres Payer.


9. In the light green highlighted first row, on the left side of the screen, verify/edit the payee (recipient) information. Verify/edit the information below by pressing the tab key in between each entry.:
 - » The **Payee TID** and whether the TID is a SSN or EIN.
 - » The **Name, Address, City, State, Zip, Phone, Email, Account No.**
 - » Any other information pertinent to the specific form.
10. In the light green highlighted first row, on the right side of the screen, verify/edit the information required for the boxes on the tax form you selected. For example, for the 1099-NEC, verify/edit **Nonemployee Compensation, Federal Tax Withheld, State 1 Withheld**, etc.

11. Repeat Steps 8-10 for all payees (recipients).
12. Click **Save**.
13. Click **Print**.

Forms Update

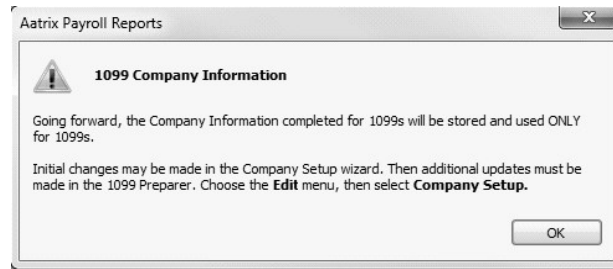
If you have Internet access and the latest version of Federal/State Tax Forms (Aatrix) is not installed, the following **Forms Update** screen will automatically be displayed when you try to print your data. Simply click on **Automatic Update** and follow the on screen instructions. Note: Once the update begins, the window may be behind your program window. If you minimize your program window, you will see the progress of the update or there may be an icon in your task bar that when clicked will display the progress of the update.

The 1099 Company Information screen displays to remind you that changes are stored only for 1099s and if needed to change Company Information from **Edit > Company Setup** in the 1099 Preparer in Aatrix. Click **OK**.

 **Note:** Changing company information in Aatrix does not change company information in TurningPoint. If a change is needed, it is suggested to change company information in TurningPoint.

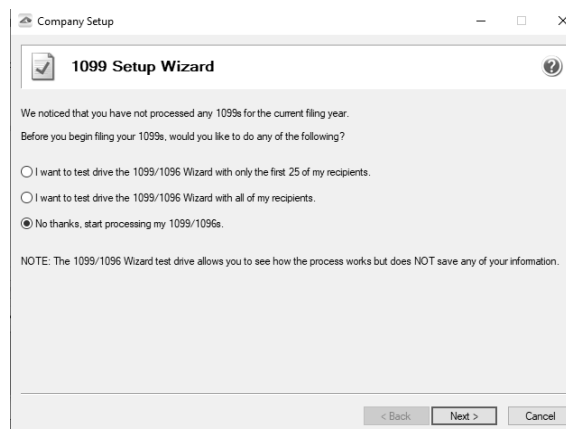


Note: The following screen shot may not appear on top of your other open windows. You may need to minimize any open windows to continue.

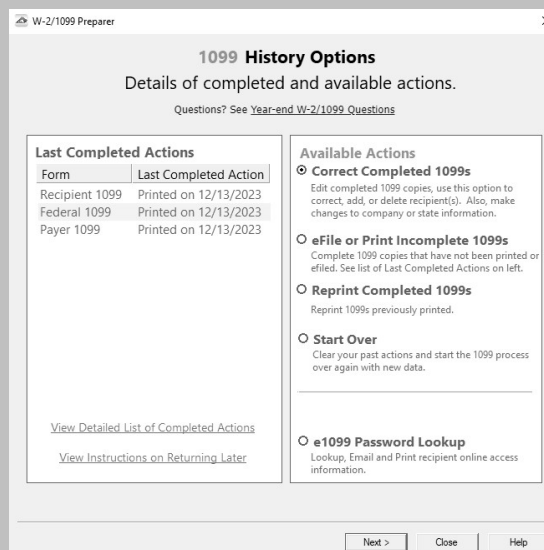


Step F - Setup 1099 Forms

1. If this is the first time 1099s are being processed this year, the **1099 Setup Wizard** will automatically be displayed. If you wish to test the 1099 Setup Wizard without saving any of the test information, select either the 25 recipients or All recipient test drive options. If you want to continue the 1099 process, select the **No thanks, start processing my 1099/1096s** option, and then click **Next**.



Note: If you started processing 1099s previously, the 1099 Setup Wizard screen will not be displayed. Instead, you'll see the **1099 History File Options** screen below. Choose the appropriate **Action**, and then click **Next**.



2. Verify that the **Payer TIN** is correct, select whether the Payer TIN is an **EIN** or **SSN** , and then click **Next**.

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

9 8 - 1 7 7 7 4 3 2

☒ EIN ☐ SSN

< Back Next > Cancel

- The **Multiple 1099 Data Files** screen will display. Select **Yes** if you have multiple payroll databases with the same EIN and see the FAQ section in this document for more information. Otherwise, select **No**, and then click **Next**. The data will now be transferred to the W2/1099 Preparer grid.

Multiple 1099 Data Files

Please Read Carefully

Answering incorrectly may require you to restart the filing process.

Do you use multiple 1099 data files for the **same federal EIN and form type**?

You may be using multiple 1099 data files in your accounting software to handle:

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

all under the same federal EIN.

☒ Yes, I use multiple 1099 data files for this EIN.

☐ No, I use a single 1099 data file for this EIN.

< Back Next > Cancel

- Review your **Payer Information**. The system will notify you if any required fields have incorrect or missing information. Click **Next**.

Payer Information

Company name: CenterPoint Orchard DBA name: CenterPoint Orchard

First name: Middle: Last name:

Country: USA (United States)

Address line 1: 491 Highway 19

Address line 2:

City: Red Wing State: MN ZIP code: 55066

Contact name: Title:


Phone: (800) 555-1234 Email: support@redwingsoftware.com

Fax: Transfer agent:


< Back Next > Cancel

- Select the appropriate filer type on the **Tax Preparer Type** screen, and then click **Next**.

6. The **State Tax Items** screen will display. The Setup Wizard will automatically verify that all required information for listed states are complete and conform to the required formats (Vermont, Pennsylvania, Oregon, Louisiana, and Wisconsin all require complete state information). If it finds a blank field or data is incorrect, it will automatically prompt you to correct the data. You will not be able to continue to the next screen until all required fields are correct. Click **Next**.

 **Note:** Changing state information in Aatrix does not change state information in TurningPoint. If a change is needed, it is suggested to change state tax information in TurningPoint.

7. The **Local Tax Items** screen will display. The Setup Wizard will automatically verify that all required information for listed local taxes are complete and conform to the required formats. If it finds a blank field or data is incorrect, it will automatically prompt you to correct the data. You will not be able to continue to the next screen until all required fields are correct. Click **Next**.

 **Note:** Changing local tax information in Aatrix does not change local tax information in TurningPoint. If a change is needed, it is suggested to change local tax information in TurningPoint.

8. The **Data Verification** screen will be displayed. Determine if you have any recipients that elected to receive 1099s electronically, and then click **Next** to continue.

9. The **Recipient Identification Numbers** screen displays. Determine if you want to truncate recipient identification numbers and how you want to print RINs on recipient copies reported as zero and then click **Next** to continue. The data will now be transferred to the W2/1099 Preparer grid.


Step G- Prepare 1099 Forms

The W-2/1099 Preparer will walk you through the process of eFiling and/or printing your 1099s. Once the displayed data has been reviewed, click **Next** to continue to the next screen. When you click on Next Step, the W-2/1099 Preparer will automatically

verify that all required fields are filled in and the data is formatted correctly. Anytime the Preparer finds data that is incorrect or missing, it will automatically prompt you to correct it.

This is an example of what the W-2/1099 Preparer will display if it finds incorrect or missing data. If this screen is displayed, simply click on the **Go Back and Correct** button and the data that needs to be corrected will be displayed in red. Click on the red data and correct the information. Once all data has been corrected, click **Next** again to continue to the next screen.

Error

 Errors were found and will be highlighted in red.


Please complete or correct required RED fields. Use TAB for the next RED field.

Error / Warning Description:

Invalid Recipient Identification Number. [1 error found]

Go Back and Correct Print List... Save Detailed List... Help...

1. The first screen of the **W-2/1099 Preparer** displays the **Taxpayer Identification Number (TIN)** for each recipient. Make any needed changes, and then click the **Next** button at the top of the screen.

 **Note:** Changing the figures on this screen will only change the printed Federal reports, it will not change the data in TurningPoint. The total for the columns appears above the column in the Totals Row.

W-2/1099 Preparer [77-9876543 CenterPoint Orchard]

File Edit View Help

Verify Recipient Taxpayer Identification Numbers (TIN)

PREVIOUS NEXT COMPANY SETUP

< > Help Tips - Did you know? Read more... ?

To correct any items in the Preparer, even after filing, access the reports through the history, and

TOTALS:		Recipients (3)																
Recipient Last Name	Recipient First Name	Recipient Middle Name	Recipient TIN	TIN Flag	Recipient Company Name	Optional Name	Recipient Address	Box 1	Box 2	Box 4	Filing State							
Last Name	First Name	Middle Name	Taxpayer ID Number	Check if FEIN	Company Name	Full Name	Address	Nonemployee Compensation	Payer Made Direct Sales of \$5,000 or More	Federal Income Tax Withheld	Filing State							
1				<input checked="" type="checkbox"/>	All Power Equipment		385 Centri	2098.00	<input type="checkbox"/>		MN							
2				<input checked="" type="checkbox"/>	MKGP Services		8327 We	5000.00	<input type="checkbox"/>		MN							
3	Meyers	Sam	222-33-4444	<input type="checkbox"/>			38583 Lai	854.00	<input type="checkbox"/>		MN							

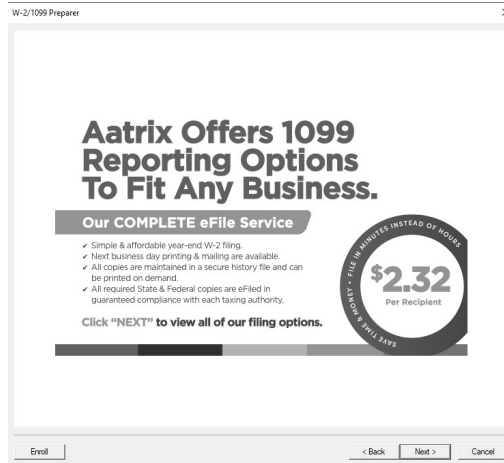
Ready

CAP NUM SCRL

- » To add a line to the W-2/1099 Preparer grid, right-click over one of the line numbers on the left side of the screen and select **Insert Row**, enter the number of rows you want to add to the end of the list of employees, and then manually enter the new information into the grid.
 - » To delete a line from the W-2/1099 Preparer grid, right-click over the line you want to remove and select **Remove Row**.
 - » To copy a line on the W-2/1099 Preparer grid, right-click over the line you want to copy, and then select **Copy**.
 - » To add a copied line to the W-2/1099 Preparer grid, right-click over the line where the copied row should be inserted, and then click **Paste**.
 - » To Find information in a column in the W-2/1099 Preparer grid, right-click on the column header name, select **Find**, in the **Find What** box, enter the information you want to locate, and then click **Find Next**.
2. The next step allows you to verify the **TIN Flag**. The **TIN Flag** Check if FEIN should be selected for each recipient that has a TIN that is an FEIN. Make any needed changes, and then click **Next**.
 3. Verify that the recipients names and addresses are correct. The recipients names will be in the Recipient Last Name, Recipient First Name, and Recipient Middle Name fields. If the recipients names are not in the correct columns, please see the second question in the Frequently Asked Questions section of this document. Make any needed changes, and then click **Next**.
 4. Continue verifying all Income boxes, Filing State, and any other amounts for the recipients, make any needed changes, and then click **Next** until all data is accurate. When all data is accurate, click **Next Step** to begin printing and/or eFiling

1099s.

5. If a Complete eFile Service informational screen displays, click **Next**.

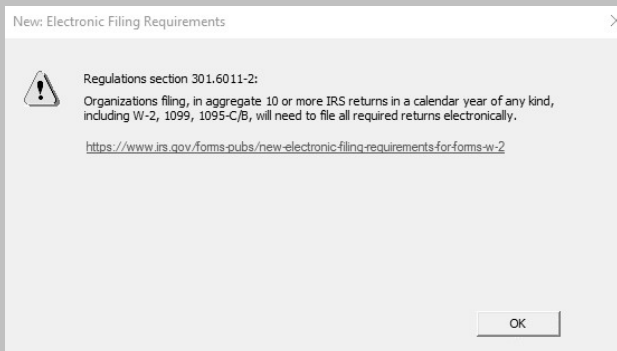


6. The **1099 Printing and Filing Options** screen will be displayed. All printing and eFiling options are displayed with the costs associated for eFiling and Complete Filing Service (which does all the printing and eFiling for you). Choose the appropriate options for your company and click **Next**.

Service	# Recipients	Price/Recip.	Subtotal
Print and Mail Recipient Copies	3	\$2.32	\$6.96
e1099 Only Recipient Copies	0	\$0.99	\$0.00
File your Federal 1099s and 1096		included	FREE
File all applicable State 1099s and Reconciliation Forms		included	FREE
e1099s Available for all Recipients		included	FREE
Total Cost		Minimum	\$24.95

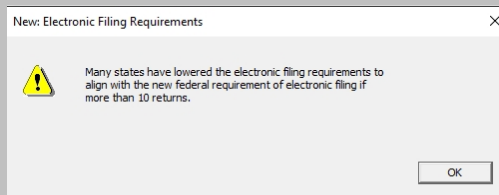
Other Options	# Recipients	Price/Recip.	Subtotal
<input type="checkbox"/> Print Recipient 1099 Copies			
<input type="checkbox"/> eFile Federal 1099s and 1096	3	\$0.49	\$0.00
<input type="checkbox"/> eFile State 1099s and Reconciliation Forms	3	\$0.69	\$0.00
<input type="checkbox"/> Print Federal 1099s and 1096			
<input type="checkbox"/> Print State 1099s and Reconciliation Forms			
Official Payer 1099s will display when any Federal 1099s are selected			
Total Cost			\$ 0.00

Note: If you chose to print your Federal forms, you will receive a New Electronic Filing Requirements screen. This screen outlines the regulation the IRS and the Department of Treasury changed on February 21, 2023 which changed the Federal eFile threshold for 2023 from 250 to 10. Click [here](#) for more information. For specific 1099 series information, click [here](#). Click **OK** to return to the filing options screen to continue printing if you are compliant or make eFiling selections to remain compliant.

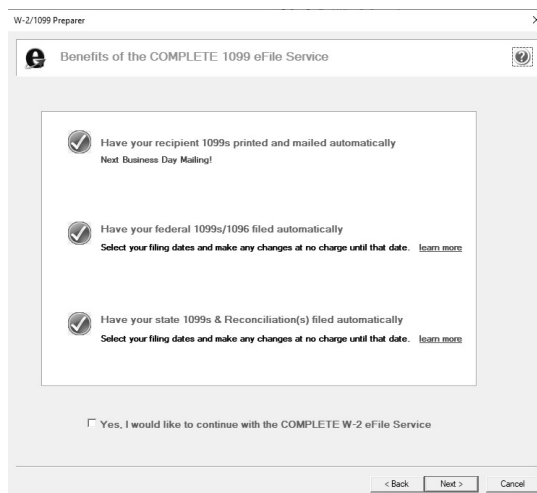




Many states have lowered the eFiling requirements to align with the new Federal requirement and you will receive a New Electronic Filing Requirements screen when printing state copies. Click **OK** to return to the filing options screen to continue printing if you are compliant or make eFiling selections to remain compliant.



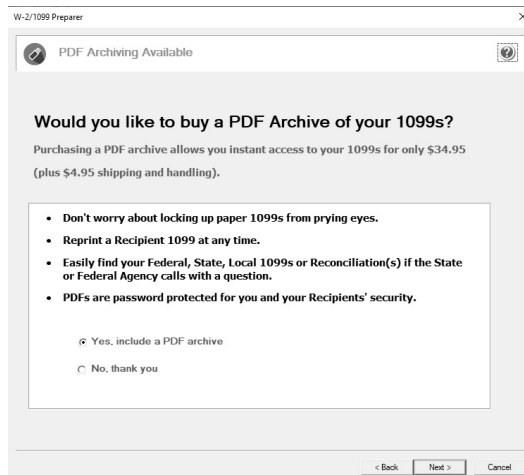
7. Information about the Complete 1099 eFiling service will be displayed. Click **Next**.
8. If you have **not** chosen the **Complete 1099 eFiling Service** option, you have another chance to select that service instead of printing the 1099s yourself. Click **Next** to continue with the original printing options selected. If you've changed your mind and would like Aatrix to print and eFile all of your 1099s, select **Yes, I would...** and then click **Next**.



9. If you chose the **1099 eFiling Service**, you have the option to purchase a PDF archive on a USB of your 1099s, select **Yes, include a PDF archive** to purchase an archive or select **No, thank you** to continue without purchasing an archive.



Red Wing Software recommends purchasing a PDF Archive of your 1099s as a backup so you can easily view or reprint a filed 1099 form. If your Aatrix History file becomes corrupt, the file cannot be located, or you get a new computer and the file is not copied to your new computer the PDF Archive can be used instead.



10. If you have elected to file state copies of the 1099 forms, the **Select the States you Wish to File** screen may display. If there are any states in which you do not want to file, unselect those states now.

W-2/1099 Preparer

Select the States you Wish to File

You have elected to file state copies of the 1099 forms. If there are any states in which you do not want to file, uncheck those states now.

☒ WI - Wisconsin

Select All Select None

< Back Next > Cancel

11. The **Review Data** screen will display. If you select the Print button, a printed version of exactly what displays on this screen will be printed. If any changes are needed, click **Back**. Otherwise, click **Next** to continue.

W-2/1099 Preparer

Review Data

Based upon your selections, we need you to review data on the following forms :

Federal
eFile Federal 1099-NEC
eFile Federal 1099-NEC Recipient
Payer
Print Payer 1099-NEC

You will not be able to view your recipient copies while in the Forms Viewer. If you would like to view your recipient 1099s, please choose to reprint in the 1099 History File Options screen at the end of the process.

If you would like a copy for your records of the actions that will be taken, click 'Print.'

Print

< Back Next > Cancel

12. The first selected 1099 form will be displayed. The form type is displayed in the yellow bar at the top of the screen. It also specifies how many different forms were selected to print.

7171 ☐ VOID ☐ CORRECTED

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.
CENTERPOINT ORCHARD
491 HIGHWAY 19
RED WING MN 55066
(800) 555-1234

PAYER'S TIN
77-9876543

RECIPIENT'S TIN
22-334455

RECIPIENT'S name
ALL POWER EQUIPMENT

Street address (including apt. no.)
385 CENTRAL AVENUE

City or town, state or province, country, and ZIP or foreign postal code
OWATONNA MN 55060

Account number (see instructions) 2nd TIN not ☐

OMB No 1545-0116
Form **1099-NEC**
(Rev. January 2022)
For calendar year 2023

Nonemployee Compensation

1 Nonemployee compensation 2098.00

2 Payer made direct sales totaling \$5,000 or more of consumer products to recipient for resale ☐

3

4 Federal income tax withheld \$

5 State tax withheld \$ /

6 State/Payer's state no. /

7 State income \$


Form 1099-NEC Department of the Treasury - Internal Revenue Service

Do Not Cut or Separate Forms on This Page — Do Not Cut or Separate Forms on This Page

Matrix Rev. 10/26/23

Copy A
For Internal Revenue Service Center
File with Form 1096.
For Privacy Act and Paperwork Reduction Act Notice, see the current General Instructions for Certain Information Returns.

13. To print this first form, click **Print Copy**. Once the data is printed, click **Next Step** to continue to the next selected form.

Do not staple  Aatrix Rev. 10/26/23

Form 1096	Annual Summary and Transmittal of U.S. Information Returns	OMB No. 1545-0046 2023																																																																																																																																																							
RILEY'S name CENTERPOINT ORCHARD Street address (including room or suite number) 491 HIGHWAY 19 City or town, state or province, country, and ZIP or foreign postal code RED WING MN 55066																																																																																																																																																									
Name of person to contact JOE SMITH Email address SUPPORT@REDWINGSOFTWARE.CO		Telephone number 800 555-1234 Fax number 77-9876543																																																																																																																																																							
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Return this entire page to the Internal Revenue Service. Photocopies are not acceptable.
 Send this form, with the copies of the form checked in box 6, to the IRS in a flat mailer (not folded).
 Under penalties of perjury, I declare that I have examined this return and accompanying documents and, to the best of my knowledge and belief, they are true, correct, and complete.

Signature **SIGNATURE ON FILE - AATRIX** Title _____ Date **12/07/2023**

14. The next form will be displayed. Click **Print Copy** to print the form, then click **Next Step** to continue to the next form. The last form will be displayed. Click **PrintFinal** to print the form, then click **Next Step**.

<input type="checkbox"/> VOID <input type="checkbox"/> CORRECTED		<input type="checkbox"/> VOID <input type="checkbox"/> CORRECTED	
1 Nonemployee compensation \$ 2098.00		1 Nonemployee compensation \$ 854.00	
2 Federal income tax withheld \$		2 Federal income tax withheld \$	
PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. CENTERPOINT ORCHARD 491 HIGHWAY 19 RED WING MN 55066		PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. CENTERPOINT ORCHARD 491 HIGHWAY 19 RED WING MN 55066	
PAYER'S TIN (800) 555-1234		PAYER'S TIN (800) 555-1234	
RECIPIENT'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code ALL POWER EQUIPMENT 395 CENTRAL AVENUE OWATONNA MN 55060		RECIPIENT'S name, street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code SAM MEYERS 38583 LAKESIDE ROAD RED WING MN 55066	
RECIPIENT'S TIN 77-9876543		RECIPIENT'S TIN 222-3344444	
Account number (see instructions) 77-9876543		Account number (see instructions) 77-9876543	
3 Payer made direct sales totaling \$5,000 or more of consumer products to recipients for resale <input type="checkbox"/>		3 Payer made direct sales totaling \$5,000 or more of consumer products to recipients for resale <input type="checkbox"/>	
4 State tax withheld \$		4 State tax withheld \$	
5 StatePayer's state no. 1		5 StatePayer's state no. 1	
6 State income \$		6 State income \$	
2023 Form 1099-NEC Copy C For Payer		2023 Form 1099-NEC Copy C For Payer	

eFile 1099 Forms

 This section will not display if you did not chose to eFile your 1099 forms.

- » If you chose to eFile any of your forms, and you have not filed previously, the Aatrix Secure eFile screen will be displayed.

 Aatrix Secure eFile - EIN NOT ENROLLED! X

EIN 779876543 Not Enrolled

To eFile with this Taxpayer EIN complete one of the following steps:

Navigate to the URL below and Enroll this Taxpayer EIN under a new eFile account

or

Navigate to the URL below and Login to your eFile account to add this new company under the Companies tab.

Once you have completed either of these steps, return to this window and click the Check Enrollment status option to eFile.

To get started, click the link below to copy the URL and paste it into your preferred web browser.

<https://efile.aatrix.com/>


Check Enrollment Status

Cancel

- » If you are not enrolled to eFile with Aatrix, you can do one of the following:
 - » Click the <https://efile.aatrix.com> link to be transferred immediately to the Aatrix website, then click **Enroll** in the upper-right corner to begin the enrollment process. After you are enrolled, close the Browser window and select **I have enrolled and have my Login Id**. Enter your login information and then follow the onscreen instructions to eFile your forms.
 - » Click **Cancel** and enroll each Taxpayer EIN at <http://efile.aatrix.com>. Go back to TurningPoint/Red Wing Tax Forms, select your forms to eFile, **click I have enrolled and have my Login Id**, enter your login information, and then follow the onscreen instructions to eFile your forms.
- » If you are enrolled to eFile with Aatrix, click I have Enrolled and have my Login ID, enter your login information, and then follow the on screen instructions to eFile your forms.



- » If you need additional information during the eFile process, [click here](#) or enter <https://www.aatrix.com/support/knowledgebase/windows/> to view answers to common questions.
- » For additional information about eFiling and to view videos about the eFile process, [click here](#) or enter <http://partner.aatrix.com/redwing>
- » When the eFile process is complete, the Complete screen will indicate that your filing was successfully received for processing. A confirmation email will be sent to the email address specified on this screen.
- » The AFID (Aatrix Filing Identifier) is a number assigned to your submission for tracking purposes.

 Note: It is important to write this number down. It will be required when contacting the eFile Center with questions about your submission.

- » If you eFiled your forms, and have questions regarding your filing, contact Aatrix by email at helpme@aatrix.com, on their website at <https://efile.aatrix.com/> by clicking **Login** and entering your Aatrix username and password, or on their website at <https://efile.aatrix.com/> by clicking the **Search our FAQs** button.
20. Upon completion of the 1099 printing process, the **1099 History File Options** screen is displayed. If you are finished printing forms for the time being, select **Close**. This screen will also be displayed if the 1099 printing process is started again.

W-2/1099 Preparer

1099 History Options

Details of completed and available actions.

Questions? See [Year-end W-2/1099 Questions](#)

Last Completed Actions

Form	Last Completed Action
Recipient 1099	Printed on 12/13/2023
Federal 1099	Printed on 12/13/2023
Payer 1099	Printed on 12/13/2023

[View Detailed List of Completed Actions](#)

[View Instructions on Returning Later](#)

Available Actions

- Correct Completed 1099s**
Edit completed 1099 copies, use this option to correct, add, or delete recipient(s). Also, make changes to company or state information.
- eFile or Print Incomplete 1099s**
Complete 1099 copies that have not been printed or efiled. See list of Last Completed Actions on left.
- Reprint Completed 1099s**
Reprint 1099s previously printed.
- Start Over**
Clear your past actions and start the 1099 process over again with new data.
- e1099 Password Lookup**
Lookup, Email and Print recipient online access information.

Next > Close Help

Frequently Asked Questions

Q: Are there any important changes to the 1099 process for 2023?

A: Yes, there are two noteworthy changes to the 1099 process for 2023:

- On February 21, 2023, the IRS and the Department of the Treasury changed the Federal eFile threshold for 2023 from 250 to 10. Click [here](#) for more information. For specific 1099 series information, click [here](#).
- All** of your 1099 copies will be printed on plain paper, including the Copy A (often called the “red copy”) and your 1096. Perforated paper and envelopes can be purchased from Computer Forms, Inc. at https://redwing.computerforms.biz/c/tax_forms, by calling 800-458-0158, or by clicking the **Order Checks and Forms** icon on the Red Wing Software website. All orders are 25% off until December 31, 2023 (use promotion code RWCFITD when ordering).

Q. Why are my Recipient Last Name, Recipient First Name, and Recipient Middle Name columns blank on my 1099 grid in Aatrix for names (individuals) entered in TurningPoint with a SSN or ITIN?

A. Due to Internal Revenue Service filing specification changes for filing year 2023, the export to Aatrix tax forms for individuals was updated to export as First, Middle, Last instead of Full Name with Red Wing Tax Forms 1.12. Please download and install the version 1.12 update before processing and filing your 2023 1099 tax forms to automatically fill in the required Recipient Last Name, First Name, and Middle Name in the Aatrix grid. Note: The final version of the 2023 1099 forms will be in the Aatrix 4th quarter update, which typically is available in the December 20th time frame.

Q: What should I do if my vendor is missing from the 1099 report in TurningPoint?

A: A vendor **MUST** be set up as a 1099 vendor in **Setup > Vendors > Accounting** tab, to be listed on the 1099 worksheet or 1099 form. If they are **NOT** set up as a 1099 vendor, they are not included, even if the invoice itself is marked as 1099.

Q: What if an invoice is missing from my vendors 1099?

A: If an invoice is listed incorrectly or is not listed on this report (because it was not correctly marked as a 1099 invoice during entry), use **Accounts Payable > Transactions > Invoice Entry** to change it. This can be done even if the invoice has been paid and/or posted to the general ledger. To view all invoices for a vendor, change the **Status** field at the bottom of the **Invoice Entry** screen to **All**. Then select the appropriate **Vendor** at the bottom of the screen also. Edit the missing invoice to put a check mark in the **1099 Invoice** field. The opposite can be done if an invoice was inadvertently marked as a 1099.

Q: After importing my 1099s into Red Wing Tax Forms, I noticed some errors. What should I do to correct them?

A. You have two options.

1. You can make the changes inside Red Wing Tax Forms. This will print the correct data on the 1099s but will not change the data in TurningPoint.
2. Correct the data in TurningPoint. You can then do the Import from TurningPoint again and it will overwrite the existing data with the newly imported data. Note that any manual changes made in Red Wing Tax Forms will also be overridden when the data is reimported.

Q: When I am importing my 1099s from TurningPoint, I am receiving a warning about vendors requiring a TIN. How do I continue?

A. In TurningPoint, go to **Accounts Payable > Setup > Vendors**. Edit each vendor listed on the warning and enter an **EIN** on the **2-Accounting** tab. If these are old vendors who are not getting a 1099 this year, rather than entering an EIN, you can uncheck the **Issue 1099** box.

Q. When is the 2023 filing deadline for 1099 forms?

A. The Internal Revenue Service filing deadline for 1099 forms can be located by using the Search feature on the Internal Revenue Service website at www.irs.gov. In the Search box on the IRS website, enter the specific form name, for example, 1099-MISC, 1099-NEC, etc., to locate the specific form instructions and deadlines.

Q: I've decided to eFile my 1099 forms and want more information about signing up to eFile and the eFile process, where can I get more information about eFiling?

A: You can obtain additional information about eFiling at <https://partner.aatrix.com/redwingsoftware>.

Q. What are the 2023 eFiling deadlines for 1099 Forms?

A. Efiling deadlines can be located from this link: <https://efile.aatrix.com/pages/public/FilingDeadlinesPublic.aspx?v=ATX000>

Q. Do I need to order 1099 forms, or can I print them on plain paper?

A. All of your 1099 copies will be printed on plain paper, including the Copy A (often called the “red copy”) and your 1096. Perforated paper and envelopes can be purchased from Computer Forms, Inc. at https://redwing.computerforms.biz/c/tax_forms, by calling 800-458-0158, or by clicking the **Order Checks and Forms** icon on the Red Wing Software website. All orders are 25% off until December 31, 2023 (use promotion code RWCFITD when ordering).



Note: If you choose to use the Complete 1099 eFiling Service through Aatrix, you do not need to print any 1099 forms.

Q. I'm trying to process my 1099s, but I keep getting the message “Would you like to register now, or evaluate?”

A. You will need to follow Option A or B below to register your Federal/State Tax Forms (Aatrix) software.

Option A: Register Online

1. From Red Wing Tax Forms, select **Help > Register Federal/State Tax Forms**.
2. Click **Online**.
3. In the **Email Address** and **Password** boxes, type your email address and password for the Red Wing Software website. If you haven't registered on our website previously or forgot your password, see the Frequently Asked Questions section of this document for additional information about using the Red Wing Software website.
4. Click **Login**.
5. On the **Aatrix Product Registration** screen, enter your **Primary Company EIN** and then click **Next**.
6. On the **Your Registration Information** screen, at the **Registration Successful** message, click **OK**.
7. If you wish to have your registration information sent to you via e-mail, click **Email**.
8. Close the Your Registration Information screen.
9. Your Aatrix software is registered through the last day of the month of your Customer Care Plan anniversary date.

Option B: Register Manually (use this option only if internet access is not available)

1. Call Red Wing Software at 1-800-732-9464 and request an Aatrix Registration code.
2. Open **Red Wing Tax Forms**
3. Select **Help > Register Federal/State Tax Forms**.
4. Click **Manual**.
5. In the **Aatrix Registration Key** box, enter the key you were given by Red Wing Software (do not enter the dashes.)
6. Click **Submit**.
7. At the **Registration Successful** message, click **OK**.
8. Click **Close**.
9. Your Aatrix software is registered through the last day of the month of your Customer Care Plan anniversary date.

Q. Why am I getting a "forms update" or "mandatory update" message when I try to process my 1099s and what do I need to do?

A. At least once a quarter, including at year end, updates are created for the Federal/State Tax Forms (Aatrix) software. When you receive either of those messages, it means that Aatrix has an update available that you should install prior to continuing. Please refer to the Forms Update section of this document for step-by-step instructions on how to proceed.

Q. Can I change the figures on my Federal reports if they are incorrect?

A. Yes, once the data is in Aatrix Federal/State Tax Forms, you can change any figure on the reports that are highlighted blue. Any figure that is highlighted red must be changed before you can print the report. Any figure that is white cannot be changed, but it is a calculated number, so it can be changed by adjusting the fields around the white field.



Note: Changing the figures on this screen will only change the printed Federal reports, it will not change the data in TurningPoint.

Q. I'm trying to eFile my 1099s and I can't remember my Aatrix eFile username and/or password, how can I get it?

A. We recommend you contact Aatrix by calling 800-426-0854.

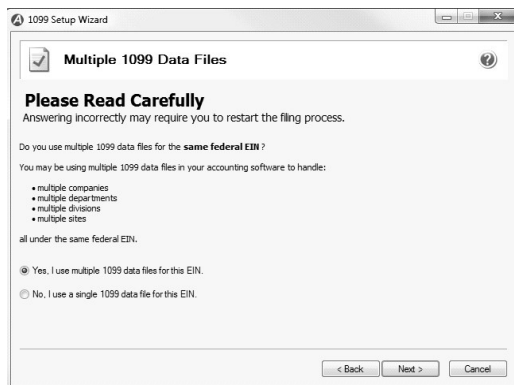
Q: I eFiled my 1099 forms, and I have questions regarding my filing, how do I contact Aatrix ?

A: For specific questions regarding your filing, you can contact Aatrix by email at helpme@aatrix.com, on their website at <https://efile.aatrix.com/> by clicking **Login** and entering your Aatrix username and password, or on their website at <https://efile.aatrix.com/> by clicking the **Search our FAQs** button.

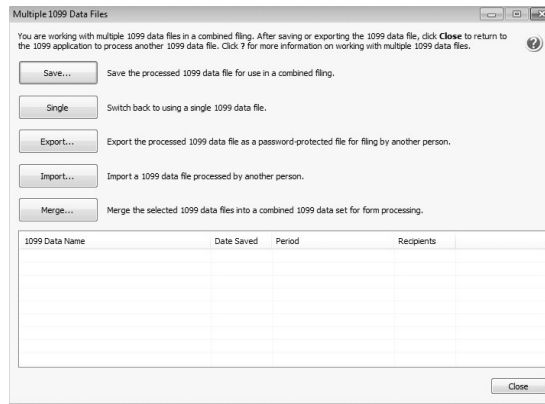
Q: I have multiple databases for one EIN; how do I merge the databases so I get one set of 1099s?

A: Follow the steps below to merge multiple databases into one set of 1099s:

1. Start the 1099 process and continue until the Multiple Payroll Data Files screen displays. On the **Multiple 1099 Data Files** screen, select **Yes, I use multiple 1099 data files for the EIN** and click **Next** to continue



2. The next **Multiple 1099 Data Files** screen displays, click **Save**, enter a name for the data file, and click **Close**.



3. Open the other database(s) and repeat steps 1-2 above for all databases you want to merge. When all data files are saved, continue to step 4.
4. At the bottom of the **Multiple Payroll Data Files** screen, select each database to be merged and then click **Merge**.
5. On the Multiple 1099 Data File Merge screen, click **Yes**.
6. On the **Multiple 1099 Data Files** screen, click **Continue** to continue processing 1099s.

Q. I'm attempting to log in to the Red Wing Software website, but it does not recognize my Email and/or Password? What should I do?

A. Follow the instructions below for information about the Red Wing Software website.

To log in to the Red Wing Software website:


1. In your web browser, enter **www.redwingsoftware.com**, and press Enter.
2. In the upper-right of the Red Wing Software home page, click **Log in**.
3. Enter your **Email Address** and your **Password**.
4. Click **Log in**.

To register on the Red Wing Software website:

If you have not previously registered or logged in on the Red Wing Software website, please follow the steps below:

1. In your web browser, enter **www.redwingsoftware.com**, and press Enter.
2. In the upper-right of the Red Wing Software home page, click **Log in**.
3. Click **Register**.
4. In the **Account Number** box, enter your company **Account Number**. Your Account Number can be located in a few different places:
 - a. On the Support Certificate that you receive upon renewing Customer Care Membership.
 - c. Red Wing Software sends customers a renewal form for Customer Care Membership. This renewal form contains your account number.
 - d. Invoices you've received from Red Wing Software contain your account number.
 - e. If others at your company have already registered, they can sign into their account and find your company's account number at www.redwingsoftware.com/home/myaccount.
5. Continue entering your **Title, First and Last Name, Email Address** (which is your login) and a **Password**.
6. Enter the displayed **Security Verification** code, and then click **Submit**.

To retrieve a forgotten password:

1. In your web browser, enter **www.redwingsoftware.com**, and press Enter.
2. In the upper-right of the Red Wing Software home page, click **Log in**.
3. Click the  **Forgot** link.
4. Enter/verify your **Email Address**, click **Send**, and then click **Close**.
5. Wait until you receive an email that includes instructions to reset your password.
6. Click the link in the email that you received from Red Wing Software.

7. Enter the **Validation Code** which was included in the email. If you enter the code and it is not recognized, copy and paste the code from the email. The Validation Code expires in 24 hours.
8. Enter a **New Password** and then **Re-enter the New Password**.
9. Click **Submit**.
10. Click **OK**.

To log out of the Red Wing Software website:

1. At the top of the Red Wing Software home page, click **Welcome, (Your Name)**.
2. In the displayed menu, select **Log out**.