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# **CheckMark 1099**

## **User's Manual**



**CheckMark**<sup>TM</sup>

**1099**

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# Chapter 1

## Getting Started

CheckMark 1099 helps centralize all your 1099 filing needs. With this program you can print or even e-file all forms needed for filing 1099-MISC, 1099-DIV, 1099-INT, 1099-S, 1099-R and 1099-NEC forms. The program has the option to print these forms on a pre-printed 2-up form or a blank sheet.

Before starting the set up of your company and recipients, please read through this manual. It covers general setup and 1099 requirements, as well as how you can receive additional support directly from Checkmark, Inc.

### System Requirements

CheckMark 1099 can be installed on a computer running either Macintosh or Windows operating systems. This software is a single-user application and not designed for multi-user access of the data files. DO NOT install the application program on a server. Install the program locally on the user's hard drive even if you save the data on a server.

Users will need to have a computer running an operating system of either **Windows 8 or higher including Windows 10 & 11**, or **Macintosh OS X 10.6 or higher including El Capitan, Sierra, Mojave, Catalina, and Big Sur**.

Along with a compatible printer, the latest version of **Adobe Reader** is also required to properly print certain forms from the program. You can download a free copy of Adobe Reader from Adobe's website at [www.Adobe.com](http://www.Adobe.com).

Whichever operating system you choose, a working knowledge of the operating system is essential. For more information about the basics and navigation of your operating system, see the user manual that came with your computer.

### Software and Patch Updates

Each year the program is issued with the latest 1099 Forms as well as added features. Program patches are released as needed throughout the year for the current version of the software. Patches are available online at [www.checkmark.com](http://www.checkmark.com). Hard Copy CDs can be purchased by calling the sales department at 800-444-9922.

Renewal notices are sent out each year, in the fall, announcing the next update. Updates must be purchased each year to receive support and the ability to install patches for changes.

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## How to Get More Help

This manual covers general set up and reporting. There may be items that are specific to your company that are not addressed here except in general terms. For these times, CheckMark, Inc. offers additional support.

Only registered users can receive technical support so please, take a moment and read the License Agreement, fill out the Registration Card and send it in.

Support is offered via internet submission, E-mail, fax or telephone. Whenever you contact support, have your customer number OR product registration number available. It is important that you are at your computer with CheckMark 1099 running when speaking with support to best resolve your question/problem.

## Before Contacting Support/Other Resources

### Check for latest version

Users with internet access can make sure that they are up-to-date as often as they wish by selecting **Check for Updates** under the **Help** menu in the program. If necessary, download and install the latest update (may require purchase if not using the current year's version).

### 1099 Manual

Users can access the 1099 program manual from the Help menu while in the CheckMark 1099 program. An updated manual is included with each update.

### Online Knowledge Base

Users with internet access can refer to the online Knowledge Base for answers to common questions. You can access the Knowledge Base at [kb.checkmark.com](http://kb.checkmark.com).

### Contacting CheckMark

For questions regarding the 1099 software, you can choose one of the following methods to request technical support:

**Online at:** <https://www.checkmark.com>.

Sign in to **My Account** using your credentials. Click on "**Support**" and Select "**Add Ticket**". Fill in all the necessary fields and click **Submit** to create a support ticket.

Once your ticket is submitted, you will receive a notification on your registered email address. Our support team will now take care of your query and update you on the ticket. You can view your submitted tickets in **Support > Ticket History** in **My Account**.

**By Phone:** 970-225-0387

**Mail:** CheckMark, Inc. 323 West Drake Rd. Suite 100 Fort Collins, CO 80526

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## Chapter 2

# Installation and Basic Use

### Installing CheckMark 1099

#### Macintosh Installation

1. Close all programs and disable any anti-virus software.

#### \*\*For CD Installation\*\*

2. Insert the CheckMark 1099 CD-ROM into your computer's drive.
3. When the CD icon appears on the Desktop, open by double-clicking it, then double-click the CheckMark 1099 installer.
4. Follow the on-screen instructions to complete installation.

#### \*\*For Download Installation\*\*

5. Click on the link provided to download. After the download is complete, double-click the download file.
6. Follow the on-screen instructions to complete installation.

The default install location on the hard drive for CheckMark 1099 is: **Macintosh HD\Applications\CheckMark\1099\year**. The (year) represents the current calendar year.

Install the program on the local drive.

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### **Windows Install**

1. Close all programs and disable any anti-virus software.

#### **\*\*For CD Install\*\***

2. Insert the CheckMark 1099 CD-ROM into your computer's drive.
3. The Installer will start automatically.

If the installer does not start automatically after a minute, click your **Start** menu and then select **Run**.

Type in the path and filename in the **Run** box. That would be the drive name, colon (:), backslash (\), Filename. For example: **D:\setup**. Then click **Ok**.

4. Follow the on-screen instructions to complete installation.

#### **\*\*For Download Install\*\***

5. Click on the link provided to start the download. After the download is complete, Choose **Run** or **Open**.
6. Follow the on-screen instructions to complete installation.

The default install location on the hard drive is **C:\ProgramFiles\CheckMark\1099\year**. The (year) represents the current calendar year.

It is recommended to install the program on the local hard drive.

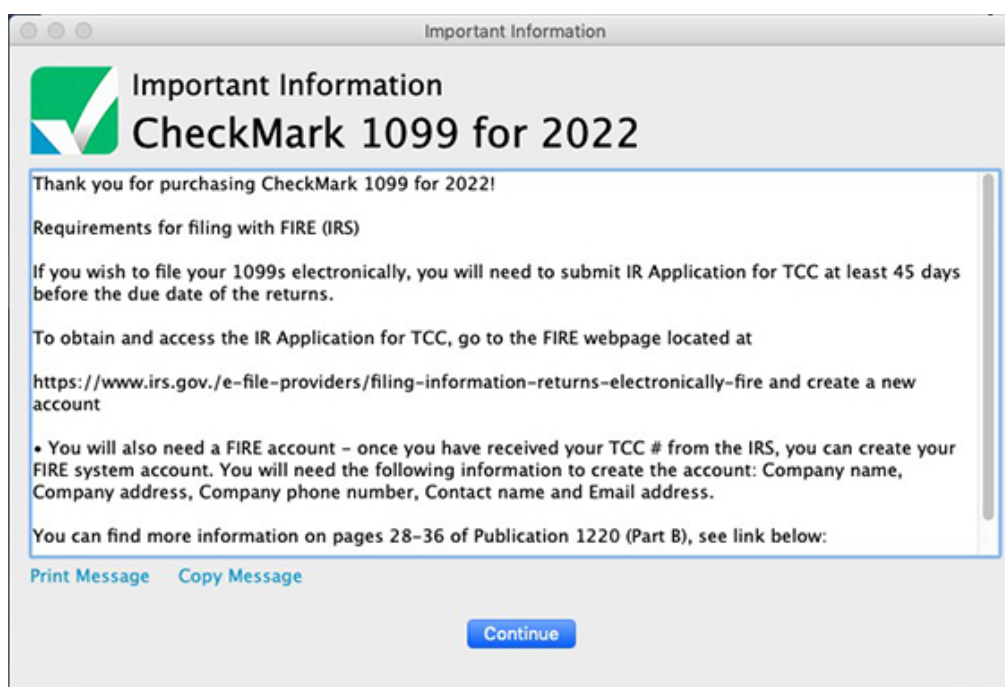
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## Opening CheckMark 1099: New User

1. Open the CheckMark 1099 application. You can use either the shortcut or alias that was created or go to the CheckMark 1099 folder that was installed and double-click the CheckMark 1099 application file.
2. The first time you open the program the welcome screen appears. This screen provides useful information regarding the set up of **Security**, **Customizing** screens and fonts and accessing the **Manual**.

Click the **Print** button to print out this information.



**Important:** It is recommended that you set up a password to protect your private information. For information on setting up passwords, See “Setting up Users and Passwords” on page 19.

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## Opening CheckMark 1099: Upgrading Old Files

The information will be stored in a database that is created the first time you open your previous files. the default location is:

Macintosh: HD\Documents\CheckMark\1099\year

Windows: C:\Documents\CheckMark\1099\year

1. Open the CheckMark 1099 application. You can either use the shortcut or alias that was created or go to the CheckMark 1099 folder that was installed and double-click the CheckMark 1099 application file.
2. If you have a previous 1099 database from a prior year, the program will ask you if you want to import the Company and Recipient information.
3. Click **Yes** to continue. Enter the Username and Password from the prior year, if requested.

A screenshot of the 'CheckMark 1099 Login' dialog box. The window has a title bar with the text 'CheckMark 1099 Login' and a close button (X) in the top right corner. Below the title bar is a banner with the 'CheckMark 1099 Software' logo, which consists of a green square with a white checkmark and the text 'CheckMark™ 1099 Software'. Below the banner are two text input fields. The first field is labeled 'Name' and the second is labeled 'Password'. At the bottom of the dialog are two buttons: 'Execute Login' on the left and 'Cancel Login' on the right. The 'Execute Login' button is highlighted with a blue border.

4. A pop up window asks if you want to clear out the prior amounts. Click **Yes** to zero out amounts and continue or **No** to retain the prior year's amount information
  5. If you clicked **Yes**, you'll be notified once the data is successfully imported.
-

## Database Manager

CheckMark 1099 stores company data in a database. When initially opening CheckMark 1099, a database named **CheckMark\_1099\_Database\_[year]** is created.

If you complete 1099 forms for only one company, this is probably the only database you will need.

However, if you process forms for more than one company, you will need to choose one of the following options to manage your companies correctly. You can either store all of your company files in the same database, or you can create separate databases and store individual companies in them.

### Storing Multiple Company Files in the Same Database

Each database can contain multiple companies. The advantage of storing all of your different company files in one database is that when you Backup Database, Restore DataBase, Close Database, or advance to a new year, all companies stored in that database will be backed up, restored, closed or advanced to a new year at the same time, saving you time.

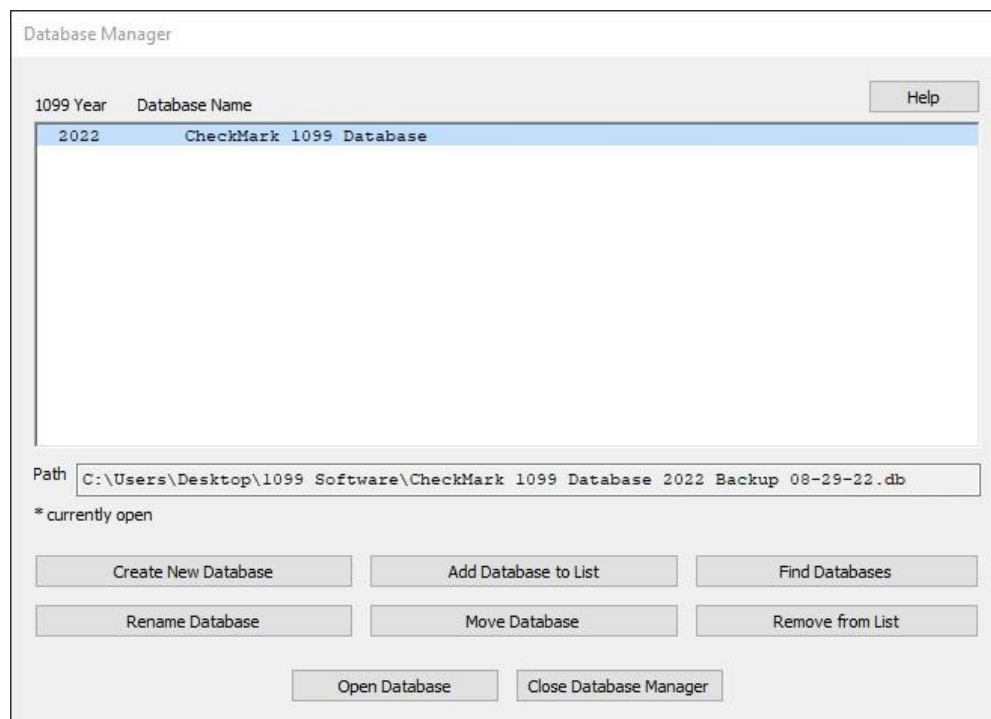
### Storing Company Files in Separate Databases

The advantage of storing each of your company files in separate databases is that you have more control over where your database is stored on your computer, as well as when you want to **Backup Database, Restore Database, Close Database**, or advance companies to a **New Year**.

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## Using the Database Manager

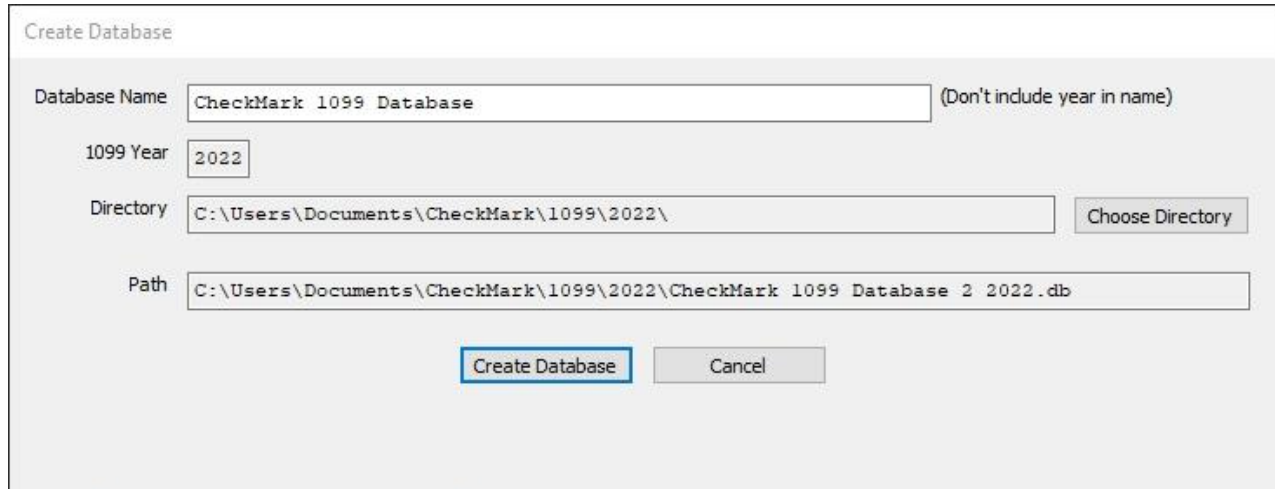
Choose **Database Manager** from the **File** menu.



## Create New Database

This option allows you to create and save a new database in any location you wish. Keep in mind that each database can store multiple companies.

1. Click **Create New Database**.
2. Enter a **Database Name** and **Payroll Year**. Click the **Browse** button to select a new location to save the database.



The screenshot shows a 'Create Database' dialog box with the following fields and buttons:

- Database Name:** A text box containing 'CheckMark 1099 Database'. To its right is the text '(Don't include year in name)'.
- 1099 Year:** A small text box containing '2022'.
- Directory:** A text box containing 'C:\Users\Documents\CheckMark\1099\2022\'. To its right is a 'Choose Directory' button.
- Path:** A text box containing 'C:\Users\Documents\CheckMark\1099\2022\CheckMark 1099 Database 2 2022.db'.
- At the bottom are two buttons: 'Create Database' (highlighted with a blue border) and 'Cancel'.

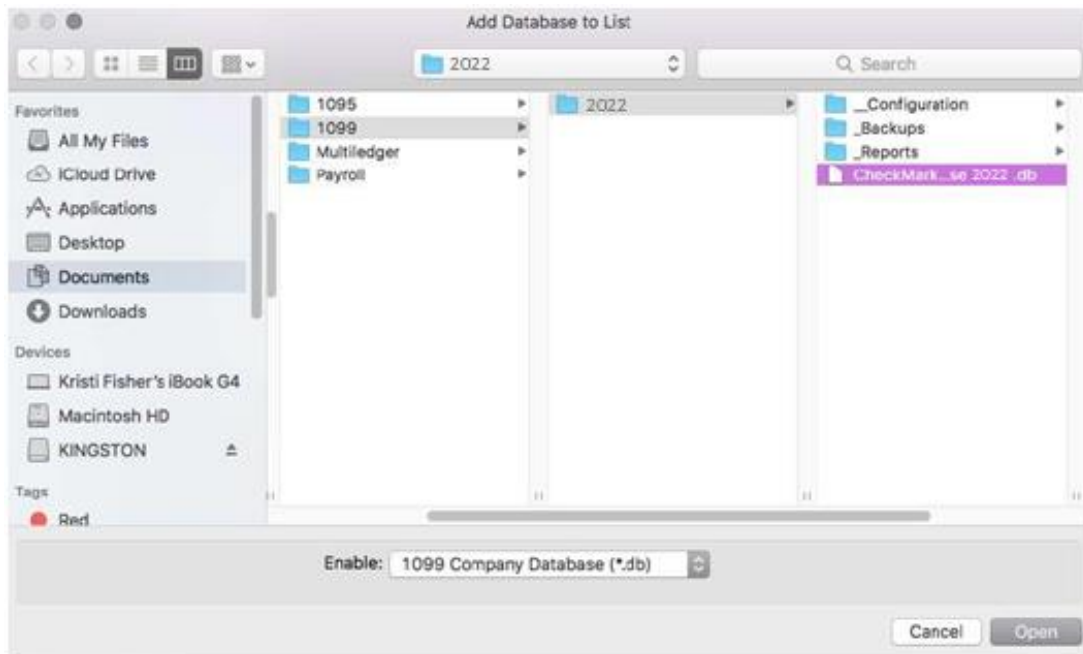
3. Click **Create Database** to save the new database.
-

## Add Database to List

This button allows you to add an already-existing database to the list. For example, if you copied a database from another computer and the **Database Manager** does not list this database, you can choose **Add Database to List** and browse to that location to update the **Database Manager's** list.

1. Click **Add Database**.

An Open dialog box appears



2. Browse to the location where the database is saved.
3. Select the database and click **Open**.

The database is added to the list in the Database Manager.

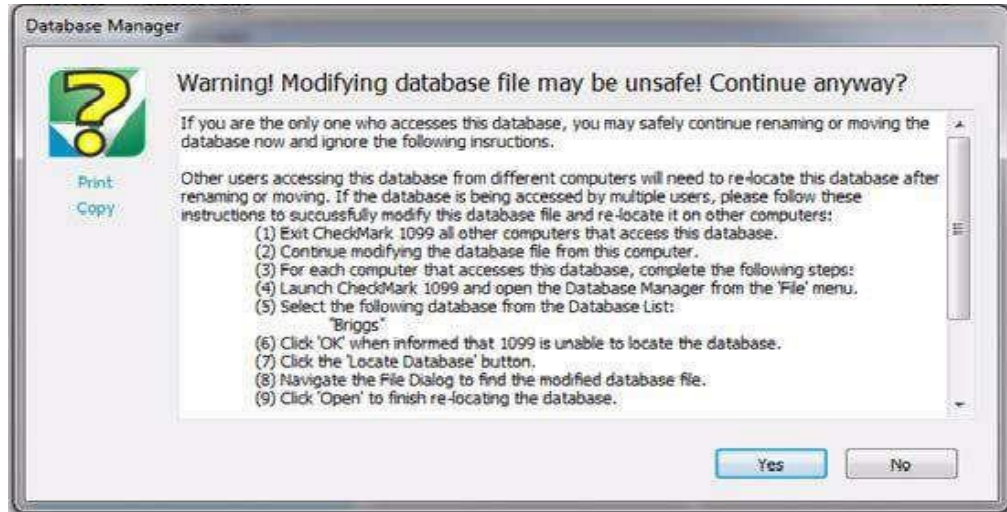
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## Rename Database

This option allows you to rename the database. It is recommended that you use only alpha-numeric characters.

1. Click **Rename Database**. The

following alert appears:



2. Click Yes. Otherwise, if you don't want to rename at this time, click no
3. Enter the new name and click **Rename Database** to save.

The Rename Database window appears:



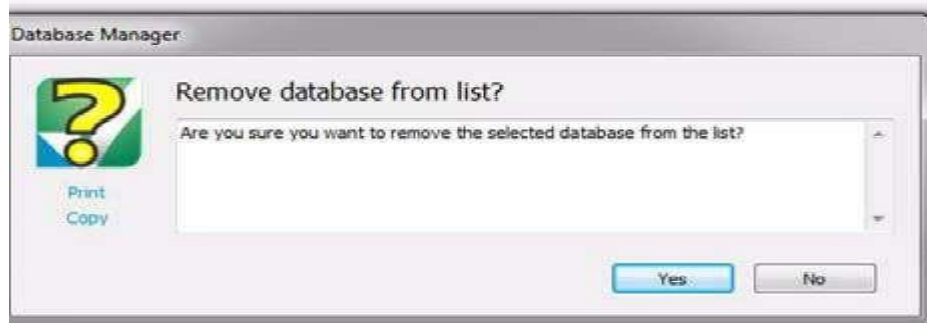
## Remove From List

This option allows you to remove a database from the list.

**Note:** This only removes the listing in the **Database Manager**. It does not delete the database file from the saved location. To delete a database, you will need to manually delete the database (.db) file from your hard drive or saved location.

1. Click **Remove From List**.

A Warning message appears



2. Click **Yes** to remove the database from the Database Manager list.

You can add the database again at anytime by using the Add Database command as long as you don't delete the database from the computer.

## Open Database

This option allows you to choose a different database and open it up to view all saved companies in that particular database.

1. Select the database you want to open and click **Open Database**.

The new database is now open and all companies stored in this database are now available.

## Close Database Manager

This option closes the Database Manager window.

---



## Update Company

This commands allows you to update the currently selected company's information. Once the program is launched, open the database that contains the company you want to update. Highlight the company and click the **Update Company** command. Enter the information you want to change, then click **Update Company** to save the changes.

## New Company

This Command allows you to add a new company to the database that is currently open. Once the program is launched open the database you wish save the company in. Click **New Company** then enter the information for this company. Click **Add Company** to save the company to the database.

## Delete Company

This command allows you to delete a company from a currently opened database. Once the program is launched open the database that contains the company you want to remove. Click **Delete Company** and a screen will appear to make sure you want to delete the company. Click **Confirm Delete** to complete the deletion process.

## Exiting CheckMark 1099

To exit or quit CheckMark 1099:

- Choose **Exit** from the **File** menu (Windows)
- Choose **Quit** from the **CheckMark 1099** menu (Mac)



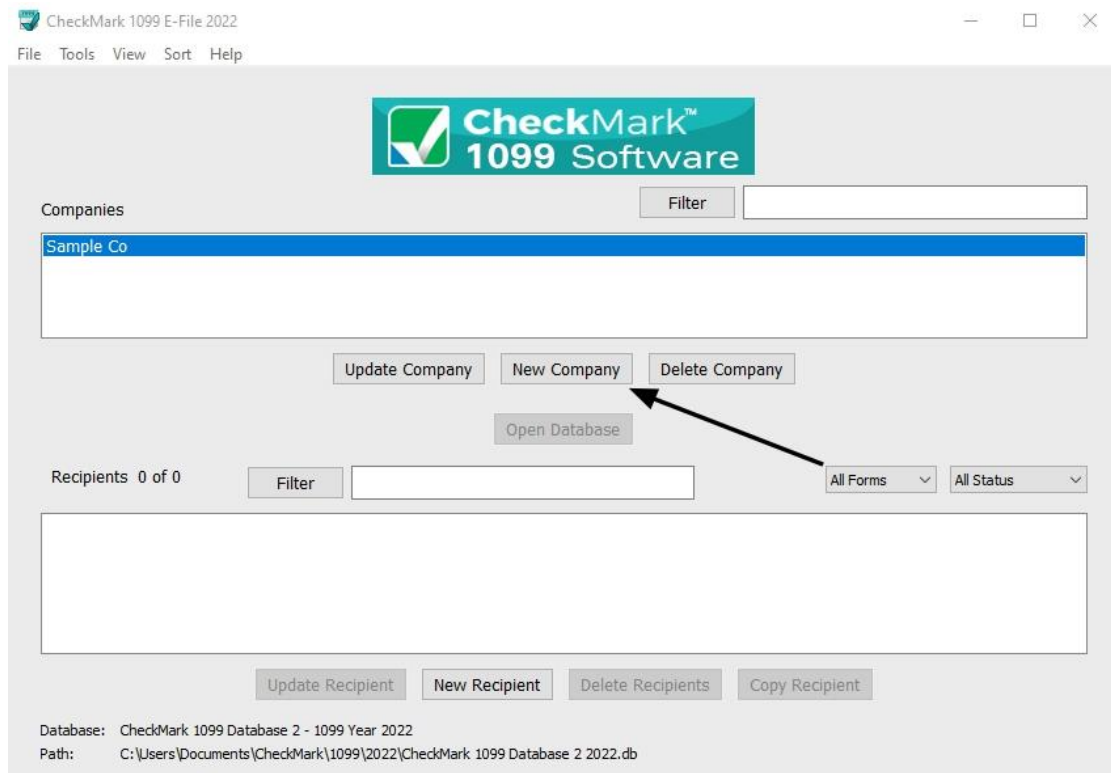
## Chapter 3

# Creating a New Company

This chapter shows you how to create a new company file and enter basic company information.

### Creating a New Company

1. On Windows, double click the 1099 shortcut on the desktop or click the **Start** menu, select **Programs**, then select **CheckMark 1099** from the CheckMark Inc. File. On Macintosh, double click on the CheckMark 1099 alias on the dock or on your Desktop, or double click the **CheckMark 1099** icon located in the install folder that was installed on your hard drive
2. Click the New Company button in the middle of the screen.

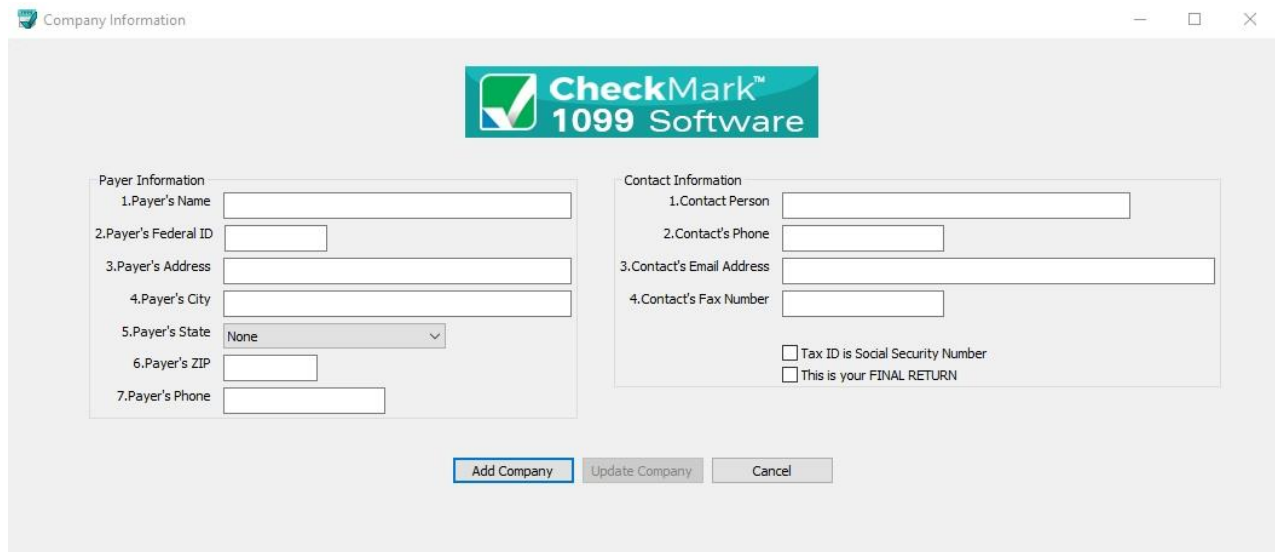


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**Note:** If the **New Company** button is greyed out that means you need to first open a database or create a database. For **Creating a Database** please see page 9

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3. Enter **Payer Information** for all pertaining fields.



4. Click **Add Company** button to **Save**.

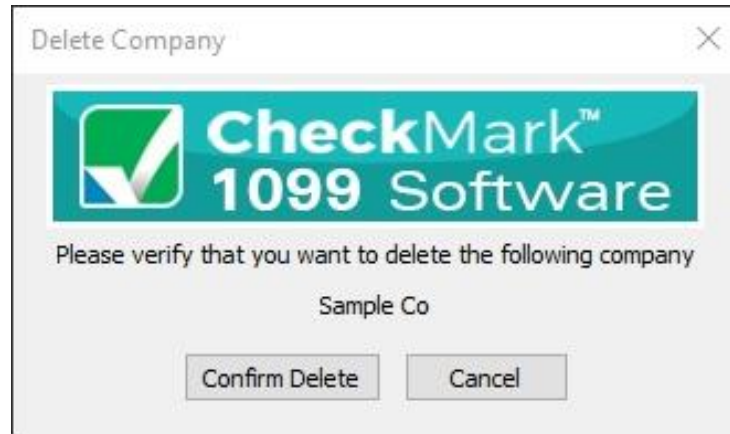
## Updating an Existing Company

1. Highlight the company in the list you wish to update and click the **Update Company** button.
2. After all changes have been made to the **Payer Information**, click the **Update Company** button to save the changes

## Deleting a Company

You cannot delete a company if there are any recipients created within the company. You must delete the recipients first before deleting a company. For information on deleting recipients see “Deleting a Recipient” on page 32.

1. Select the company you wish to delete.
2. Click **Delete Company**
3. In the pop-up window, click the **Confirm Delete** button.



If no recipients are associated with this company, the company will be deleted.

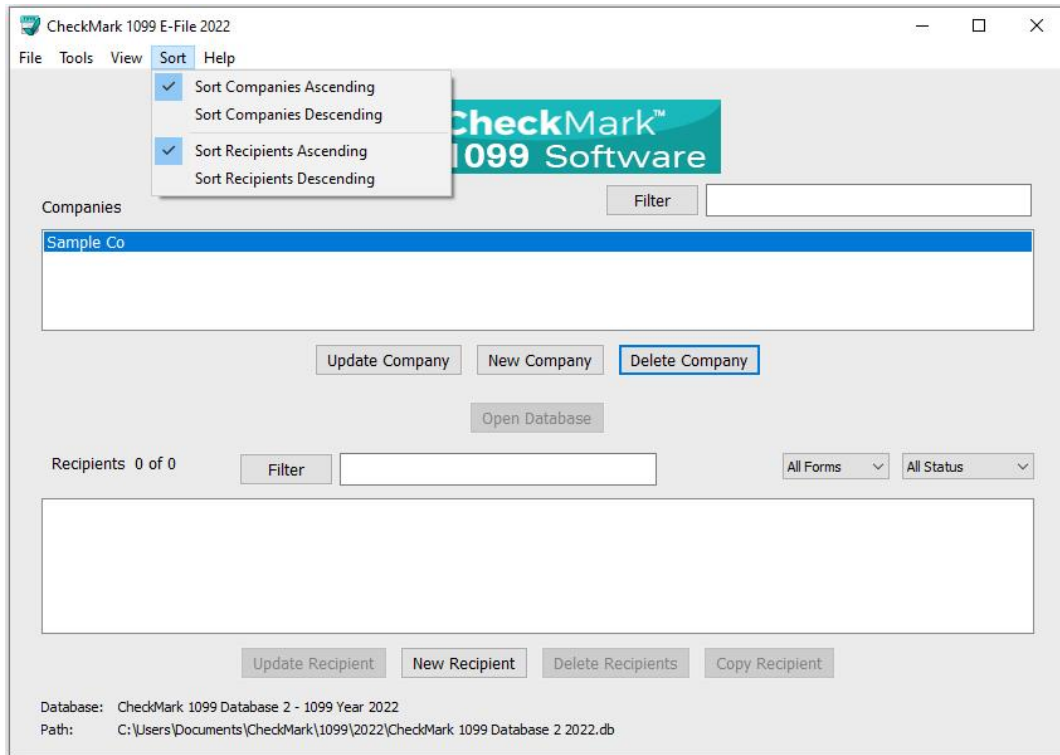
## Filtering Companies

You can use the **Filter** button to search for certain companies in the list. To find a particular company, enter all or part of the name of the company into the Filter box area at the top of the screen and click the **Filter** button. The Filter will search for any companies that contain those variables.

You can also use an asterisk (\*) to help sort groups. For instance, if you enter the first letter and then asterisk, (ex: N\*), you will receive all companies that begin with the letter “N”.

## Sorting Companies

You can sort companies by Ascending or Descending order. To select which type of sort to use, go under the **Sort** menu at the top of the screen and choose either **Sort Companies Ascending** or **Sort Companies Descending**.



## Selecting Multiple Companies

You can Select multiple companies if you choose to eFile 1099s using the IRS FIRE system.

### Consecutive Selection

**Windows:** You can select multiple companies by selecting the first company you want while holding down the mouse button and moving the mouse pointer down through the list.

You can also click on the first company, hold down the 'Shift' key on the keyboard, and then click on the last company you want in the list.

**Macintosh:** Click on the first company you want in the list, hold down the 'Shift' key on the keyboard, and then click on the last company you want in the list.

The screenshot shows the 'CheckMark 1099 Software' application window. The title bar reads 'CheckMark 1099 E-File 2022'. The menu bar includes 'File', 'Tools', 'View', 'Sort', and 'Help'. The main interface features a 'Companies' section with a list box containing 'ABC Company', 'Sample Co' (highlighted in blue), and 'XYZ Company'. To the right of the list is a 'Filter' button and an empty text input field. Below the list are buttons for 'Update Company', 'New Company', and 'Delete Company', along with an 'Open Database' button. The 'Recipients' section shows '0 of 0' with a 'Filter' button and an empty text input field. To the right are dropdown menus for 'All Forms' and 'All Status'. Below this is a large empty rectangular area. At the bottom are buttons for 'Update Recipient', 'New Recipient', 'Delete Recipients', and 'Copy Recipient'. The status bar at the very bottom displays 'Database: CheckMark 1099 Database 2 - 1099 Year 2022' and 'Path: C:\Users\Documents\CheckMark\1099\2022\CheckMark 1099 Database 2 2022.db'.

## Non-Consecutive Selection

**Windows:** To select specific companies as a group, click on the first company you want, hold down the 'Ctrl' key on the keyboard and click on any other companies you want to include.

**Macintosh:** To select specific companies as a group, click on the first company you want, hold down the 'Command' key (also referred to as the Apple key) on the keyboard and click on any other companies you want to include.

CheckMark 1099 E-File 2022

File Tools View Sort Help

**CheckMark™  
1099 Software**

Companies

ABC Company
Sample Co
XYZ Company

Recipients 0 of 0

--

Database: CheckMark 1099 Database 2 - 1099 Year 2022  
Path: C:\Users\Documents\CheckMark\1099\2022\CheckMark 1099 Database 2 2022.db

# Chapter 4

## Set Up

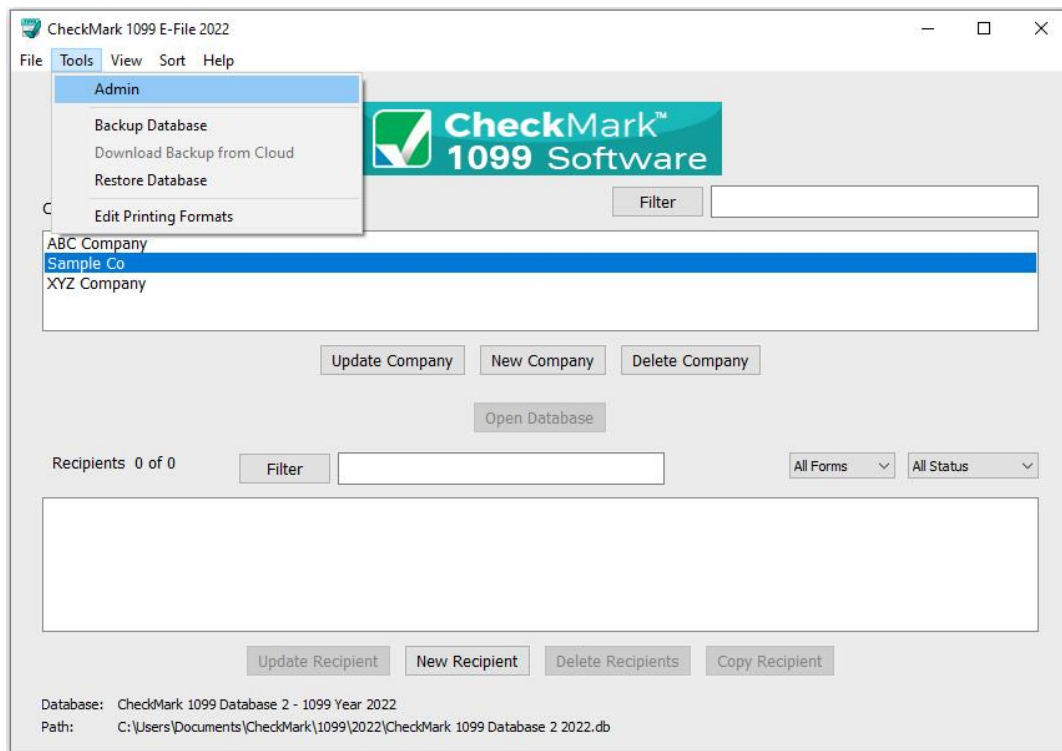
### Setting up Users and Passwords

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**IMPORTANT:** Although not required, it is recommended you set up a password to protect your private information

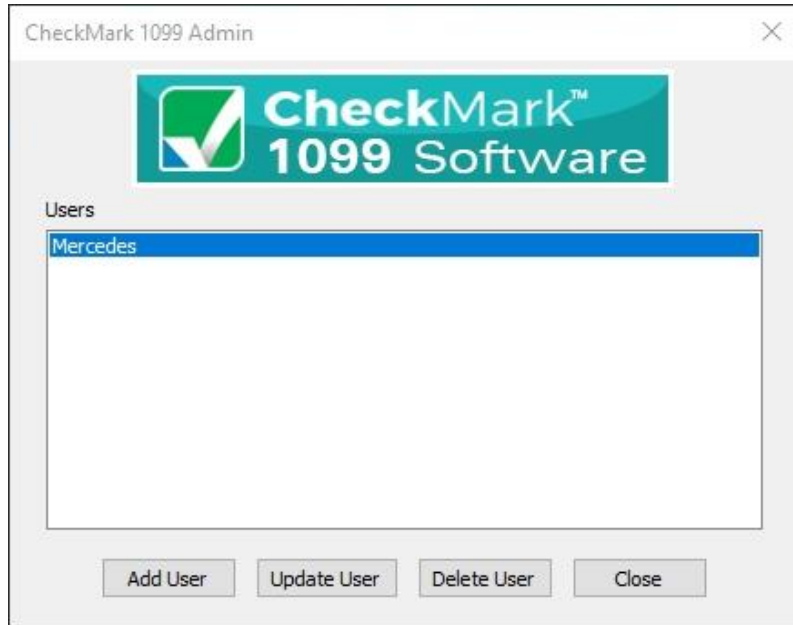
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1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Admin**





2. To create a new user click the **Add User** button.



3. Enter the **Name** and **Password**.

---

**Note:** The Name and Password are case sensitive.

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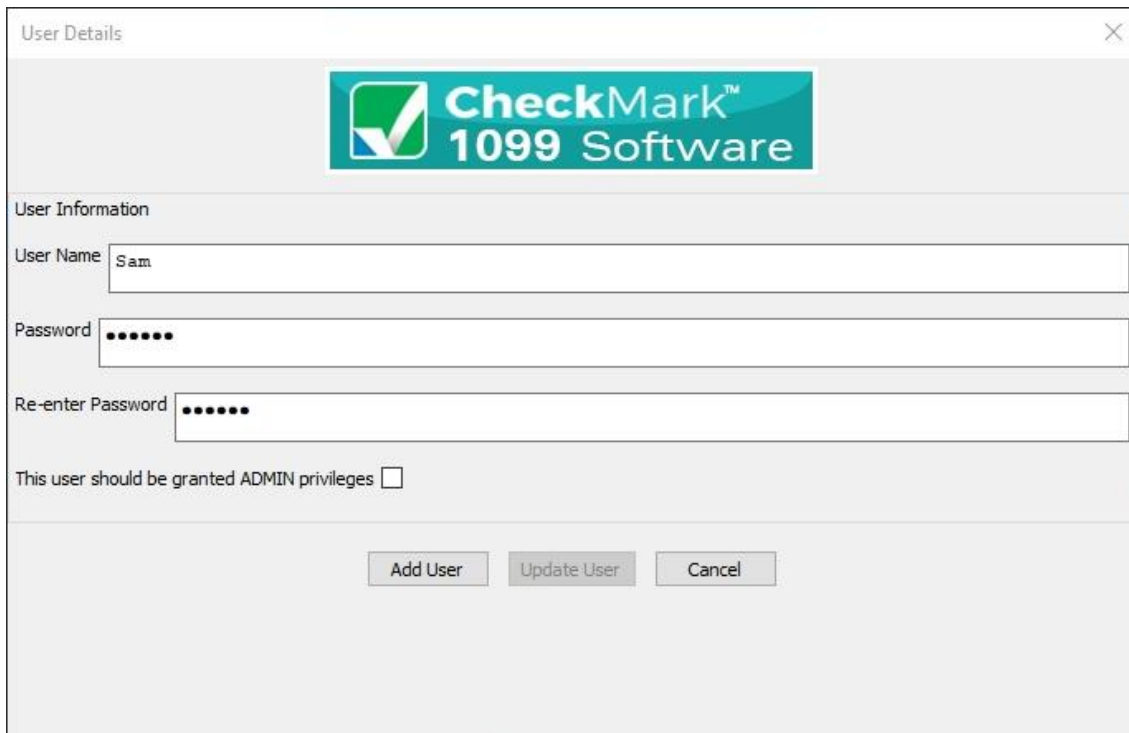
4. Click the checkbox for **This user should be granted ADMIN privileges** if you want this user to be able to add, update or delete other users.

---

**IMPORTANT:** The first user set up will have **Admin** privileges. You cannot delete or change this user's **ADMIN** privileges until another user with Admin privileges is created.

Users with **ADMIN** privileges can add/delete/update other users, Backup and Restore the database and Check for updates.

---



User Details

CheckMark™  
1099 Software

User Information

User Name Sam

Password .....

Re-enter Password .....

This user should be granted ADMIN privileges ☐

Add User Update User Cancel

5. Click the **Add User** button to save.

## Updating Users

1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Admin**.
2. Highlight the user you want to update from the list.
3. Click the **Update User** button.
4. Make the necessary changes and click the **Update User** button to save.

## Deleting Users

1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Admin**.
  2. Highlight the user you want to delete from the list.
  3. Click the **Delete User** button.
  4. In the popup window, verify that the correct user name is selected and click the **Confirm Delete** button.
-



**Note:** If you delete all users, the software will not prompt for a password upon launching the program.

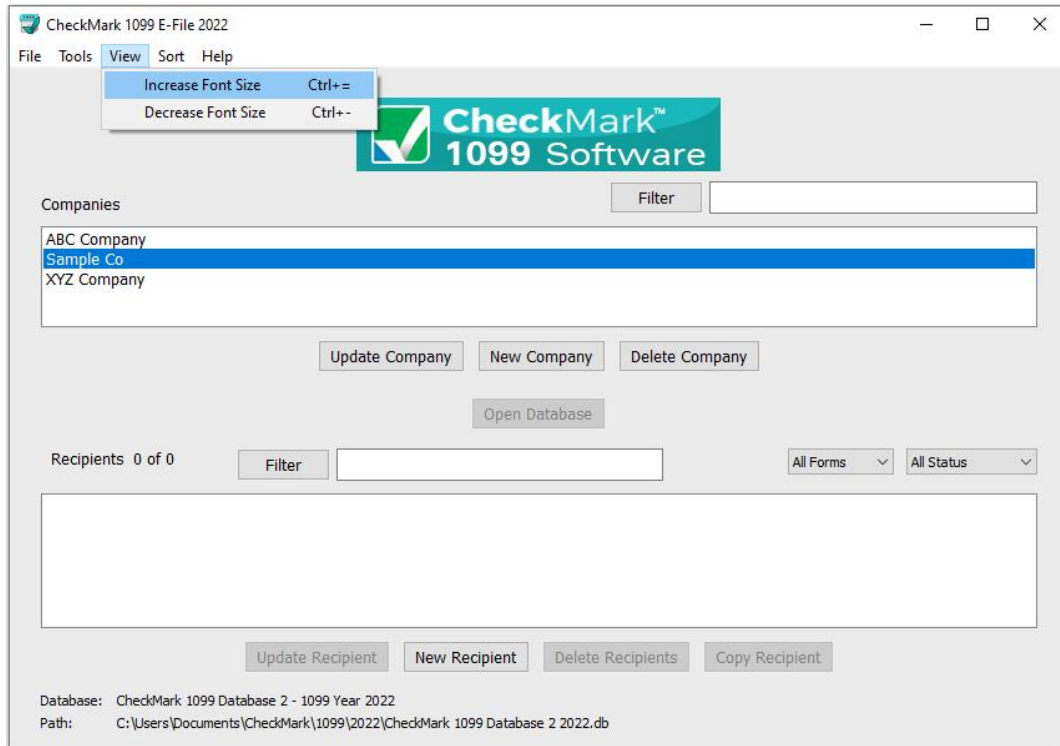
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## Setting Screen Font Size

This setting allows you to customize how big or small you want the font on the screen in the program. There are five settings to choose from: **Smallest Font, Small Font, Medium Font, Large Font, Largest Font.**

### Selecting Font Size

1. Click on the **Font Sizes** menu at the top of the screen.
2. Select which font you want to use. You can choose any font at anytime from the main screen window



## Adjusting Screen Size

You can adjust the size of each screen to maximize or minimize your viewing area.

To increase or decrease the size of any screen, simply click and hold the mouse button on the lower right hand corner of any screen and drag the corner to the desired position.

Company Information

**CheckMark™  
1099 Software**

**Payer Information**

1. Payer's Name: Sample Co

2. Payer's Federal ID: 00-0000000

3. Payer's Address: 205 Old Town Sq

4. Payer's City: Foco

5. Payer's State: Colorado-CO

6. Payer's ZIP: 80529

7. Payer's Phone: 970-555-0001

**Contact Information**

1. Contact Person: Pete Peters

2. Contact's Phone: 970-555-0001

3. Contact's Email Address: omgitsbrian@gmail.com

4. Contact's Fax Number: 970-555-0002

☐ Tax ID is Social Security Number

☐ This is your FINAL RETURN

Add Company Update Company Cancel

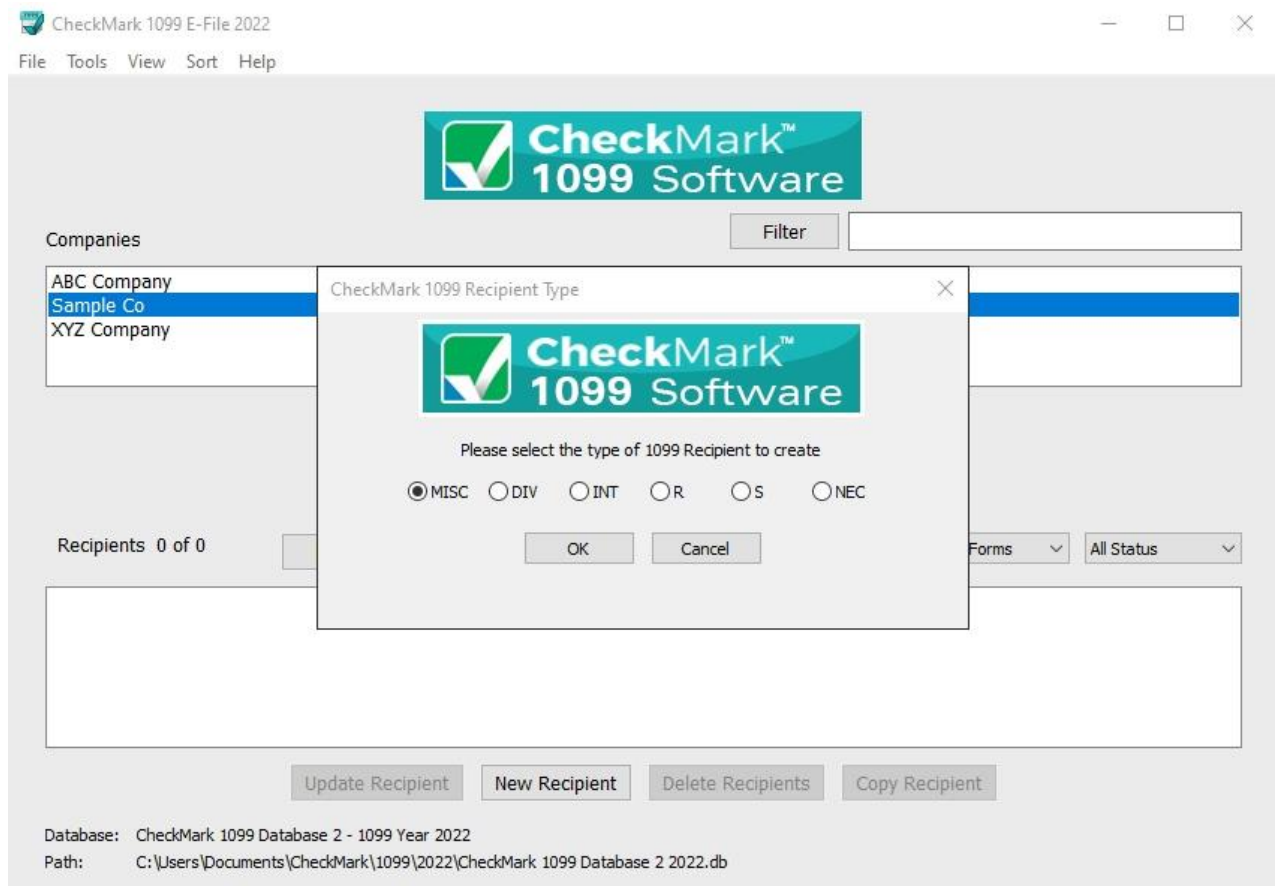
## Chapter 5

# Setting Up Recipients

This chapter explains how to setup new Recipients for each company.

### Creating New Recipient


1. Open the Database that contains the company to which you want to add recipients. If no Database exists you must first create one. See “Create New Database” on page 9.
2. Select a Company from the list. If no Companies are listed, you must first set up a company before adding recipients. For information on setting up a new company, see “Creating a New Company” on page 15.
3. Click the **New Recipient** button.



The list of fields for the new recipient corresponds to the same fields found on the 1099 forms

4. Choose which type of 1099 form this recipient should receive and click **OK**.

1099-MISC



☐ VOID    ☐ CORRECTED

OMB No. 1545-0115  
 2022  
 Form 1099-MISC

**Payer Information**

Sample Co  
 , None  
 Payer Federal ID: \_\_\_\_\_

**Recipient Information**

☐ Address not in US Territory

Recipient's ID \_\_\_\_\_

Company or Last Name \_\_\_\_\_

First Name (if applicable) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State: None ▼

ZIP \_\_\_\_\_

Country \_\_\_\_\_

Account Number (see instructions) \_\_\_\_\_

☐ 13.FATCA filing requirement    ☐ 2nd TIN not.

**Other Information**

1.Rents \$	_____	4.Federal income tax withheld \$	_____
2.Royalties \$	_____	6.Medical and health care payments \$	_____
3.Other income \$	_____	8.Substitute payments in lieu of dividends or interest \$	_____
5.Fishing boat proceeds \$	_____	10.Gross proceeds paid to an attorney \$	_____
7.Payer made direct sales totaling \$5,000 or more of consumer products to recipient for resale <input type="checkbox"/>		12.Section 409A deferrals \$	_____
9.Crop insurance proceeds \$	_____	15.Nonqualified deferred compensation \$	_____
11.Fish purchased for resale \$	_____		
14.Excess golden parachute payments \$	_____		


16.State tax withheld \$	17.State/Payer's state no.	18.State income \$
_____	_____	_____
_____	_____	_____

Previous Recipient
Add Recipient
Update Recipient
Cancel
Next Recipient

5. Enter the **Recipient's ID** along with the **Recipient's Information**.
6. Fill in any fields that are applicable for the recipient.
7. Click the **Add Recipient** button to Save the information.

If any information is invalid, a popup window will open explaining which fields have errors.

**Error** ✕



The following errors were discovered:

Address: Must be between 1 and 40 characters.  
 City: Must be between 1 and 40 characters.  
 State: Please select a State or Province.  
 ZIP: Must be of form XXXXX or XXXXX-XXXX.

Continue Anyway
Cancel

Press **cancel** to go back to the set up screen to correct any errors, or **Continue Anyway** to Save the recipient information

**NOTE:** If any field has an invalid entry, once you return to the Recipient set up screen, that field name will show up in “**Red**”. In addition, some fields will not save the invalid information and remain empty. For more information on validated information, see “Validated Status” on page 37.

## Updating an Existing Recipient

1. Select the company that contains the recipient(s) you wish to update.
2. Highlight the recipient in the list you wish to update and click **Update Recipient** but-ton.
3. After all changes have been made to the **Recipient Information**, click **Update Recipient** button to save changes.

1099 MISC

**CheckMark™ 1099 Software**

☐ VOID ☐ CORRECTED OMB No. 1545-0115 2022 Form 1099-MISC

**Payer Information**

Sample Co  
205 Old Town Sq  
Foco, Colorado-CO 80529 970-555-0001  
Payer Federal ID: 00-0000000

**Recipient Information**

☐ Address not in US Territory

Recipient's ID 123-00-0000

Company or Last Name Cage

First Name (if applicable) Rusty

Address 1337 Elite Dr.

City Fort Collins

State Colorado-CO

ZIP 80526

Country

Account Number (see instructions)

☐ 13.FATCA filing requirement ☐ 2nd TIN not.

**Other Information**

1.Rents \$

2.Royalties \$

3.Other income \$ 10000.00

4.Federal income tax withheld \$ 965.00

5.Fishing boat proceeds \$

6.Medical and health care payments \$

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

8.Substitute payments in lieu of dividends or interest \$

9.Crop insurance proceeds \$

10.Gross proceeds paid to an attorney \$

11.Fish purchased for resale \$

12.Section 409A deferrals \$

14.Excess golden parachute payments \$

15.Nonqualified deferred compensation \$

16.State tax withheld \$

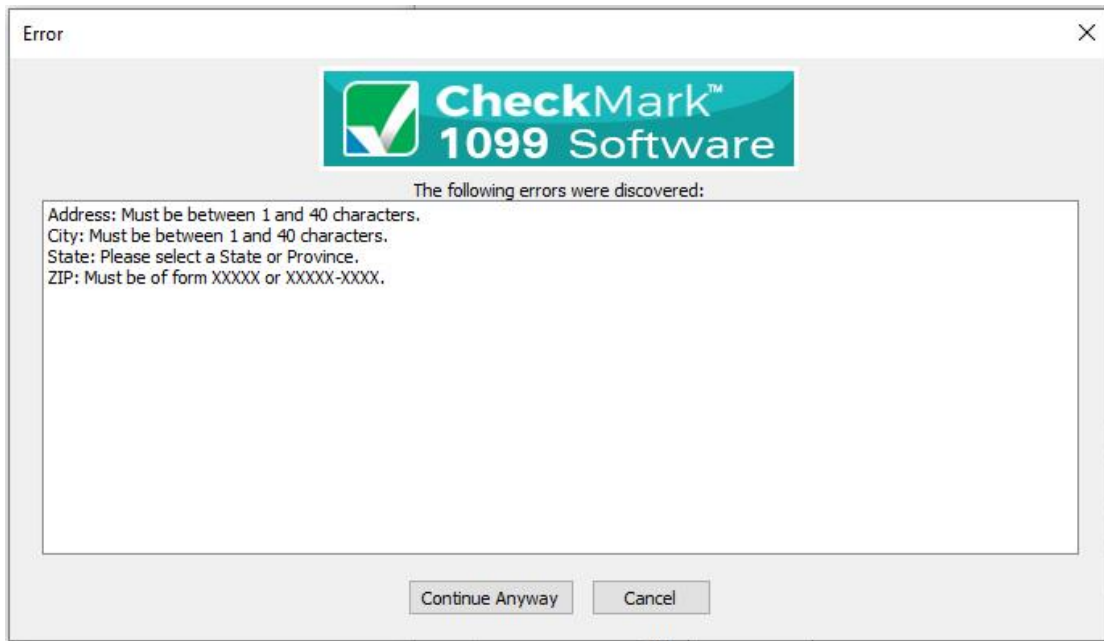
17.State/Payer's state no.

18.State income \$

Previous Recipient Add Recipient Update Recipient Cancel Next Recipient

If any information is incorrect, a popup window will open explaining which fields have errors.





Press **cancel** to go back to the set up screen to correct any errors, or **Continue Anyway** to Save the recipient information.

---

**NOTE:** If any field has an invalid entry, once you return to the Recipient set up screen, that field name will show up in “**Red**”. In addition, some fields will not save the invalid information and remain empty. For more information on validated information, see “Validated Status” on page 37.

---

## Voided Recipient

If a 1099 is incorrectly filed, or included in a filing, that was incorrectly filed, you can resubmit the 1099 as a Voided copy to void the original 1099 to the IRS. Please read the IRS Instructions on how to file this.

1. Select the recipient from the list and click **Update Recipient** button
2. Click the **Void** check box at the top of the screen.

If the recipient’s Status is already considered **Printed** and/or **Completed**, you’ll receive a pop up window asking if you would like to change the status back to Not Printed and/or Not Completed. For information on what the different Statuses mean, see “Status” on page 36.

---



3. Mark the corresponding checkbox next to “**NOT Printed**” and/or “**NOT Complete**” if you want to change the status and click the **Save and Continue** button. If you do not want to change the status, click the **Cancel** button. If you do not select either checkbox, you can still click the **Save and Continue** button to save any updated recipient information without changing their status.

If you initially printed the form, reprint another 1099 with the updated **Void** status and submit that form to the IRS with a new 1096 form. for instructions on printing 1099 forms, see “Printing 1099s for Recipients” on page 57.

If you initially e-filed, create a new .txt file with that recipient and updated **Void** information and submit it to the IRS. For information on e-Filing, see “Creating a file to eFile” on page 64.

## Corrected Recipient

If a 1099 is filed, or included in a filing, with incorrect information, a **Corrected** 1099 must be filed with the IRS.

1. Select the recipient from the list and click the **Update Recipient** button.
2. Click the **Corrected** check box at the top of the screen, update any information and click the **Update Recipient** button to Save.

If the recipient’s Status is already considered **Printed** and/or **Completed**, you’ll receive a pop up window asking if you would like to change the status back to **Not Printed** and/or **Not Completed**. For information on what the different Statuses mean, see “Status” on page 36.

---



3. Mark the corresponding checkbox next to “**NOT Printed**” and/or “**NOT Complete**” if you want to change the status and click the **Save and Continue** button. If you do not want to change the status, click the **Cancel** button. If you do not select either checkbox, you can still click the **Save and Continue** button to save any updated recipient information without changing their status.

If you initially printed the form, reprint another 1099 with the updated **Corrected** status and submit that form to the IRS with a new 1096. for instructions on printing 1099 forms, see “Printing 1099s for Recipients” on page 57.

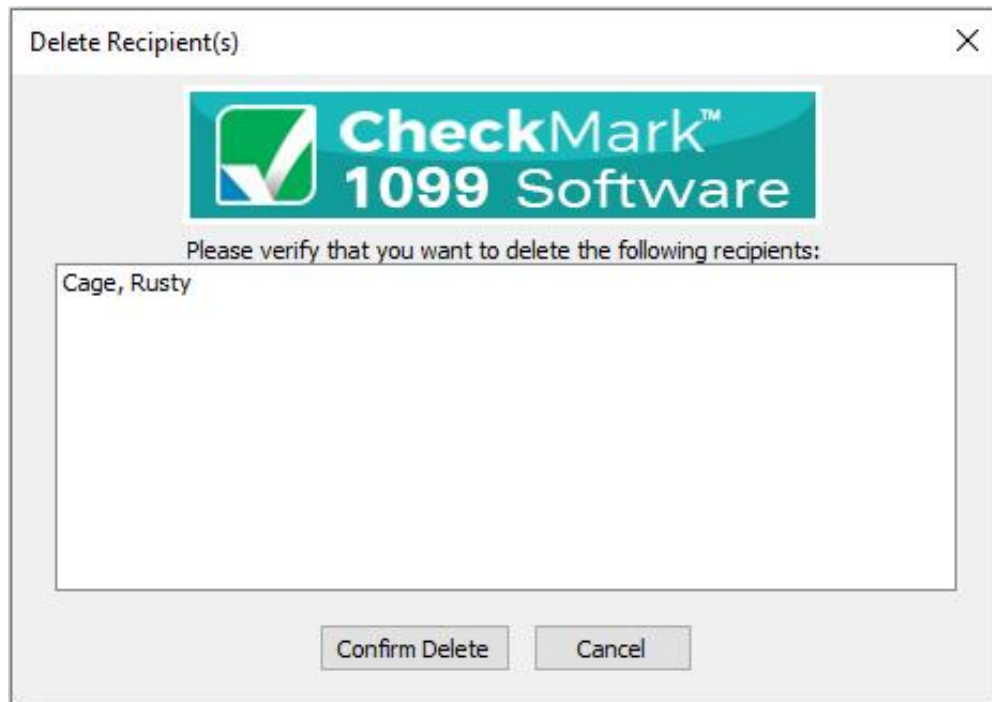
If you initially e-Filed, create a new .txt file with that recipient and updated Corrected information and submit it to the IRS. For information on eFiling, see “Creating a file to eFile” on page 64.

## Deleting a Recipient

1. Select the company that contains the recipient(s) you wish to delete
2. Highlight the recipient in the list you wish to Delete.

If you want to delete more than one recipient, you can highlight multiple recipients at once. See “Selecting Multiple Recipients” on page 38.

3. Click **Delete Recipient** button.
4. A pop-up window appears to confirm that these are the recipients you want to delete.



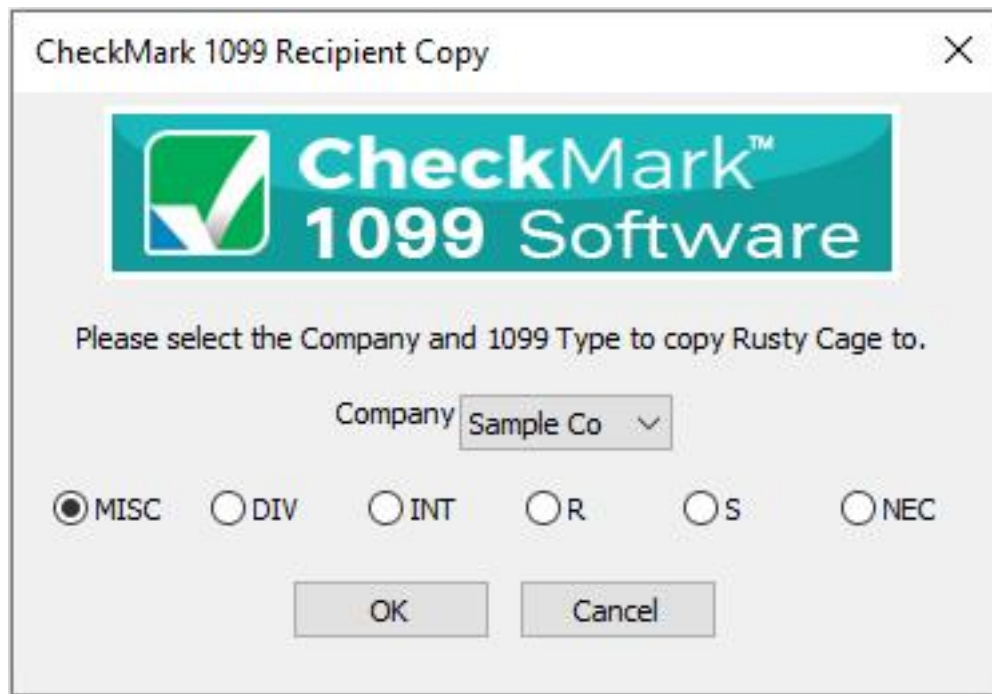
5. Click **Confirm Delete** to complete the process.

## Copy Recipient

If you have a recipient that needs to be included in multiple companies or requires different types of 1099 forms, you can easily copy that person’s set up information and add them either under a new company and/or with a different type of 1099 form.

1. Select the company that contains the recipient(s) you wish to copy.
  2. Highlight the recipient in the list you wish to copy.
  3. Click the **Copy Recipient** button.
-

4. A pop-up window appears. Select which company and which type of 1099 form this recipient should be copied as.



5. Click **OK** to copy the recipient.

## Filtering Recipients

You can use the **Filter** button to search for certain recipients in the list. To find a particular recipient, enter all or part of the name into the **Filter** box area above the recipients section and click the **Filter** button. The Filter will search for any recipients that contain those variables.

You can also use an asterisk(\*) to help sort groups. For instance, if you enter the first letter and then an asterisk, ex: N\*, you will receive all recipients that start with the letter “N”.

---

**IMPORTANT:** When filtering, make sure you choose the appropriate form you want to search in. If filtering from **All Forms**, recipients will be searched from the entire company. If however, you choose **DIV Forms** for example and filter certain variables, only those recipients set up as receiving a **1099-DIV** will be displayed in the results.

---

## Sort Recipients

You can sort recipients by Ascending or Descending order. To select which type of sort to use, go under the **Sort** menu at the top of the screen and choose either **Sort Recipients Ascending** or **Sort Recipients Descending**.

The screenshot displays the CheckMark 1099 Software application window. The menu bar at the top includes File, Tools, View, Sort, and Help. The 'Sort' menu is currently open, showing four options: 'Sort Companies Ascending' (checked), 'Sort Companies Descending', 'Sort Recipients Ascending' (checked), and 'Sort Recipients Descending'. The main window area is divided into two sections. The top section, labeled 'Companies', contains a text input field with 'Sample Co', a 'Filter' button, and a list of actions: 'Update Company', 'New Company', and 'Delete Company'. Below this is an 'Open Database' button. The bottom section, labeled 'Recipients 0 of 0', also features a 'Filter' button, a list of actions: 'Update Recipient', 'New Recipient', 'Delete Recipients', and 'Copy Recipient', and two dropdown menus for 'All Forms' and 'All Status'. At the bottom of the window, the database information is displayed: 'Database: CheckMark 1099 Database - 1099 Year 2022' and 'Path: C:\Users\Desktop\1099 Software\CheckMark 1099 Database 2022 Backup 08-29-22.db'.

File Tools View **Sort** Help

- ✓ Sort Companies Ascending
- Sort Companies Descending
- ✓ Sort Recipients Ascending
- Sort Recipients Descending

CheckMark™  
1099 Software

Companies

Filter

Sample Co

Update Company New Company Delete Company

Open Database

Recipients 0 of 0

Filter

All Forms All Status

Update Recipient New Recipient Delete Recipients Copy Recipient

Database: CheckMark 1099 Database - 1099 Year 2022  
Path: C:\Users\Desktop\1099 Software\CheckMark 1099 Database 2022 Backup 08-29-22.db

## Status

The **Status** drop down menu has certain statuses that are categorized based upon their setup and completion of being printed. You can sort using the different options to see which employees or vendors have been **Printed**, **Completed**, **Validated**, **Voided**, or **Corrected**.

*Recipients can be in multiple statuses at the same time, however you can only sort by one status at a time.*

---

**NOTE:** Before choosing a **Status**, you should first select one or more companies in the list. For information on selecting multiple companies see “Selecting Multiple Companies” on page 19.

---

The screenshot displays the CheckMark 1099 Software interface. At the top, there is a menu bar with 'File', 'Tools', 'View', 'Sort', and 'Help'. Below the menu bar is the 'CheckMark 1099 Software' logo. The main window is divided into two sections: 'Companies' and 'Recipients'.

**Companies Section:**

- A 'Filter' button and a text input field are located at the top right of the Companies list.
- The list contains one entry: 'Sample Co'.
- Below the list are three buttons: 'Update Company', 'New Company', and 'Delete Company'.
- Below these buttons is an 'Open Database' button.

**Recipients Section:**

- A 'Filter' button and a text input field are located at the top right of the Recipients list.
- The list contains one entry: 'Cage, Rusty'.
- Below the list are four buttons: 'Update Recipient', 'New Recipient', 'Delete Recipients', and 'Copy Recipient'.

**Status Dropdown Menu:**

- The dropdown menu is open, showing the following options: 'All Status', 'All Status', 'NOT Printed', 'Printed', 'NOT Completed', 'Completed', 'NOT Validated', 'Validated', 'NOT Voided', 'Voided', 'NOT Corrected', and 'Corrected'.
- The 'NOT Completed' option is currently selected.

**Database Information:**

- Database: CheckMark 1099 Database - 1099 Year 2022
- Path: C:\Users\Desktop\1099 Software\CheckMark 1099 Database 2022 Backup 08-29-22.db

## Printed Status

You can easily sort using this status to see which recipients still need the form 1099 printed.

You can select either **Printed** or **Not Printed** status to sort for recipients by whether or not you have printed a 1099 for them. Once you select the **Print Forms for Recipient** command from the **File** menu, that recipient will automatically be moved to the **Printed** status from the **NOT Printed** status.

## Completed Status

You can use the **Completed** status to indicate which recipients have or have not been printed or e-Filed this form 1099 for employer related copies.

Once you select the **Print forms for Filing** option under the **File** menu, recipients listed under **NOT Completed** will be moved to the **Completed** status.

## Validated Status

Sorting by **Validated** or **NOT Validated** helps you easily determine if there is any recipient that is not set up correctly. In the recipient screen, certain fields require specific characters, numbers, etc. to be accepted upon filing.

Select **Validated** to see which recipients are ready to be filed. Select **NOT Validated** to see any recipients that have set up criteria which is incorrect for filing purposes. Once you have sorted by **NOT Validated**, select a recipient and click on the **Update Recipient** button to view the set up and make necessary changes. Fields marked in “**RED**” do not meet the requirements for filing and corrections should be made.

## Voided Status

In the Recipient set up screen, there is a checkbox at the top of the screen for **Void**. If you filed a 1099 for a recipient that was unintended, you can mark **Void** to resent the 1099 for that recipient as a void status.

Choosing a **Voided** status will list all recipients marked **Void** in the Recipient set up screen. All other recipients that are not marked **Void** in the recipient set up screen are listed as **NOT Voided** for a status.

## Corrected Status

In the Recipient set up screen, there is a checkbox at the top of the screen for **Corrected**. If you filed an incorrect 1099 and need to resubmit a new 1099 with updated information, select the **Corrected** checkbox in the recipients set up screen before submitting the new 1099 information.

---



The **Corrected** status indicates all recipients who are marked as **Corrected** in the recipient set up screen. All other recipients will be listed as **Not Corrected**.

## Selecting Multiple Recipients

### Consecutive Selection

**Windows:** You can select multiple recipients by clicking the first recipient while holding down the mouse and moving the mouse down through the list

You can also click the first recipient, hold down the 'SHIFT' key on the keyboard and then click on the last recipient you want in the list.

**Macintosh:** Click on the first recipient you want in the list, hold down the 'SHIFT' key on the keyboard and then click on the last recipient you want in the list

The screenshot shows the 'CheckMark 1099 Software' application window. The title bar reads 'CheckMark 1099 E-File 2022'. The menu bar includes 'File', 'Tools', 'View', 'Sort', and 'Help'. The main interface is divided into two sections: 'Companies' and 'Recipients'.

**Companies Section:**

- Header: 'Companies' with a 'Filter' button and an empty text input field.
- List: A single entry 'Sample Co' is highlighted in blue.
- Buttons: 'Update Company', 'New Company', and 'Delete Company' are located below the list.
- Button: 'Open Database' is centered below the company buttons.

**Recipients Section:**

- Header: 'Recipients 1 of 6' with a 'Filter' button and an empty text input field.
- Buttons: 'MISC forms' and 'All Status' are dropdown menus on the right.
- List: A single entry 'Cage, Rusty' is highlighted in blue.
- Buttons: 'Update Recipient', 'New Recipient', 'Delete Recipients', and 'Copy Recipient' are located below the list.

**Footer:**

- Database: CheckMark 1099 Database - 1099 Year 2022
- Path: C:\Users\Desktop\1099 Software\CheckMark 1099 Database 2022 Backup 08-29-22.db

## Non-Consecutive Selection

**Windows:** To select specific recipients as a group, click on the first recipient you want, hold down the 'CTRL' key on the keyboard and click on any other recipients you want to include.

**Macintosh:** To select specific recipients as a group, click on the first recipient you want, hold down the 'COMMAND' key on the keyboard (also known as the Apple key) and click any other recipients you want to include.

The screenshot displays the 'CheckMark 1099 Software' application window. The title bar reads 'CheckMark 1099 E-File 2022'. The menu bar includes 'File', 'Tools', 'View', 'Sort', and 'Help'. The main interface is divided into two primary sections: 'Companies' and 'Recipients'.

**Companies Section:**

- Header: 'Companies' with a 'Filter' button and an empty text input field.
- Table: A single row is visible, 'Sample Co', which is highlighted in blue.
- Buttons: 'Update Company', 'New Company', and 'Delete Company' are located below the table.
- Button: 'Open Database' is centered below the company buttons.

**Recipients Section:**

- Header: 'Recipients 3 of 8' with a 'Filter' button and an empty text input field.
- Dropdowns: 'MISC forms' and 'All Status' are located to the right of the filter input.
- Table: Three rows are visible, all highlighted in blue: 'Cage, Rusty', 'jagger, mike', and 'Jett, Joan'.
- Buttons: 'Update Recipient', 'New Recipient', 'Delete Recipients', and 'Copy Recipient' are located below the table.

**Footer Information:**

Database: CheckMark 1099 Database - 1099 Year 2022  
Path: C:\Users\Desktop\1099 Software\CheckMark 1099 Database 2022 Backup 08-29-22.db

## Chapter 6

# Exporting and Importing

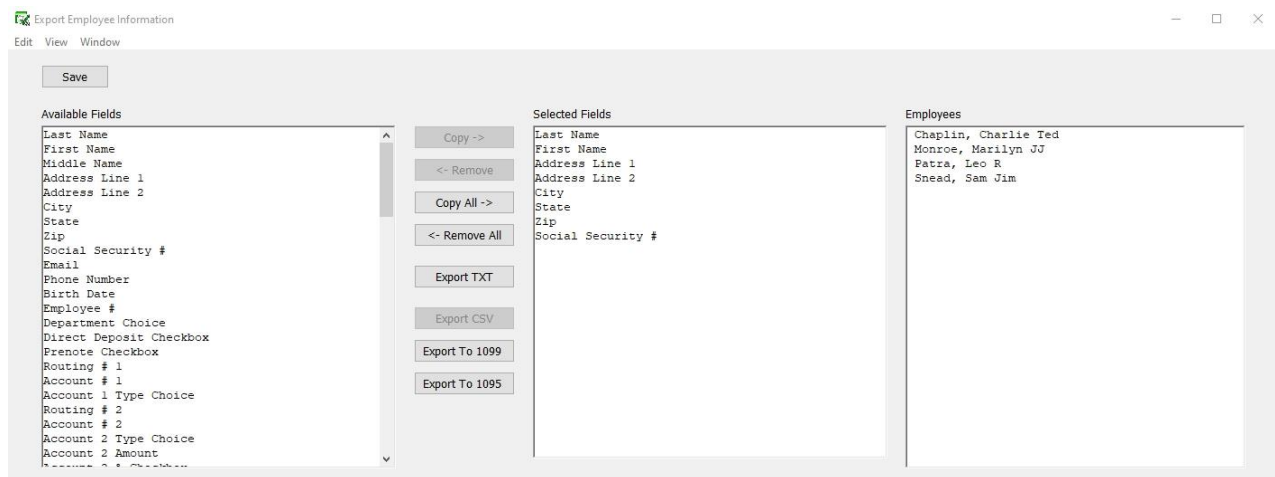
This chapter explains how to export employees and companies from CheckMark Payroll as well as vendors from CheckMark MultiLedger and how to import this information from CheckMark Payroll, MultiLedger or tab-delimited text file.

### Exporting Recipients from CheckMark Payroll

1. Open up CheckMark Payroll, go under **File** menu and choose **Export Employees**
2. Highlight which recipients you want to export from the list.

**Note:** If the recipients to be imported are using different types of 1099 forms, you should create multiple export files for each type of form. Example, one export file for 1099 MISC, one file for 1099 INT, etc.

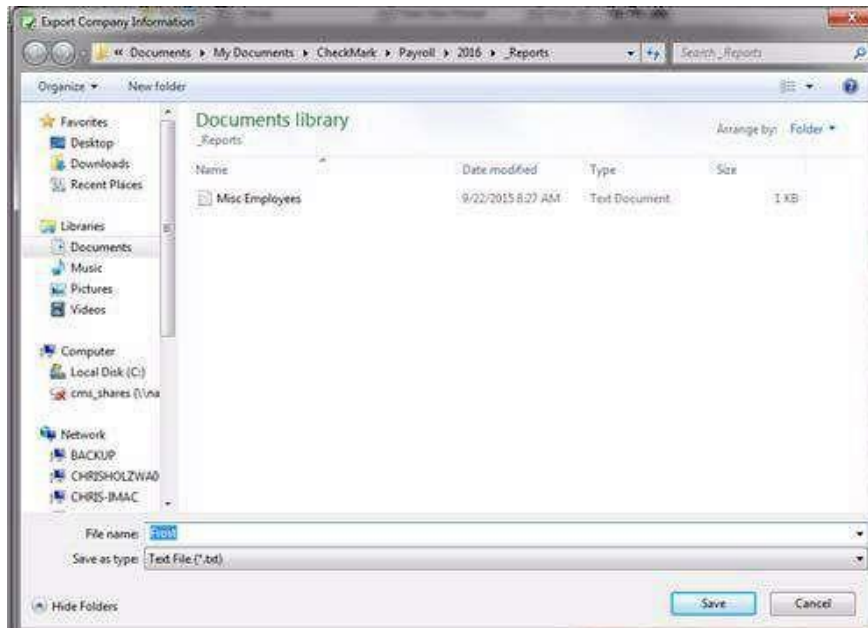
3. Click the **Export 1099** button. The **Selected Field** list will automatically populate with the correct available fields to import into the 1099 software.



4. A **Save** dialogue box appears in the **File** name field, give the file a name if needed and choose a location to save the file to, an example would be your Desktop.
5. Click **Save**.

## Exporting Companies From CheckMark Payroll

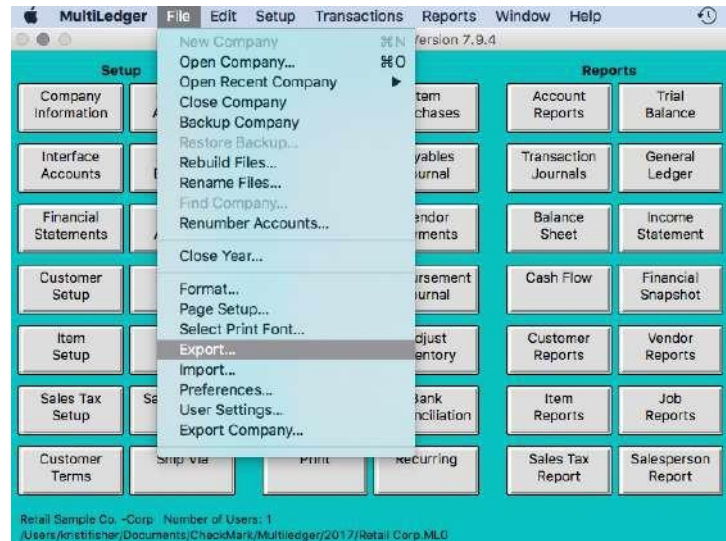
1. Open CheckMark Payroll, then open the Company you wish to export.
2. Under the **File** menu select **Export Company to 1099**.
3. A **Save** dialogue box appears. In the **File** name field, give the file a name if needed and choose a location to save the file to, an example would be your Desktop.



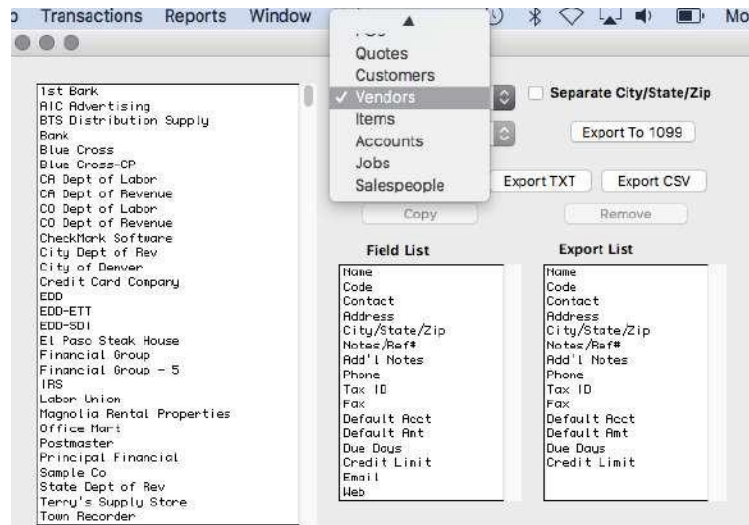
4. Click **Save**.

## Exporting Recipients from MultiLedger

1. Open the MultiLedger program, under the File menu select **Export...**



2. Select **Vendors** from the drop-down menu at the top.



3. Make sure you select the correct period and click the **Export to 1099** button.

4. A **Save** dialogue box appears. In the **File** name field, give the file a name if needed and choose a location to save the file to, an example would be your desktop.
5. Click **Save**.

## Importing Recipients from CheckMark Payroll and Multiledger.

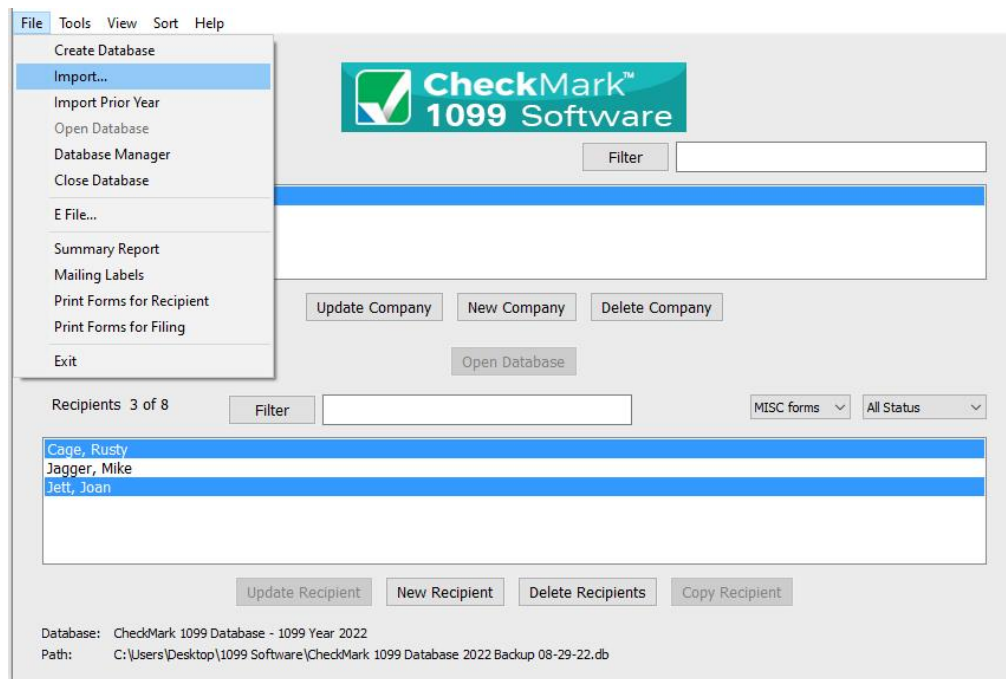
1. Open the CheckMark 1099 application.
2. Open the Database which contains the company you want to import into.

---

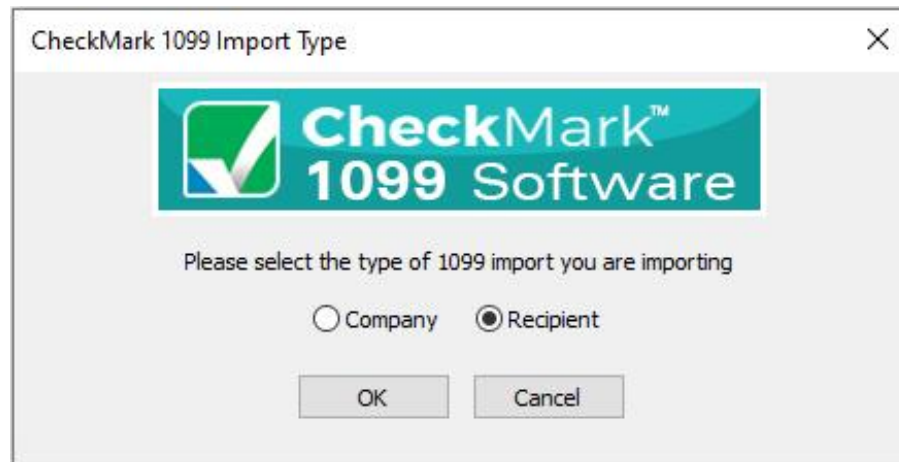
**Note:** If the company you want to import recipients to does not exist, you will need to create a new company or import a company before importing recipients. For information on creating a new company or importing a company, see “Creating a New Company” on page 15 or “Importing a Company” on page 47.

---

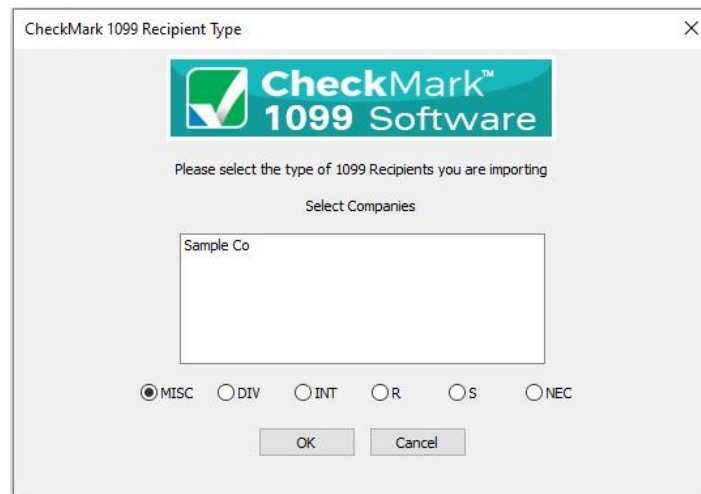
3. Under the **File** menu select **Import...**



4. Select **Recipient** in the popup window.



5. In the popup window select which type of 1099 recipient(s) you are importing: **MISC**, **DIV**, **INT**, **R**, **S**, or **NEC** and which company you want to import the recipients to.



The image shows a dialog box titled "CheckMark 1099 Recipient Type". At the top is the "CheckMark 1099 Software" logo. Below the logo, the text reads "Please select the type of 1099 Recipients you are importing". Underneath this is the label "Select Companies" followed by a text input field containing "Sample Co". At the bottom of the dialog, there are six radio buttons labeled "MISC", "DIV", "INT", "R", "S", and "NEC". The "MISC" radio button is selected. Below the radio buttons are two buttons: "OK" and "Cancel".

6. Click **OK**
-



7. Click the **Import from Payroll or MultiLedger** button. The appropriate fields will automatically populate for you.

Import Recipient Data

**CheckMark™ 1099 Software**

Import from Payroll or MultiLedger

**Available Fields**

- Company/Last Name (Required)
- First Name
- Address Line 1
- Address Line 2
- City
- State
- ZIP Code
- Country
- Address not in U.S. - Checkbox
- Recipient's ID
- Account Number
- FATCA\_MISC - Checkbox
- 2nd TIN not. - Checkbox
- Void - Checkbox
- Corrected - Checkbox

**Selected Fields**

- Company/Last Name (Required)
- First Name
- Address Line 1
- Address Line 2
- City
- State
- ZIP Code
- Country

Add Field --> Add All Fields --> <-- Remove Field <-- Remove All Fields

Import\_TXT Import\_CSV Cancel

8. A **Look in** screen for Windows or choose the file to Import screen for Macintosh appears allowing you to browse to the location where you saved your text file from CheckMark Payroll or MultiLedger.
9. Select the text file and click **Open**. All recipients will be imported into the selected company.

## Importing a Company from CheckMark Payroll

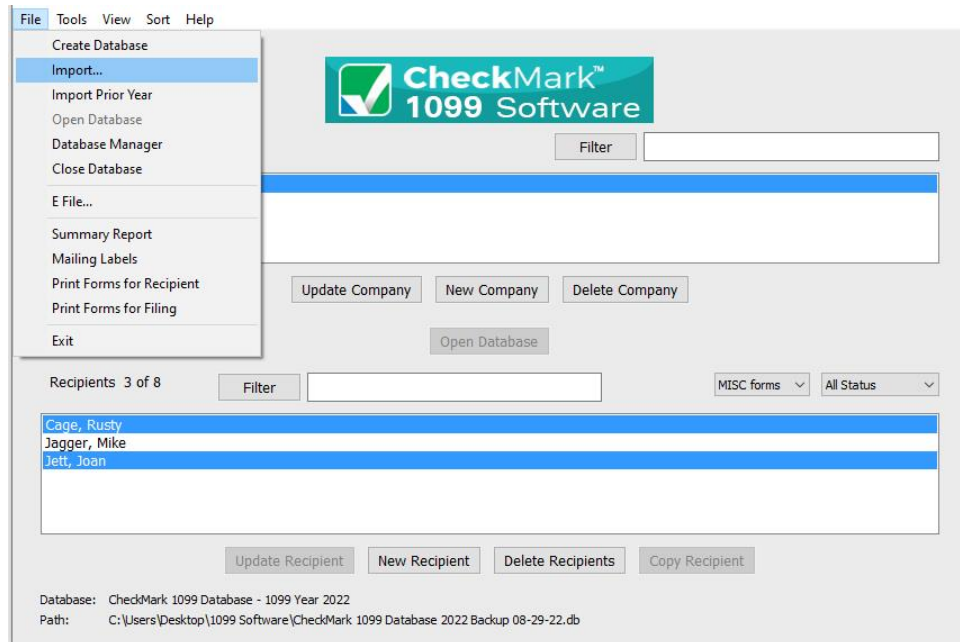
1. Open the CheckMark 1099 application.
2. Open the Database you want to import the company into.

---

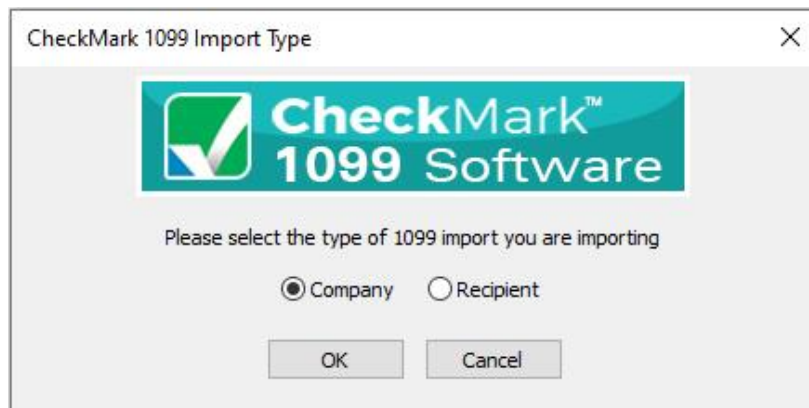
**Note:** If the database that you want to import recipients to does not exist, you will need to create a new database before importing. For information on creating a new database see “Creating a New Database” on page 9.

---

3. Under the **File** menu select **Import...**
-




4. Select **Company** in the popup window.



5. Click **OK**
6. Click the **Import from Payroll or MultiLedger** button. The appropriate fields will automatically populate for you.

CheckMark 1099 Import Type



Import from Payroll or MultiLedger

<p>Available Fields</p> <ul style="list-style-type: none"> <li>Payer's Name</li> <li>Payer's Federal ID</li> <li>Address</li> <li>City</li> <li>State</li> <li>ZIP</li> <li>Phone</li> </ul>	<p>Add Field --&gt;</p> <p>Add All Fields --&gt;</p> <p>&lt;-- Remove Field</p> <p>&lt;-- Remove All Fields</p>	<p>Selected Fields</p> <ul style="list-style-type: none"> <li>Payer's Name</li> <li>Payer's Federal ID</li> <li>Address</li> <li>City</li> <li>State</li> <li>ZIP</li> <li>Phone</li> </ul>
--	---	---

7. A **Look in** screen for Windows or choose the file to Import screen for Macintosh appears allowing you to browse to the location where you saved your text file from CheckMark Payroll.
8. Select the text file and click **Open**. All recipients will be imported into the selected company.

## Importing using a tab-delimited text file.

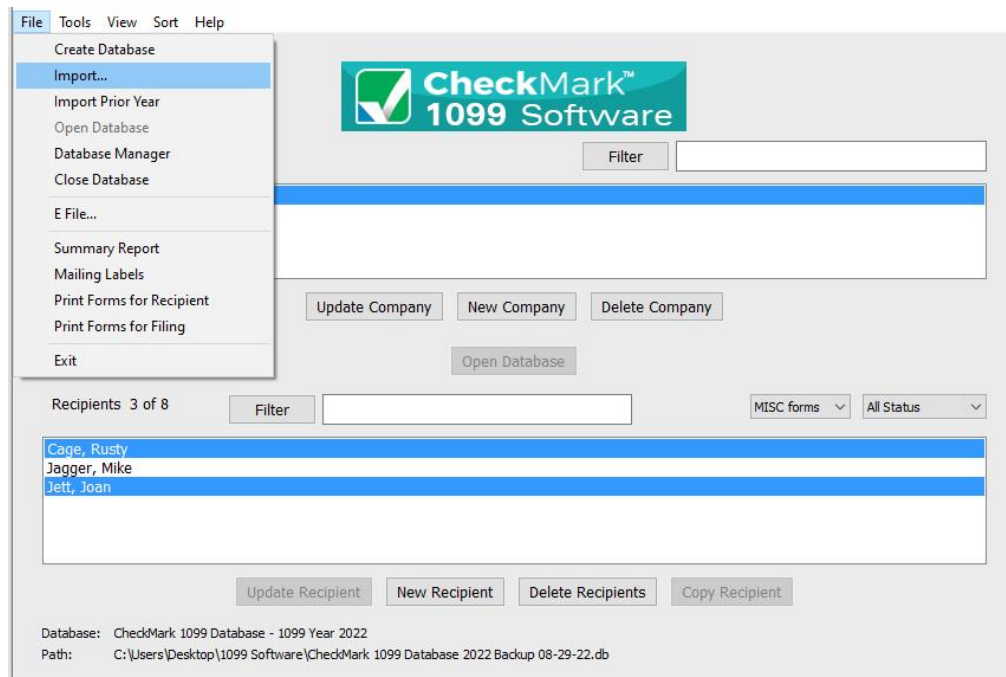
1. Open up the CheckMark 1099 application.
2. Open the Database which contains the company you want to import into.

---

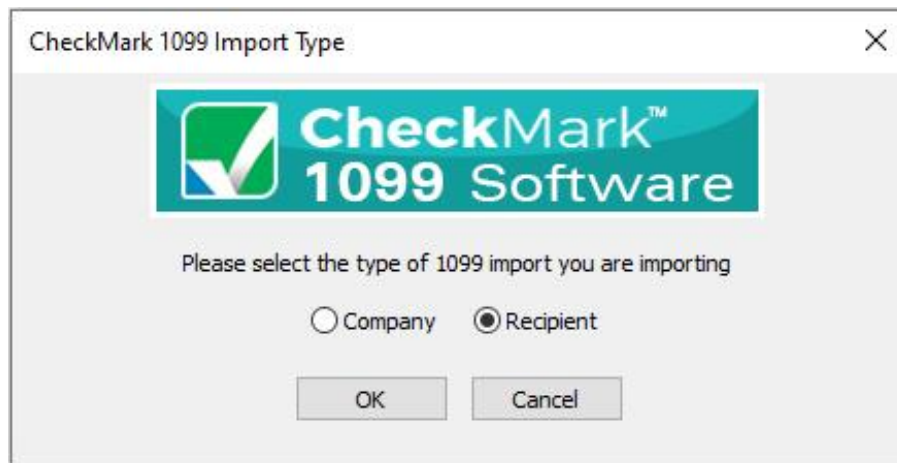
**Note:** If the company you want to import recipients to does not exist, you will need to create a new company or import a company before importing recipients. For information on creating a new company or importing a company, see “Creating a New Company” on page 15 or “Importing a Company” on page 47.

---

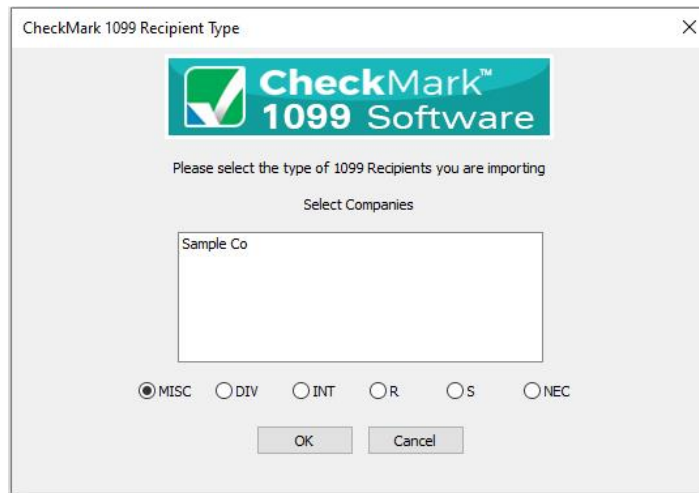
3. Go under the **File** menu and select **Import...**
-



4. Select **Recipient** or **Company** in the popup window.



5. In the popup window select which type of 1099 recipient(s) you are importing: **MISC**, **DIV**, **INT**, **R**, **S**, or **NEC** and which company you want to import the recipients to.



CheckMark 1099 Recipient Type

**CheckMark™ 1099 Software**

Please select the type of 1099 Recipients you are importing

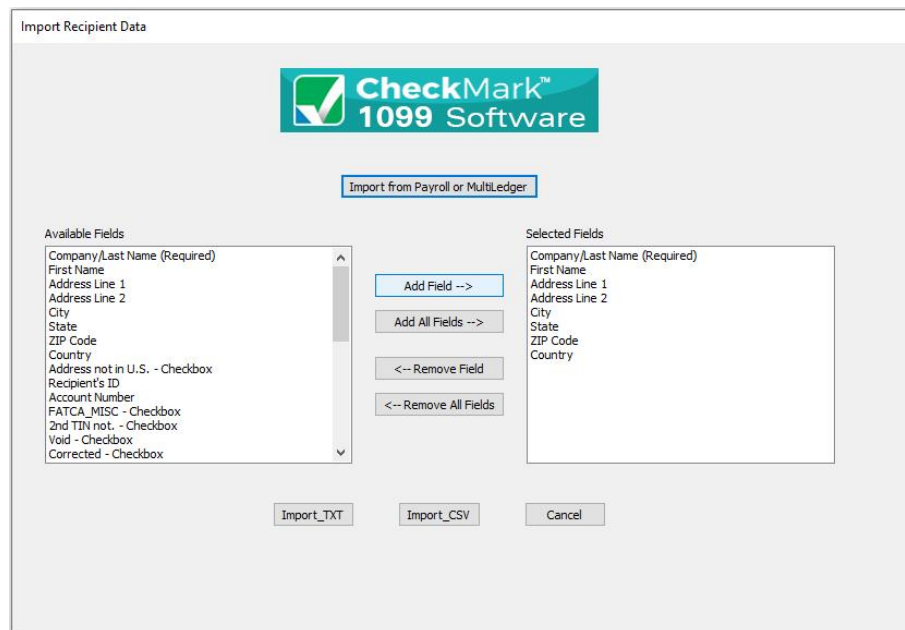
Select Companies

Sample Co

☒ MISC
 ☐ DIV
 ☐ INT
 ☐ R
 ☐ S
 ☐ NEC

OK Cancel

6. The import screen allows you to select which fields are being imported. Select the fields in the same order as the text file you're importing. Click the **Import** button after you have added all fields to the **Selected Field list**.



Import Recipient Data

**CheckMark™ 1099 Software**

Import from Payroll or MultiLedger

Available Fields

- Company/Last Name (Required)
- First Name
- Address Line 1
- Address Line 2
- City
- State
- ZIP Code
- Country
- Address not in U.S. - Checkbox
- Recipient's ID
- Account Number
- FATCA\_MISC - Checkbox
- 2nd TIN not. - Checkbox
- Void - Checkbox
- Corrected - Checkbox

Selected Fields

- Company/Last Name (Required)
- First Name
- Address Line 1
- Address Line 2
- City
- State
- ZIP Code
- Country

Add Field -->  
 Add All Fields -->  
 <-- Remove Field  
 <-- Remove All Fields

Import\_TXT Import\_CSV Cancel

7. A **Look in** screen for Windows or choose the file to Import screen for Macintosh screen appears allowing you to browse to the location where you saved your text file.

8. Select the text file and click **Open**. All recipients will be imported into the selected company.

## Text File Format for Importing

CheckMark 1099 program uses a tab-delimited .txt file for importing Companies and the Recipients.

Each field is separated by a **Tab** with **Return** at the end of the record before starting the next recipient. An example of a text file to be imported is shown below and contains the **Selected Fields**: *Company Name/Last Name (required), First Name, Address 1, Address 2, City, State, Zip, Recipients ID*.

```
Power[tab]Max[tab]44 Main St[tab]Ste 101[tab]Fort Collins[tab]CO[tab]80525[tab]123-45-6789[return]
```

- If any fields are not applicable, for instance the address 2 field, a space can be used as a place holder. For example:

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

- If no space is included, two consecutive [tabs] will also work. For example:

```
Power[tab]Max[tab]44 Main St[tab][tab]FortCollins[tab]CO[tab]80525[tab]123-45-6789[return]
```

---

**IMPORTANT:** Make sure the items in the **Selected Fields** list are in the same order as the items in the text file being imported to ensure that all values are imported into the correct fields.

---

## Chapter 7

# Printing 1099 Forms

This chapter explains how to print 1099 forms for the company and each recipient.

*While CheckMark Inc. attempts to maintain up-to-date and accurate tax and form information, we cannot be responsible for changes or discrepancies in tax values and forms that are filed incorrectly.*

---

**IMPORTANT:** You must install the latest version of Adobe Reader to print 1099 and 1096 forms properly. Go to [www.adobe.com](http://www.adobe.com) to download the latest update.

---

## Summary Report

The 1099 Summary Report summarizes recipient payments by 1099 type. These totals can be compared to Box 5 on Form 1096. Use this report to verify the accuracy of your information before printing.

1. Go under **File**, select **Summary Report**. Click **Print**.

The screenshot displays the CheckMark 1099 Software interface. The 'File' menu is open, showing options: Create Database, Import..., Import Prior Year, Open Database, Database Manager, Close Database, E File..., **Summary Report** (highlighted), Mailing Labels, Print Forms for Recipient, Print Forms for Filing, and Exit. The main window features a 'CheckMark 1099 Software' logo, a 'Filter' button, and a large empty text area. Below this are buttons for 'Update Company', 'New Company', 'Delete Company', and 'Open Database'. At the bottom, it shows 'Recipients 3 of 8', another 'Filter' button, and dropdown menus for 'MISC forms' and 'All Status'. A list of recipients is visible: Cage, Rusty; Jagger, Mike; Jett, Joan. At the bottom of the interface are buttons for 'Update Recipient', 'New Recipient', 'Delete Recipients', and 'Copy Recipient'. The status bar at the very bottom indicates the database is 'CheckMark 1099 Database - 1099 Year 2022' and provides the file path: 'C:\Users\Desktop\1099 Software\CheckMark 1099 Database 2022 Backup 08-29-22.db'.

## Print 1099 Forms and 1096 Form for Each Company

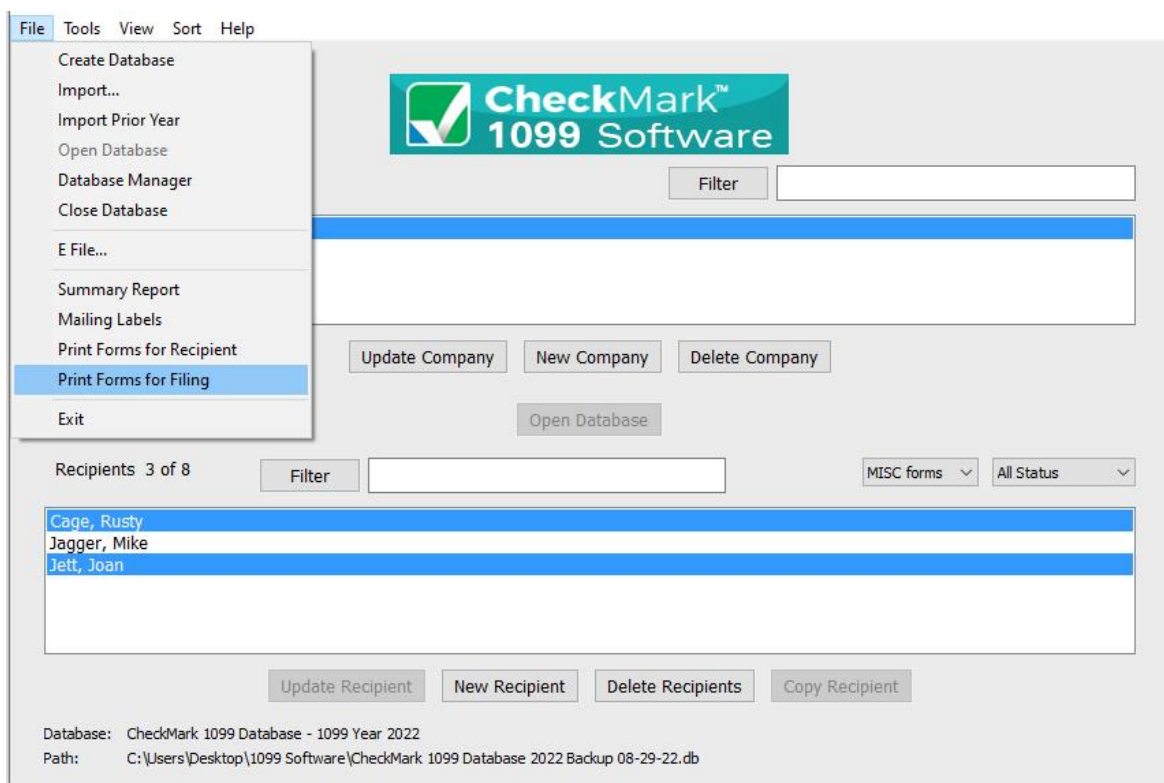
1. Select the company you wish to print 1099s and a 1096 form.
2. Select which type of 1099 form you want to print from the Forms drop down menu: **MISC, DIV, INT, R, S, and NEC.**
3. Select which recipient(s) in the list you would like to print forms for. If no recipients are selected, all recipients will be included.

---

**Note:** You can sort the recipients by using the Status drop down menu to group recipients by **Printed, Completed, Validated, Corrected, and Void**. For more information on using the Status drop down menu and what each Status means, see “Status” on page 36.

---

4. Under the **File** menu, select the **Print Forms for Filing** option.



5. A popup window appears.

The first section pertains to 1096 information. The default choice is to **Use all recipients for 1096 totals** for the selected company. If you are filing Corrected or Voided 1099s, then choose the **Use selected recipients for 1096 totals** option.

---



The second section of the screen pertains to 1099s. The default choice is to **Print 1099s for all recipients**. If you are filing Corrected or Voided 1099s and only want selected recipients to be included, choose the **Print 1099s for selected recipients** options.

Print Forms for Filing

**CheckMark™  
1099 Software**

Choose 'Use Selected' if you are printing ONLY CORRECTED and VOIDED 1099s, otherwise choose 'Use All' to use all Sample Co MISC recipients

☒ Use all recipients for 1096 totals ☐ Use selected recipients for 1096 totals

Choose 'Print All Recipients' if you want to print 1099s for all Sample Co MISC recipients, otherwise choose 'Print Selected Recipients'

☒ Print 1099s for all recipients ☐ Print 1099s for selected recipients


Continue Cancel

**\*\*If printing 1099 MISC or INT Only\*\***

If you are printing **1099 MISC or INT forms**, you'll be prompted to choose **I Sent 2-up forms to recipients** or **I sent 4-up forms to recipients**. Choose the **I sent 2-up forms to recipients** option if you plan on using 2-up pre-printed forms for all copies of 1099-MISC. If you plan on printing Copy B, Copy 2 and Copy C for the recipient on blank paper, you can select **I sent 4-up forms to recipients**. After making your selection, click **OK**.

**Note :** When opted NEC forms you'll be prompted to choose I sent 3-up forms to recipients.

Print Forms for Filing



Choose 'Use Selected' if you are printing ONLY CORRECTED and VOIDED 1099s, otherwise choose 'Use All' to use all Sample Co MISC recipients

☒ Use all recipients for 1096 totals ☐ Use selected recipients for 1096 totals

Choose 'Print All Recipients' if you want to print 1099s for all Sample Co MISC recipients, otherwise choose 'Print Selected Recipients'


☒ Print 1099s for all recipients ☐ Print 1099s for selected recipients

Continue Cancel

**NOTE:** If you have not selected any recipients for the company selected, all recipients will be printed.

6. A message box will open telling which form to load in the printer and how many. Click **OK** after you have loaded the correct forms in your printer. Do this for each message box that appears.
- 7.

#of forms message box



Please put 1 copies of 1099-MISC CopyA into the printer, then hit ok

OK

## Printing 1099s for Recipients

1. Select the company you wish to print 1099 forms for.
2. Select which type of 1099 form you wish to print from the Forms drop down menu: **MISC, DIV, INT, R, S** or **NEC**.

---

**NOTE:** Recipients shown will be for the type of 1099 form that is selected. You can choose **SHOW ALL** to show all recipients, but you must select a specific 1099 form from the drop down list to be able to print.

---

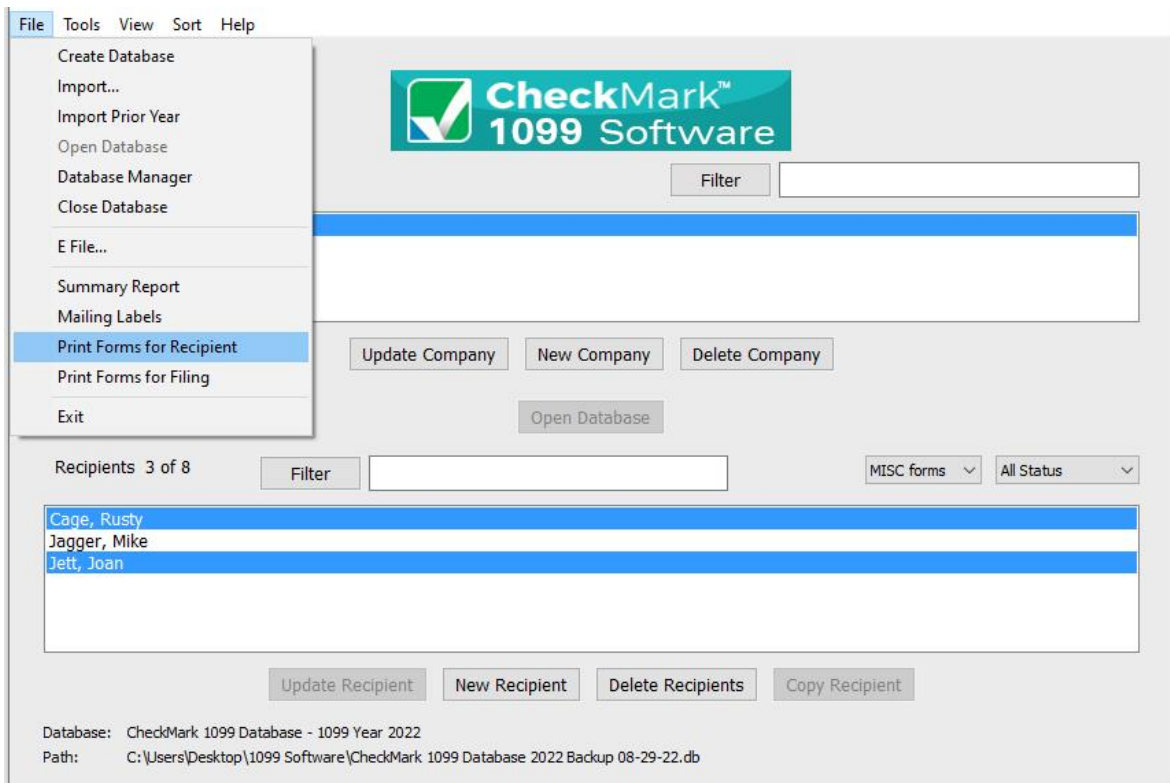
3. Select which recipient(s) in the list you wish to print 1099s for.

---

**NOTE:** You can sort the recipients by Status drop down menu to group recipients as **Printed, Completed, Validated, Corrected and Void**. For more information on using the Status drop down menu and what each Status means, see “Status” on page 35.

---

4. Under the **File** menu, select the **Print Forms for Recipient** option.



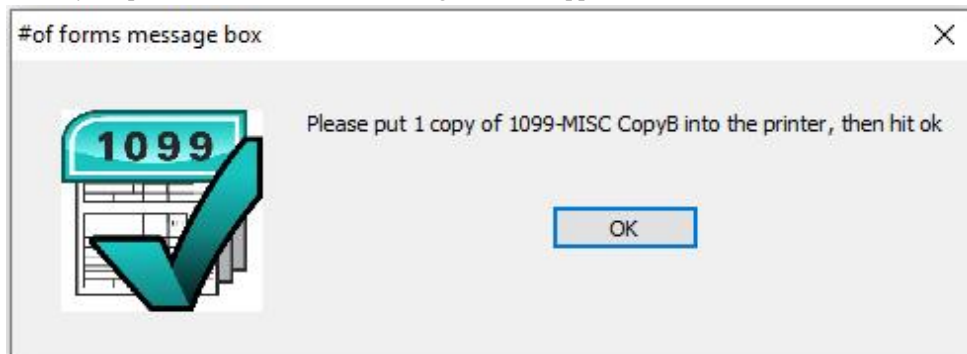
**\*\*If Printing 1099-MISC and 1099-INT only\*\***

If you are printing **1099 MISC forms** or **1099 INT forms**, you'll be prompted to choose **Print 2-up MISC** or **INT forms** or **Print 4-up MISC** or **INT forms**. Choose **Print 2-up MISC forms** option if you plan on using 2-up pre-printed forms for all copies of 1099 MISC. If you plan on printing Copy B, Copy 2, and Copy C for the recipient on blank paper, you can select **Print 4-up MISC Forms**. After making your selection, click **OK**.



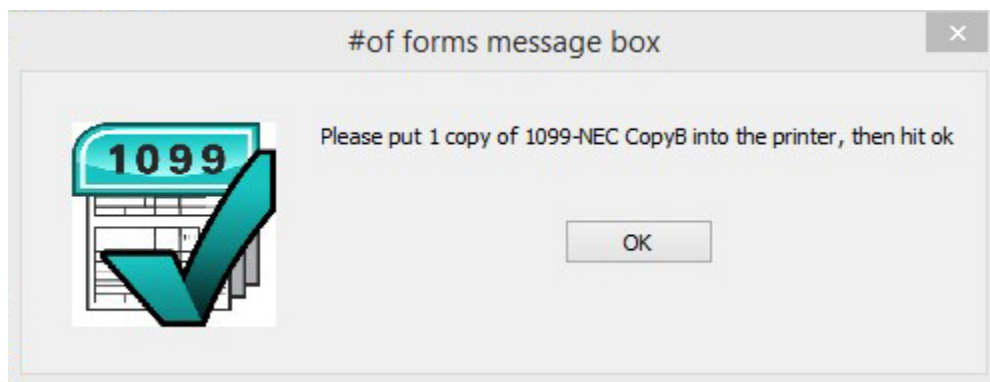
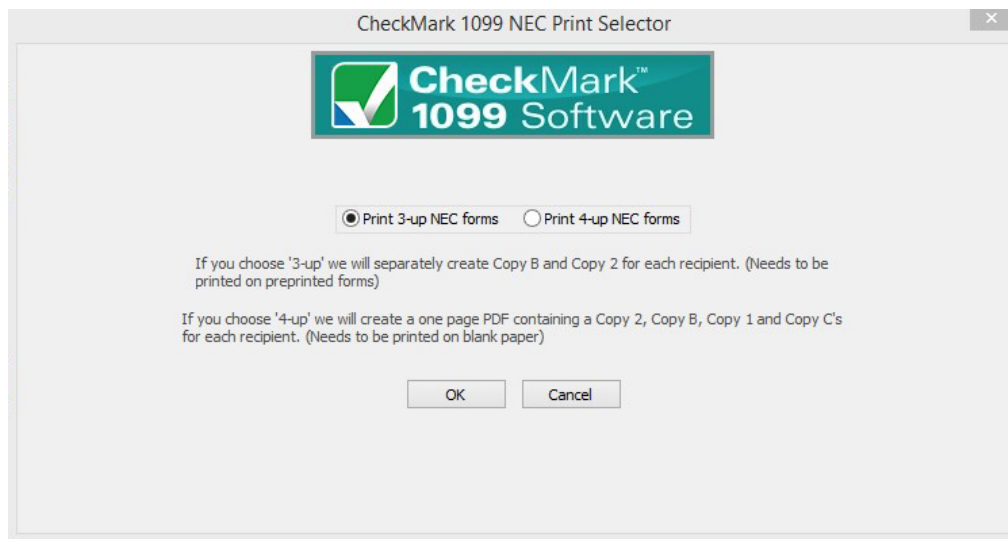
**NOTE:** Using the 4-up sheet method will produce two Copy Cs instead of one Copy 1

5. If printing 2-up on pre-printed forms, a message box will open telling you which form to load in the printer and how many. Click **OK** after you have loaded the correct forms in your printer. Do this for each message box that appears for each form.



**\*\*If Printing 1099-NEC only\*\***

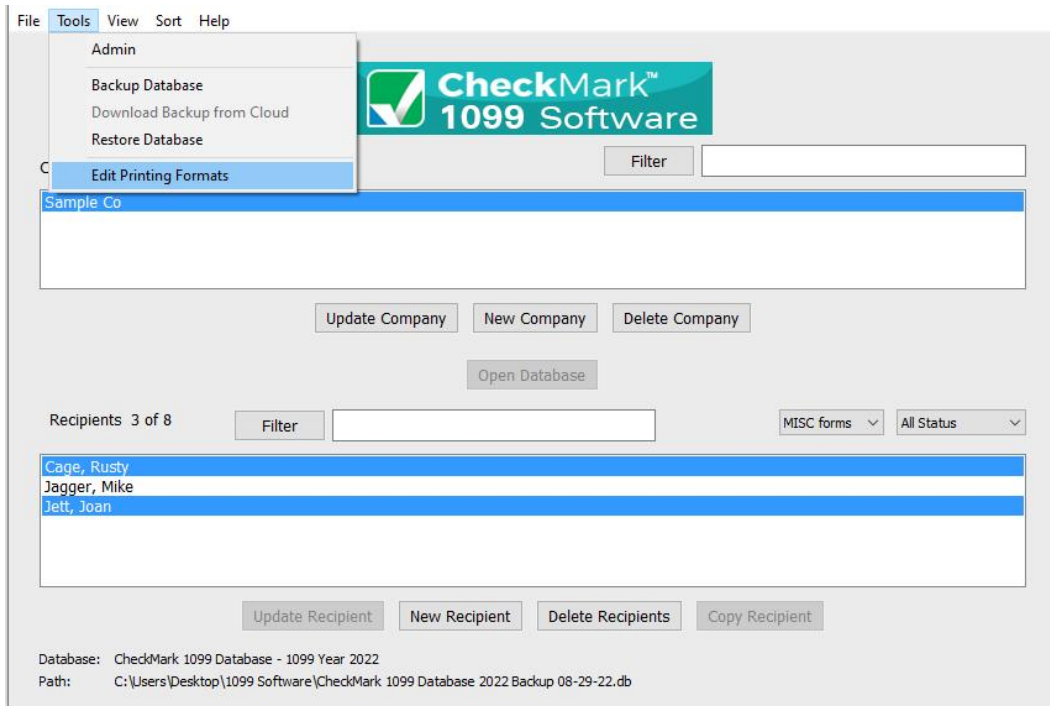
If you are printing **1099 NEC form** you'll be prompted to choose **Print 3-up NEC** or **Print 4-up NEC**. Choose **Print 3-up NEC forms** option if you plan on using 3-up pre-printed forms for all copies of 1099 NEC. If you plan on printing Copy B, Copy 2, and Copy C for the recipient on blank paper, you can select **Print 4-up NEC Forms**. After making your selection, click **OK**.



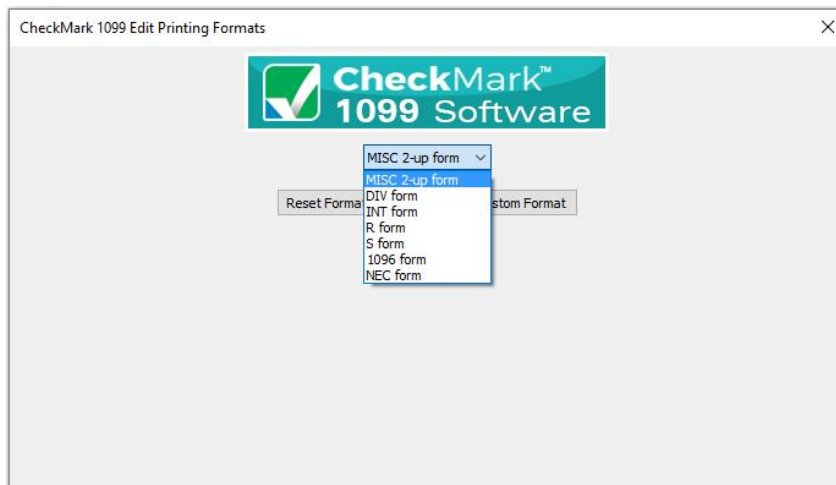
## Edit Printing Formats

You can adjust each individual print field if printing on pre-printed forms.

1. Choose **Edit Printing Formats** located under the **Tools** menu.



2. Select which forms you want to modify from the drop down menu: **MISC 2-up form**, **DIV form**, **INT form**, **R form**, **S form**, **NEC form**, and **1096 form**.



3. Click **Edit Current Custom Format**. A window showing all print fields on the selected form opens.

The screenshot shows the '1099 Format Window' with a grid of input fields. The window has a title bar with a close button (X) and a scroll bar on the right. The grid is organized as follows:

Row	Column 1	Column 2	Column 3	Column 4
0				
1	payer name		box 1	
2	payer address		box 2	
3	payer city-state-zip		box 3	box 4
4	payer phone			
5				
6	payer id	recipient id	box 5	box 6
7	recipient name			box 8
8	recipient address		box 9	box 10
9	recipient city-state-zip-country		box 11	box 12
10	recipient acct		box 14	box 15
11			box 16-1	box 17-1
12			box 16-2	box 17-2
13				box 18-1
14				box 18-2

Fields are labeled with checkboxes (X) indicating they are to be printed. The window includes a horizontal ruler at the top and a vertical ruler on the left.

You can adjust any field by dragging it with the mouse. Or click on any field to highlight and use arrow keys on the keyboards.

Double-clicking any field will turn the text from 'black' or 'red' or vice versa. Any field labeled in 'red', will not print.

4. To reset the back to the default format, click the **Reset Format** button

## **Edit Page Format (Mac Only)**

If using a Macintosh computer, you must set the printing preferences the first time you print to correctly format the page.

A warning message will appear the first time you try to print.

You can access the **Edit Page Setup** screen by clicking the **Edit Page Setup** button.

You can also access the **Edit Page Setup** screen under the **Tools** menu.

1. Click **Edit Page Setup** under the **Tools** menu.
2. Follow the instructions in the warning message. You can also print out the instructions to follow along.





## Chapter 8

### eFile

This chapter shows you how to eFile 1099 forms using the IRS Filing Information Returns Electronically (FIRE) System. If you have never eFiled 1099s in the past, You will need to visit the IRS website at [www.irs.gov](http://www.irs.gov) to sign up for a FIRE system account and receive a Transmitter Control Code (TCC), You should do this 45-60 days before the filing deadline.

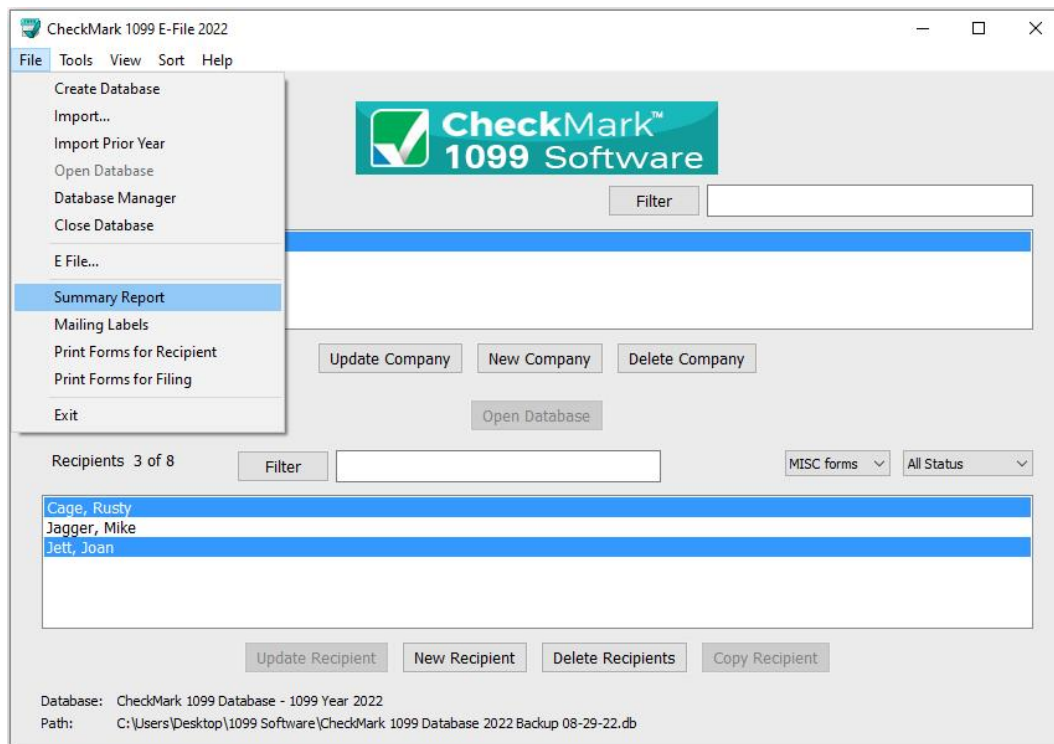
*While CheckMark Inc. attempts to maintain up-to-date and accurate tax and for information, we cannot be held responsible for changes or discrepancies in tax values and forms that are filed incorrectly.*

**NOTE:** The ability to eFile is only available to customers who have purchased the 1099 eFile version. If you need to upgrade from the printed version, visit the CheckMark website at [www.checkmark.com](http://www.checkmark.com).

### Summary Report

The 1099 Summary Report Summarizes vendor payments by 1099 type. These totals can be compared to Box 5 on Form 1096. Utilize this report to verify the accuracy of your values before printing.

1. Under **File**, select **Summary Report**. Click **Print**.



## Creating a file to eFile

1. Select the company you want to eFile for. You can select multiple companies if you wish. For information on selecting multiple companies, see “Selecting Multiple Companies” on page 19.
2. Select the recipients you wish to include. You can sort using the different forms or choose **All Forms** from the drop down menu to select all recipients. For information on selecting multiple recipients, see “Selecting Multiple Recipients” on page 38.

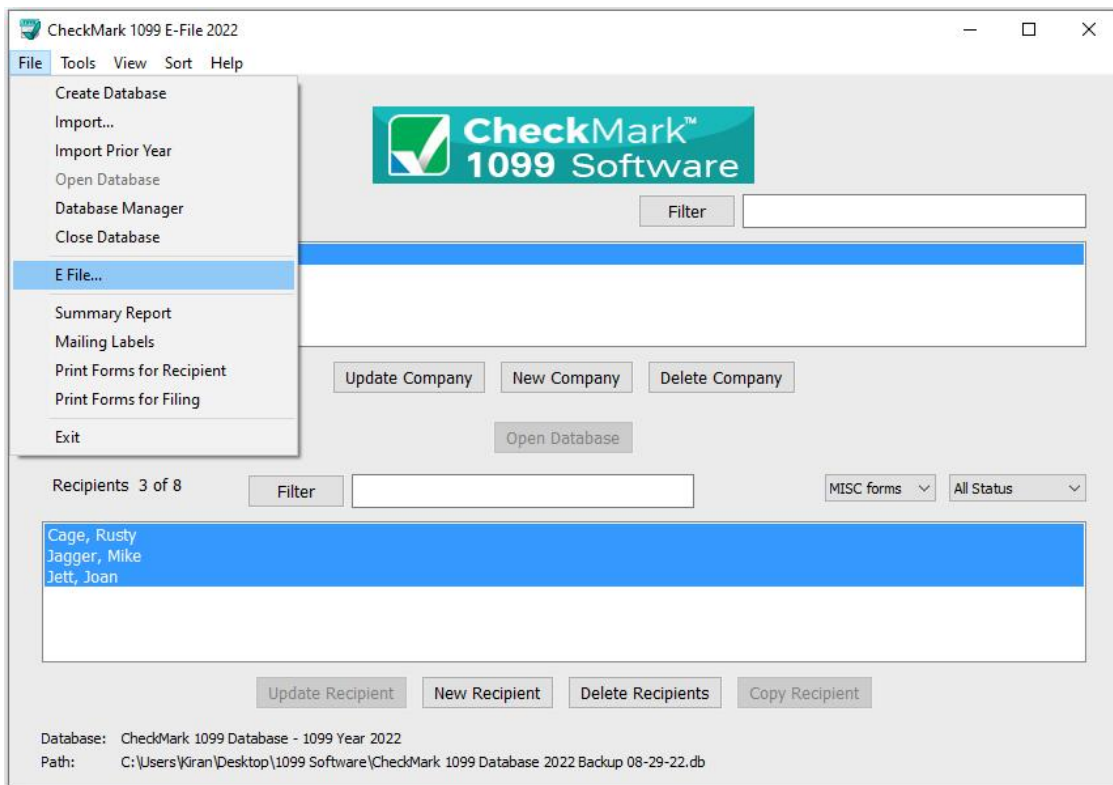
---

**NOTE:** You must choose at least one company, but if you do not choose any recipients, all recipients will be included in the eFile.

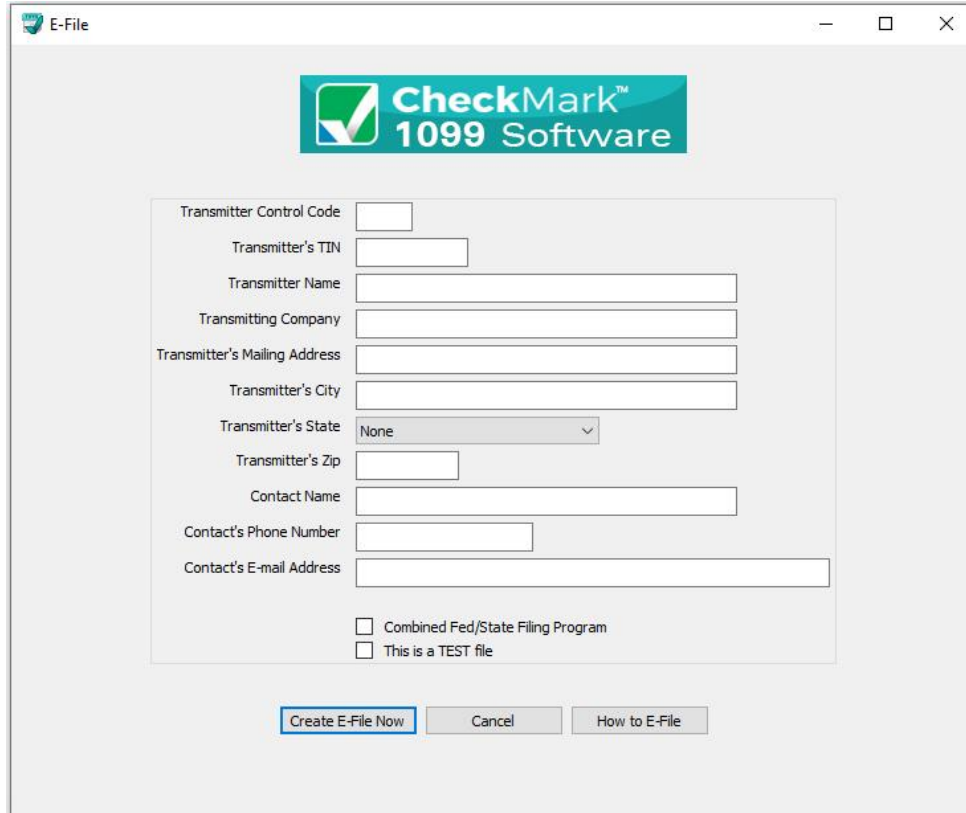
You can sort the recipients by the Status drop down menu to group recipients as **Printed, Completed, Validated, Corrected** and **Void**. For more information on using the Status drop down menu and what Status means, see “Status” on page 36.

---

3. From the **File** menu, choose **eFile...**



4. In the pop-up window. Fill in all applicable fields.



E-File

**CheckMark™  
1099 Software**

Transmitter Control Code

Transmitter's TIN

Transmitter Name

Transmitting Company

Transmitter's Mailing Address

Transmitter's City

Transmitter's State

Transmitter's Zip

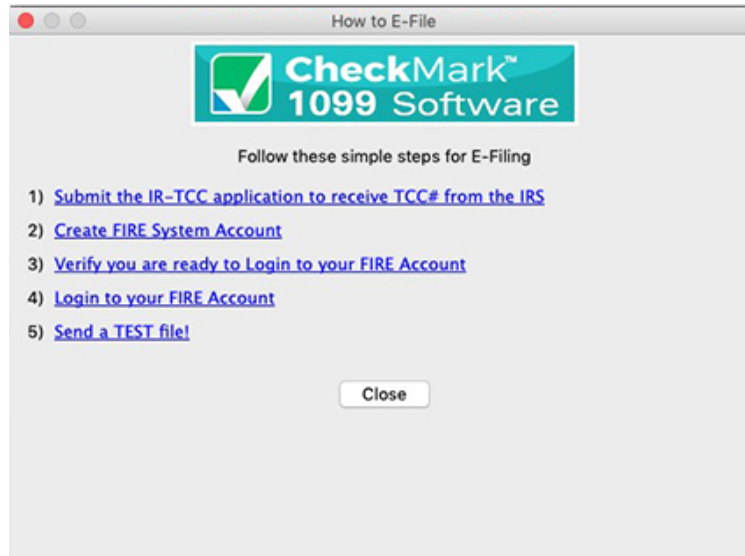
Contact Name

Contact's Phone Number

Contact's E-mail Address

☐ Combined Fed/State Filing Program  
☐ This is a TEST file

5. *Optional:* If you need more information on how to set up an E-file account, Click the **How to E-file** button. A pop-up window with important links on how to first apply, create a FIRE system account.



How to E-File

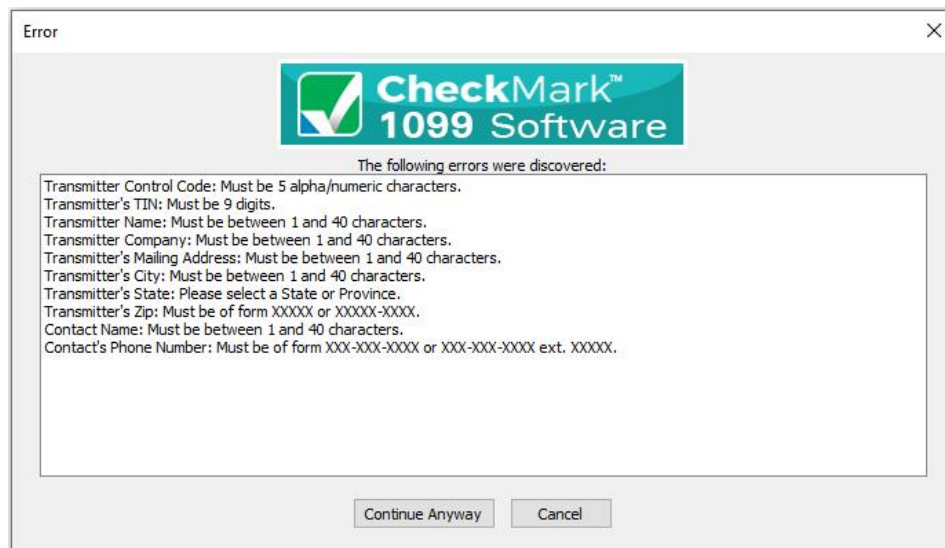
**CheckMark™  
1099 Software**

Follow these simple steps for E-Filing

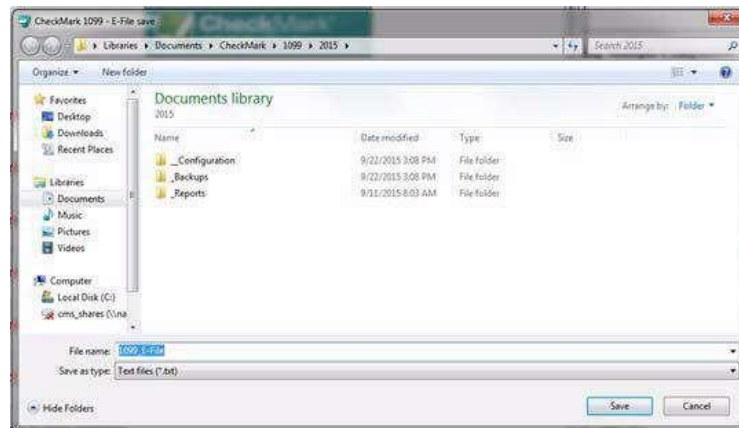
- 1) [Submit the IR-TCC application to receive TCC# from the IRS](#)
- 2) [Create FIRE System Account](#)
- 3) [Verify you are ready to Login to your FIRE Account](#)
- 4) [Login to your FIRE Account](#)
- 5) [Send a TEST file!](#)

6. Once all the information is filled in, click the **Create E-File Now** button.

7. If there are any errors in the transmitter information window, you will see a pop-up window explaining what errors occurred.



8. Click **Cancel** to go back to the transmitter information window to correct any set up errors. Or click **Continue Anyway** to proceed with saving the .txt file.
9. A **Save as** dialog box opens.



10. Enter a name for the file or use the default name if one is given. Save the file to a location that is easy to find. The Desktop is an easy location to save the file to and find it there later when you are ready to submit the file to the IRS FIRE system. Click **Save**.

## Chapter 9

# Backup and Restore

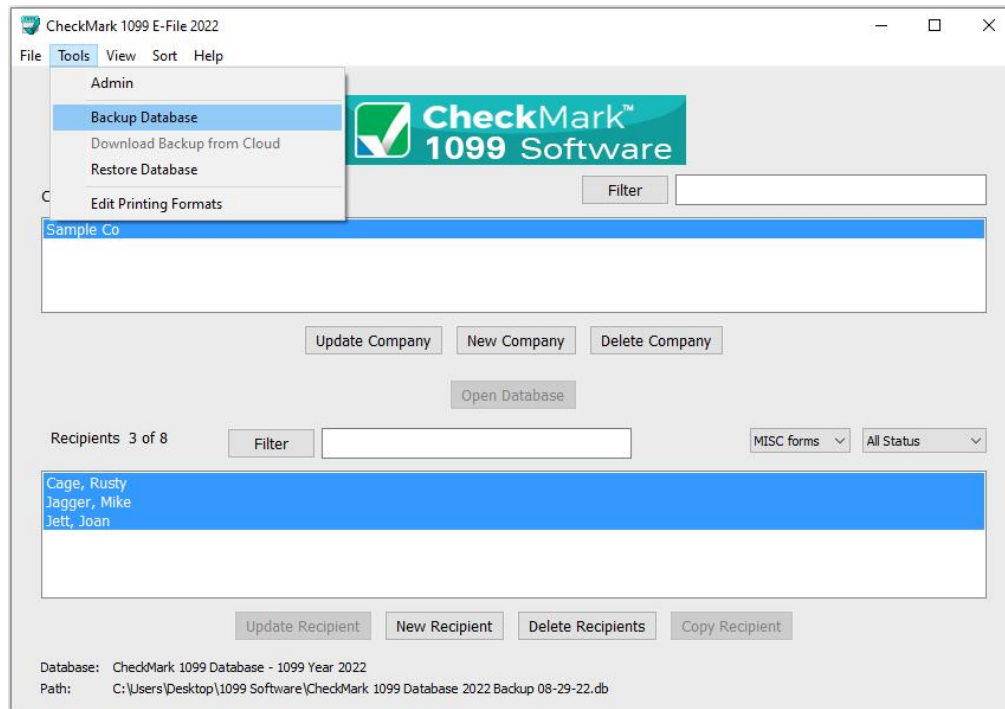
Making backups is critical to protecting your data. You should always keep current backups. CheckMark 1099 allows you to easily backup your data to any external source for safekeeping.

### Backing Up Using the Backup Database Command

Using the **Backup Database** command within the program allows you to backup a duplicate copy of the database. You can restore this database in case of computer failure or to revert back to a previous database in case of an error in your current database. It is recommended that you make current backup databases anytime you modify information.

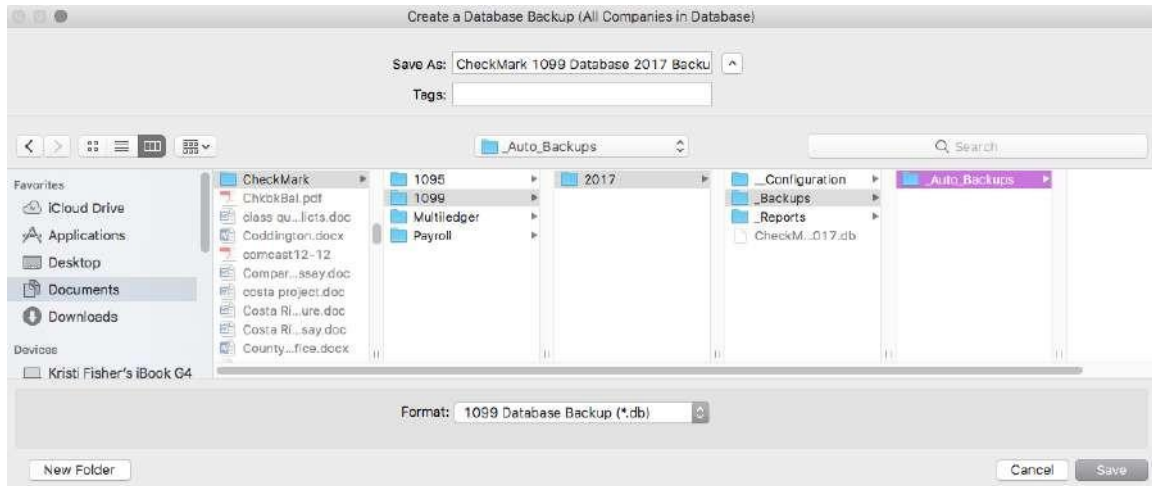
**NOTE:** Only users with **Admin privileges** can backup and restore a database. For more information on setting up Admin privileges, see “Setting up Users and Passwords” on page 21.

1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Backup Database**.



2. A **Save In** dialog box appears. Choose a destination you would like to save the backup database to.

3. A default name of **backup (with the current date).db** is given. Change the name of the backup if you wish and leave the .db extension.

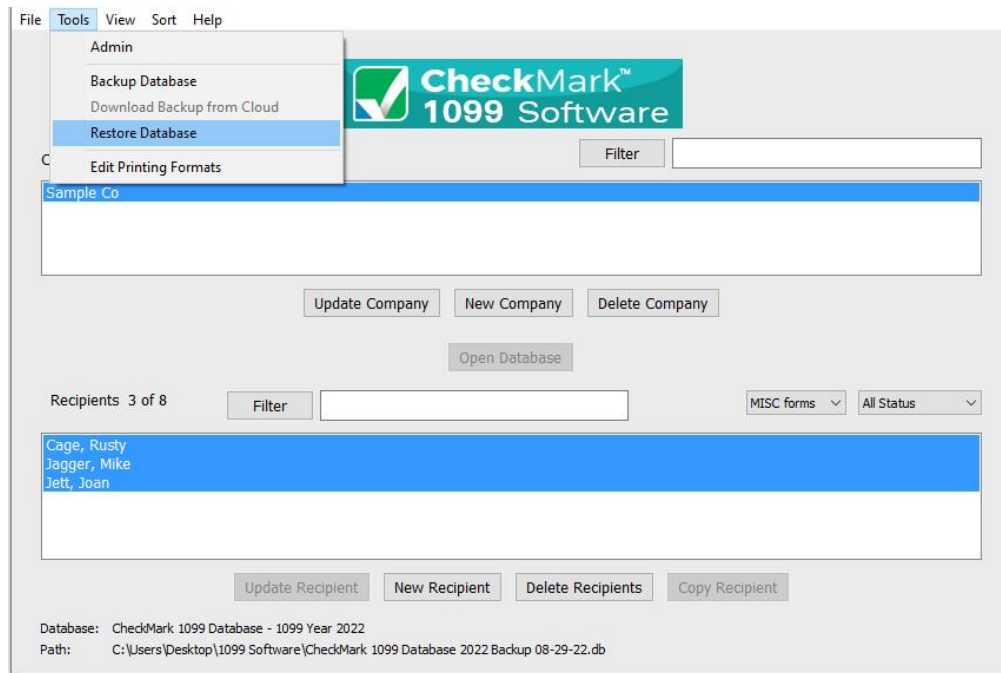


4. Click **Save**.

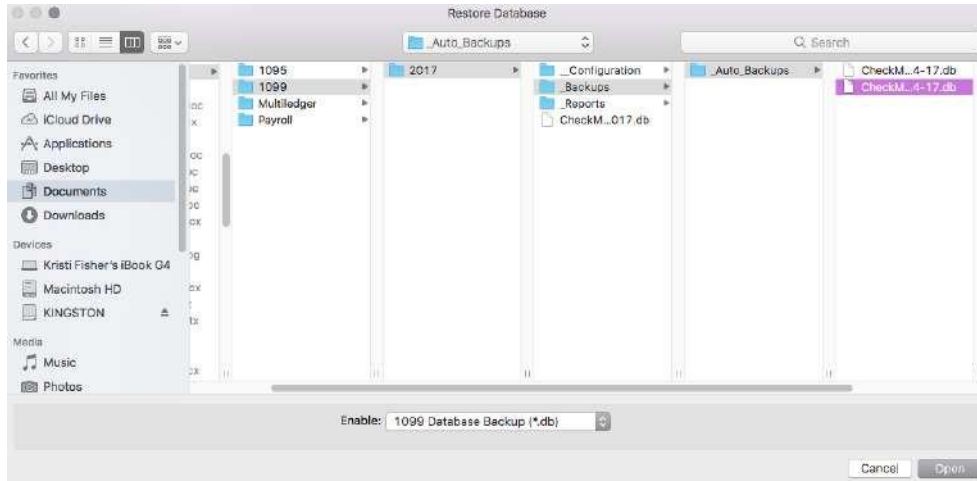
## Restoring Database using Restore Database Command

In case of computer failure, corruption or if you made a mistake and would like to revert back to a previous database, the **Restore Database** command will open any previous backups you have saved. You must have a Database created before you can restore a backup.

1. Click on the **Tools** menu in the upper left hand corner of the screen and select **Restore Database**.



2. A **Look in screen for Windows or Restore Database screen for Macintosh** opens. Browse to the location of the Backup Database file.



3. Select the file and click **Open**.

---

**Important:** Restoring a database file will **overwrite the existing .db file**. Restoring a database file is used in cases of the current file becoming damaged or information being entered incorrectly into the current database. Restoring from a previous database is faster than manually updating the incorrect information.

---



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