Red Wing Payroll 1099 Printing Process with Red Wing Tax Forms

Document #:	3043	Product:	Red Wing Payroll and Red Wing Tax Forms

This document describes how to prepare, print and/or eFile 1099 forms from Red Wing Payroll using Red Wing Tax Forms. This topic includes the following instructions:

Step 1: Report 1099 Payments from Red Wing Payroll

To get the 1099 payment amount for the employees that need a 1099 form printed, print the Payroll Register for the specific employee(s) by following the steps below.

1. From Red Wing Payroll, select **Payroll** > **Reports** > **Pay Data Reports** > **Payroll Register**.
2. In the **Pay Run From** box, enter **01/01/20**.
3. In the **Pay Run To** box, enter **12/31/20**.
4. In the **Employee From/To** boxes, select the employee (s) that need a 1099 form printed.
5. In the **Report Type** box, select **Summary**.
6. Click **Print**.
7. The information from this report will be used in Step 6 of this document.
8. To print a 1099 for an employee, the Income Form option on the employee must be set to **1099**. This can be viewed or changed by selecting **Setup** > **Employees** > 6 - **Accounting** tab > **Income Form** field

Step 2: Install Red Wing Tax Forms

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

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 3: Register Red Wing Tax Forms

Printing/eFiling 1099s through Red Wing Payroll requires that Red Wing Tax Forms is registered. Register using one of the options below:

Option A: Register Manually

1. Open Red Wing Tax Forms, select **Help** > **Register...**
2. At the Registration screen, click on **Manual**.
3. From the email you received outlining the new Red Wing Payroll 1099 process, locate the **Registration Key**.
4. On the **Registration Key Entry** screen, enter the unique registration key provided to you in the **Registration Key** field. Then click **Save**. When you enter the registration key:

   » It is not necessary to enter the dashes
   » Either upper/lower case letters can be entered
   » The letters I, Q, O and S will not be a part of the registration key. For example, all "0" characters are the number zero.

Option B: 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 4: Register Federal/State Tax Forms (Aatrix)

Printing 1099s through Red Wing Payroll 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 5: Add Payers

1. Select **Payers** > **New** or if you are performing this section of the document immediately after opening Red Wing Tax Forms, click **New** on the Open Payer screen.

2. Click the **EIN** button and select either SSN or EIN to indicate whether the Federal Tax ID number entered in the Tax ID box is a tax identification number or a social security number.
3. Enter the **Tax ID** number.
4. Enter the **Name** as it will appear on all tax form documents.
5. If a company is operating under a name different from their registered legal name, enter the **Trade Name**.
6. Enter the **Address, City, State** and **Zip** for the payer as it will appear on the tax form documents.
7. Enter an optional **Phone** or **Fax** numbers.
8. Enter an optional payer **Contact**, **Title**, or **Email**.
9. If the payer is a financial institution, enter the **RTN** (routing transit number).
10. Select the appropriate **Preparer** for this payer.
11. On the right hand side of the screen, enter each **State** and state **Tax ID** number this payer reports to. Enter as many states as necessary.
12. Click **Save**.

Step 6: Preparing and Printing 1099s

1. Select **Payers** > **Open** or 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

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

3. In the light green highlighted first row, on the left side of the screen, enter the payee (recipient) information from the report you printed in Step 1 of this document. Enter the following information by pressing the tab key in between each entry:
   » **Payee TID** and select 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.

> Note: If a payee (recipient) has been entered on another form and the Social Security/EIN/TIN Number matches, some of the above data will be auto-filled for you.

4. In the light green highlighted first row, on the right side of the screen, enter the information required for the boxes on the tax form you selected from the report you printed in Step 1 of this document. For example, for the 1099-NEC, enter **Nonemployee Compensation**, **Federal Tax Withheld**, **State 1 Withheld**, etc.

5. Repeat Steps 2-4 for all payees (recipients).
6. Click **Save**.
7. 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.
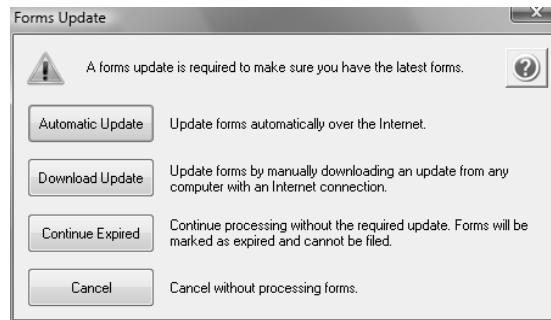
8. If this is the first time 1099s are being processed this year, the **1099 Setup Wizard** will automatically be displayed. If you wish to test the 1099 Setup Wizard without saving any of the test information, select either the 25 or All recipient option. If you want to continue the 1099 process, select the **No thanks, start processing my 1099/1096s** option and then click **Next**. Then, verify that the Payer TIN is correct and select if it is an **EIN** or **SSN** 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. Choose the appropriate **Action** and click **Next**.

9. The **Multiple 1099 Data Files** screen will be displayed. 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 click **Next**. The data will now be transferred to the W2/1099 Preparer grid.

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

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

12. The **State & Local Tax Items** screen will display. Click **Next**. The Setup Wizard will automatically verify that all required information for listed states and 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 of the Wizard until all required fields are correct.

13. 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.

14. The **Recipient Identification** 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 W-2/1099 Preparer will guide you through the process of eFiling and/or printing your 1099s. Once the displayed data has been reviewed, click **Next Step** to continue to the next screen. When you click on Next Step, the W2/1099 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 W2/1099 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 Step** again to continue to the next screen.

15. The first screen of the **W2/1099 Preparer** displays the **Recipient TIN/Taxpayer Identification Number (TIN)** for each recipient. Make any needed changes and click **Next Step** at the top of the screen.
16. The next step allows you to verify the **TIN Flag**. The **TIN Flag** should have a check mark for each employees who's TIN is an FEIN. Make any needed changes and click **Next Step**.
17. Verify that the recipients names and addresses are correct. The recipients names will be in the **Optional Name** field, not the Recipient Last Name and Recipient First Name fields. Make any needed changes and click **Next Step**.
18. Verify all Income boxes for the recipients. Make any needed changes. Click **Next Step**.
19. Verify the Filing State for the recipients. Make any necessary changes and click **Next Step**.
20. Verify any other amounts for the recipients. Make any needed changes and click **Next Step**.
21. The next screen offers one more chance to verify all data and make any changes. When all data is accurate, click **Next Step** to begin printing and/or eFiling 1099s.
22. If an informational screen displays, click **Next**.
23. 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 printings and eFiling for you). Choose the appropriate options for your company and click **Next**.

W-2/1099 Preparer ✕

1099 Printing and Filing Options

eFile Services allow you to pick Filing Dates. FREE Corrections before selected Filing Dates. More info?

		# Recipients	Price/Recip.	Subtotal
◉ **Complete 1099 eFiling Service** *Next Business Day Mailing!*				
The eFile Center will:				
- Print and Mail Recipient Copies		1	$2.14	$2.14
- e1099 Only Recipient Copies *What's This?*		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** *eFilers receive Free Corrections before selected Filing Dates*				
☐ Print my Recipient 1099 Copies				
☐ eFile Federal 1099s and 1096		1	$0.49	$ 0.00
☐ eFile State 1099s and Reconciliation Forms		1	$0.69	$ 0.00
☐ Print Federal 1099s and 1096				
☐ Print State 1099s and Reconciliation Forms				
		Total Cost		**$ 0.00**

Official Payer 1099s will display when Federal 1099s are selected

[< Back] [Next >] [Cancel]

24. If you chose the Complete 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.

W-2/1099 Preparer ✕

PDF Archiving Available ?

Would you like to buy a PDF Archive of your 1099s?

Purchasing a PDF archive allows you instant access to your W-2s for only $34.95 (plus $4.95 shipping and handling).

- Don't worry about locking up paper 1099s from prying eyes
- Reprint a Recipient 1099 at any time
- Easily find your Federal, State, Local W-2s, or Reconciliation(s) if the State or Federal Agency calls with a question
- PDFs are password protected for you and your recipients' security

◉ Yes, include a PDF archive

○ No, thank you

[< Back] [Next >] [Cancel]

25. 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 for you, select **Yes, I would...** and then click **Next**.

W2/1099 Preparer ✕

Benefits of the Complete 1099 eFile Service ?

✓ **Have your recipient 1099s printed and mailed automatically**
Next Business Day Mailing!

✓ **Have your federal 1099s/1096 filed automatically**
Select your filing dates and make any changes at no charge until that date. learn more

✓ **Have your state 1099s & Reconciliation(s) filed automatically**
Select your filing dates and make any changes at no charge until that date. learn more

☐ Yes, I would like to continue with the Complete 1099 eFile Service

[< Back] [Next >] [Cancel]

26. The **Review Data** screen will display the printing/eFiling options selected. If any changes are needed, click **Back**. Otherwise click **Next** to continue.

27. 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.

28. To print this first form, click **Print Copy** and then **OK**. Once the data is printed, click **Next Step** to continue to the next selected form. Repeat this process for each selected form. If a pre-printed form is required when printing a report, you will be notified to insert the pre-printed form prior to printing.
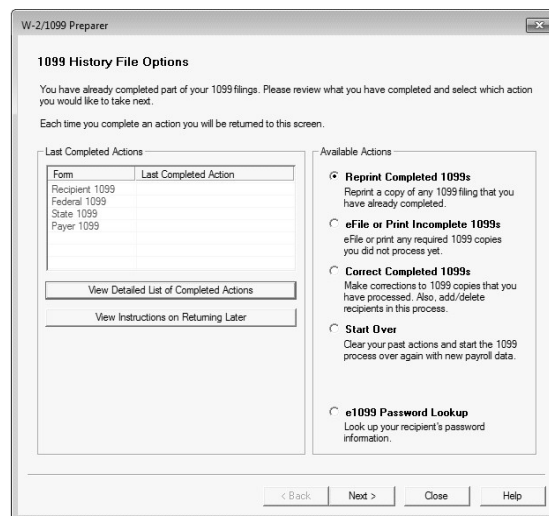
29. When the last form is displayed, click **Print Final** and the click **OK**.
30. If you have chosen to eFile any of your forms, the Secure eFile login screen will be displayed. Enter your Aatrix Username and Password to process your eFile request. Follow the onscreen instructions.

Aatrix Secure eFile - Login [TEST]

Secure eFile Login   981777432-d02ecd1e-0f0a-1111371

Username [   ]   Forgot your login?
Password [   ]

[Login]   ☐ Remember Me

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31. 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.

Frequently Asked Questions

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

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 **Login**.

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.
b. Red Wing Software sends customers a renewal form for Customer Care Membership. This renewal form contains your account number.
c. Invoices you've received from Red Wing Software contain your account number.
d. If others at your company have already registered, they can sign in to 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 link.
4. Enter/verify your **Email Address**.
5. Enter the **Security Verification** code, and then click **Send**. Click **Close**.
6. Wait until you receive an email that includes instructions to reset your password.
7. Click the link in the email that you received from Red Wing Software.
8. 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.
9. Enter a **New Password** and then **Re-enter the New Password**.
10. Click **Submit**.
11. 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 **Logout**.

Q. I'd prefer to register the Red Wing Tax Forms product online, how do I register online?

A. To register online, follow the steps below:

1. Select **Help** > **Register…**
2. Click **Online**.
3. The Registration Online form will be displayed. If you are currently a member of the Red Wing Software website, enter your **Email Address** and **Password**, then click **Login** to access the online product registration.
4. On the next **Registration** screen, your registration information will display, click **Next**.
5. Click **OK**.
6. 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**.

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

A. The majority of your 1099 copies will be printed on plain paper; but the Federal government does require that the Copy A (often called the "red copy") be printed on a preprinted form. These forms are available from Computer Forms, Inc. at http://redwing.computerforms.biz/shop_category.aspx?cid=131 or by calling 800-458-0158. The IRS does require that you also print your 1096 information on a preprinted red copy.

Q. Do I need a laser printer to be able to print the forms?

A. A laser printer is best, but you can also print with most desk jet and ink jet printers.

Q. I'm trying to process my forms, but I keep getting the message "Would you like to register now, or evaluate?"

A. You'll need to register your Federal/State Tax Forms (Aatrix) software. If you have an Internet connection, choose **Register Federal/State Tax Forms**. Your login will be recognized from the Red Wing Software website, follow the prompts to create your registration code. If you don't have an Internet connection, call 800-732-9464 and request an Aatrix registration code. If a registration code is faxed to you, do not enter the hyphen included in the number. Enter just the letters and numbers.

Q. Why am I getting a "forms update" or "mandatory update" message when I try to process my forms 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.

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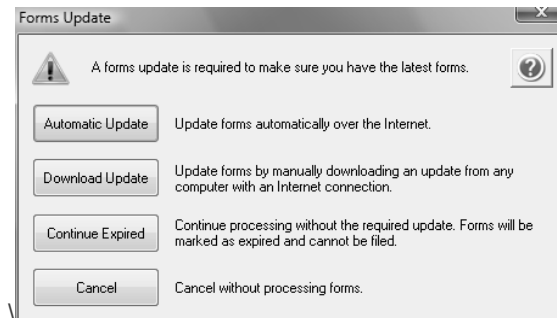
Q. Can I change the figures on my Federal reports if they are incorrect?

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.

Q : I'm trying to eFile my forms 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. Where can I locate additional documentation on Red Wing Tax Forms?

A. From within the Red Wing Tax Forms software, click **Help** > **View Help** or press **F1**.