



**PRINTING TAX 1099 FORMS  
WITH MAG-FILER®**  
Character-Based version

PURPOSE: Use MAG-FILER® to print form 1099 utilizing IRS specifications.



*The MAG-FILER® application is only used to print your forms via laser printer. Any diskettes that you prepare for the IRS should continue to be processed in CMI's TAX application, as they have always been.*

**1099 Checklist**

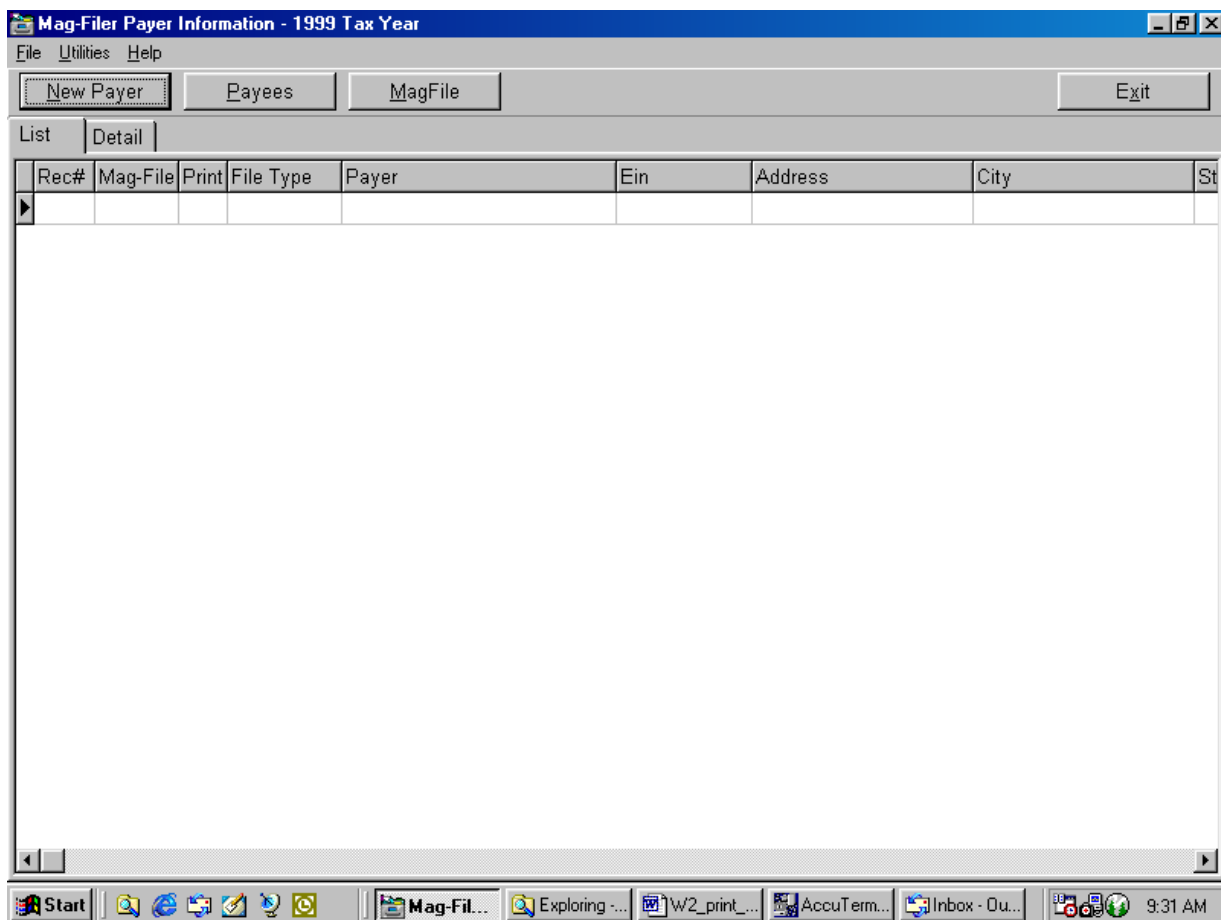
- ❑ Step 1: Load MAG-FILER® on a PC and Create Payer(s).
- ❑ Step 2: Proof/correct 1099s using CMI's TAX software.
- ❑ Step 3: Download 1099 info from CMI's TAX software to MAG-FILER®.
- ❑ Step 4: Import 1099 info into MAG-FILER®.
- ❑ Step 5: Verify imported 1099 data by using reports generated with MAG-FILER®.
- ❑ Step 6: Print 1099s from MAG-FILER® software.



*MAG-FILER® has on-line help that is available by selecting the **Help** drop-down menu.*

## **STEP 1:**

Load the MAG-FILER® software on a PC. When complete, open the application and a screen similar to the following will display:



If this is your first time entering the MAG-FILER® application for this tax year, select the **New Payer** button to enter the necessary information about your agency.

A screen similar to the following will be displayed:



*A **Payer** record must be completed for each type of form you wish to print: W2, 1099-C, 1099-R, etc.*

## **SCREEN NOTES**

**State** Enter the two-character abbreviation for your state.

**Zip** A five- or nine-digit zip code may be entered.

**Fed EIN#** Enter your agency's Employer Identification Number. This number is assigned by the IRS.

**EIN#** Check this box if you entered an EIN# in the **Fed EIN#** field. If you leave this field blank, it will be assumed that a Social Security Number was entered in the **Fed EIN#**.



When the **EIN#** box is checked, the format of the display in the **Fed EIN#** field will change from ###-##-#### to ##-#####.

**Phone #** Not required for 1099 reporting.

### **1099 Only**

**Name Control** This is a four-character code that can be found on the mailing label with the 1099 package that is normally sent to payers each December. *If you do not know the code, leave this field blank.*

**Foreign Corp** *Leave this check box blank.*

**Transfer Agent** *Leave this check box blank.*

**Combined Fed/State** *Leave this check box blank.*

**1098T method change** *Leave this check box blank.*


### **1042S Only**

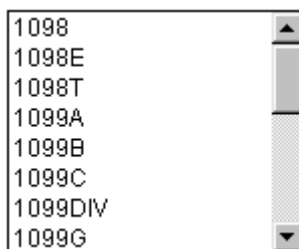
*Leave all fields in this section blank.*

### **W2 Only**

**Other EIN#, 3rd Party Withholding, Employment Type, Establishment #** Leave these fields blank for 1099s.

## Transmission Information

**Filing Type** Click the  to view the acceptable entries for this field.




A vertical dropdown menu with a scroll bar on the right. The menu items are: 1098, 1098E, 1098T, 1099A, 1099B, 1099C, 1099DIV, and 1099G.

Select **1099G**.

To enter your state filing numbers, click . Key in your two-character state abbreviation(s) and your State Identification Number(s). Click **Save/Close** when you are done.

**Batch Print** - This field should be checked.

**Mag File** - *This field is left blank since you will be submitting your magnetic media using your CMI Municipal Income Tax, not MAG-FILER®.*

When you have completed the **Payer** information for the 1099s, click  in the **Controls** area of the screen to save your input.

Click the **List** tab to view the list of current **Payer** records. A sample is shown below.

Rec#	Mag-File	Print	File Type	Payer	Ein	Address	City
2	No	Yes	1099C	YOUR AGENCY	10-1011111	500 MAIN STREET	ENGLEWOOD
4	No	Yes	1099G	YOUR AGENCY	10-1011111	500 MAIN STREET	ENGLEWOOD
1	No	Yes	W2	YOUR AGENCY	10-1011111	500 MAIN STREET	ENGLEWOOD



*The **Rec#** is auto-assigned. If you delete a **Payer** record, that **Rec#** will not appear on your list.*

**STEP 2:**

Enter any 1099 corrections or additions in 1099 MAINTENANCE (Menu 8-3). Make sure to print the 1099 PROOF LISTING (Menu 8-4) to proof your entries.



**WARNING!!!** *MAG-FILER® allows you to make additions or corrections to the printed 1099s. Changes made in MAG-FILER® will not be reflected in the CMI Municipal Income Tax system. If you are filing your 1099s magnetically, you MUST make all 1099 additions or corrections that you wish to see reflected in the magnetic file in the CMI Municipal Income Tax system.*

**STEP 3:**

When you are ready to print 1099s, run 1099 MAG MEDIA (Menu 8-6) and select **MAGFILER -- Magfiler Laser Program** in your CMI Municipal Income Tax system to create the file to be imported into MAG-FILER®. You will see the following prompts:

**CURRENT DOWNLOAD MODE: (AccuTerm or Wintegrate)**

**DOWNLOAD OPTIONS:**

**ENTER REPORTING YEAR (YYYY)**

Enter the tax year, and the file creation will begin. It may take a few minutes to create the list. When the list has been created, you will then be prompted with the following:

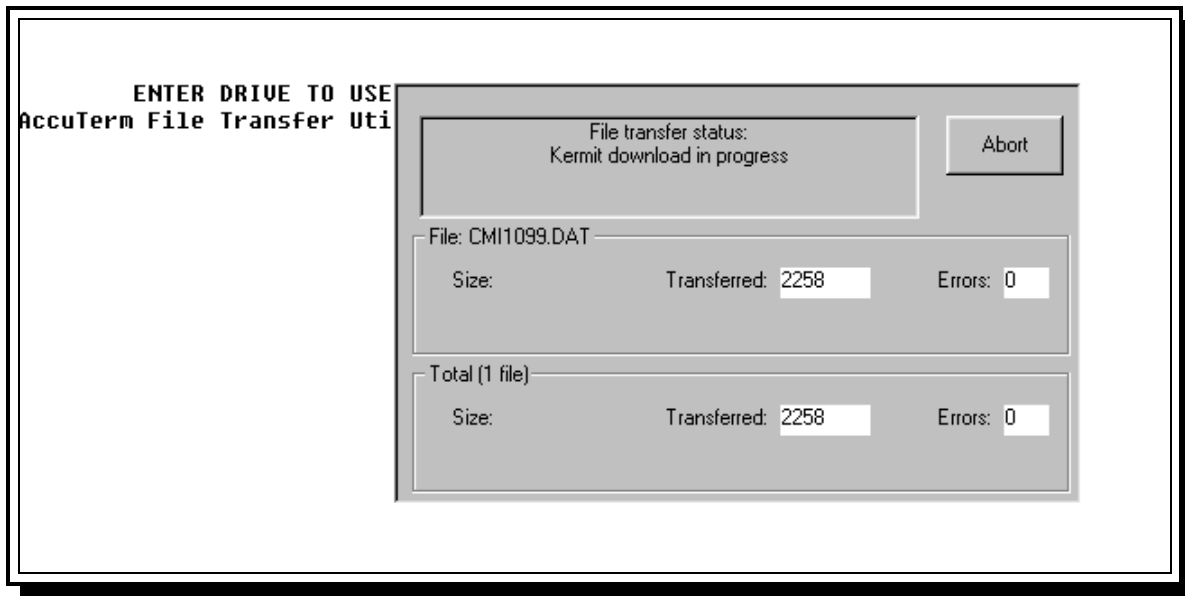
**(W)integrate or (A)ccuterm ('E' to end):**

Enter the letter for the correct download software, and you will then be prompted with the following:

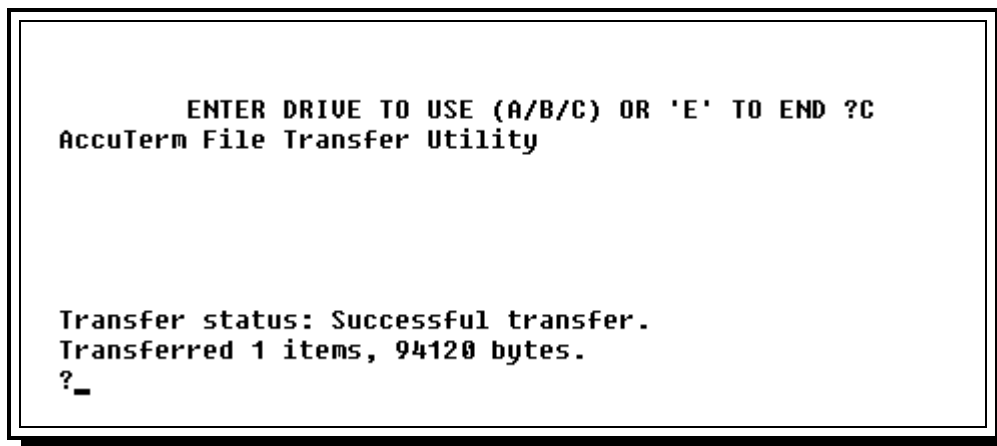
**ENTER DRIVE TO USE (A/B/C) or 'E' TO END**

Enter the specification for the desired destination drive. Normally, you will store the MAG-FILER® file on the C: drive. Unless you have a nonstandard PC setup, the C: drive will be your system hard drive and should be used as your drive of choice.

As the file is being written, a screen similar to the following is displayed:



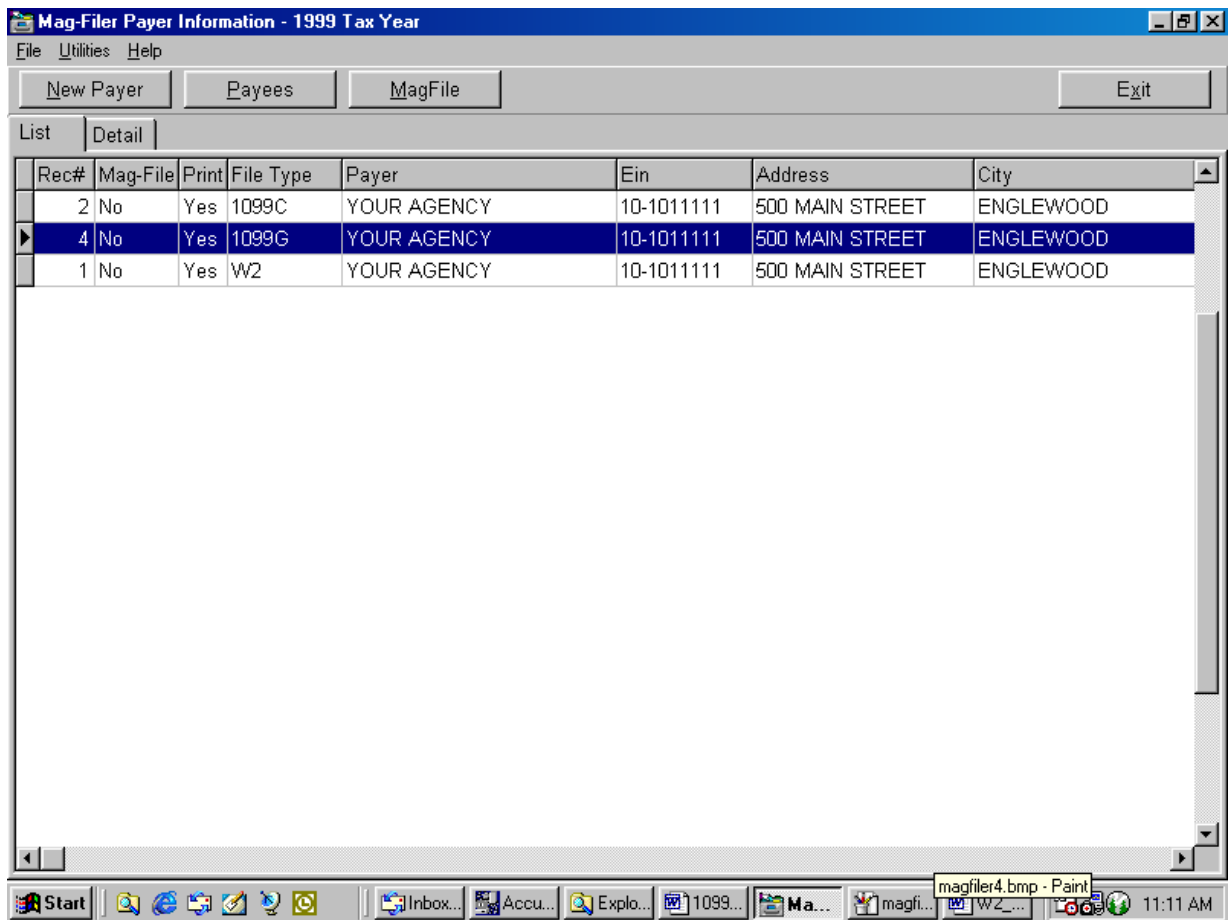
When the download is complete, a screen similar to the following will be displayed:



Press **<ENTER>** at the ? prompt to return to the menu. The download file will be named "CMI1099.DAT".

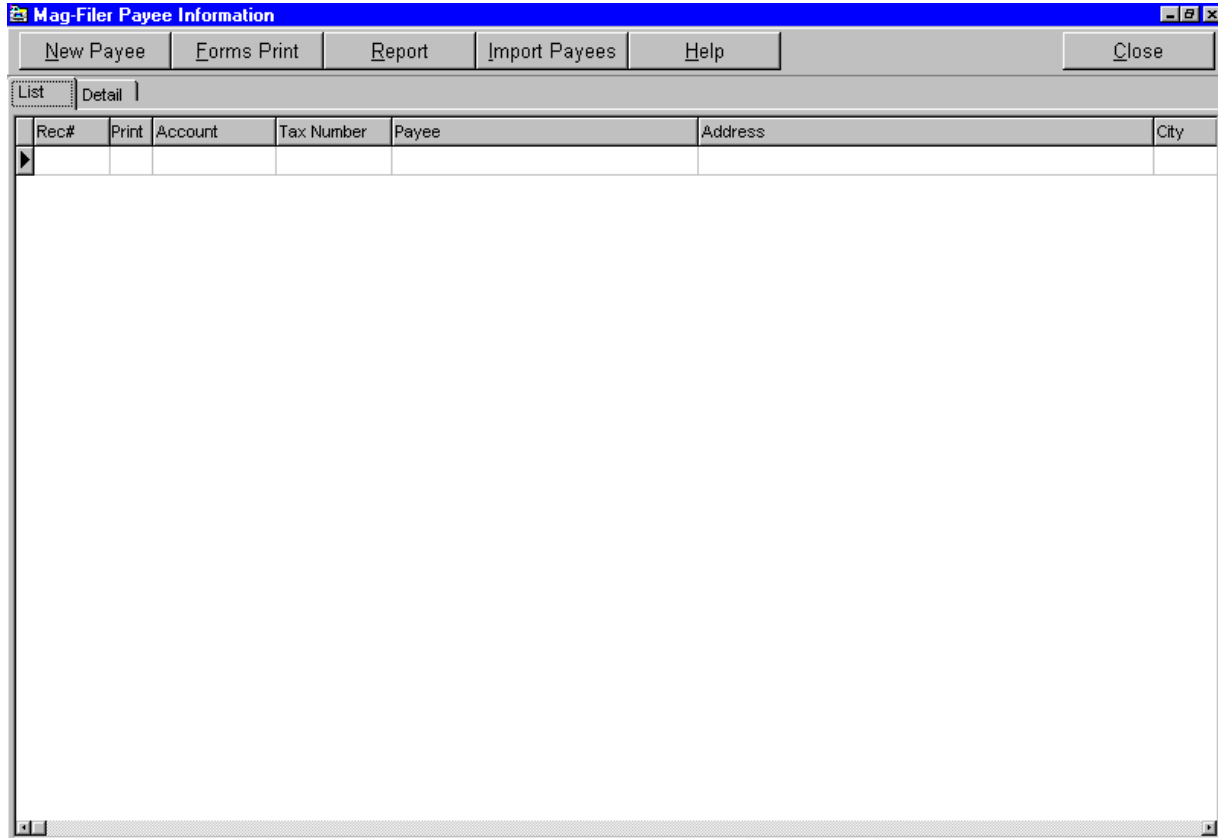
**STEP 4:**

Open the MAG-FILER® application. A screen similar to the following will be displayed:

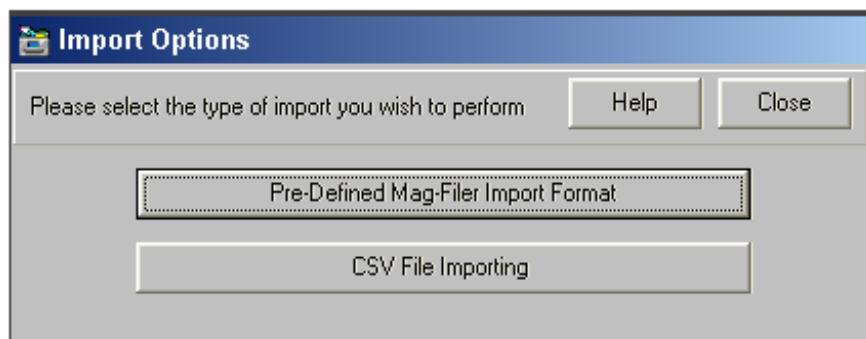


Highlight the **Payer** line for 1099Gs. Click the **Detail** tab and verify that all **Payer** information is correct.

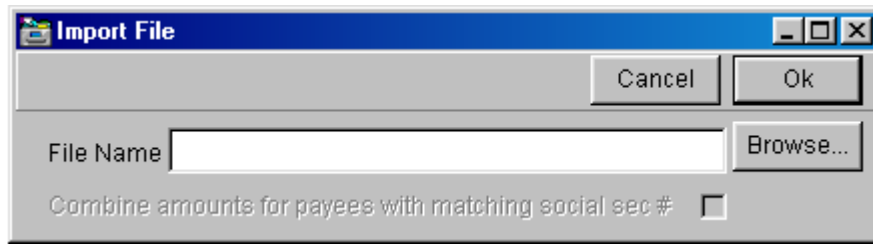
Select the **Payees** button to begin the import of the 1099 data. A screen similar to the following will be displayed:




Click the **Import Payees** button. The application will first display an Import Confirmation message.



Select  to continue.

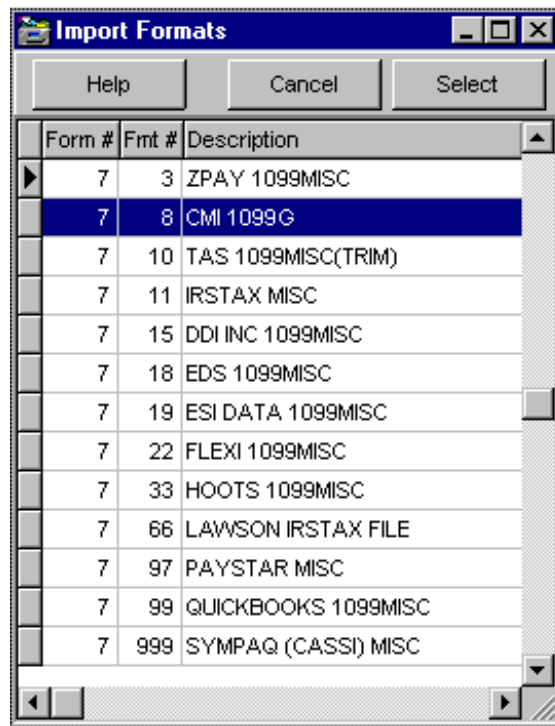


Click the  button in order to locate the file. Locate the file and open it. The file selected will appear in the **File Name** window.



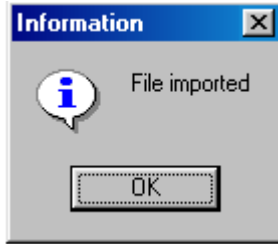
Click **Combine amounts for payee with matching social sec#** if you wish, in order to have a single 1099 produced for multiple 1099 records with the same Social Security Number.

After you click **Ok**, you will be presented with the following screen to select the import format:



Click  to select **CMI 1099G**. The file will now be imported.

When the import is complete, the following window will appear:



Click **OK** to continue.

A screen similar to the following will be displayed:

Mag-File Payee Information - Form 1099G : YOUR AGENCY								
New Payee		Forms Print		Report		Import Payees		Close
List		Detail						
Rec#	Corrected	Print	Account	Tax Number	Payee	Address	City	
1	N	N	XXXXXXXX	SSAN	PAYEE NAME	PAYEE ADDRESS	PAYEE CITY	
2	N	N		OR FED ID				
3	N	N						
4	N	N						
5	N	N						
6	N	N						
7	N	N						
8	N	N						

This is the list of **Payees** created from the imported file. To view the detail of a record, highlight the record, then select the **Detail** tab.

A screen similar to the following will be displayed:

Mag-File Payee Information - Form 1099G : CMI										
New Payee		Forms Print		Report		Import Payees		Help		Close
List		Detail								
Account				TIN #	--		<input checked="" type="checkbox"/> SSN (else EIN)			
Name										
Address										
City				State			Zip			
Unemployment compensation				ATAA payments						
State or local income tax refunds, cred, or offsets				Taxable grants						
Above amount for tax year				Agriculture payments						
Fed income tax withheld				State or local amount applies to inc. from trade/business	<input type="checkbox"/>					
Special				<input type="checkbox"/> Select Print <input type="checkbox"/> Corrected Return						

You can make corrections to the information to be printed on the individual's 1099s on this screen.



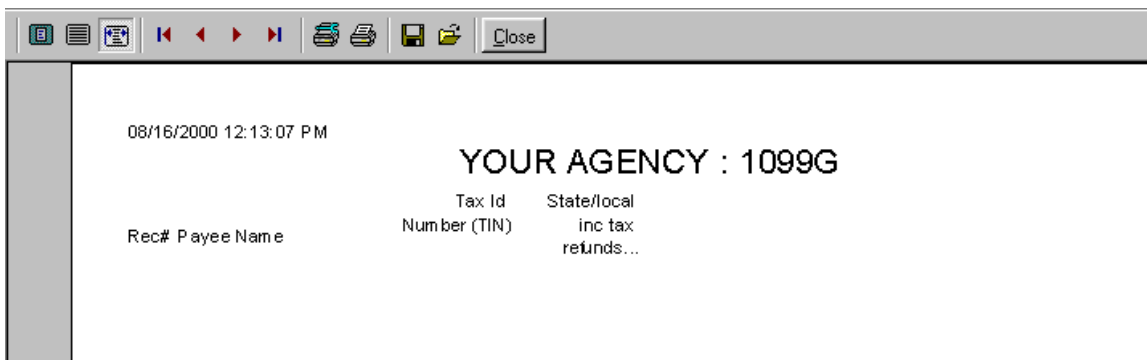
**WARNING!!!** *Changes made in MAG-FILER® will not be reflected in your CMI Municipal Income Tax system and will not appear on any magnetic media created from your CMI Municipal Income Tax system.*



*If you are printing a corrected 1099 for this payee, click the **Corrected Return** box. This occurs when you have already submitted a return for this payee and are now submitting a correct return. The default is for the **Corrected Return** box to be unchecked.*



A report similar to the following will be displayed:



Use the icons at the top of the screen to print or save this report.

## PRINTING TAX 1099 FORMS WITH MAG-FILER®

### **STEP 6:**


To print the 1099 forms, click the **Forms Print** button and a screen similar to the following will be displayed:

The screenshot shows the 'Print Format' dialog box with the following settings:

- Which Copy:** Copy B (selected), 4 Up, 2 Up B2, 3 Up BC2, 4 Down, Copy B&C, Substitute, Copy A, B/W, 1096, W3.
- Send To:** Screen (selected), Printer.
- What to Print:** All Payees (selected), Single Payee, Restart Print. Sorted by: Payee Name. Restart at: [empty field].
- Print Control:** Print, Cancel, Pause every [empty field], Pre-Printed Forms (Copies A, B, W3 etc) [unchecked].
- Margin Control:** Top Margin [0], 2nd Form Adv [0], 3rd Form Adv [0], Left Margin [0].



*Make sure that you are assigned to the desired laser printer. If you are not assigned to the proper printer, click **Cancel**,*

*select **Report**, select **Run Report**, then select the  (Printer Setup) icon at the top of the screen to change the printer assignment. When you return the **Form Print**, you will be assigned to the new printer.*



*Before spooling all the 1099s to the printer, it is recommended that you select a payer from the list, then select the desired 1099 copy (under **Which Copy**), select the **Screen** radio button (under **Send to**), and select the **Single Payee** radio button (under **What to Print**). View the 1099 on the screen and see whether it is the format that you wanted. Then select the **Printer** radio button (under **Send to**) and print the form to verify that it is the correct format before you print **All Payees**.*