

Your guide to the 1099 forms

First, you need to be sure that you're buying and printing on the right forms. This document will show you what those are. You must:

- Buy forms from Intuit
- If not from Intuit, they must be QuickBooks compatible (and say so on the package)

Here's what the first form will look like—it's usually in red and is called **Copy A**. It gets mailed directly to the IRS. This form will print with two separate vendors on the page. When the batch is done, collect all the red ones and send them to the IRS in one envelope.

The image shows two identical 1099-MISC forms for the year 2012. Each form is titled 'Miscellaneous Income' and is labeled 'Copy A'. The forms are for 'Form 1099-MISC' and 'Form 1099-MISC'. The forms are for 'Miscellaneous Income' and include fields for payer and recipient information, various income types, and state tax withholdings. A vertical label on the right side reads 'DETACH BEFORE MAILING'.

Form 1099-MISC (top):

- Form 1099-MISC
- OMB No. 1545-0047
- Department of the Treasury Internal Revenue Service
- Form 1099-MISC
- DETACH BEFORE MAILING

Form 1099-MISC (bottom):

- Form 1099-MISC
- OMB No. 1545-0047
- Department of the Treasury Internal Revenue Service
- Form 1099-MISC
- DETACH BEFORE MAILING

The second form is called **Copy 1** and goes to the state where you file your taxes. You'll compile all the copy 1 forms and send them in one envelope to the state.

<input type="checkbox"/> VOID <input type="checkbox"/> CORRECTED				OMB No. 1545-0115 <div style="font-size: 2em; font-weight: bold;">2012</div> Form 1099-MISC		Miscellaneous Income					
PAYER'S name, street address, city, state, ZIP code, and telephone no. PAYER'S federal identification number		1 Rents \$ 2 Royalties \$ 3 Other income \$		4 Federal income tax withheld \$		Copy 1 For State Tax Department					
								5 Fishing boat proceeds \$		6 Medical and health care payments \$	
								7 Nonemployee compensation \$		8 Substitute payments in lieu of dividends or interest \$	
RECIPIENT'S name, address, and ZIP code Account number (see instructions)		9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale <input type="checkbox"/> \$ 11		10 Crop insurance proceeds \$ 12							
								13 Excess golden parachute payments \$		14 Gross proceeds paid to an attorney \$	
								15a Section 409A deferrals \$		15b Section 409A income \$	
Form 1099-MISC		Department of the Treasury - Internal Revenue Service <small>38-2099803</small>									

<input type="checkbox"/> VOID <input type="checkbox"/> CORRECTED				OMB No. 1545-0115 <div style="font-size: 2em; font-weight: bold;">2012</div> Form 1099-MISC		Miscellaneous Income					
PAYER'S name, street address, city, state, ZIP code, and telephone no. PAYER'S federal identification number		1 Rents \$ 2 Royalties \$ 3 Other income \$		4 Federal income tax withheld \$		Copy 1 For State Tax Department					
								5 Fishing boat proceeds \$		6 Medical and health care payments \$	
								7 Nonemployee compensation \$		8 Substitute payments in lieu of dividends or interest \$	
RECIPIENT'S name, address, and ZIP code Account number (see instructions)		9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale <input type="checkbox"/> \$ 11		10 Crop insurance proceeds \$ 12							
								13 Excess golden parachute payments \$		14 Gross proceeds paid to an attorney \$	
								15a Section 409A deferrals \$		15b Section 409A income \$	
Form 1099-MISC		Department of the Treasury - Internal Revenue Service <small>38-2099803</small>									

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Here's the next form in the set. It's called **Copy B** and goes to the 1099 vendor. These also print 2 vendors per page and you should separate the forms and mail to the vendor along with Copy 2 in the same envelope.

<input type="checkbox"/> CORRECTED (if checked)					
PAYER'S name, street address, city, state, ZIP code, and telephone no.		1 Rents \$	OMB No. 1545-0115 2012 Form 1099-MISC	Miscellaneous Income	
		2 Royalties \$			
PAYER'S federal identification number		3 Other income \$	4 Federal income tax withheld \$	Copy B For Recipient	
RECIPIENT'S identification number		5 Fishing boat proceeds \$	6 Medical and health care payments \$		
RECIPIENT'S name, address, city, and ZIP code		7 Nonemployee compensation \$	8 Substitute payments in lieu of dividends or interest \$	This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.	
		9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale <input type="checkbox"/> \$	10 Crop insurance proceeds \$		
Account number (see instructions)		11 \$	12 \$		
		13 Excess golden parachute payments \$	14 Gross proceeds paid to an attorney \$		
15a Section 409A deferrals \$	15b Section 409A income \$	16 State tax withheld \$	17 State/Payer's state no. \$	18 State income \$	
Form 1099-MISC		(keep for your records)		Department of the Treasury - Internal Revenue Service	

<input type="checkbox"/> CORRECTED (if checked)					
PAYER'S name, street address, city, state, ZIP code, and telephone no.		1 Rents \$	OMB No. 1545-0115 2012 Form 1099-MISC	Miscellaneous Income	
		2 Royalties \$			
PAYER'S federal identification number		3 Other income \$	4 Federal income tax withheld \$	Copy B For Recipient	
RECIPIENT'S identification number		5 Fishing boat proceeds \$	6 Medical and health care payments \$		
RECIPIENT'S name, address, city, and ZIP code		7 Nonemployee compensation \$	8 Substitute payments in lieu of dividends or interest \$	This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.	
		9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale <input type="checkbox"/> \$	10 Crop insurance proceeds \$		
Account number (see instructions)		11 \$	12 \$		
		13 Excess golden parachute payments \$	14 Gross proceeds paid to an attorney \$		
15a Section 409A deferrals \$	15b Section 409A income \$	16 State tax withheld \$	17 State/Payer's state no. \$	18 State income \$	
Form 1099-MISC		LMB (keep for your records)		5111 Department of the Treasury - Internal Revenue Service	

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Next, there's **copy 2**. This one gets mailed to the vendor along with copy B in the same envelope.

<input type="checkbox"/> CORRECTED (if checked)					
PAYER'S name, street address, city, state, ZIP code, and telephone no.		1 Rents		OMB No. 1545-0115 2012 Form 1099-MISC	
		2 Royalties			
PAYER'S federal identification number		3 Other income		4 Federal income tax withheld	
		5 Fishing boat proceeds		6 Medical and health care payments	
RECIPIENT'S name, address, and ZIP code		7 Nonemployee compensation		8 Substitute payments in lieu of dividends or interest	
		9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale <input type="checkbox"/>		10 Crop insurance proceeds	
Account number (see instructions)		11		12	
		13 Excess golden parachute payments		14 Gross proceeds paid to an attorney	
15a Section 409A deferrals	15b Section 409A income	16 State tax withheld		17 State/Payer's state no.	18 State income
\$	\$	\$			\$
Form 1099-MISC Department of the Treasury - Internal Revenue Service 38-2099803					

<input type="checkbox"/> CORRECTED (if checked)					
PAYER'S name, street address, city, state, ZIP code, and telephone no.		1 Rents		OMB No. 1545-0115 2012 Form 1099-MISC	
		2 Royalties			
PAYER'S federal identification number		3 Other income		4 Federal income tax withheld	
		5 Fishing boat proceeds		6 Medical and health care payments	
RECIPIENT'S name, address, and ZIP code		7 Nonemployee compensation		8 Substitute payments in lieu of dividends or interest	
		9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale <input type="checkbox"/>		10 Crop insurance proceeds	
Account number (see instructions)		11		12	
		13 Excess golden parachute payments		14 Gross proceeds paid to an attorney	
15a Section 409A deferrals	15b Section 409A income	16 State tax withheld		17 State/Payer's state no.	18 State income
\$	\$	\$			\$
Form 1099-MISC Department of the Treasury - Internal Revenue Service 38-2099803					

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Finally, **Copy C**. It's for you to keep for your own records.

<input type="checkbox"/> VOID <input type="checkbox"/> CORRECTED				OMB No. 1545-0115		2012	Miscellaneous Income
PAYER'S name, street address, city, state, ZIP code, and telephone no.		1 Rents	\$	Form 1099-MISC			
		2 Royalties	\$	3 Other income	\$	4 Federal income tax withheld	Copy C For Payer or State Copy or Copy 2
PAYER'S federal identification number	RECIPIENT'S identification number	5 Fishing boat proceeds	\$	6 Medical and health care payments	\$		
RECIPIENT'S name, address, city, and ZIP code		7 Nonemployee compensation	\$	8 Substitute payments in lieu of dividends or interest	\$	For Privacy Act and Paperwork Reduction Act Notice, see the 2012 General Instructions for Certain Information Returns.	
		9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale <input type="checkbox"/>	\$	10 Crop insurance proceeds	\$		
		11	\$	12	\$		
Account number (see instructions)	2nd TIN not <input type="checkbox"/>	13 Excess golden parachute payments	\$	14 Gross proceeds paid to an attorney	\$		
15a Section 409A deferrals	15b Section 409A income	16 State tax withheld	\$	17 State/Payer's state no.	18 State income	\$	\$
\$	\$	\$	\$	\$	\$	\$	\$
Form 1099-MISC		Department of the Treasury - Internal Revenue Service					

<input type="checkbox"/> VOID <input type="checkbox"/> CORRECTED				OMB No. 1545-0115		2012	Miscellaneous Income
PAYER'S name, street address, city, state, ZIP code, and telephone no.		1 Rents	\$	Form 1099-MISC			
		2 Royalties	\$	3 Other income	\$	4 Federal income tax withheld	Copy C For Payer or State Copy or Copy 2
PAYER'S federal identification number	RECIPIENT'S identification number	5 Fishing boat proceeds	\$	6 Medical and health care payments	\$		
RECIPIENT'S name, address, city, and ZIP code		7 Nonemployee compensation	\$	8 Substitute payments in lieu of dividends or interest	\$	For Privacy Act and Paperwork Reduction Act Notice, see the 2012 General Instructions for Certain Information Returns.	
		9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale <input type="checkbox"/>	\$	10 Crop insurance proceeds	\$		
		11	\$	12	\$		
Account number (see instructions)	2nd TIN not <input type="checkbox"/>	13 Excess golden parachute payments	\$	14 Gross proceeds paid to an attorney	\$		
15a Section 409A deferrals	15b Section 409A income	16 State tax withheld	\$	17 State/Payer's state no.	18 State income	\$	\$
\$	\$	\$	\$	\$	\$	\$	\$
Form 1099-MISC		LMC/LM2		5112		Department of the Treasury - Internal Revenue Service	

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OK, so now that we know how it's SUPPOSED to work, here are some things that can go wrong:

Wrong collation of forms:

When you print forms in QuickBooks Online, it only prints ONE COPY of the five sets needed. So, you need to load your copy A, and print all the 1099s. Then you need to load your copy B, and so on.

The 1099s will print two vendors per page. So if you have 16 vendors, you'll need 8 forms. If you have 17 vendors, you'll need 9. When you click **Print 1099**, QuickBooks Online will print for 17 vendors, on 9 pages, if you've checked off 17 vendors to print. Then it will stop.

You have to load 9 Copy B forms, then print again. Then load 9 Copy 1 forms and print again, and so on.

If you've collated them yourself (such as copy A, B, 1, 2, and C all stacked together), QBO will print each vendor once on the pages, so it won't work for you.

Wrong forms:

We're seeing people buying forms from other suppliers that don't work with QuickBooks. It has to state on the package that it does! Here's some pictures of wrong forms:

VOID CORRECTED

PAYER'S name, street address, city, state, and ZIP code		1 Gross distribution \$	OMB No. 1545-0119 2011 Form 1099-R		Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
		2a Taxable amount \$	Total distribution <input type="checkbox"/>		
		2b Taxable amount not determined <input type="checkbox"/>	Copy 1 For State, City, or Local Tax Department		
PAYER'S federal identification number	RECIPIENT'S identification number	3 Capital gain (included in box 2a) \$	4 Federal income tax withheld \$		
RECIPIENT'S name		5 Employee contributions / Designated Roth contributions or insurance premiums \$	6 Net unrealized appreciation in employer's securities \$		
Street address (including apt. no.)		7 Distribution code(s)	IRA/SEP/SIMPLE <input type="checkbox"/>	8 Other \$ %	
City, state, and ZIP code		9a Your percentage of total distribution %	9b Total employee contributions \$		
10 Amount allocable to IRR within 5 years \$	11 1st year of desig. Roth contrib.	12 State tax withheld \$	13 State/Payer's state no.	14 State distribution \$	
Account number (see instructions)		15 Local tax withheld \$	16 Name of locality	17 Local distribution \$	

Form **1099-R** Department of the Treasury - Internal Revenue Service

This form isn't a 1099-MISC, it's a 1099-R. As a reminder, the only form QuickBooks Online supports and prepares is a 1099-MISC.

CORRECTED (if checked)

PAYER'S name, street address, city, state, ZIP code, and telephone no.		1 Rents \$	9 <small>Have other uses of 1099-MISC been provided to other recipients?</small> <input type="checkbox"/>	OMB No. 1545-0115 2004 Miscellaneous Income Copy B For Recipient <small>This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.</small>	
		2 Royalties \$	10 Crop Insurance Proceeds \$		
		3 Other income \$	11 <small>Excess Golden Parachute Payments</small> \$		
PAYER'S Federal identification number	RECIPIENT'S identification number	4 Federal income tax withheld \$	14 Gross proceeds paid to an attorney \$		
RECIPIENT'S name, address, and ZIP code		5 Fishing boat proceeds \$	16 State tax withheld \$		
		6 Medical and health care paym \$	17 State/Payer's state number		
		7 Nonemployee compensation \$	18 State income \$		
Account number (optional)		8 Substitute payments in lieu \$	15 \$		
Form 1099-MISC		(keep for your records)			Department of the Treasury - Internal Revenue Service

VOID CORRECTED (if checked)

PAYER'S name, street address, city, state, ZIP code, and telephone no.		1 Rents \$	9 <small>Have other uses of 1099-MISC been provided to other recipients?</small> <input type="checkbox"/>	OMB No. 1545-0115 2004 Miscellaneous Income Copy C For Payer or State Copy <small>For Privacy Act and Paperwork Reduction Act Notice, see the 2004 General Instructions for Forms 1099, 1099-SS, and W-9.</small>	
		2 Royalties \$	10 Crop Insurance Proceeds \$		
		3 Other income \$	11 <small>Excess Golden Parachute Payments</small> \$		
PAYER'S Federal identification number	RECIPIENT'S identification number	4 Federal income tax withheld \$	14 Gross proceeds paid to an attorney \$		
RECIPIENT'S name, address, and ZIP code		5 Fishing boat proceeds \$	16 State tax withheld \$		
		6 Medical and health care paym \$	17 State/Payer's state number		
		7 Nonemployee compensation \$	18 State income \$		
Account number (optional)	2nd TIN not <input type="checkbox"/>	8 Substitute payments in lieu \$	15 \$		
Form 1099-MISC		(keep for your records)			Department of the Treasury - Internal Revenue Service

VOID CORRECTED (if checked)

PAYER'S name, street address, city, state, ZIP code, and telephone no.		1 Rents \$	9 <small>Have other uses of 1099-MISC been provided to other recipients?</small> <input type="checkbox"/>	OMB No. 1545-0115 2004 Miscellaneous Income State Copy or Extra File Copy	
		2 Royalties \$	10 Crop Insurance Proceeds \$		
		3 Other income \$	11 <small>Excess Golden Parachute Payments</small> \$		
PAYER'S Federal identification number	RECIPIENT'S identification number	4 Federal income tax withheld \$	14 Gross proceeds paid to an attorney \$		
RECIPIENT'S name, address, and ZIP code		5 Fishing boat proceeds \$	16 State tax withheld \$		
		6 Medical and health care paym \$	17 State/Payer's state number		
		7 Nonemployee compensation \$	18 State income \$		
Account number (optional)		8 Substitute payments in lieu \$	15 \$		
Form 1099-MISC		(keep for your records)			Department of the Treasury - Internal Revenue Service

Anything with multiple form types (Copy B, Copy 1, etc.) on the same page isn't going to work! Also, no form with three parts on one page will work. So this form above is a double whammy.

If these tips didn't help, you can get in touch with QuickBooks Online Customer Care by clicking **Help** in the upper right of any screen, then choosing **Contact Us**.