iWire Direct

1099 Manual Entry Instructions

Updated 8/2/12

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iWire Direct is a tool that allows you to manually enter a small number of 1099s that have already been prepared. You MUST have already prepared the 1099 either by hand, using software, or with the Internal Revenue Service using Publication 1220. If you have more than 20 1099s you need to submit, you should consider submitting them in separate transmissions.

Helpful hints before you begin entering 1099s:

- Make sure you have enough time allotted to enter all the 1099s you wish to file in one submission.
- Consider submitting your data periodically. This will help prevent having to start over again because of intermittent browser issues, third-party plug-ins, or unexpected shut-downs (power outages, etc.). For example, if you have 29 1099s to enter and you think it will take you 3 hours to enter them, consider entering in two batches; one of 15 1099 and one of 14 1099s.
- You may enter more than one type of 1099 in one submission. If you wish to do this, be sure to have all your information available before starting.
- Be sure to read the help text at the bottom of the screen as you tab through the entry fields. Many of the fields are self-explanatory but if you have questions, the help text might answer your question.
- On the right side of the submission page, there is a “cancel submission” link that allows you to stop your submission and start over if necessary. This causes ALL information stored so far to be lost. When you start over, you will have to re-enter all of your submitter contact information and any other information you previously entered.
- Once you click “Next” on a screen, you may not go “back” to the prior screen as you initially add an employee. Do not use the “back” button on your browser as it will ask you if you want to exit iWire. This will cause you to lose all data you have entered to that point if you click yes. If you realize you’ve made an error in the entry, you may edit it before you submit by clicking on the name on the right side of the screen. Once you click edit, you can change any item you have previously entered for that payer/payee by navigating back and forth through the screens.

Entering Submitter Information.

When we ask for “submitter” information, we are asking for information about you. You may or may not work for the company whose 1099s you are submitting. All of the fields are required.

Submitter ID Type.

Select one of the options from the drop-down menu.

- Use the Business Identification Number (BIN) that we assigned to you when you registered with us. This must be an 8 digit number and could have leading zeros.
- Use the Federal Employer Identification Number (FEIN) assigned to you by the Internal Revenue Service (IRS).
- Use the "Social Security Number" as a last resort if you have no other number to use.

Submitter ID Number.

Enter the number that corresponds to the Submitter ID type you chose in the prior field. For example, if you chose to use your BIN, enter that number in this field.

Name.

Enter YOUR name in this field. You, the person entering the 1099s into iWire Direct, are the "submitter." When we ask for "submitter" information, we are asking for information about you.

Company.

Enter the name of the "company" for whom you, as the submitter, work. This could be your own (company's) name if you are the payer, or the name of the company you work for. This is not necessarily the name of the payer who's 1099s you are submitting.

Phone.

Enter your telephone number without dashes. We may call you if there is an issue with the file or data you are submitting to us. Be sure to enter correct information.

E-mail address.

Enter the e-mail address at which you want us to contact you about this submission. The email address you provide here is the email address at which you will receive confirmation that your file has been accepted or, in rare cases, rejected. Verify you have entered your email address accurately.

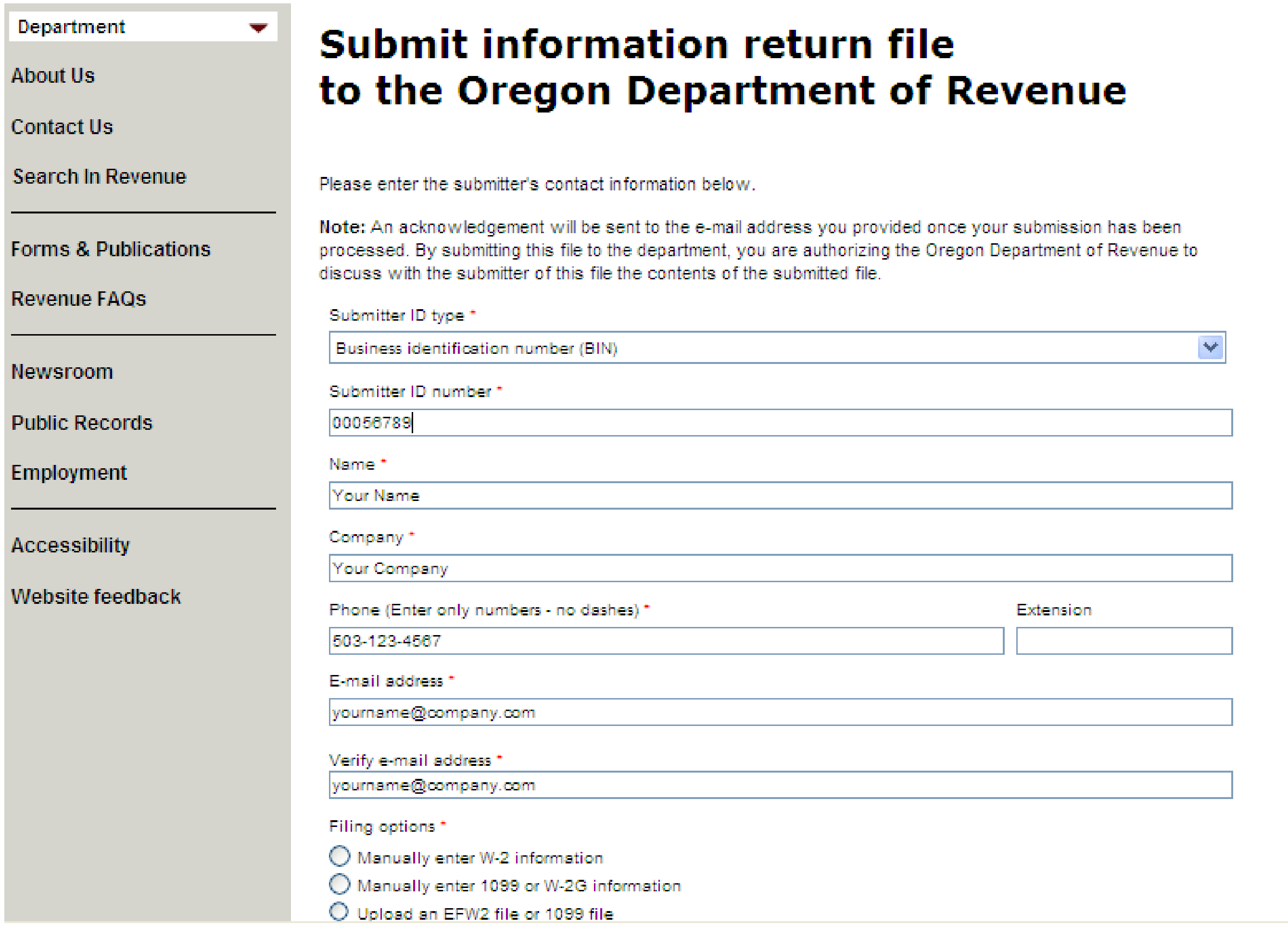
Verify e-mail address.

Re-enter the e-mail address you entered in the previous field. You cannot copy and paste the previous email into this field. Verify that you've entered a correct email address. For example, if your email address is yourname@company.com ensure that it doesn't say yourname@company.cmo. Typing CMO instead of COM is a common error that will cause you to not receive a confirmation email because the domain is incorrect. If you do not enter your email address correctly, you will not receive a confirmation email.

Filing Options.

Select the button for "Manually enter 1099 or W-2G information" at the bottom of the screen to begin entering 1099s. A new window will pop up in your browser asking for more information about you as the submitter.

<u>Sample Main Submission screen</u>



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Submit information return file to the Oregon Department of Revenue

Please enter the submitter's contact information below.

Note: An acknowledgement will be sent to the e-mail address you provided once your submission has been processed. By submitting this file to the department, you are authorizing the Oregon Department of Revenue to discuss with the submitter of this file the contents of the submitted file.

Submitter ID type *

Business identification number (BIN)

Submitter ID number *

00056789

Name *

Your Name

Company *

Your Company

Phone (Enter only numbers - no dashes) *

503-123-4567

Extension

E-mail address *

yourname@company.com

Verify e-mail address *

yourname@company.com

Filing options *

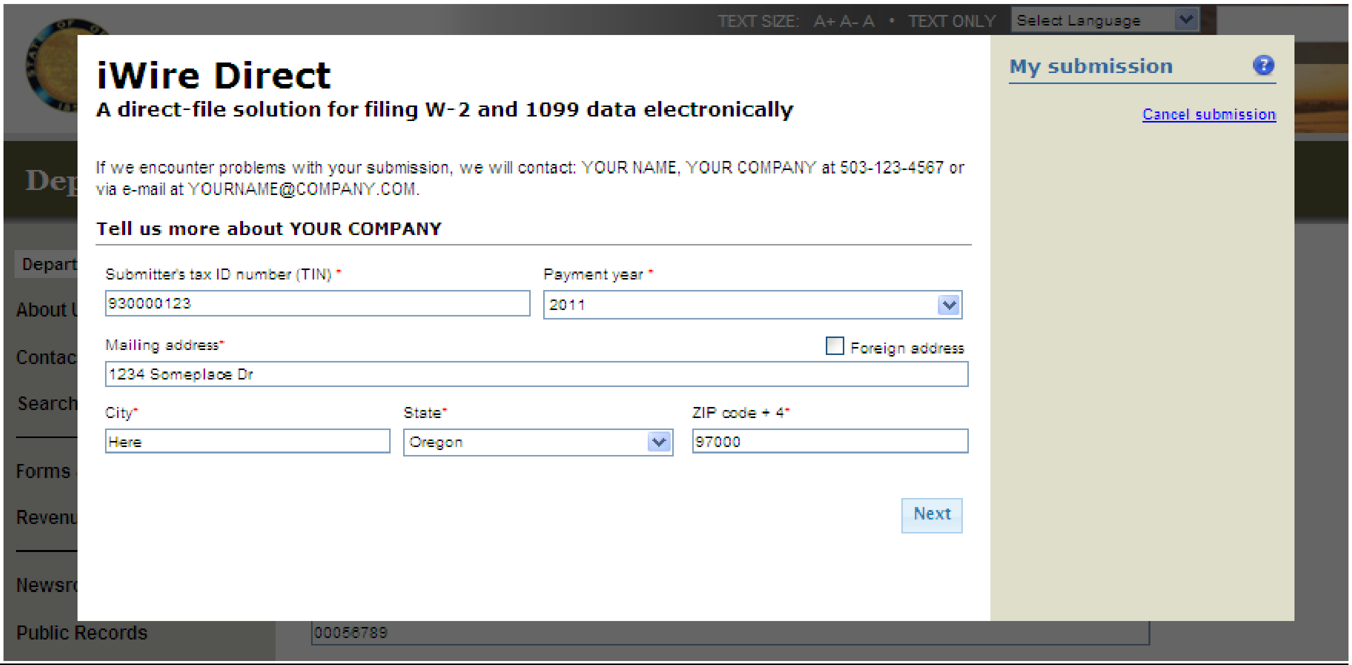
- Manually enter W-2 information
- Manually enter 1099 or W-2G information
- Upload an EFW2 file or 1099 file

TELL US MORE ABOUT YOUR COMPANY.

Enter the tax ID number (TIN) of the submitter.(your company's TIN)
Select from the drop down menu which payment year you are reporting.
Enter the Mailing Address of the submitter. This is usually your mailing address.
Enter the City, State and ZIP that are associated with the Mailing Address.

When you have finished entering all the information, click next. If you have any errors in this window (i.e. you forgot to enter a state) you will get an error message telling you what you need to fix. After you fix it, click "next" again and a new window will open in your browser.

Sample Submitter Info screen



TELL US ABOUT THE PAYER.

Select the "copy from submitter" link if the information is the same as what you entered on the prior screen. If the information here is different, then do not click "copy from submitter."

Payer's tax ID number (TIN).
Enter the payer's tax ID number. This is a **required** field.

Payer's name.
If you did not select the "copy from submitter" link enter the payer's name. This is a **required** field.

Transfer/paying agent box.
Click this box ONLY if there is a transfer or paying agent. A new box will appear to enter this name. If there is no transfer or paying agent do not check the box.

Payer's name.
If you did not select the "copy from submitter" link enter the payer's telephone number and extension, if available.

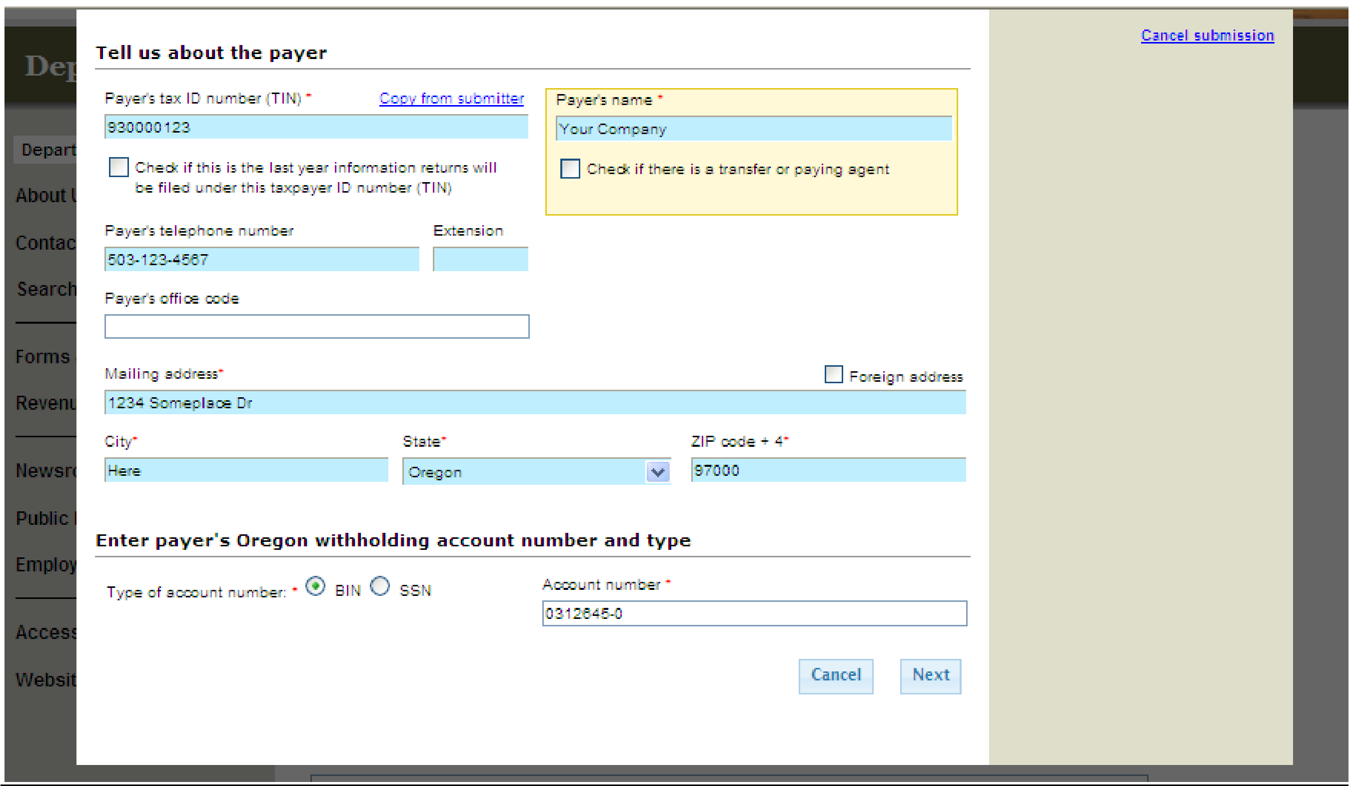
Payer's office code.
Enter the payer's office code, if none.

Payer's mailing address.
Enter the Mailing Address of the payer.
Enter the City, State and ZIP that are associated with the Mailing Address. This is a **required** field.

Enter the payer's Oregon withholding account number and type.
Click the BIN or the SSN, then type in the corresponding number. This is a **required** field.

After you have entered all the information, click "next" to move to the next screen to enter information about the employer. Again, if you are missing any information on this screen, you will receive an error message before you can proceed to enter employer information.

Sample Payer Screen



NOTE: After clicking "next", you should now see the name of your company on the right-hand side of the screen with the option to "add payer" if you choose to add another payer to the file.

Tell us about the Recipient

Type of TIN.
Click EIN, SSN/ITIN/ATIN or Other/None; then type in the corresponding number in the Payee's tax ID number box to the right. This is a **required** field.

What type of form are you filing for this payee?
From the drop down menu, select the form you are filing (1099G, 1099 Misc, 1099R or W-2G). This is a **required** field.

Payer's Account Number for Payee.
If you are submitting more than one information return of the same type for the same payee (i.e. a second 1099MISC for the same person) enter a unique identifier here.

Corrected Information Return.
Click this box ONLY if you are correcting a previously filed 1099.

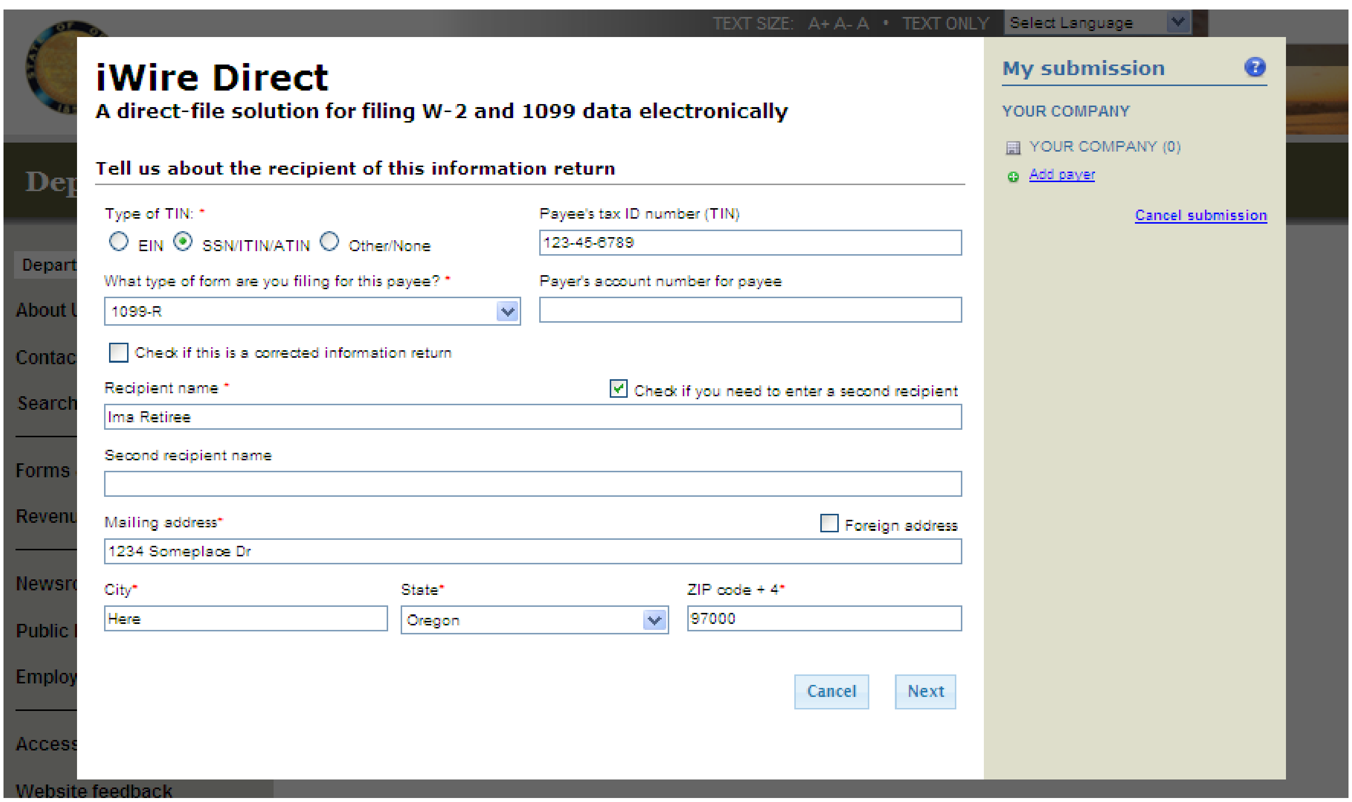
Recipient Name.
Enter the recipient's name as entered on the 1099. This is a **required** field.

Second Recipient
Click this box ONLY if you need to enter a second recipient name. A new box will appear for you to enter the second name.

Recipient's Mailing Address.
Enter the Mailing Address of the recipient.
Enter the City, State and ZIP that are associated with the Mailing Address. This is a **required** field**.**

After you have entered all the information, click "next" to move to the next screen to enter information about the employer. Again, if you are missing any information on this screen, you will receive an error message before you can proceed to entering the employee information.

Sample Recipient screen



NOTE: After clicking "next", you should now see "add a payee" and "add a payer" on the right-hand side of the screen. This allows you to add another payer or payee to the file.

Tell us about the Payee's 1099-G

Unemployment compensation (Box 1).
Enter the "unemployment compensation" exactly as shown in Box 1.

State or local tax refund, credit, or offset (Box 2).
Enter the "state/local tax refund, credit or offset" exactly as shown in Box 2.

Box 2 amount is for tax year (Box 3).
From the "drop down" menu choose the year from Box 2.

Federal income tax withheld (Box 4).
Enter the "federal income tax withheld" exactly as shown in Box 4.

Alternative Trade Adjustment Assistance (ATAA) or Reemployment Trade Adjustment Assistance (RTAA) payments (Box 5).
Enter the "ATAA or RTAA payments" exactly as shown in Box 5.

Taxable grants (Box 6).
Enter the "taxable grants" exactly as shown in Box 6.

Agriculture payments Box 7).
Enter the "agriculture payments" exactly as shown in Box 7.

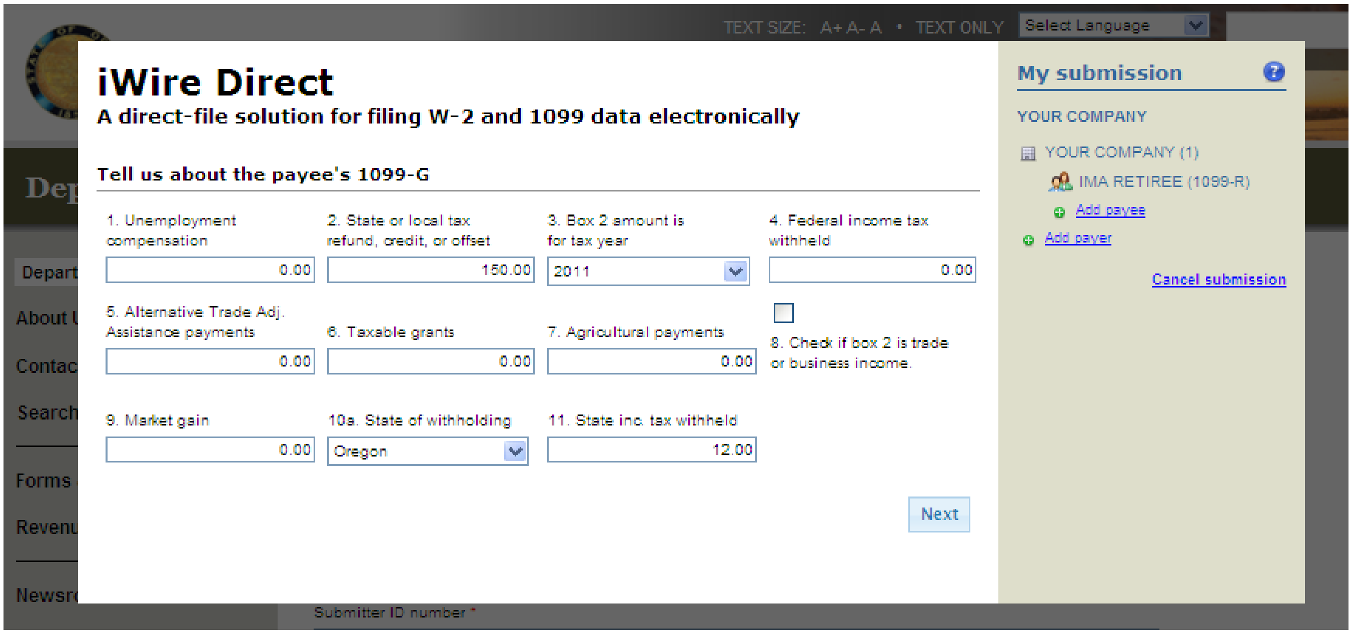
Trade or business income (Box 8).
Check this box ONLY if Box 2 is trade or business income, as shown in Box 8.

Market gain (Box 9).
Enter the "market gains" exactly as shown in Box 9.

State of withholding (Box 10a).
From the "drop down", menu choose the state to which the Payee's state withholding is being reported, as shown in Box 10a.

State income tax withheld (Box 11).
Enter the "state income tax withheld" exactly as shown in Box 11.

Sample Payee's 1099G screen



TELL US ABOUT THE PAYEE'S 1099-MISC

Rents (Box 1)
Enter "rents" exactly as shown in Box 1.

Royalties (Box 2)
Enter "royalties" exactly as shown in Box 2.

Other income (Box 3)
Enter "other income" exactly as shown in Box 3.

Federal income tax withheld (Box 4)
Enter the "federal income tax withheld" exactly as shown in Box 4.

Fishing boat proceeds (Box 5)
Enter "fishing boat proceeds" exactly as shown in Box 5.

Medical and health care payments (Box 6)
Enter "medical and health care payments" exactly shown in Box 6.

Nonemployee compensation (Box 7)
Enter "nonemployee compensation" exactly as shown in Box 7.

Substitute payments in lieu of dividends/interest (Box 8)
Enter "substitute payments in lieu of dividends/interest" exactly as shown in Box 8.

Payer made direct sales of $5,000+ of consumer products to a buyer (recipient) for resale (Box 9)
Check this box ONLY if the payer made direct sales of $5,000 or more of consumer products to a buyer for resale, as shown in Box 9.

Crop insurance proceeds (Box 10)
Enter “crop insurance proceeds” exactly as shown in Box 10.

Excess golden parachute payments (Box 13)
Enter “excess golden parachute payments” exactly as shown in Box 13.

Gross proceeds paid to attorney for legal services (Box 14)
Enter “gross proceeds paid to attorney for legal services” exactly as shown in Box 14.

Section 409A deferrals (Box 15a)
Enter the “section 409A deferrals” exactly as shown in Box 15a.

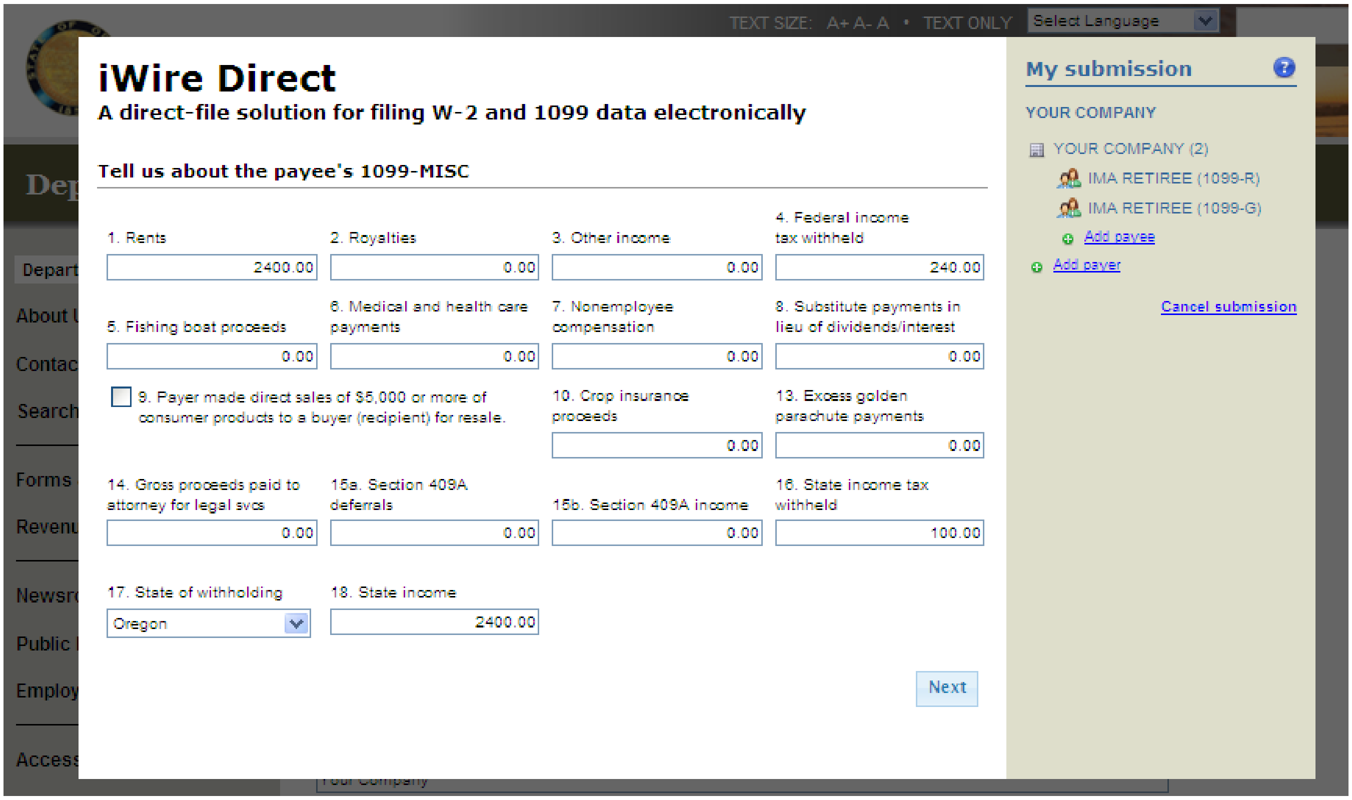
Section 409A income (Box 15b)
Enter the “section 409A income” exactly as shown in Box 15b.

State income tax withheld (Box 16)
Enter “state income tax withheld” exactly as shown in Box 16.

State of withholding (Box 17)
From the drop down menu choose the state to which the “Payee’s” state withholding is being reported, as shown in Box 17.

State income (Box 18)
Enter “state income” exactly as shown in Box 18.

Sample Payee's 1099Misc screen



Tell us about the Payee's 1099-R

Gross distribution (Box 1).

Enter "gross distribution" exactly as shown in Box 1.

Taxable amount (Box 2a).

Enter "taxable amount" exactly as shown in Box 2a.

Taxable amount (Box 2b).

- If you do not know the taxable amount leave Box 2a blank and check Box 2b marked "Taxable amount not determined".
- If the distribution resulted in closing out the account, check Box 2b marked "Total distribution".

Capital gains (Box 3).

Enter "capital gains" exactly as shown in Box 3.

Federal income tax withheld (Box 4).

Enter "federal income tax withheld" exactly as shown in on Box 4.

Employee contributions or insurance premiums (Box 5).
Enter “employee contributions or insurance premiums” exactly as shown in Box 5.

Net unrealized appreciation in employer’s securities (Box 6).
Enter “net unrealized appreciation in employer’s securities” exactly as shown in Box 6.

Distribution code (Box 7).
From the “drop down” menu, choose the appropriate distribution code. If you need to add a second code, another box is available to the right. This is a **required** field.

IRA/SEP/SIMPLE
Check this box ONLY if this was an IRA/SEP/SIMPLE

Other (Box 8)
Enter “other” exactly as shown in Box 8.

Percentage of total distribution (Box 9a)
Enter “percentage of total distribution” exactly as shown in Box 9a.

Total employee contribution (Box 9a)
Enter “total employee contribution” exactly as shown in Box 9b.

Amount allocable to IRR within 5 years (Box 10)
Enter the “amount allocated to IRR within 5 years” exactly as shown in Box 10.

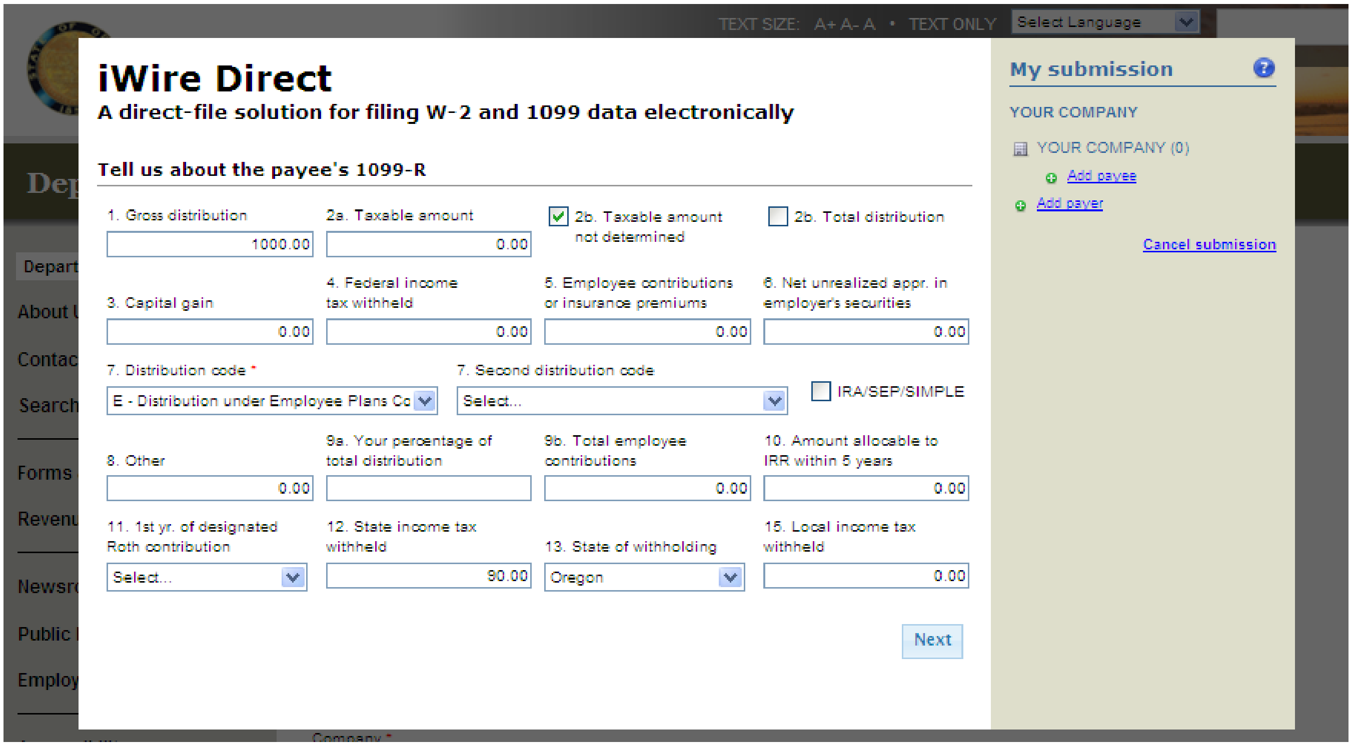
First year of designated Roth contribution (Box 11)
From the drop down menu, choose the first year of the designated Roth contribution exactly as shown in Box 11.

State income tax withheld (Box 12)
Enter the amount of state income tax withheld exactly as shown in Box 12.

State of withholding (Box 13)
From the drop down menu, choose the state to which the Payer’s state withholding is being reported.

Local income tax withheld (Box 15)
Enter the amount of “local income tax withheld” exactly as shown in Box 15.

Sample Payee's 1099-R screen



Tell us about the Payee's W-2G

Gross winnings (Box 1)
Enter "rents" exactly as shown in Box 1.

Federal income tax withheld (Box 2)
Enter "federal income tax withheld" exactly as shown in Box 2.

Type of wager (Box 3)
From the drop down menu, choose the type of wager shown in Box 3. This is a required field.

Date won (Box 4)
From the calendar provided, choose the "date of winnings", as shown on Box 4. This is a required date.

Transaction (Box 5)
Enter "transaction" exactly as shown in Box 5.

Race/game number (Box 6)
Enter "race/game number" exactly as shown in Box 6.

Winnings from identical wagers (Box 7)
Enter "winnings from identical wagers" here exactly as it is shown on Box 7.

Cashier (Box 8)
Enter "cashier's number" exactly as shown in Box 8. This is a required field.

Window (Box 10)
Enter the "windows number" exactly as shown in Box 10. This is a required field.

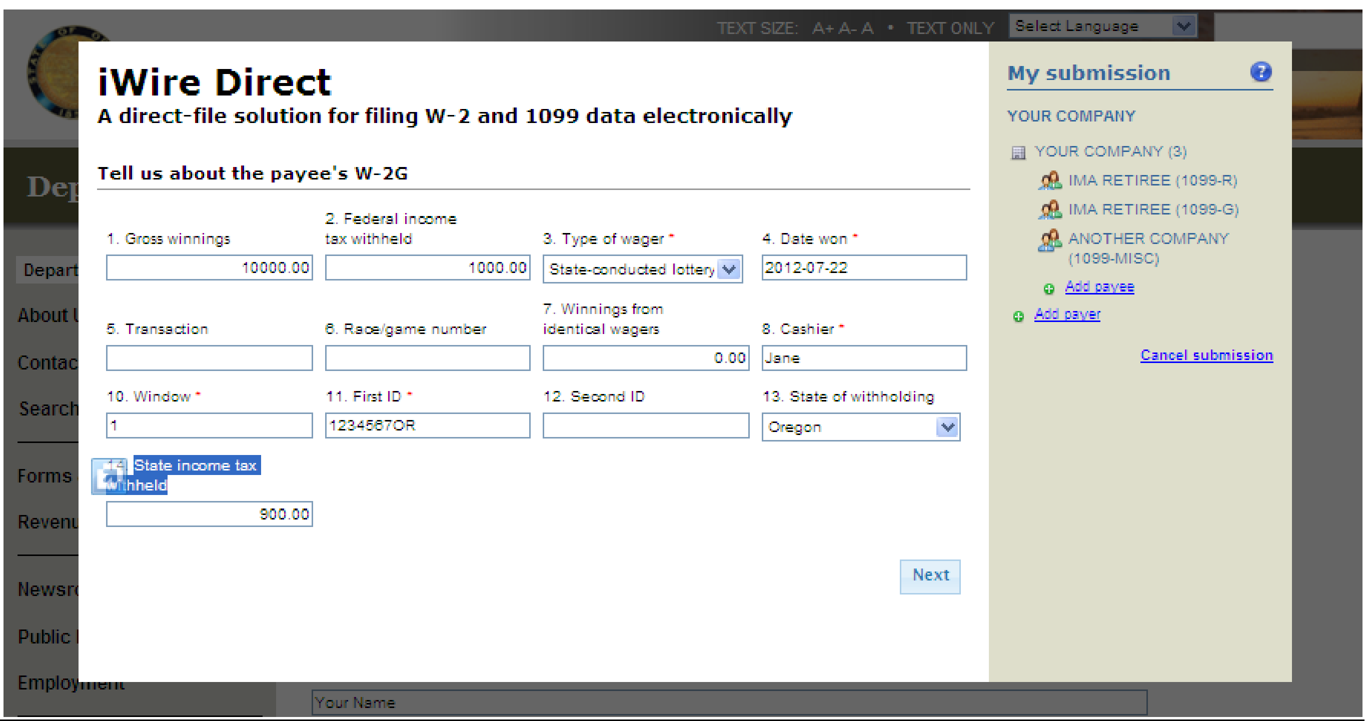
First ID (Box 11)
Enter the "first id" exactly as shown in on Box 11. This is a required field.

Second ID (Box 12)
Enter the "second ID" exactly as shown in Box 12.

State of withholding (Box 13)
From the drop down menu, choose the state to which the Payer's state withholding is reported, as shown in Box 13.

State income tax withheld (Box 14)
Enter the amount of "state income tax withheld" exactly as shown in Box 14.

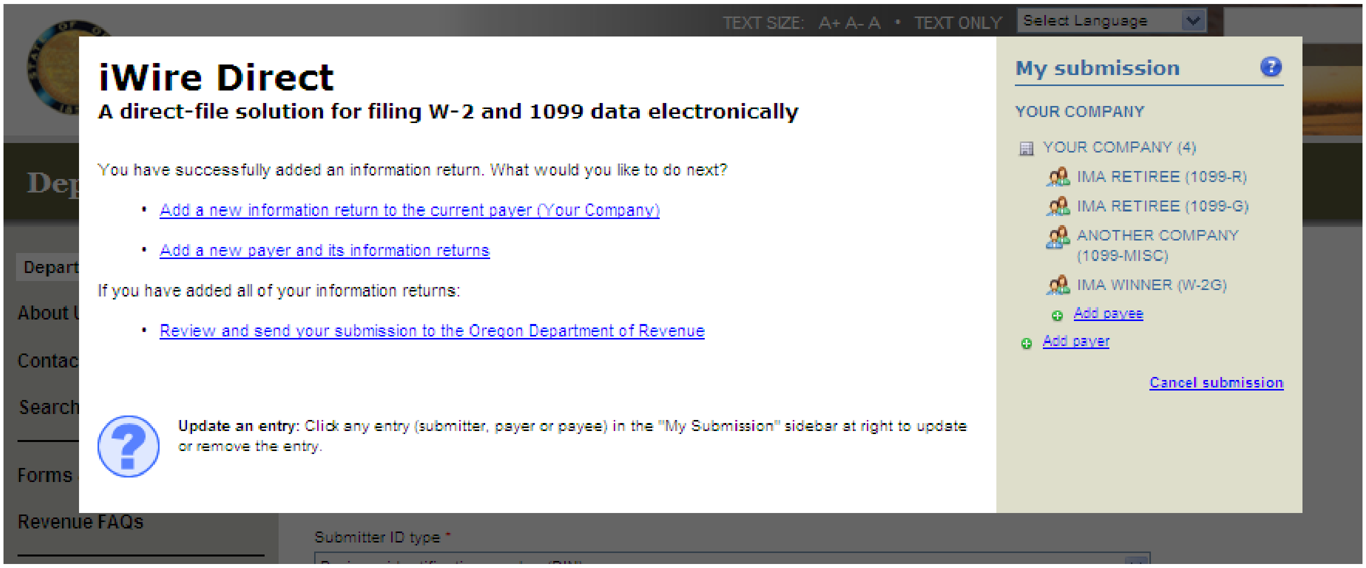
Sample Employee screen



Click "Next" to complete the 1099.

NOTE: After you have entered all the information, you will see a screen that says you successfully added either a 1099 or W-2G. That screen will ask you what you want to do next. It is also at this point where you will see the names in the tree on the right-hand side of the screen.

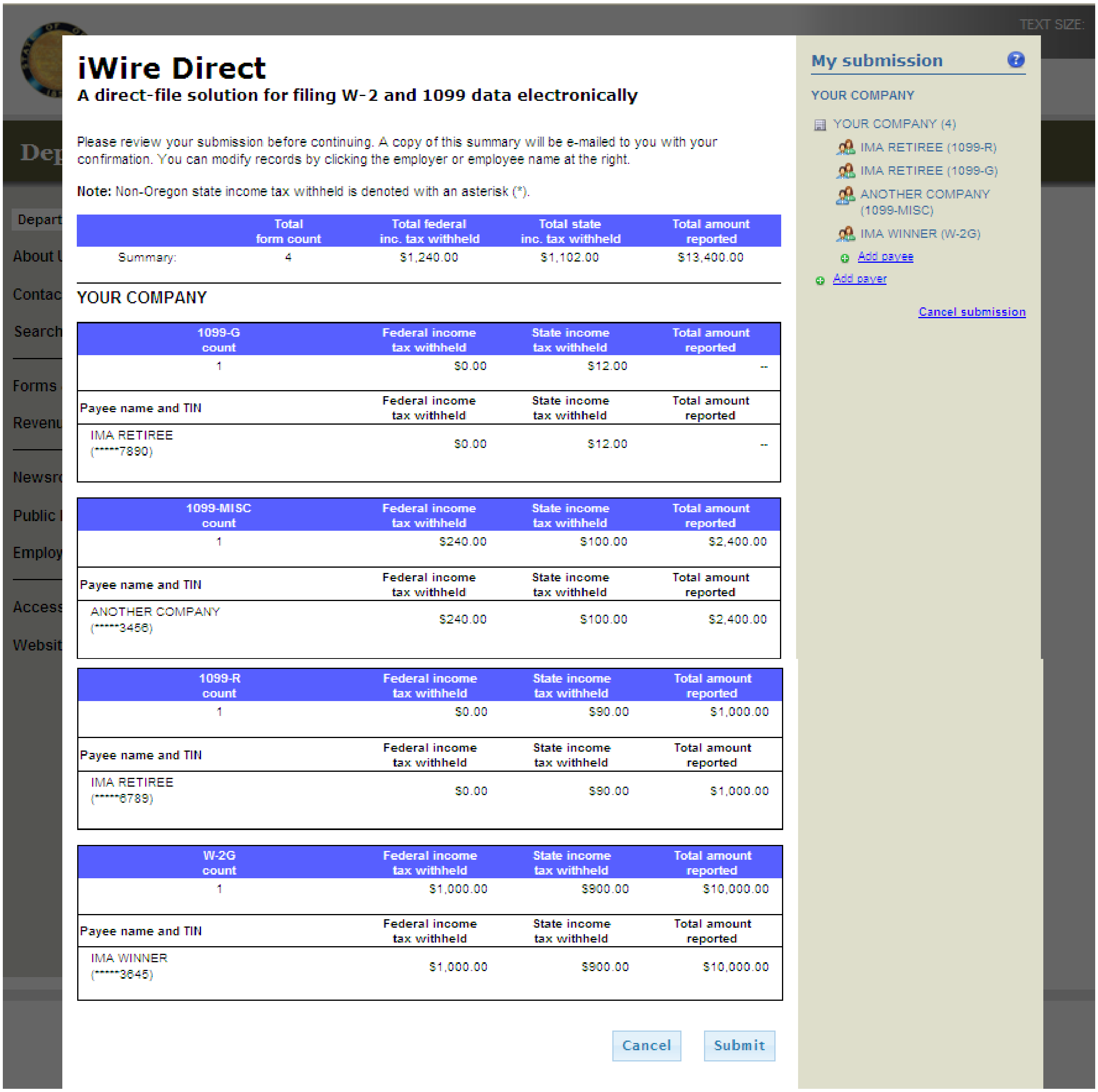
Sample "Add Another" or "Review and Submit File" screen:



Review your submission to the Oregon Department of Revenue.

When you are ready to submit the file you have created to the department, click "Review" and send your submission to the Oregon Department of Revenue." A screen will display that shows you a list of all the 1099's or W-2Gs you entered. Be sure to review this carefully before you click submit. Once you click submit, you will receive a confirmation email that contains a PDF of this list.

Sample Review page:



iWire Direct

A direct-file solution for filing W-2 and 1099 data electronically

Please review your submission before continuing. A copy of this summary will be e-mailed to you with your confirmation. You can modify records by clicking the employer or employee name at the right.

Note: Non-Oregon state income tax withheld is denoted with an asterisk (*).

	Total form count	Total federal inc. tax withheld	Total state inc. tax withheld	Total amount reported
Summary:	4	$1,240.00	$1,102.00	$13,400.00

YOUR COMPANY

1099-G count	Federal income tax withheld	State income tax withheld	Total amount reported
1	$0.00	$12.00	--
Payee name and TIN	**Federal income tax withheld**	**State income tax withheld**	**Total amount reported**
IMA RETIREE (*****7890)	$0.00	$12.00	--

1099-MISC count	Federal income tax withheld	State income tax withheld	Total amount reported
1	$240.00	$100.00	$2,400.00
Payee name and TIN	**Federal income tax withheld**	**State income tax withheld**	**Total amount reported**
ANOTHER COMPANY (*****3456)	$240.00	$100.00	$2,400.00

1099-R count	Federal income tax withheld	State income tax withheld	Total amount reported
1	$0.00	$90.00	$1,000.00
Payee name and TIN	**Federal income tax withheld**	**State income tax withheld**	**Total amount reported**
IMA RETIREE (*****6789)	$0.00	$90.00	$1,000.00

W-2G count	Federal income tax withheld	State income tax withheld	Total amount reported
1	$1,000.00	$900.00	$10,000.00
Payee name and TIN	**Federal income tax withheld**	**State income tax withheld**	**Total amount reported**
IMA WINNER (*****3645)	$1,000.00	$900.00	$10,000.00

Cancel Submit

My submission

YOUR COMPANY

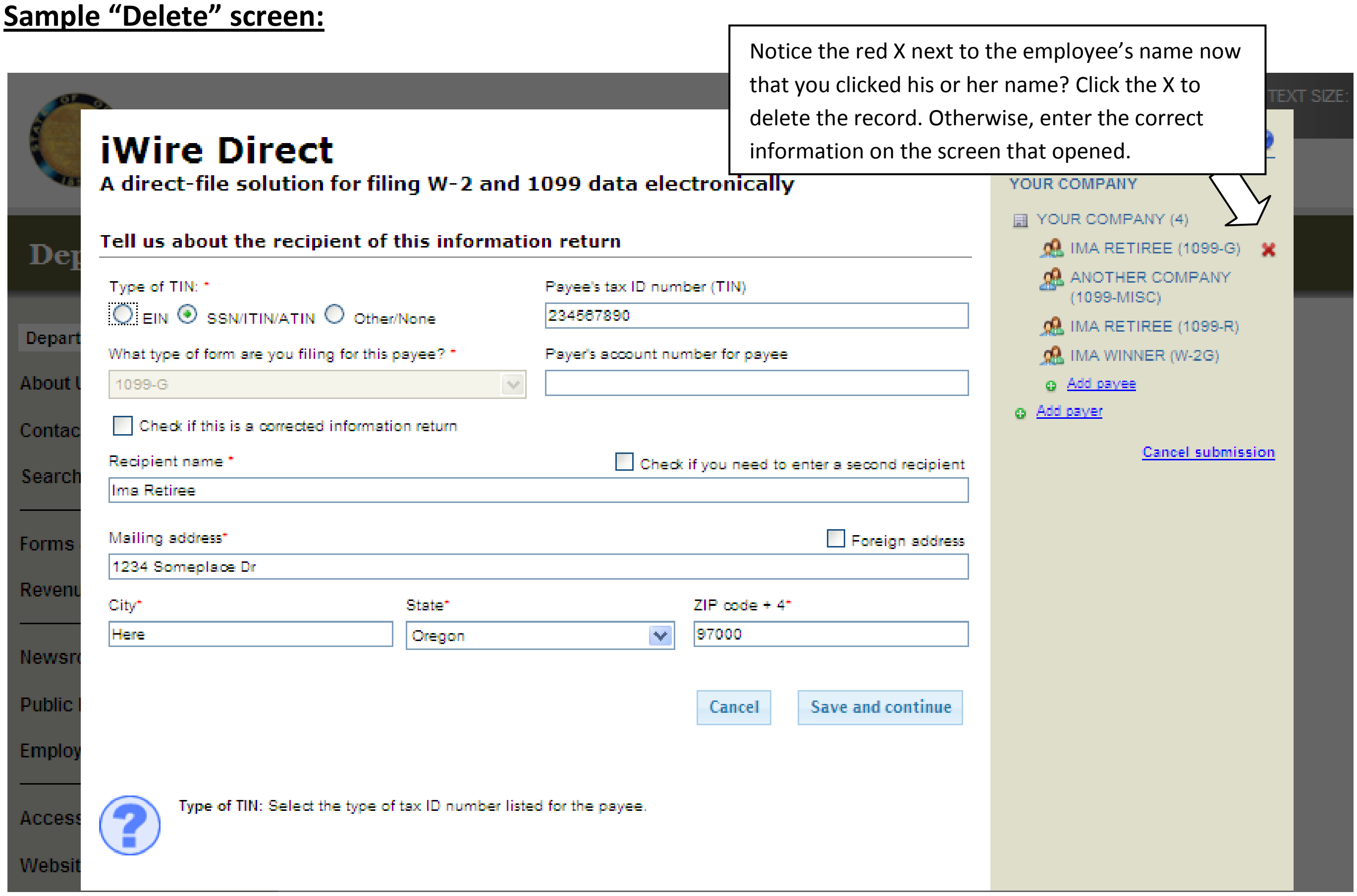
YOUR COMPANY (4)
IMA RETIREE (1099-R)
IMA RETIREE (1099-G)
ANOTHER COMPANY (1099-MISC)
IMA WINNER (W-2G)
Add payee
Add payer

Cancel submission

CORRECTING AN ENTRY ERROR IN IWIRE BEFORE SUBMITTING FILE

If you realize you made an error while entering the 1099 or W-2G data, you may now edit (correct) the file before you submit it. Do this by clicking on the name that you wish to change (payer or payee). You may either edit or delete the information you previously entered. In the "My Submission" screen on the right side of the page simply click the name of the employee or employer that needs correcting. If you wish to delete it, simply click the red X next to the name. Use caution when choosing to "Delete" a record because it will delete all information you've entered.

Sample “Delete” screen:



The familiar screen you saw before will come back up. This time you will see a “Save and continue” button at the bottom of each page in the employee record rather than the “Next” button. Once you enter the correct information, simply click “Save and continue” to move forward through the screens. It is at this point you can move back and forth freely through the screens. If you make changes and click “Back” without saving, you will lose the updated information. Be sure to click “Save and continue” each time.

If you accidently clicked on the wrong employee or wrong employer, simply hit “Cancel” to get back to the prior screen.

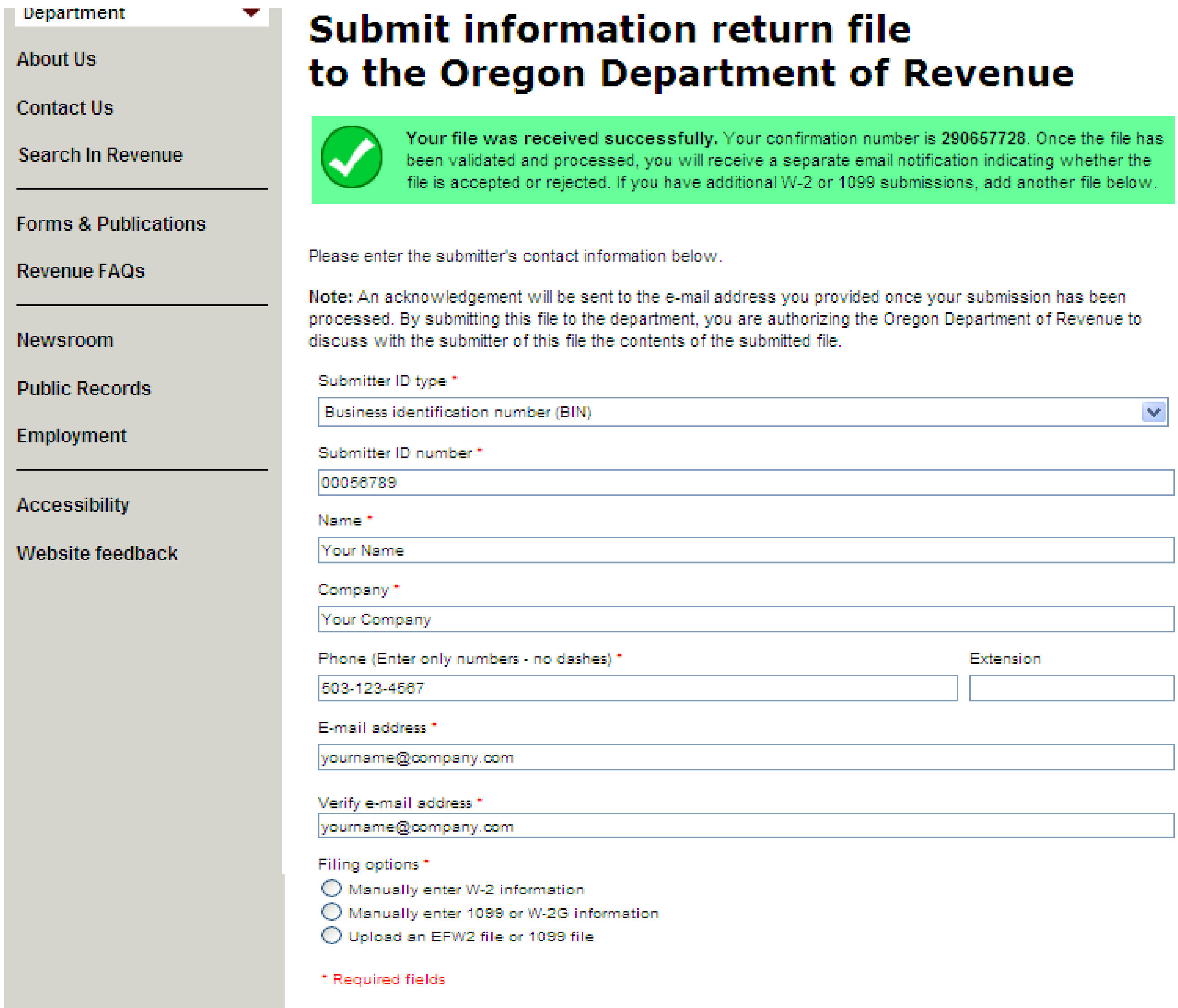
Send your submission to the Oregon Department of Revenue.

Now that you have reviewed the entire submission and you are satisfied, click on “Submit” to send the information to the department.

You may submit your file any time that you have completed entering an entire 1099 or W-2G. This is convenient if you must stop your entry and come back at a later time. Once you close your browser, you cannot re-open an existing session to pick up where you left off; however, you can start a new one to finish entering the 1s099’ you didn’t submit earlier. You will need to enter your submitter information again. Do not re-enter the 1099’s you have already submitted.

Once you click submit, you will get a message immediately in your browser that says we have received your file and gives you a confirmation number.

Sample In-browser confirmation: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Submit information return file to the Oregon Department of Revenue

Your file was received successfully. Your confirmation number is **290657728**. Once the file has been validated and processed, you will receive a separate email notification indicating whether the file is accepted or rejected. If you have additional W-2 or 1099 submissions, add another file below.

Please enter the submitter's contact information below.

Note: An acknowledgement will be sent to the e-mail address you provided once your submission has been processed. By submitting this file to the department, you are authorizing the Oregon Department of Revenue to discuss with the submitter of this file the contents of the submitted file.

Submitter ID type *
Business identification number (BIN)

Submitter ID number *
00056789

Name *
Your Name

Company *
Your Company

Phone (Enter only numbers - no dashes) * | Extension
503-123-4567

E-mail address *
yourname@company.com

Verify e-mail address *
yourname@company.com

Filing options *
- Manually enter W-2 information
- Manually enter 1099 or W-2G information
- Upload an EFW2 file or 1099 file

* Required fields

In a few minutes, you will get an email confirmation indicating that we've accepted and processed your 1099's or W-2G's. Attached to that email will be a PDF that contains a redacted list of the information returns you submitted in the file for your records.

Sample Email:

From: iwire.dor@state.or.us [mailto:iwire.dor@state.or.us]
Sent: Tuesday, March 27, 2012 10:09 AM
To: yourname@company.com
Subject: Oregon iWire Submission Processed (Confirmation Number: 953515218)

Your 1099 submission has been accepted.

If you have any questions regarding your submission, please refer to confirmation number 953515218 when responding to this e-mail.

This e-mail was automatically sent from the Oregon Department of Revenue iWire system. If you have questions about this e-mail, you may reply directly to it or you may call us at 503-945-8127. Leave a message with your confirmation number and a member of the iWire team will contact you as soon as possible. You may also find your answer in our frequently asked questions and troubleshooting guidelines information on our website.

In very rare cases, you may receive an email that says we've rejected the file and provide reasons why the file was rejected. 1099's filed with us using iWire Direct are rarely rejected so contact us if that happens.

Sample PDF:

Note: Non-Oregon state wages are denoted with an asterisk (*).

	Total form count	Total federal inc. tax withheld	Total state inc. tax withheld	Total amount reported
Summary	3	$0.00	$9,000.00	$0.00

COMPANY

1099-G count	Federal income tax withheld	State income tax withheld	Total amount reported
2	$0.00	$5,000.00	--

Payee name and TIN	Federal income tax withheld	State income tax withheld	Total amount reported
RECIP 1 *****2345	$0.00	$2,000.00	--
RECIP2 *****5456	$0.00	$3,000.00	--

COMPANYTWO

1099-G count	Federal income tax withheld	State income tax withheld	Total amount reported
1	$0.00	$4,000.00	--

Payee name and TIN	Federal income tax withheld	State income tax withheld	Total amount reported
NAMETHREEE *****6620	$0.00	$4,000.00	--

TROUBLESHOOTING.

Text recognition issues.

If you are having trouble with your entry, check to make sure your browser hasn't used "smart quotes" or "smart apostrophes" as you enter your information. Our system is not able to read any character that is not something you enter yourself. A "smart quote" or "smart apostrophe" is when, for example, you type in the letters "its" and the computer automatically detects it should have been "it is" and inserts the apostrophe without you asking it to do so. Thus it changes "its" to "it's" and our system doesn't know what to do with extra character. It looks like an apostrophe to the naked eye, but it doesn't read that way in code.

Browser issues.

If your browser seizes up while you are working in iWire, check to see if you are operating a browser we can support. Usually the error occurs when you use a version of Internet Explorer that is older than IE8. If you are using IE6 or IE7, you can visit Microsoft's website to download an update.

Operating system issues.

Some filers using Windows 7 have reported issues using IE 9 (which is required with Windows 7). Consider downloading Mozilla Firefox or Google Chrome and try again. If that still doesn't work, contact Microsoft for help with Windows 7.

HOW TO CONTACT US.

iWire Technical Support Team:
Telephone: 503-945-8127
E-mail: iwire.dor@state.or.us

Office hours: Monday through Friday 8 to 5, except holidays and furlough days

Our goal is to respond to your request within one business day. In peak times (January through April) it may be two business days depending on the issue needing resolved.