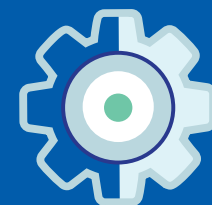
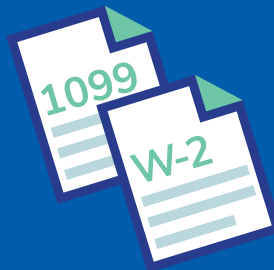


# Quick Start Guide to E-File



# Filing tax information returns including 1099s and W-2s is fast and easy!

## 4 EASY STEPS

You can complete your forms directly on the site in just a few minutes.

### 1 Create a free account

You can try out our service – including creating and saving forms – with no obligation. You don't pay a cent, or even enter a credit card number, until you are ready to file a form and check out.

### 2 Set up your payer and recipient records

The “payer” is the company or other entity that paid the form recipient. If you're preparing forms for more than one company or client, you can create additional payers under one account. Have a lot of payers or recipients to add? See page 5 for upload options.

Enter the name, address, and SSN or TIN for each recipient (contractor, employee or other payee).

### Get Started

Enter your email address below to create your free account. If you don't already have an account, we'll send you a link to get started. You'll be ready to file your forms in no time.

By creating an account, you agree to our [Terms](#)

Continue

[Log In](#)

### Add Payer

☐ EIN ☐ SSN ☒ Unknown

Country  
United States

State  
Select State

[Cancel](#)

Save

### 3 Fill out the on-screen forms

Our online forms look just like the paper forms from the IRS. Just select the payer and recipient from the drop-down lists and fill in the required “boxes” with the payment amounts. If you’re missing information, you can save partially completed forms in your account and return later to complete and file them.

### 4 Review and submit your completed forms

You decide which forms to submit, when you are ready. Add all your forms to the cart and check out once, or submit them in batches (by company, client or form type, for example).

We’ll take care of the rest!



☐ VOID ☐ CORRECTED

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

OMB No. 1545-0116  
Form **1099-NEC**  
(Rev. January 2022)  
For calendar year 20

**Nonemployee Compensation**

**Copy 1  
For State Tax Department**

PAYER'S TIN	RECIPIENT'S TIN	1 Nonemployee compensation	
		\$	
RECIPIENT'S name		2 Payer made direct sales totaling \$5,000 or more of consumer products to recipient for resale	<input type="checkbox"/>
Street address (including apt. no.)		3	
City or town, state or province, country, and ZIP or foreign postal code		4 Federal income tax withheld	\$
Account number (see instructions)		5 State tax withheld	\$
		6 State/Payer's state no.	
		7 State income	\$

Form **1099-NEC** (Rev. 1-2022) [www.irs.gov/Form1099NEC](http://www.irs.gov/Form1099NEC) Department of the Treasury - Internal Revenue Service

SAVE & FILE MORE

SAVE & CHECKOUT

CANCEL

☐ VOID ☐ CORRECTED

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

OMB No. 1545-0115  
Form **1099-MISC**  
(Rev. January 2022)  
For calendar year 20

**Miscellaneous Information**

**Copy 1  
For State Tax Department**

PAYER'S TIN	RECIPIENT'S TIN	1 Rents	\$
		2 Royalties	\$
RECIPIENT'S name		3 Other income	\$
Street address (including apt. no.)		4 Federal income tax withheld	\$
City or town, state or province, country, and ZIP or foreign postal code		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	<input type="checkbox"/>
		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	\$
		13 FATCA filing requirement	<input type="checkbox"/>
		14 Excess golden parachute payments	\$
		15 Nonqualified deferred compensation	\$
Account number (see instructions)		16 State tax withheld	\$
		17 State/Payer's state no.	
		18 State income	\$

Form **1099-MISC** (Rev. 1-2022) [www.irs.gov/Form1099MISC](http://www.irs.gov/Form1099MISC) Department of the Treasury - Internal Revenue Service

SAVE & FILE MORE

SAVE & CHECKOUT

CANCEL

# Once you've submitted your forms, we do the rest.

## After you submit your forms, we:

- ✓ **E-file your forms directly to the IRS and/or SSA**  
During tax-filing season, we file daily, sometimes multiple times each day.
- ✓ **Deliver forms to your recipients** (if you select this service)  
We can print and mail your forms to recipients. Forms are pressure-sealed using high-security paper and delivered via first-class mail. Or we can e-deliver to your recipients if you provide their e-mail addresses. We will give them the choice to access their forms immediately online via a secure link. No waiting for the mail!
- ✓ **Notify you via email at each step of the way**  
You'll receive e-mail confirmations when:
  - You complete your transaction (check out)
  - Your recipient copies are postmarked and mailed
  - The IRS/SSA will begin processing 2022 form filings mid-January 2023.
  - Store your form data on our secure servers. You can view or print PDF versions of your forms any time after filing, for at least four years.



# Have many forms to file? We have upload options.



## To make it even easier:

If you have many forms to file, use accounting software, or you are a tax preparer filing on behalf of multiple clients, use one of these upload options:

### QuickBooks Online Plus

All vendors flagged as 1099 vendors will be transferred automatically and instantly from your existing QuickBooks® Online Plus account straight into your e-file account.

### QuickBooks Desktop Plug-In

Install our QuickBooks Plug-In to easily export all your 1099-NEC form data in the correct format.

### Xero API

Import your 1099-NEC form data directly from your Xero account.

### Excel Template

Download our Excel template to file multiple form types. It provides predefined columns for all the required payer, recipient, form and amount fields. You can copy and paste data from other reports/systems or fill in the fields directly for uploading.



E-FILING IS EASY WITH