



PRINTING INSTRUCTIONS FOR CALENDAR YEAR 2021 1099s (EFFECTIVE JANUARY 2022) JOB AID NCAS-2

NCAS

The purpose of this job aid is to explain how to print Calendar Year 2021 1099s in NCXCloud.

Beginning with year 2020, agencies have been responsible for printing their agency's 1099 forms. The 1099s will be created using the Systemware product NCXCloud. NCXCloud is a cloud-based repository for mainframe reports. To print 1099s, you will need a basic knowledge of NCXCloud. If you are unfamiliar with this product, please refer to the introduction documentation located at:

<https://www.osc.nc.gov/documents/ncxcloud>

Three 1099s forms will be generated for year 2021. The first form is for miscellaneous information, 1099-MISC. Calendar year 2020, the IRS moved reporting box 7 from the 1099-MISC to a new form, 1099-NEC, the second form. The third form is the 1099-G for governmental payments. Each form is loaded in separate XPTR form IDs and are secured by agency. Below are the locations for the three forms:

P Region

OPAY OSCOPC 1099-G YEAR 2021
OPAW OSCOPC 1099-MISC YEAR 2021
OPAX OSCOPC 1099-NEC YEAR 2021

F Region

OFAY OSCOPF 1099-G YEAR 2021
OFAW OSCOPF 1099-MISC YEAR 2021
OFAX OSCOPF 1099-NEC YEAR 2021
OFAP OSCOPF 1099-NEC YEAR 2021- LOTTERY ONLY

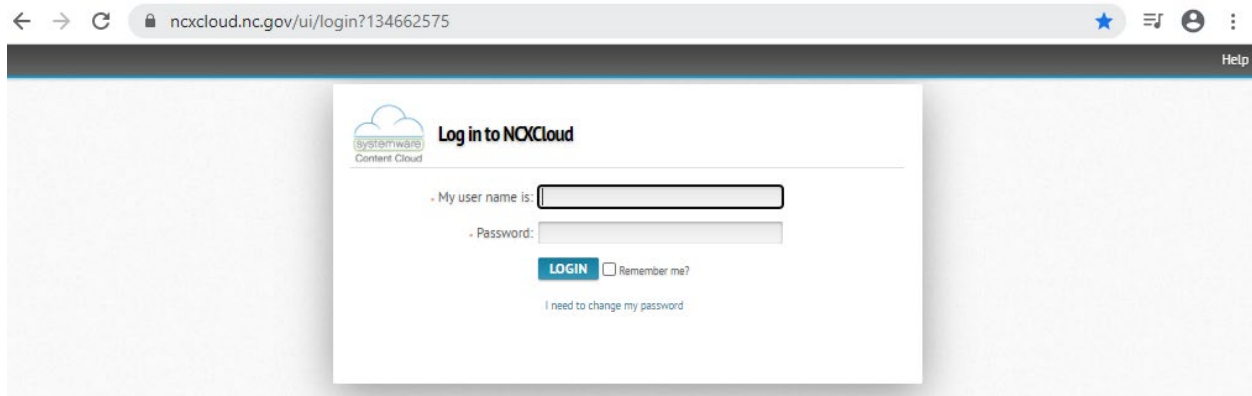
To access NCXCloud, you must be on the state VPN. Some agencies have internal VPNs that belong to the State. These agencies' VPNs may have firewall issues. Contact DIT if you have any trouble getting to the sign on page for NCXCloud.

Before printing, make sure you have enough 8 ½ X 11 paper, a proper supply of ink for the printer chosen to print 1099s and 1099 envelopes. The products can be purchased from your local office supply store.

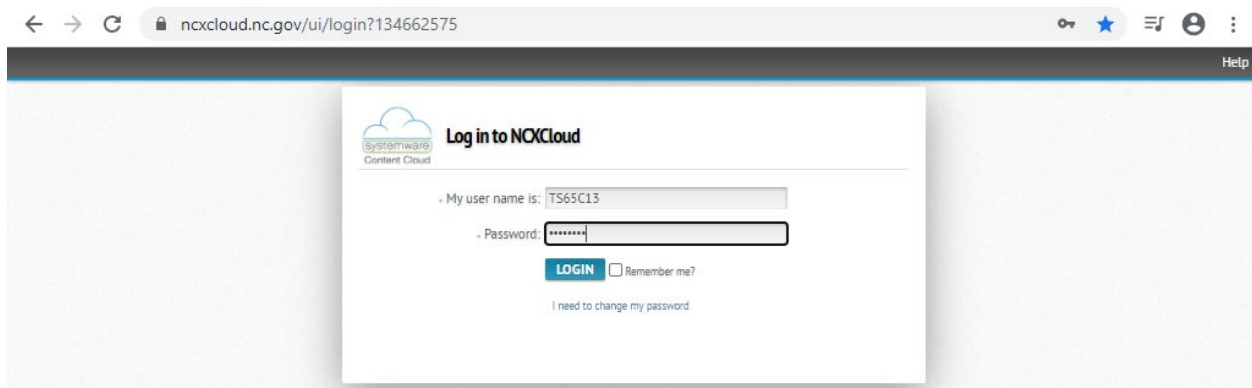
To begin, sign on to the state VPN. Access your internet browser. These instructions use Chrome as the browser.

The address for the production environment is: <https://ncxcloud.nc.gov>.

If there are no firewall or VPN issues, the sign on screen will display.



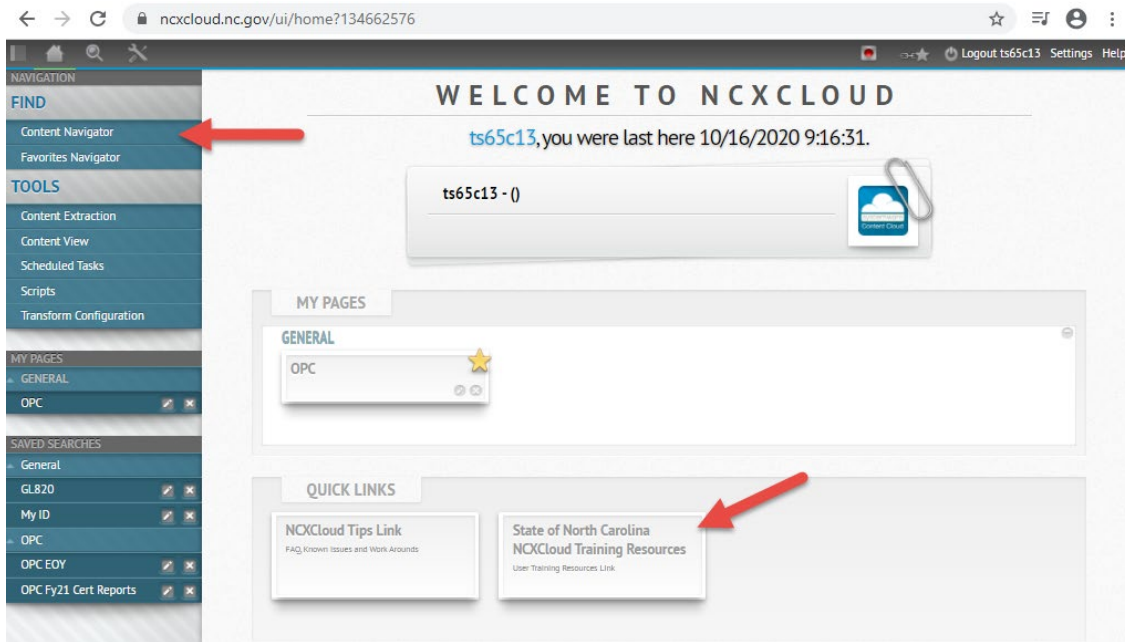
Your RACF ID and password are used to sign into NCXCloud. Press ENTER.



Each user can tailor their home page to their preferences. This document will step the user directly to the 1099 forms no matter how their home page looks. Everyone should have an icon on their home page that displays NCXCloud Training Resources. By clicking this link, the user will be directed to additional training material.

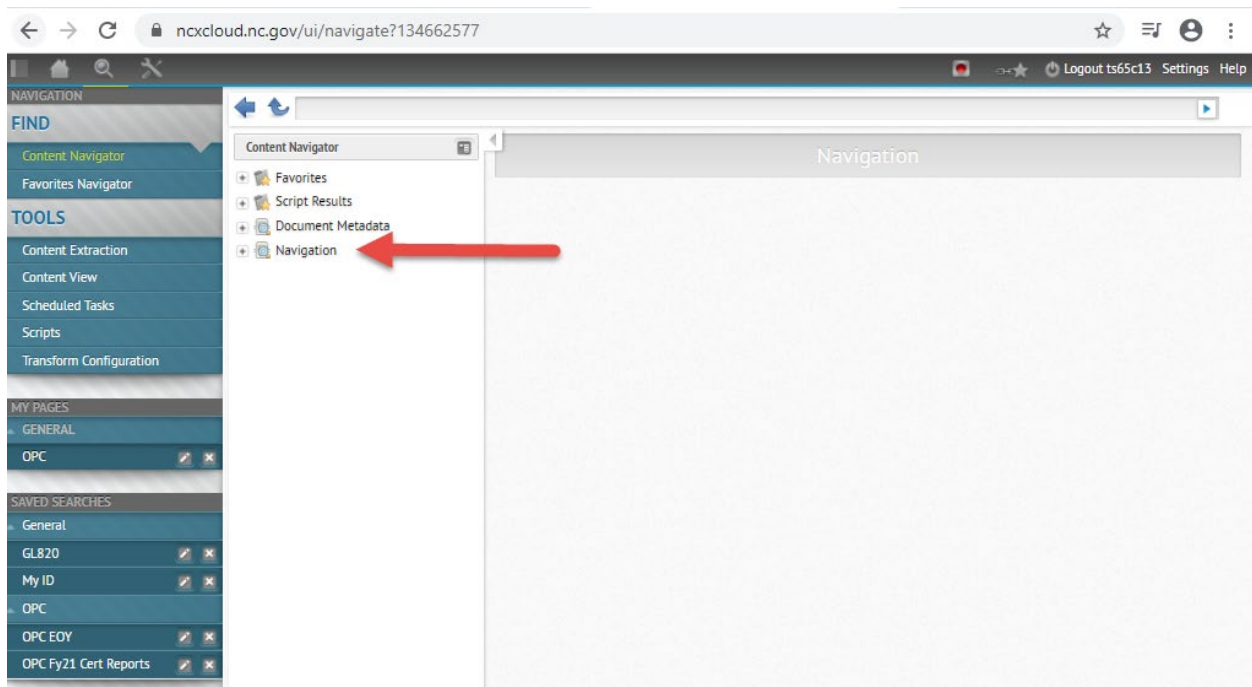


From your home page, click on the navigation direction for Content Navigator.

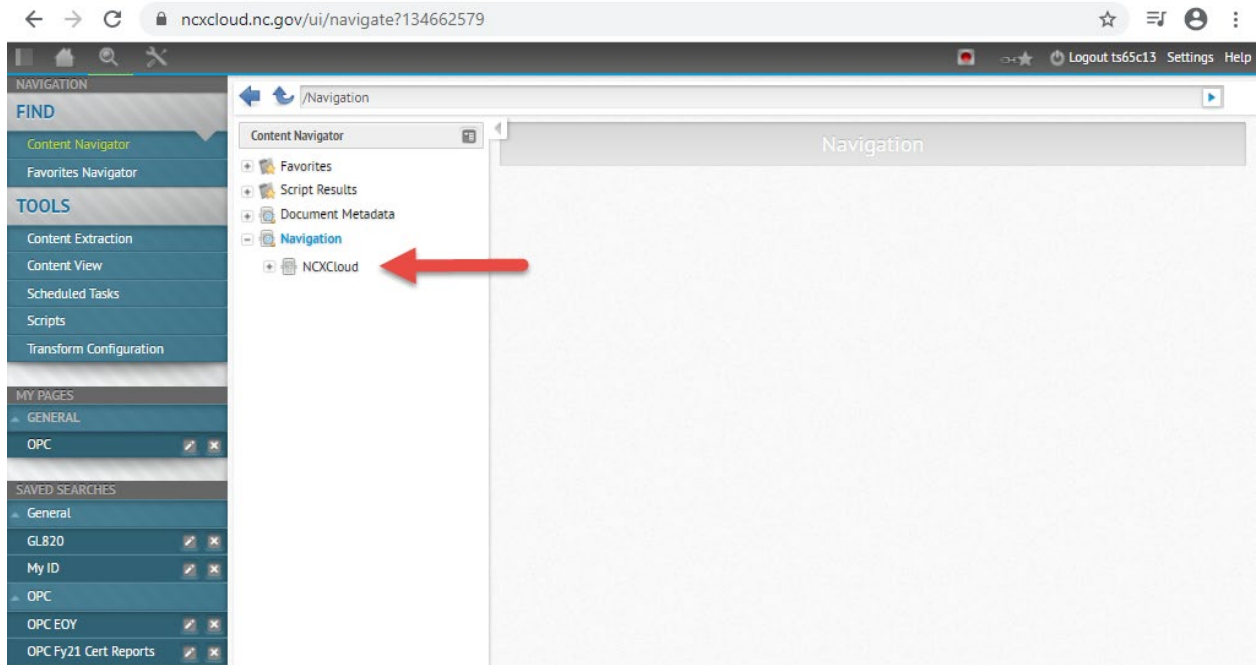


The Content Navigation panel opens. From here, click on the word Navigation.

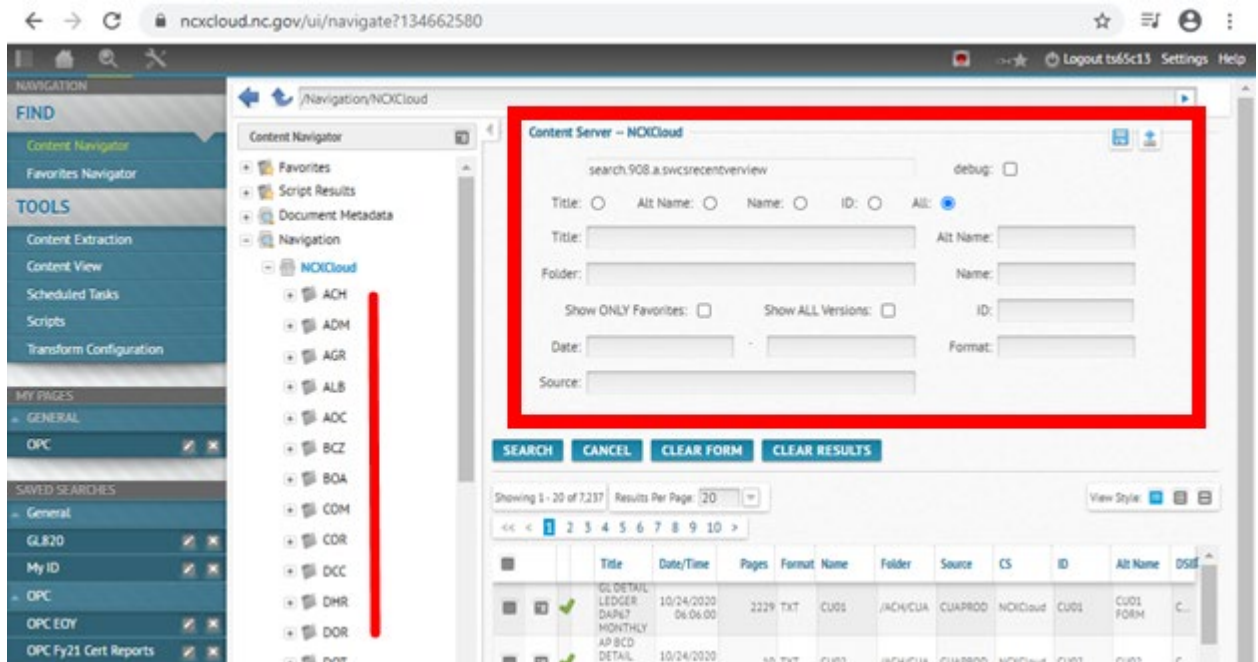
NOTE: Click on the words, not the + symbol.



The high level NCXCloud directory will display.



To access the agency directories, click on the word NCXCloud. Various directories may display. You will be able to view on the directories for which you have security. This document uses OSC’s directories. The right side on the screen now displays a SEARCH panel. You can go directly to the reports by using this SEARCH panel.



These instructions will access the 1099 forms by using the form ID. **At the beginning of this document, the form IDs were listed for 2021 1099 processing.**

THESE INSTRUCTIONS WILL GIVE AN EXAMPLE USING FORMS CREATED FOR TESTING. MAKE SURE YOU SELECT 2021 FORMS WHEN YOU ARE READY TO PRINT YOUR 1099s FOR THE CURRENT YEAR.

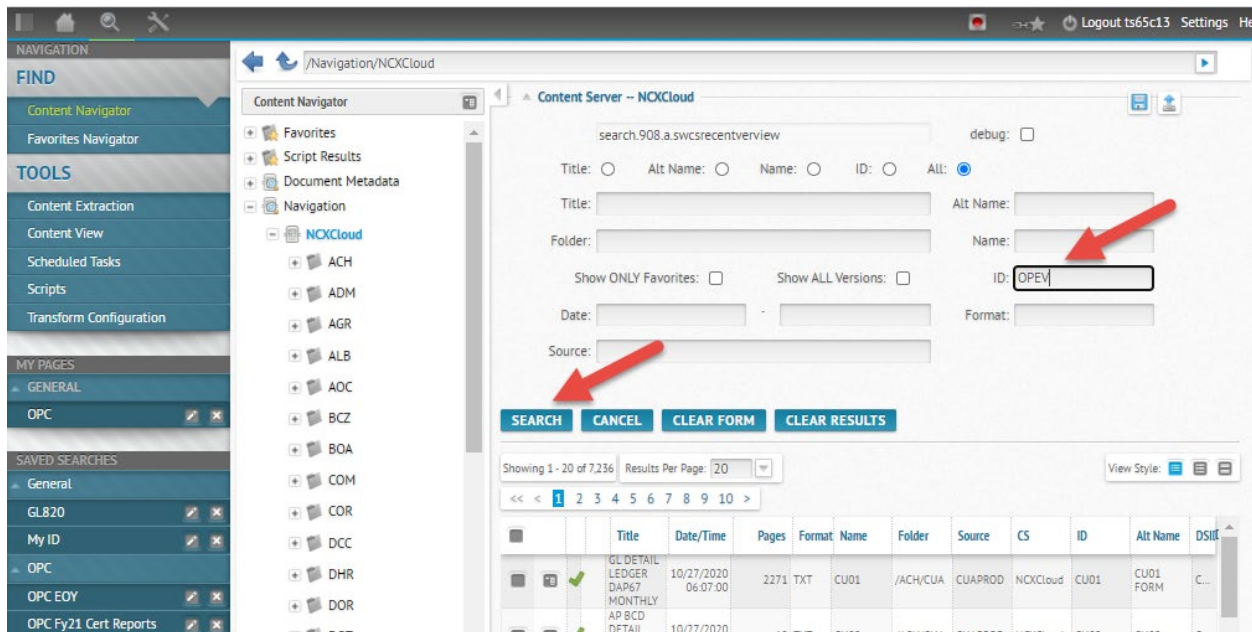
The first example for an agency on the P region, to print 1099-MISC forms.

The form ID we are using for 1099-MISC for P region is:

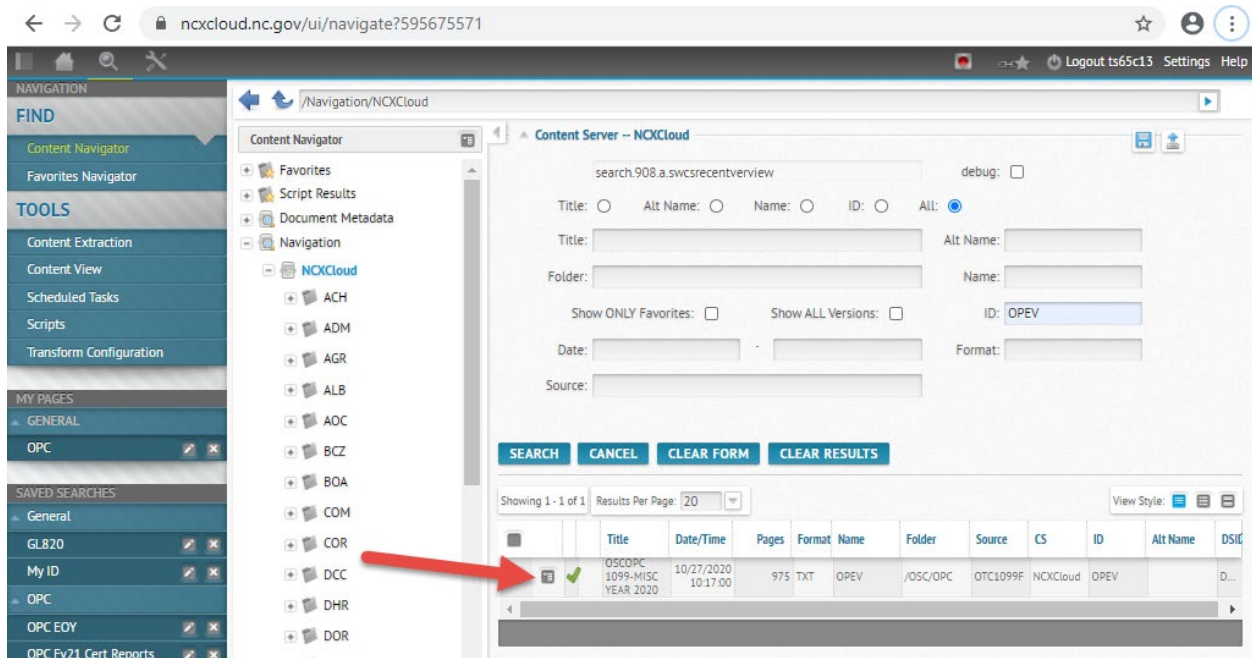
OPEV OSCOPC 1099-MISC YEAR 20XX

There are various methods to access reports in NCXCloud. These instructions use the most expeditious method.

Enter the form ID OPEV in the ID field. Then click on SEARCH.

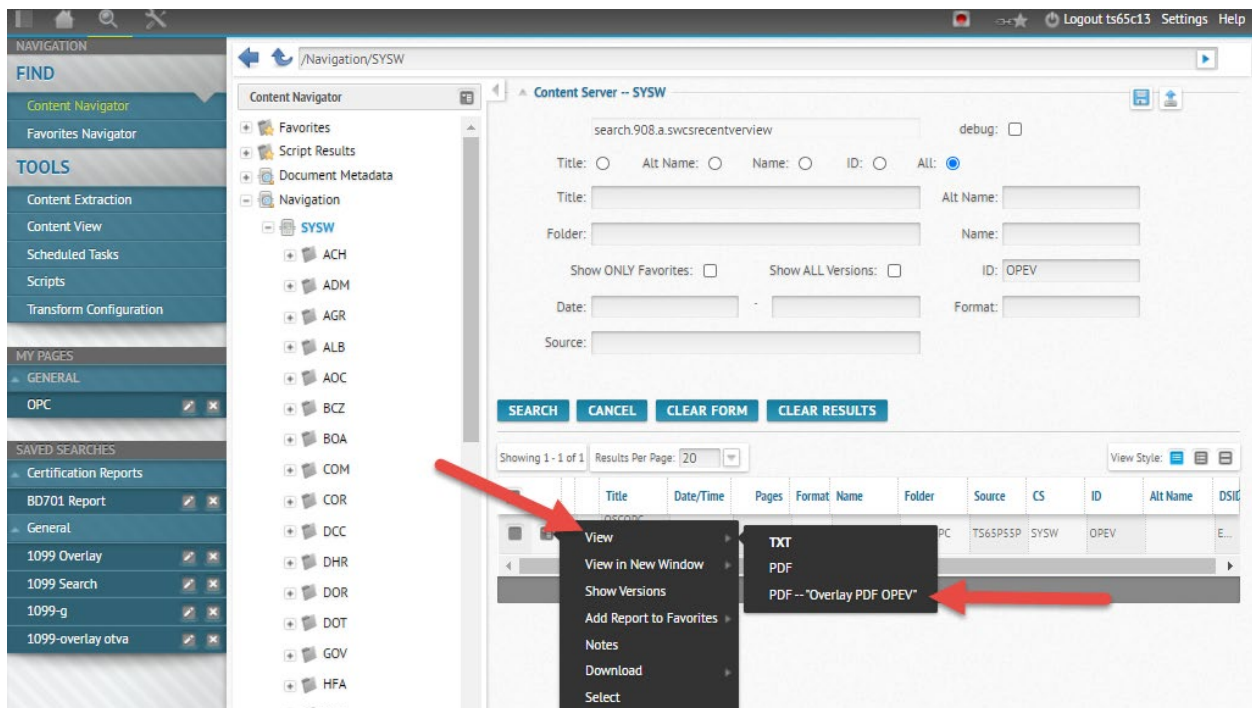


The report matching the form ID is displayed.



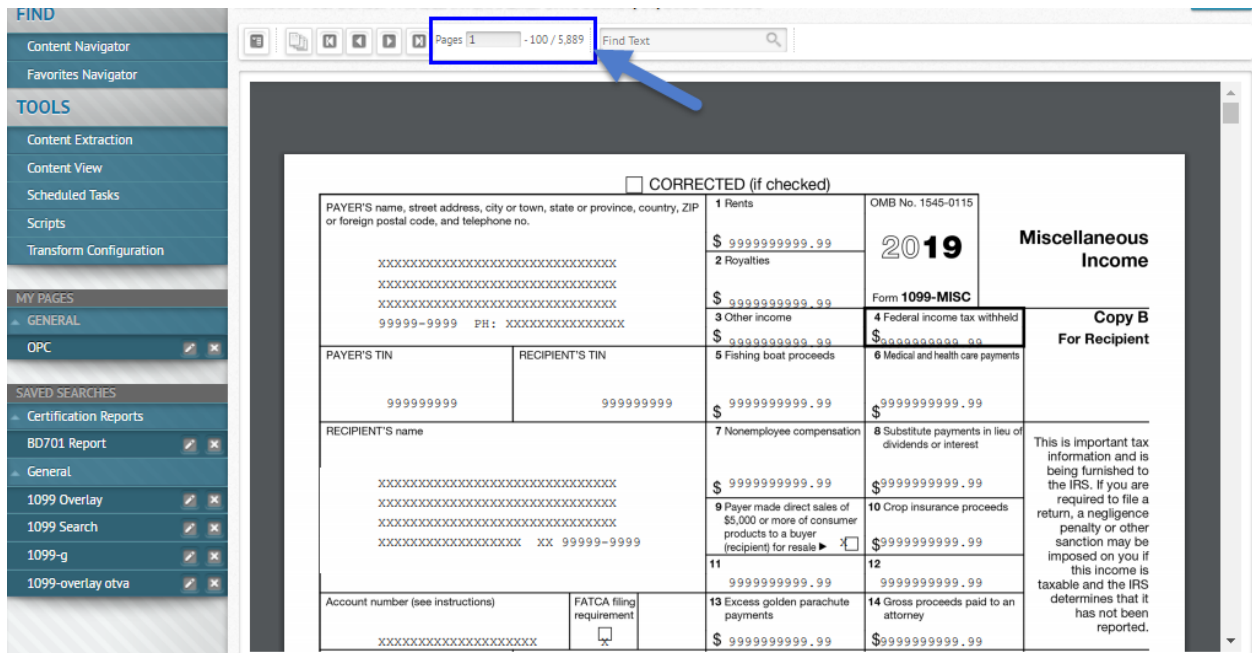
Once the report displays, click on the show menu to the left of the check mark. The first option is **VIEW**. Hover over the **VIEW** option and you see three options associated with **VIEW**. Select the option **PDF – “OVERLAY PDF OPEV.”**

NOTE: Be careful not to select “VIEW IN NEW WINDOW” option. The PDF overlay is only applicable to the standalone VIEW option.



The 1099-MISC data will appear within the PDF overlay form. This PDF form is now ready to print. The first two forms are dummy alignment forms.

The total number of 1099s is displayed at the top of the form. Below, it is circled in blue.



NOTE: It is a good idea to print at least one test form to ensure your printer will print acceptable forms. Make sure you have 8 1/2 x 11 paper, 1099 envelopes, and extra printer ink, if necessary.

BEFORE PRINTING, MAKE SURE YOU ARE PRINTING 1099s FOR THE CORRECT YEAR. THE FORM DISPLAYED IN NCXCLOUD SHOULD HAVE THE CORRECT YEAR. THE EXAMPLE ABOVE IS A PREVIOUS YEAR NOT THE CURRENT YEAR.

To print a TEST form, hover over the form. A printer icon will appear on the screen. Click the printer icon and a printer panel will open.

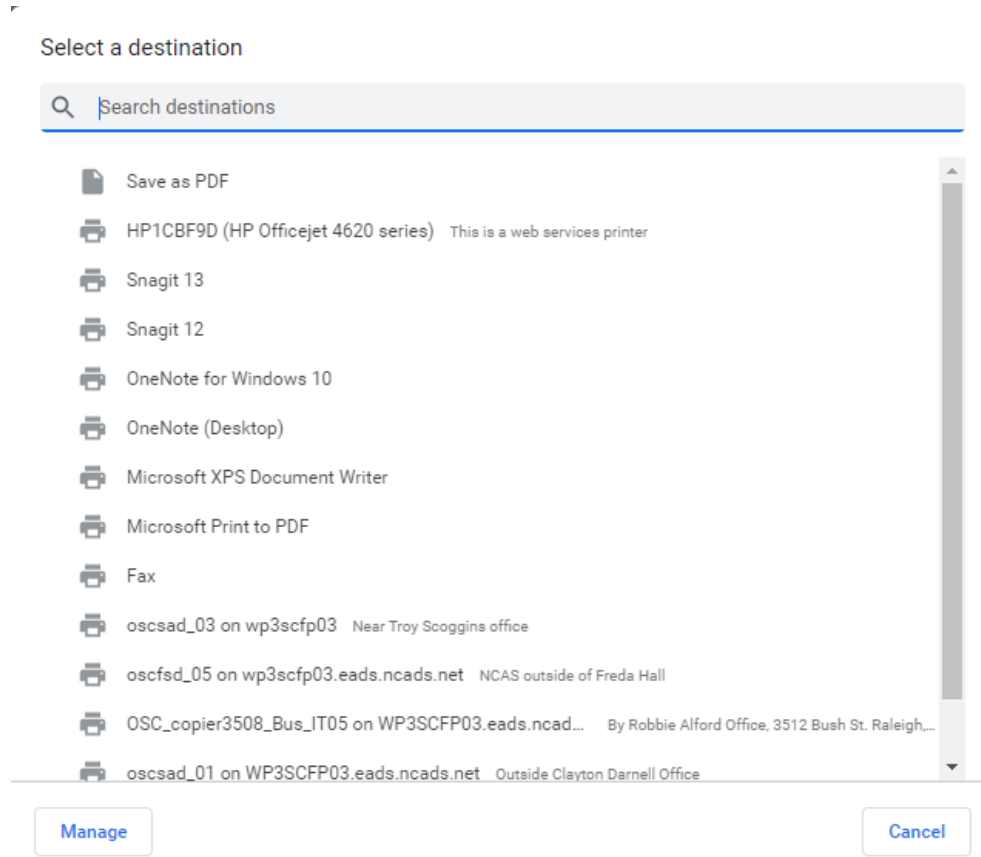
NOTE: The printer panels that will open may be dependent on the printers available.

The screenshot shows a web application interface for printing a 2019 Form 1099-MISC. On the left, there is a sidebar with sections: 'FIND' (Content Navigator, Favorites Navigator), 'TOOLS' (Content Extraction, Content View, Scheduled Tasks, Scripts, Transform Configuration), 'MY PAGES' (GENERAL, OPC), and 'SAVED SEARCHES' (Certification Reports, BD701 Report, General, 1099 Overlay, 1099 Search, 1099-g, 1099-overlay otva). The main content area displays the form with the following details:

- Form Title: 1 - VER_55 - 20201016T133000.000-0400 - DSID_D6... 1 / 100
- Form Type: 2019 Form 1099-MISC
- Section: Miscellaneous Income
- Copy B For Recipient
- Form Status: CORRECTED (if checked)
- PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. (Redacted with XXXXXXXXXXXXXXXXXXXXXXXXXXXX)
- PAYER'S TIN: 999999999
- RECIPIENT'S TIN: 999999999
- RECIPIENT'S name (Redacted with XXXXXXXXXXXXXXXXXXXXXXXXXXXX)
- Account number (see instructions): XXXXXXXXXXXXXXXXXXXX
- FATCA filing requirement:
- Income Categories and Amounts:
 - 1 Rents: \$ 999999999.99
 - 2 Royalties: \$ 999999999.99
 - 3 Other income: \$ 999999999.99
 - 4 Federal income tax withheld: \$ 999999999.99
 - 5 Fishing boat proceeds: \$ 999999999.99
 - 6 Medical and health care payments: \$ 999999999.99
 - 7 Nonemployee compensation: \$ 999999999.99
 - 8 Substitute payments in lieu of dividends or interest: \$ 999999999.99
 - 9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale: \$ 999999999.99
 - 10 Crop insurance proceeds: \$ 999999999.99
 - 11: \$ 999999999.99
 - 12: \$ 999999999.99
 - 13 Excess golden parachute payments: \$ 999999999.99
 - 14 Gross proceeds paid to an attorney: \$ 999999999.99
- Disclaimer: This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligent penalty or other sanction may be imposed on you if this income taxable and the IRS determines that it has not been reported.

The first item on most printer panels is the DESTINATION. This is the printer where the 1099s will print. Remember, 1099s contain PII data. Make sure once they print, someone is available to secure them until mailing.

NOTE: The destinations available will be unique to your PC and agency. This is just a sample of the destination screen displayed for the PC used for these instructions.



The second item on the printer panel is the number of pages. For this test print, change the number of pages to 1.

The third item is the number of copies. Leave it at 1.

NOTE: Before clicking print, change the number of pages to 1.

The screenshot shows a web browser window displaying a 1099-MISC form for the year 2019. The form is titled "Miscellaneous Income" and includes fields for payer and recipient information, various income categories (1-18), and a "CORRECTED" checkbox. To the right of the form is a print dialog box. The print dialog shows "1 sheet of paper" and "Destination: HP1CBF9D (HP Office)". The "Pages" field is set to "1" and the "Copies" field is set to "1". A red arrow points to the "Pages" field, and another red arrow points to the "Print" button at the bottom right of the dialog.

There may be additional options available for your printer. The most important options are the destination and number of pages.

Once these are set, click Print. One test print form should now print on the selected printer.

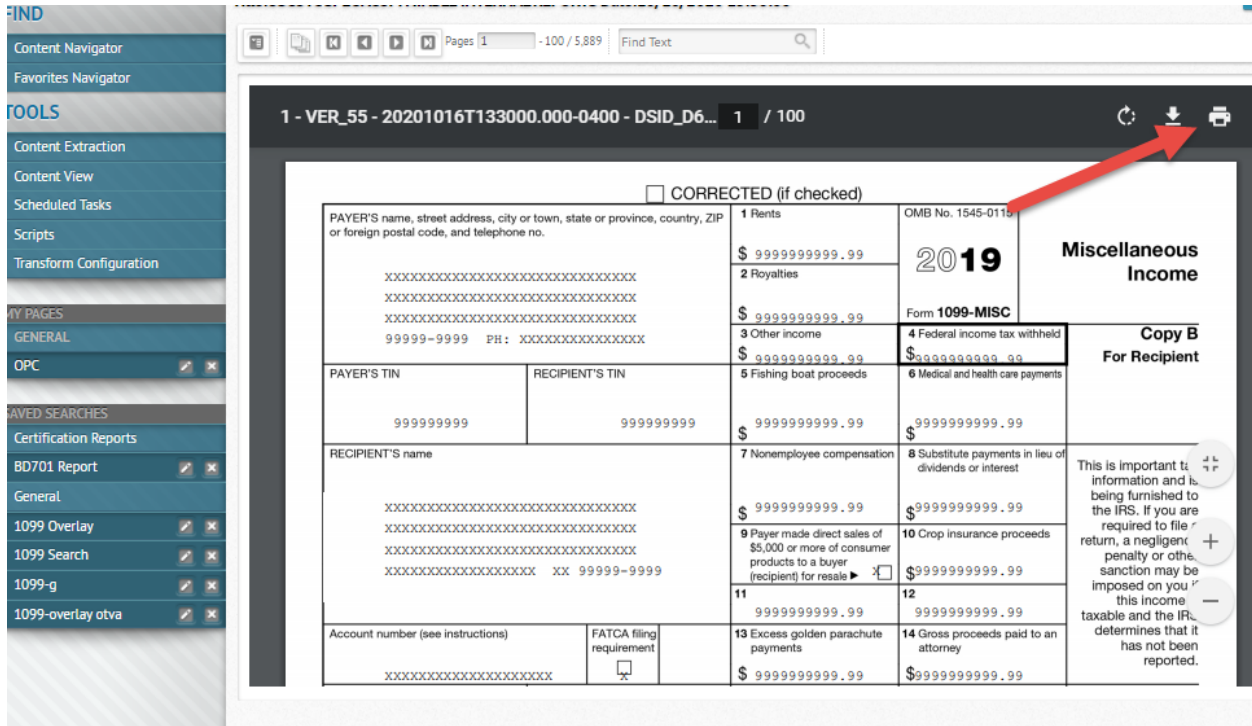
Retrieve the printed 1099 form. Fold in half and insert into the 1099 envelope. Ensure the agency address is aligned in the “return to” window and the vendor’s address is aligned in the “send to” window.

If the test 1099 print is successful, you are now ready to print all your 1099s.

Once you print (or cancel), you should be back on the VIEW PDF OVERLAY page.

The process is the same as printing a test page.

Hover over the form until a printer is displayed.



Make sure you have enough paper available for the number of forms you are printing. Remember, the total number of forms that are available to print is displayed at the top. The printer panel will open. Change the destination to the selected printer you have chosen to print 1099s.

BEFORE PRINTING, MAKE SURE YOU ARE PRINTING 1099s FOR THE CORRECT YEAR. THE FORM ITSELF SHOULD HAVE THE CORRECT YEAR.

To print all forms, leave the Pages option set to All. Click Print.

CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, zip or foreign postal code, and telephone no. DEPARTMENT OF PUBLIC SAFETY 2020 YORKERS RD RALEIGH NC 27604 PH: (919) 324-1081		1 Rents \$	OMB No. 1545-0118 2019 Miscellaneous Income Form 1099-MISC
PAYER'S TIN 30-0712287		3 Other income \$	4 Federal income tax withheld \$
RECIPIENT'S TIN 318961		5 Fishing boat proceeds \$	6 Medical and health care payments \$
RECIPIENT'S name DARWIN JERMAINE FREEMAN 4501 JOE COTTON DRIVE HIGHTSTABLE NC 27604		7 Nonemployee compensation \$ 1,697.00	8 Substitute payments in lieu of dividends or interest \$
Account number (see instructions) 2199E 318961		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 \$
FATCA filing requirement <input type="checkbox"/>		11 Excess golden parachute payments \$	12 Gross proceeds paid to an attorney \$
15a Section 408a deferrals \$		13 State tax withheld \$	14 Gross proceeds paid to an attorney \$
15b Section 408a income \$		16 State tax withheld \$	17 State/Payer's state no. \$
18 State income \$		19 State income \$	

Form 1099-MISC (keep for your records) www.irs.gov/Form1099MISC Department of the Treasury - Internal Revenue Service

Instructions for Recipient

Recipient's taxpayer identification number (TIN). For your protection, this form may show only the last four digits of your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employee identification number (EIN). However, the payer has reported your complete TIN to the IRS.

Account number. May show an account or other unique number the payer assigned to distinguish your account.

FATCA filing requirement. If the FATCA filing requirement box is checked, the payer is reporting on this Form 1099 to satisfy its chapter 4 account reporting requirement. You also may have a filing requirement. See the instructions for Form 8878.

Amounts shown may be subject to self-employment (SE) tax. If your net income from self-employment is \$400 or more, you must file a return and compute your SE tax on Schedule SE (Form 1040). See Pub. 334 for more information. **Note:** If you are still receiving payments on which no income, social security, and Medicare taxes are withheld, you should make estimated tax payments. See Form 1040-ES (or Form 1040-ES-INT). Individuals must report these amounts as explained in the box 7 instructions on this page. Corporations, fiduciaries, or partnerships must report the amounts on the proper line of their tax returns.

Form 1099-MISC incorrect? If this form is incorrect or has been issued in error, contact the payer. If you cannot get the form corrected, attach an explanation to your tax return and report your income correctly.

Box 1. Report rents from real estate on Schedule E (Form 1040). However, report rents on Schedule C (Form 1040) if you provided significant services to the tenant, and real estate is a business, or rented personal property as a business. See Pub. 527.

Box 2. Report royalties from oil, gas, or mineral properties, copyrights, and patents on Schedule E (Form 1040). However, report payments for a working interest as explained in the box 7 instructions. For royalties on timber, coal, and iron ore, see Pub. 544.

Box 3. Generally, report this amount on the "Other income" line of Schedule 1 (Form 1040) or Form 1040NR and identify the payment. The amount shown may be payments received as the beneficiary of a deceased employee, prize, awards, taxable damages, Indian gaming profits, or other taxable income. See Pub. 525. If it is trade or business income, report this amount on Schedule C or F (Form 1040).

Box 4. Shows backup withholding or withholding on Indian gaming profits. Generally, a payer must backup withhold if you did not furnish your TIN. See Form W-9 and Pub. 555 for more information. Report this amount on your income tax return as tax withheld.

Box 5. An amount in this box means the fishing boat operator considers you self-employed. Report this amount on Schedule C (Form 1040). See Pub. 334.

Box 6. For individuals, report on Schedule C (Form 1040).

Box 7. Shows nonemployee compensation. If you are in the trade or business of catching fish, box 7 may show cash you received for the sale of fish. If the amount in this box is SE income, report it on Schedule C or F (Form 1040), and complete Schedule SE (Form 1040). You received this form instead of Form W-2 because the payer did not consider you an employee and did not withhold income tax or social security and Medicare tax. If you believe you are an employee and cannot get the payer to correct this form, report this amount on the line for "Wages, salaries, tips, etc." of Form 1040 (or Form 1040NR). You also must complete Form 8878 and attach it to your return. If you are not an employee but the amount in this box is not SE income (for example, it is income from a sporadic activity or a hobby), report this amount on the "Other income" line of Schedule 1 (Form 1040) or Form 1040NR.

Box 8. Shows substitute payments in lieu of dividends or tax-exempt interest received by your broker on your behalf as a result of a loan of your securities. Report on the "Other income" line of Schedule 1 (Form 1040) or Form 1040NR.

Box 9. If checked, \$5,000 or more of sales of consumer products was paid to you on a buy-sell, goods/commission, or other basis. A dollar amount does not have to be shown. Generally, report any income from your sale of these products on Schedule C (Form 1040).

Box 10. Report this amount on Schedule F (Form 1040).

Box 13. Shows your total compensation of excess golden parachute payments subject to a 20% excise tax. See the Form 1040 (or Form 1040NR) instructions for where to report.

Box 14. Shows gross proceeds paid to an attorney in connection with legal services. Report only the taxable part as income on your return.

Box 15a. May show current year deferrals as a nonemployee under a nonqualified deferred compensation (NQDC) plan that is subject to the requirements of section 408A, plus any earnings on current and prior year deferrals.

Box 15b. Shows income as a nonemployee under an NQDC plan that does not meet the requirements of section 408A. This amount also is included in box 7 as nonemployee compensation. Any amount included in box 15a that is currently taxable also is included in this box. This income also is subject to a substantial additional tax to be reported on Form 1040 (or Form 1040NR). See the Form 1040 (or Form 1040NR) instructions.

Boxes 16-18. Show state or local income tax withheld from the payments.

Future developments. For the latest information about developments related to Form 1099-MISC and its instructions, such as legislation enacted after they were published, go to www.irs.gov/Form1099MISC.

Print 100 sheets of paper

Destination HP1CBF9D (HP Office)

Pages All

Copies 1

Color Black and white

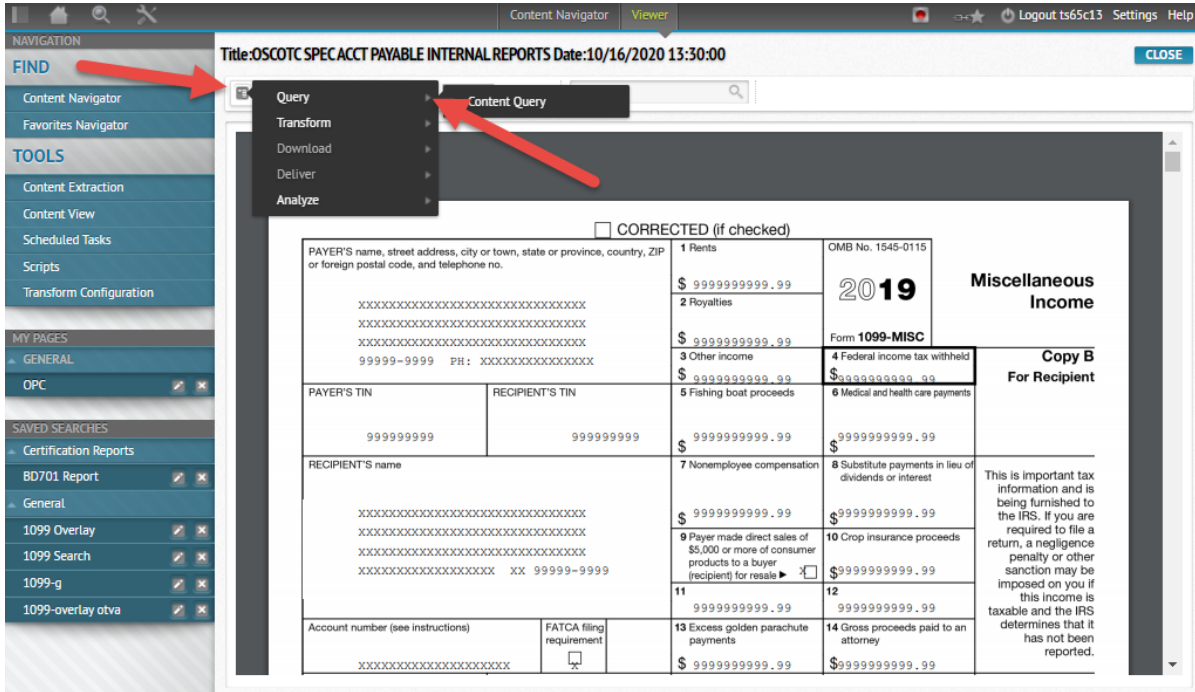
More settings

Print Cancel

If a reprinted 1099 is needed for a lost or damaged form, use the following instructions:

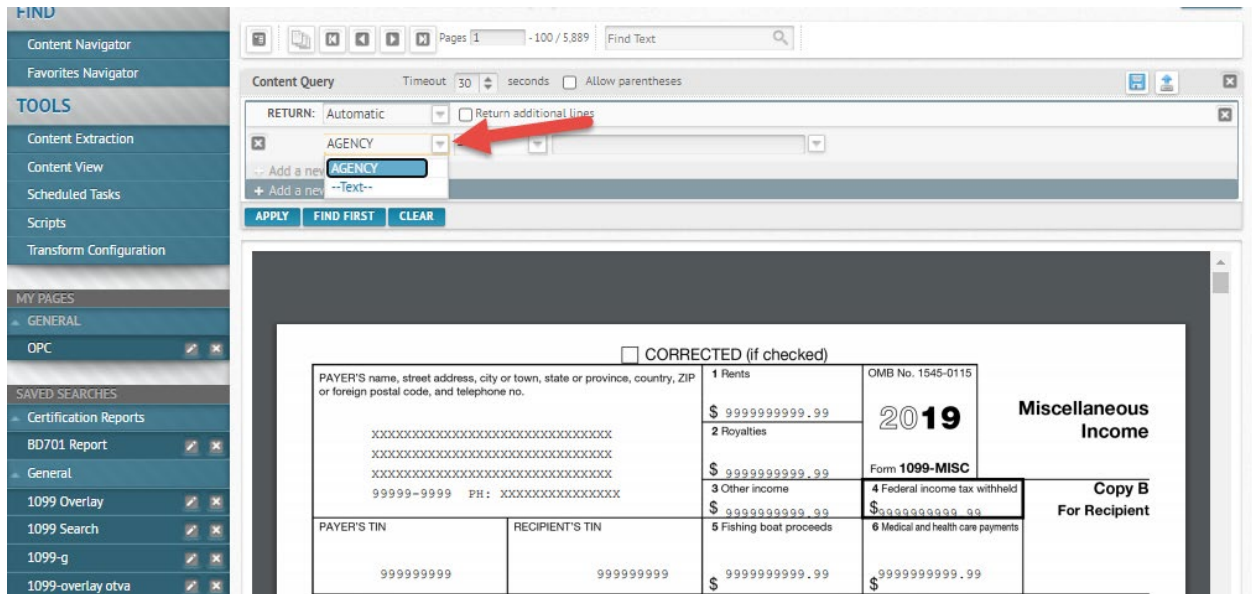
Follow the instructions to display the form in VIEW PDF OVERLAY.

Find the ACTION menu in the upper left of the form. Click on Query.

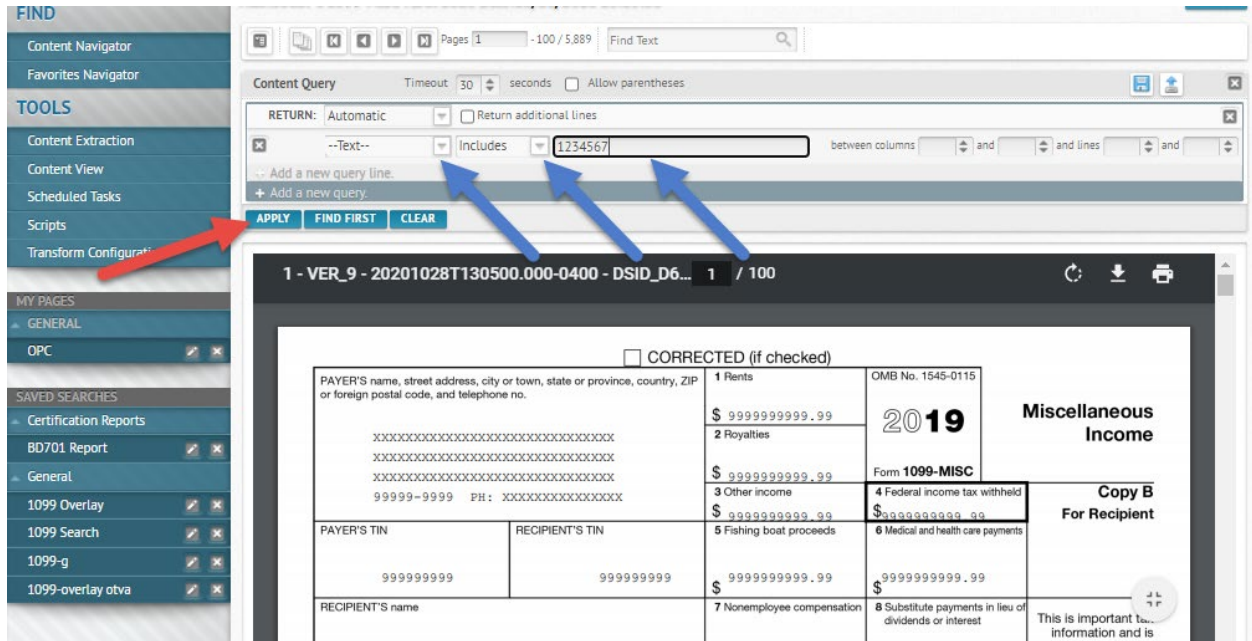


Once you click on Query, a Query panel is displayed. The index, "AGENCY," will display but to search for a Social Security number, we will use a TEXT query.

Click the dropdown box and you will see AGENCY and TEXT. Select TEXT.



The next box contains the function - Include and Excludes. Select Includes. In the last field, input the recipient’s TIN number, vendor name, vendor number, or any text that needs to be searched. After entering the criteria, click APPLY. NCXCloud will search for a form(s) matching your criteria.



All forms that match the criteria are presented. To print, hover over the form until the printer icon is displayed. ALWAYS check the number of pages before clicking PRINT. When finished, click CLOSE in the upper right-hand side of the screen.

If you have any questions, please contact Support Services at OSC.Support.Services@osc.nc.gov.

Change Log

- Effective 8/25/2021- Updated Form Location Regions. -S.Fields
- Effective 9/13/2021- Updated Note Text Format. -L.Lee
- Effective 1/26/2022- Corrected Error OFAY to OFAX for 1099 Printing instructions from the P region.-L.Lee