The purpose of this job aid is to explain how to print Calendar Year 2022 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 2022. 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

OPE1	OSCOPC 1099-G YEAR 2022
OPE2	OSCOPC 1099-MISC YEAR 2022
OPE3	OSCOPC 1099-NEC YEAR 2022

F Region

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OFE1	OSCOPF 1099-G YEAR 2022
OFE2	OSCOPF 1099-MISC YEAR 2022
OFE3	OSCOPF 1099-NEC YEAR 2022
OFE4	OSCOPF 1099-NEC YEAR 2022- 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.
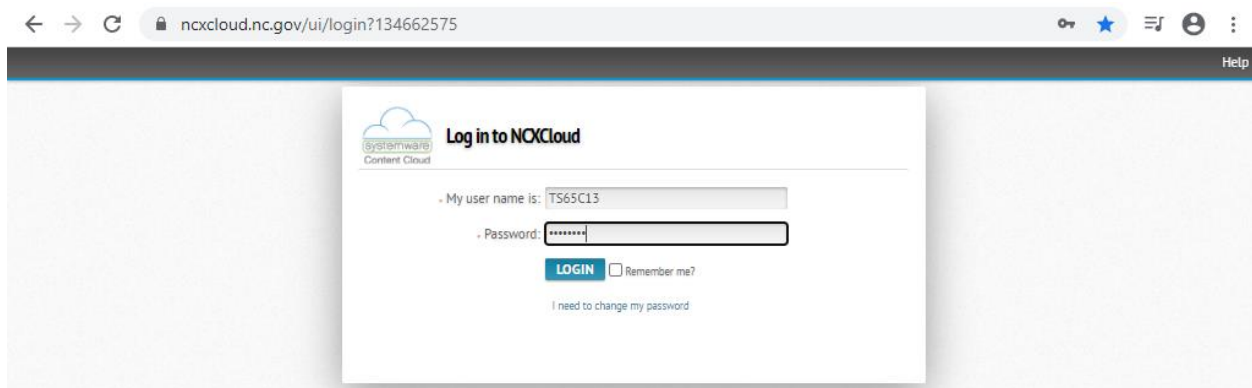
To begin, sign on to the state VPN. Access your internet browser. These instructions use Chrome as the browser.

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.
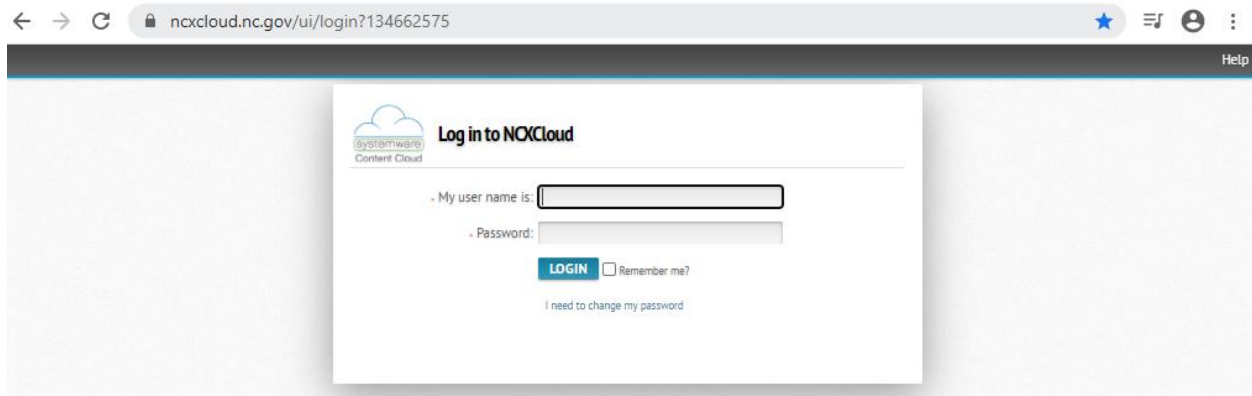

Your RACF ID and password are used to sign into NCxCloud. Press ENTER.

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.
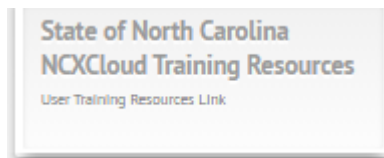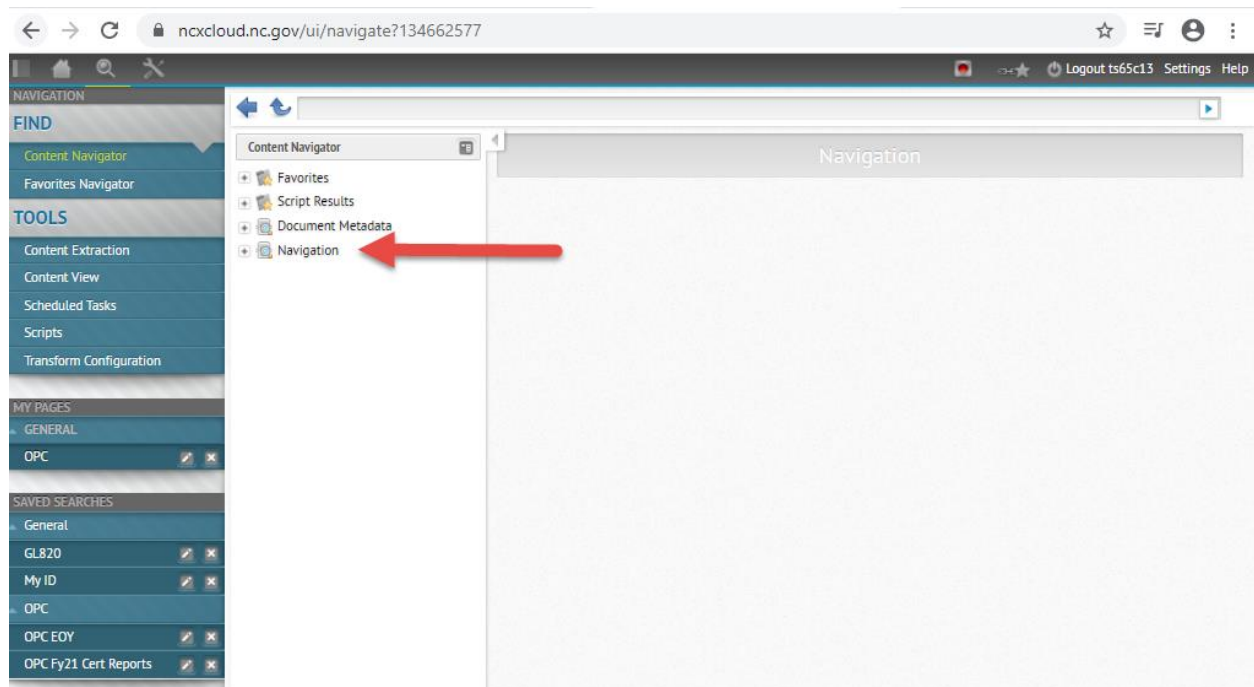
From your home page, click on the navigation direction for Content Navigator.
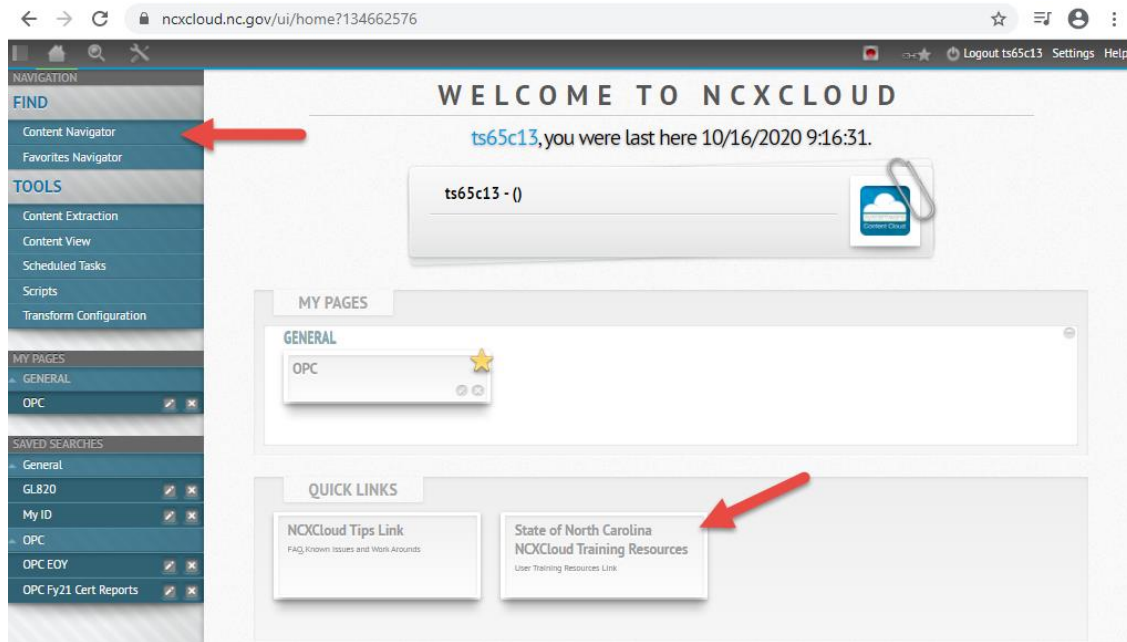
The Content Navigation panel opens. From here, click on the word Navigation.

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

The high level NCXCloud directory will display.
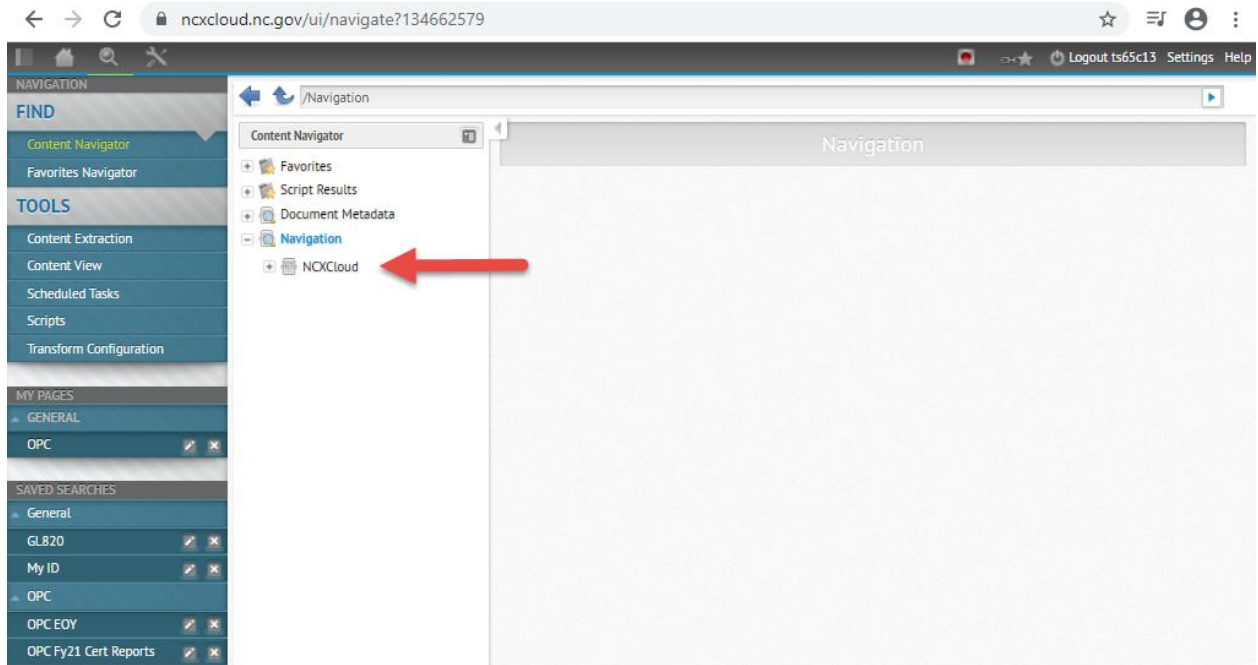
To access the agency directories, click on the word NCXCloud. Various directories may display. You will be able to view on the directories for which you have security. This document uses OSC's directories. The right side on the screen now displays a SEARCH panel. You can go directly to the reports by using this SEARCH panel.
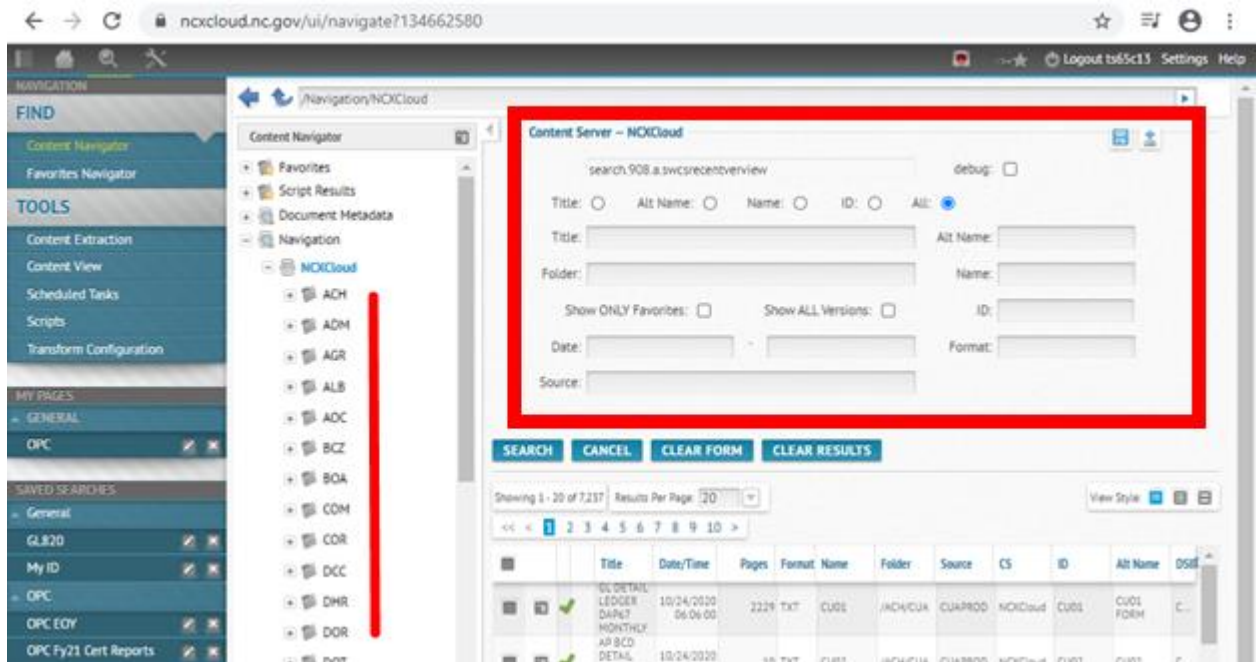
These instructions will access the 1099 forms by using the form ID. **At the beginning of this document, the form IDs were listed for 2022 1099 processing.**

THESE INSTRUCTIONS WILL GIVE AN EXAMPLE USING FORMS CREATED FOR TESTING. MAKE SURE YOU SELECT <u>2022 FORMS</u> 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.
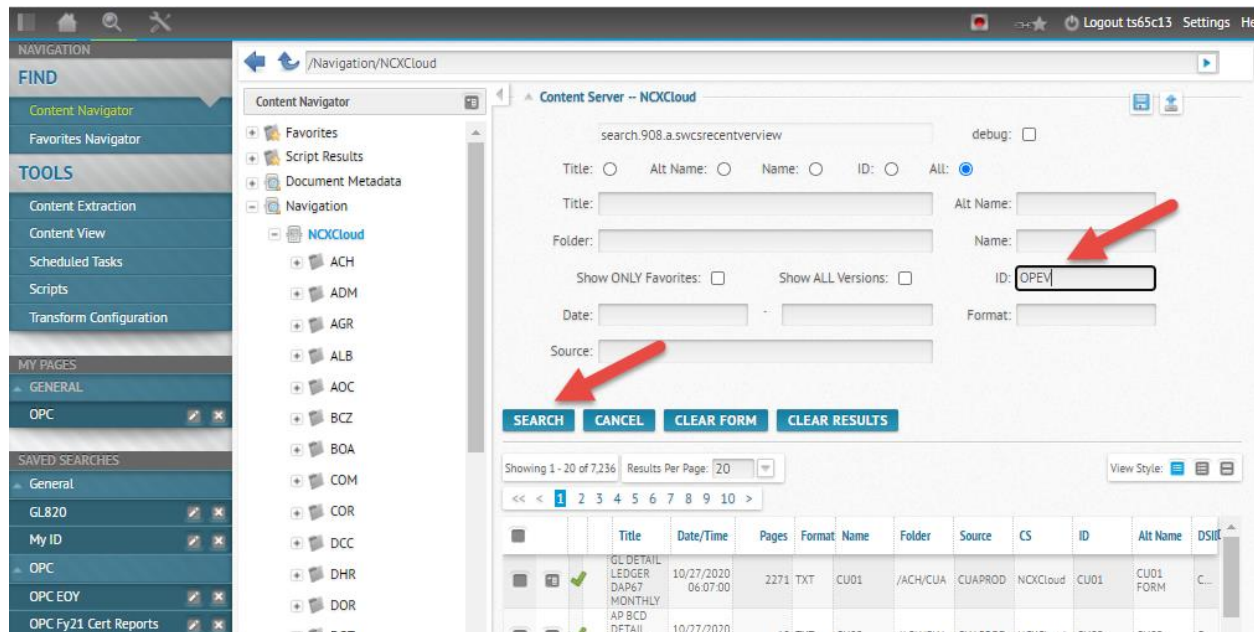
The report matching the form ID is displayed.
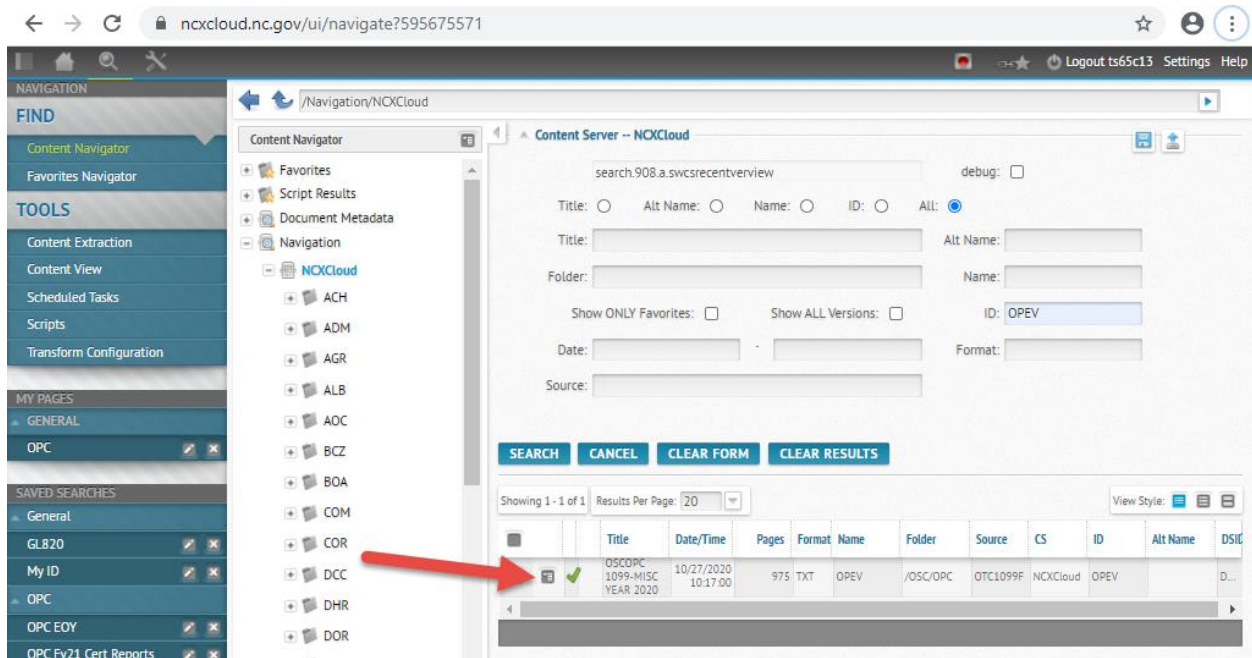
Once the report displays, click on the show menu to the left of the check mark. The first option is **VIEW**. Hover over the VIEW option and you see three options associated with **VIEW**. Select the option **PDF – "OVERLAY PDF OPEV."**

NOTE: Be careful not to select "VIEW IN NEW WINDOW" option. The PDF overlay is only applicable to the standalone VIEW option.
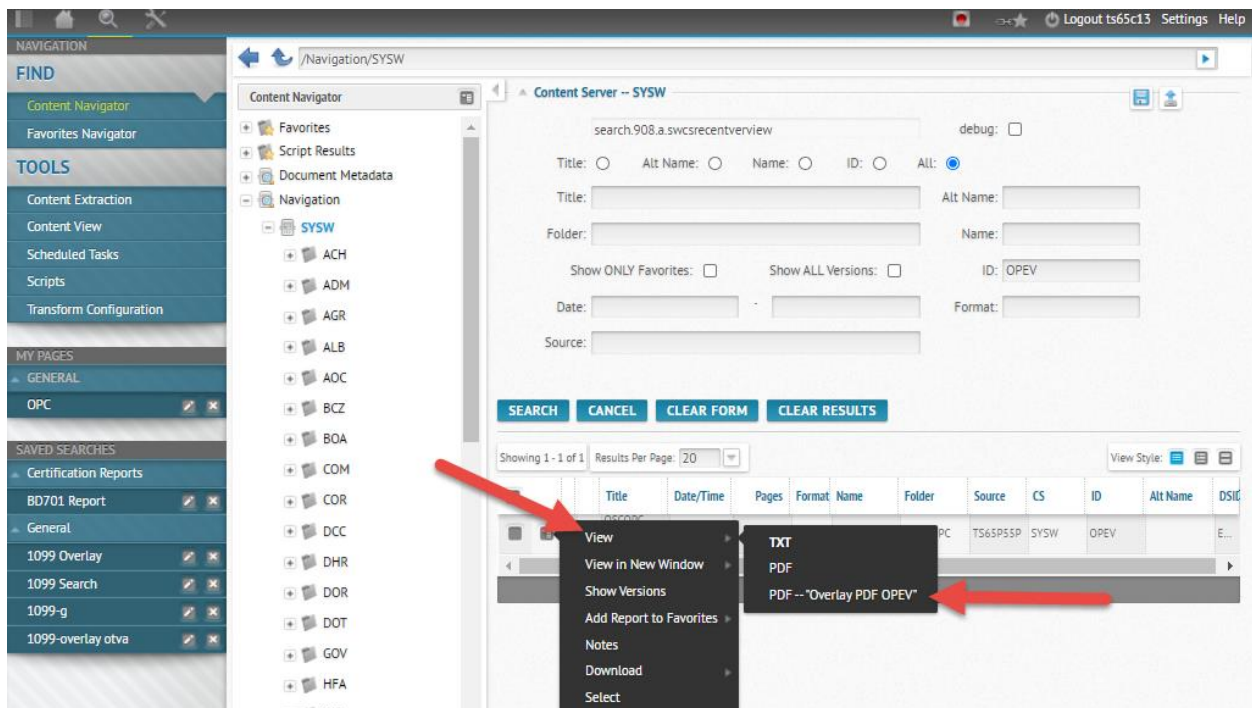
The 1099-MISC data will appear within the PDF overlay form. This PDF form is now ready to print. The first two forms are dummy alignment forms.

The total number of 1099s is displayed at the top of the form. Below, it is circled in blue.
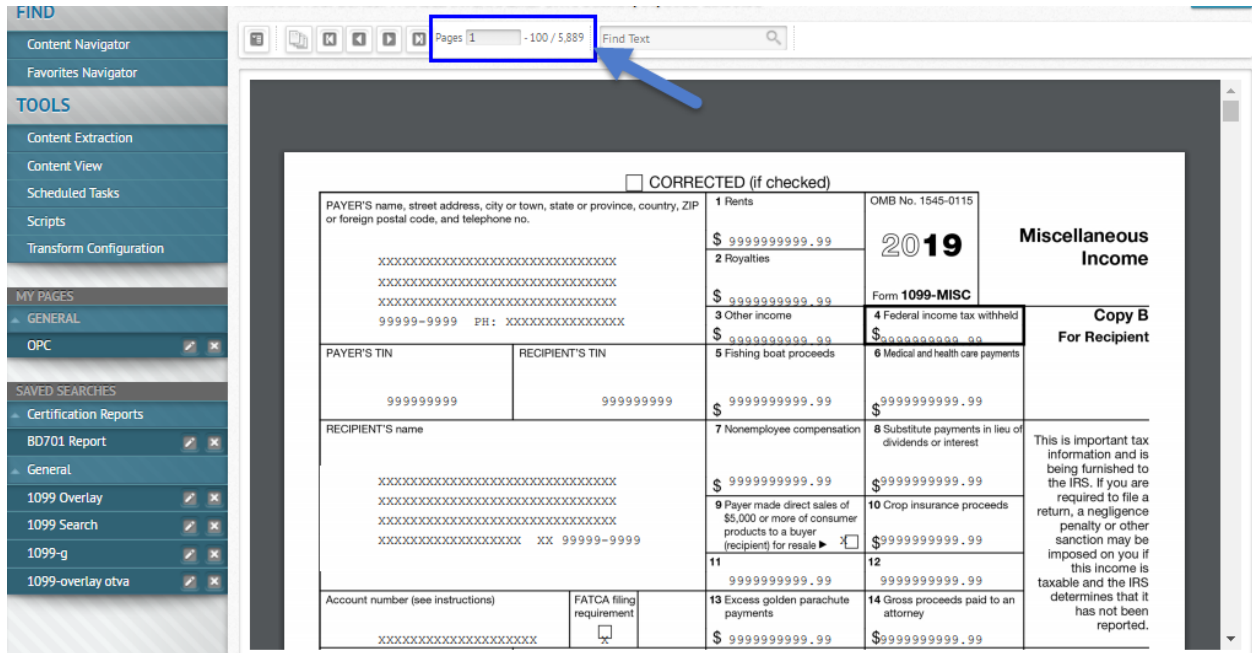
NOTE: It is a good idea to print at least one test form to ensure your printer will print acceptable forms. Make sure you have 8 1/2 x 11 paper, 1099 envelopes, and extra printer ink, if necessary.

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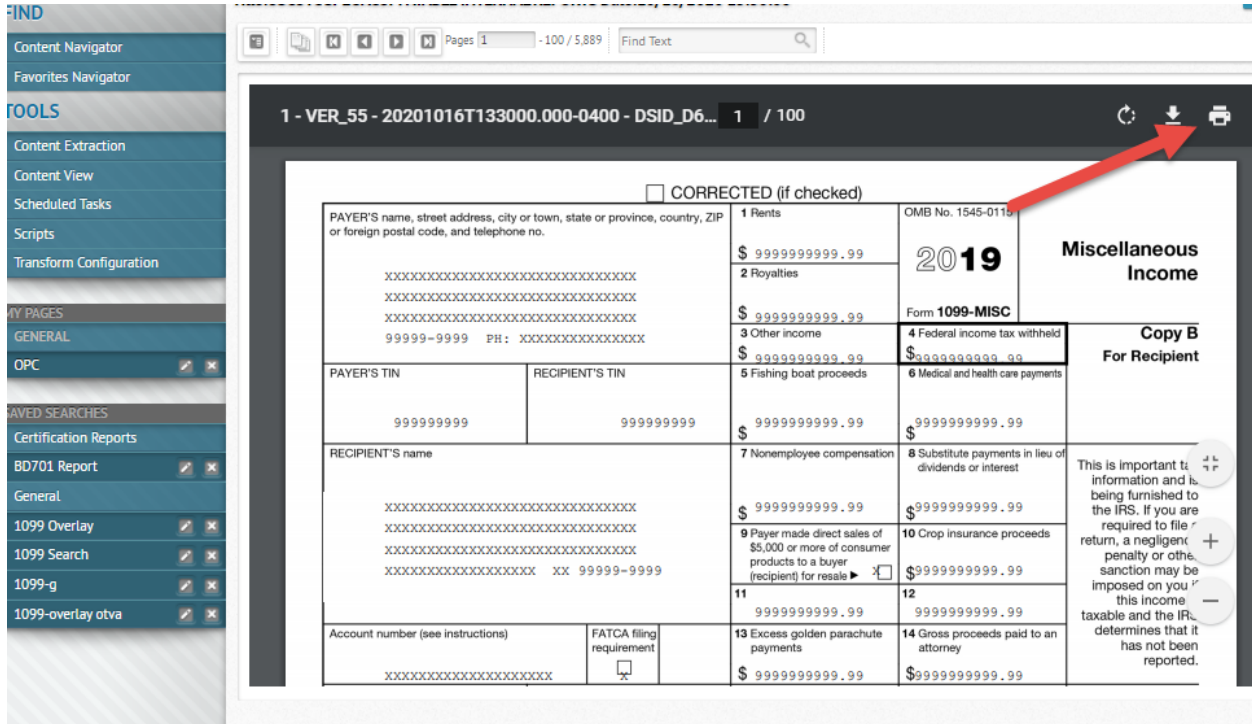
The first item on most printer panels is the DESTINATION. This is the printer where the 1099s will print. Remember, 1099s contain PII data. Make sure once they print, someone is available to secure them until mailing.

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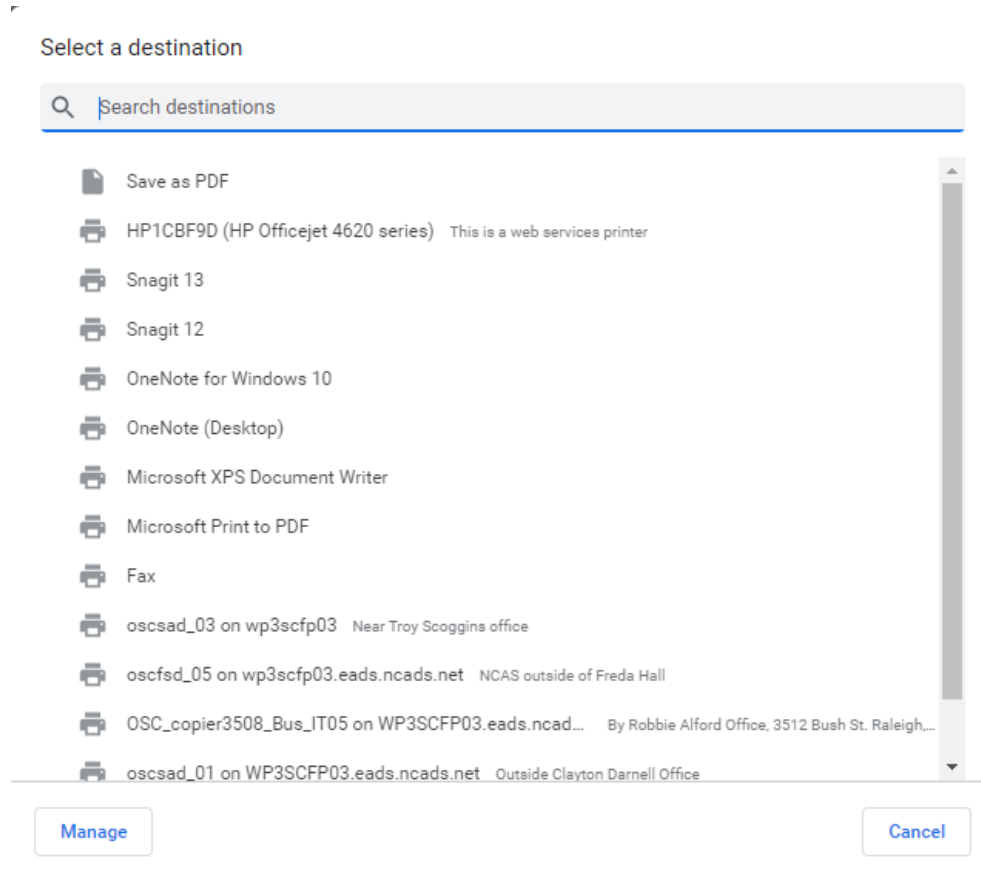
The second item on the printer panel is the number of pages. For this test print, change the number of pages to 1.

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

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

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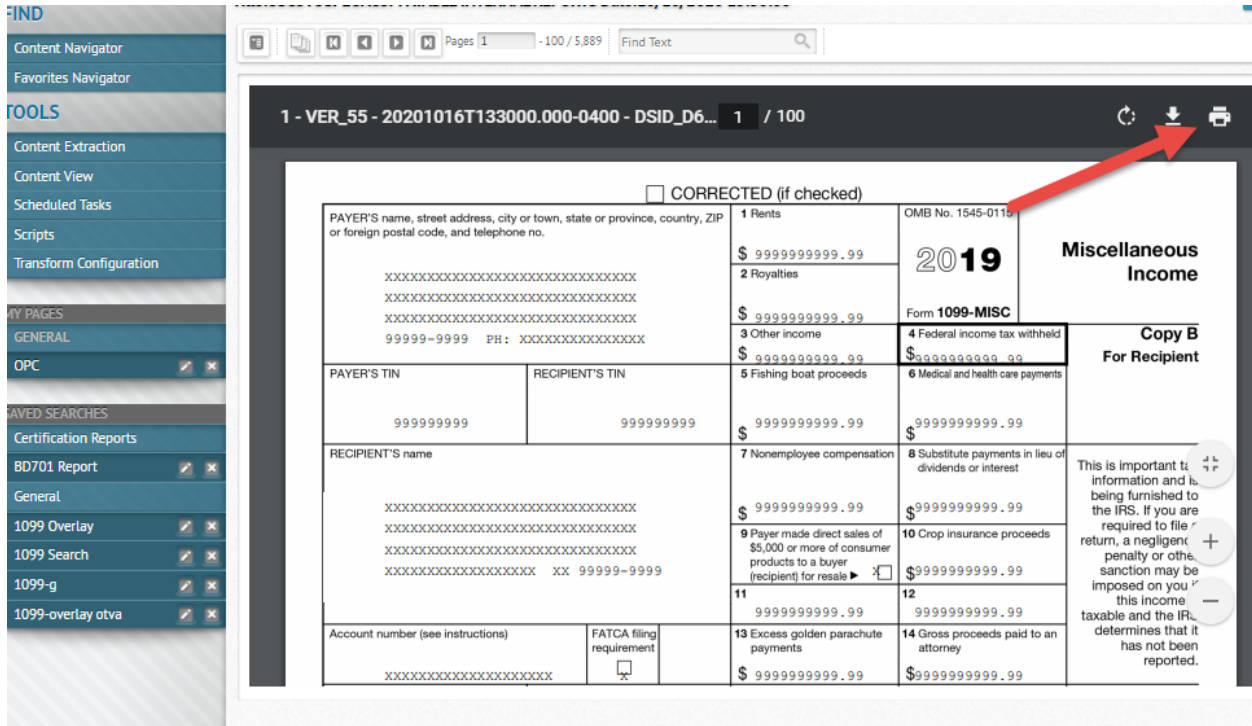
Make sure you have enough paper available for the number of forms you are printing. Remember, the total number of forms that are available to print is displayed at the top. The printer panel will open. Change the destination to the selected printer you have chosen to print 1099s.

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.
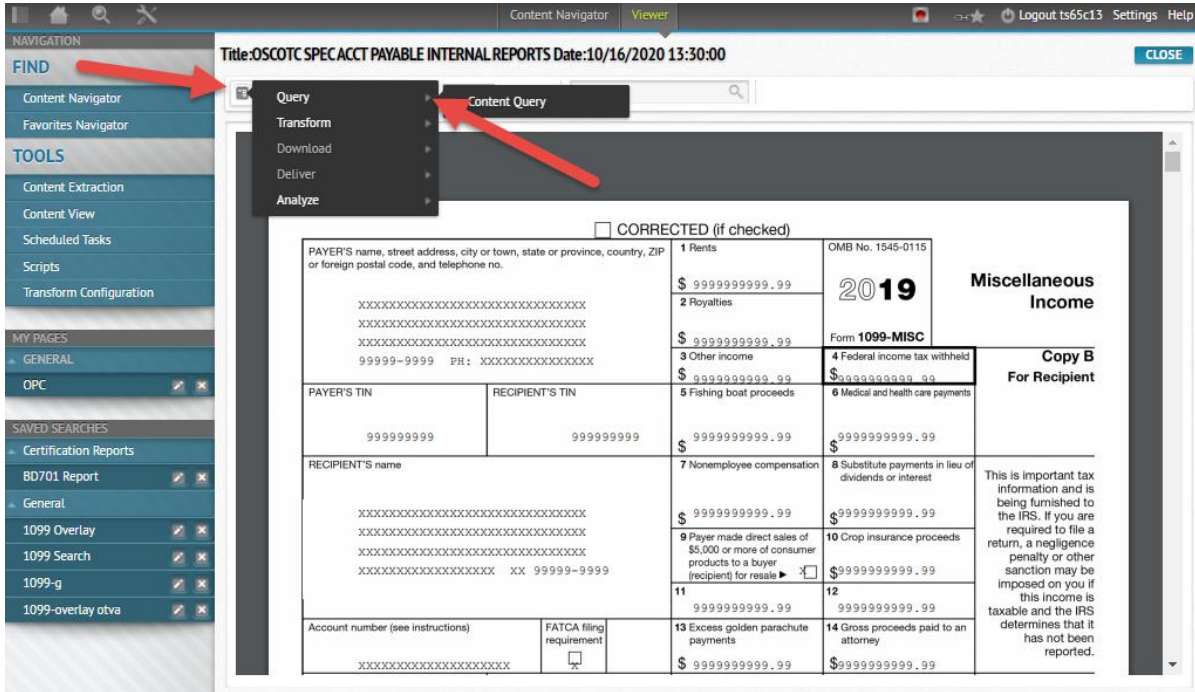
If a reprinted 1099 is needed for a lost or damaged form, use the following instructions:
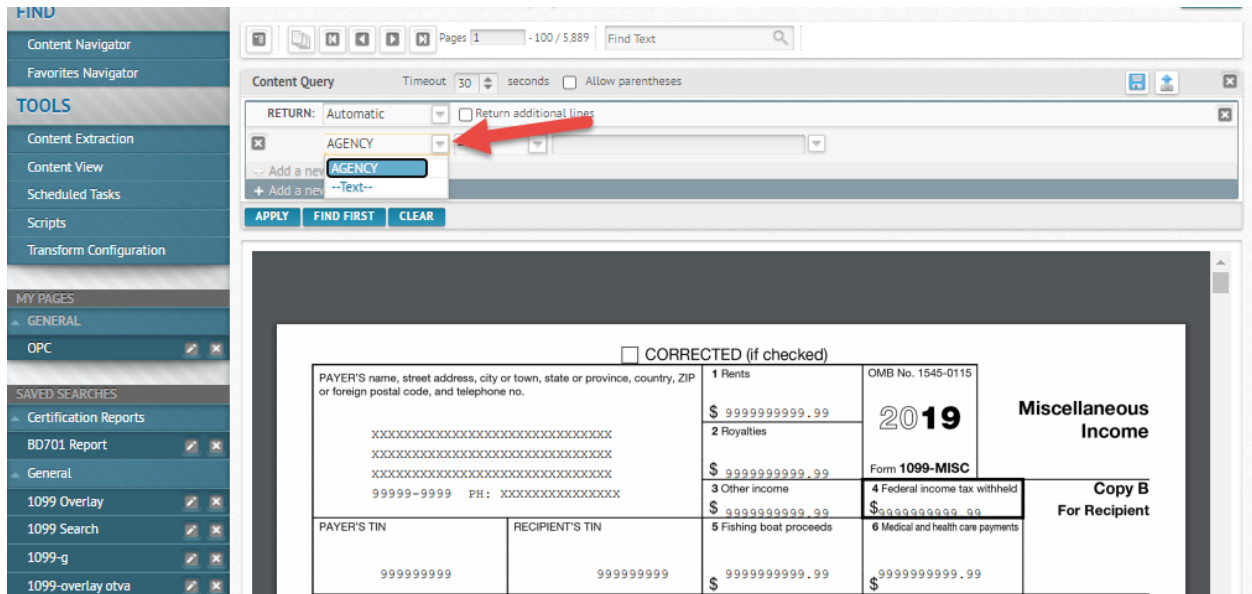
Follow the instructions to display the form in VIEW PDF OVERLAY.

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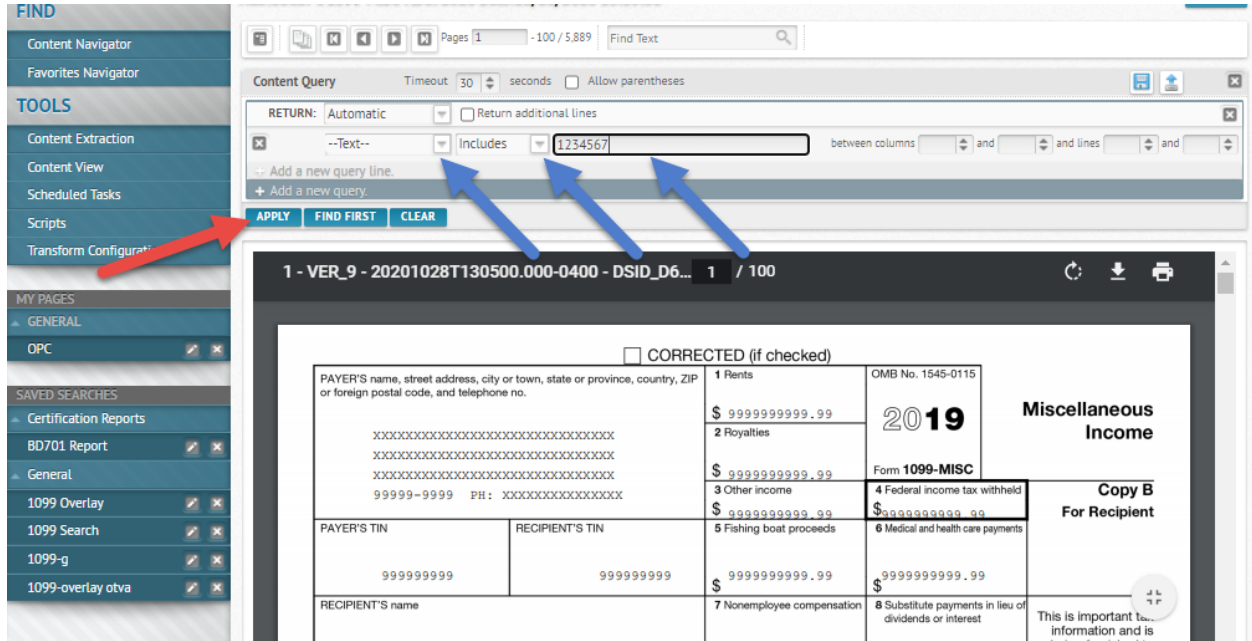
All forms that match the criteria are presented. To print, hover over the form until the printer icon is displayed. ALWAYS check the number of pages before clicking PRINT. When finished, click CLOSE in the upper right-hand side of the screen.

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