

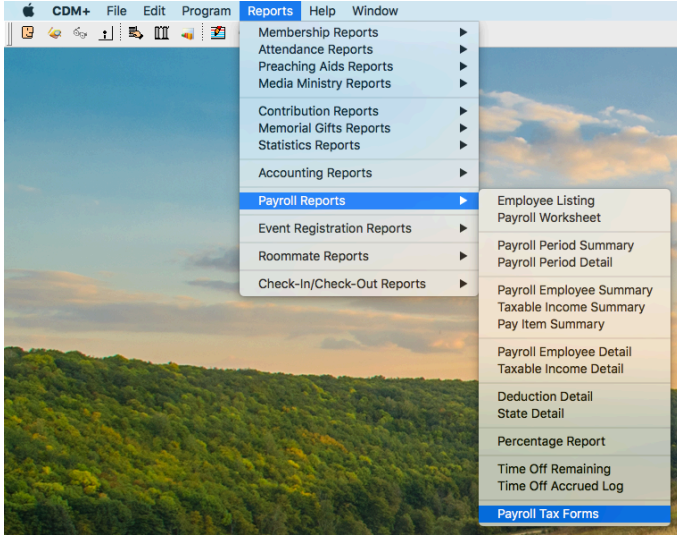
# 1099 Reports

Created by Alex Clay on Dec 28, 2015

CDM+ 9.3 and CDM+ 9.1 now use the Aatrix Forms viewer to display vendor 1099s.

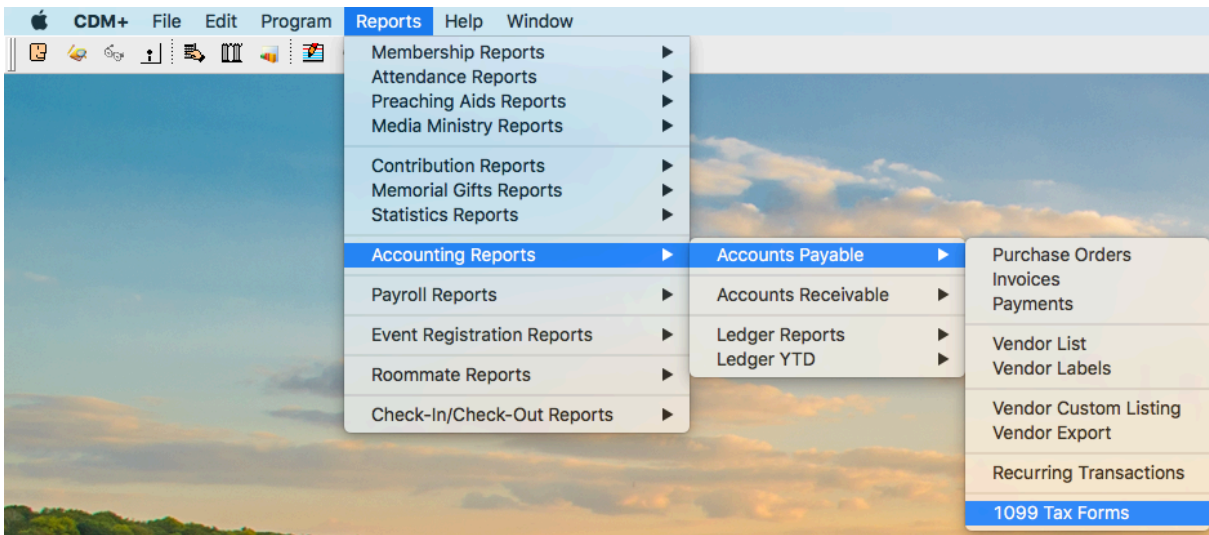
## Payroll Tax Forms

To differentiate between the previous Aatrix integration for payroll forms and the 1099 tax forms, the menu item to access payroll tax forms has changed from **Tax Forms** to **Payroll Tax Forms**.

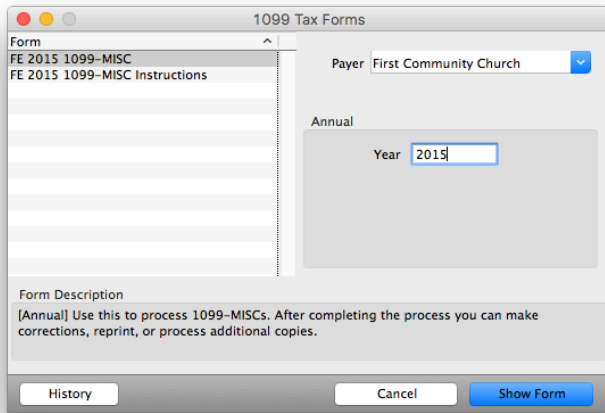


## 1099 Tax Forms

A new menu option is available under **Reports -> Accounting Reports -> Accounts Payable -> 1099 Tax Forms**.




This option replaces the Vendor 1099 report available in previous versions of CDM+.



To produce 1099s, select the 1099-MISC form, enter a year and click **Show Forms**. If need be, you will be prompted to configure a payer when opening this window.

Any vendor with \$600.00 or more of debits for the selected year marked to print on a 1099 will generate a 1099. Use the Vendor Records 1099 tab to configure the box in which the amount will print.

 As of this writing, CDM+/DonorWorks does not require a specific version or support enrollment to access 1099 Tax Forms like it does for Payroll Tax Forms. This may change before the final 9.3/9.1 release.

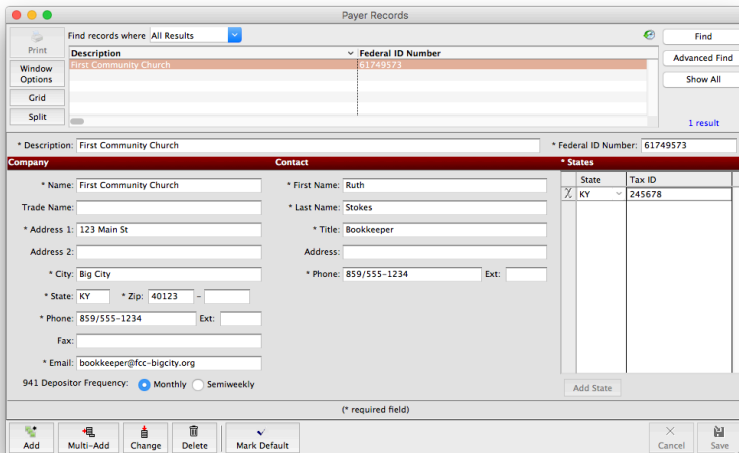
## Payer Records

As some users may need 1099 forms but do not own payroll, configuring payers has moved out of Payroll Setup in CDM+ 9.3/DonorWorks 9.1. You can now configure payers by accessing either of these options:

- **Program -> Accounting -> Payer Records**
- **Program -> Payroll -> Payer Records**

Both menu items access the same window. Users with permission to access accounting setup or payroll setup will be able to access Payer Records.

The payer setup has moved to a traditional record frame interface.

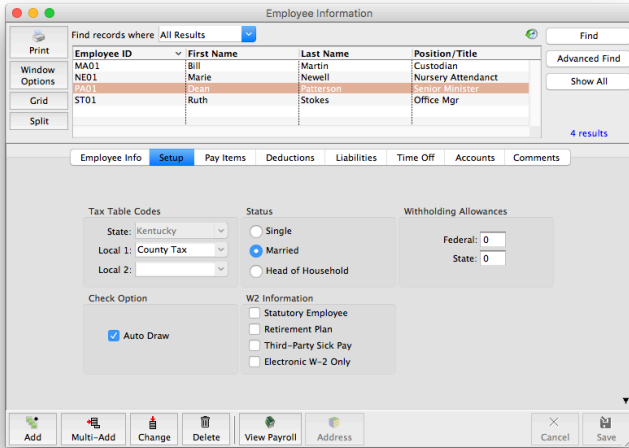


Other than a visual redesign, payer setup is identical to previous versions.

# Contractual Payroll and Employee 1099s

CDM+ 9.3 and DonorWorks 9.1 remove the contractual payroll option and the ability to produce employee 1099s. For users with contractual payroll in 2015 who need to produce a 1099 for contractors, a process will be available to transition those employee records to vendor records and produce a 1099 using the 1099 Tax Forms.

There is no longer an option to mark employees and receiving a W-2, 1099, or no tax form. This means the Setup tab of Employee Information is slightly different.



Also, all employees will now be included on 941s and W-2. Previously, only employees marked to receive a W-2 would be included on the payroll reports. It is expected the contractor migration process will address this issue by removing those employee records and their payroll once they are transitioned to vendors.

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