
SP.020.030 – ADDING 1099 INFORMATION TO A SUPPLIER

Purpose	To add 1099 withholding information to an existing supplier.
Description	Withholding information can be added to supplier information at any time, but it is most efficient to add this information when the supplier is first set up. This allows all vouchers entered for withholding suppliers to be automatically flagged for withholding reporting.
Security Role	BOR_PO_VENDOR_MAINT
Assumptions	User was granted the Authority to enter user preference, via the Supplier Processing Authority page (Set Up Financials/Supply Chain > Common Definitions > User Preferences > Define User Preferences > Procurement > Supplier Processing Authority).
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions on how to setup 1099 Withholding information for a Withholding Supplier.

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator icon.
3.	Click the Suppliers link.
4.	Click the Supplier Information link.
5.	Click the Add/Update link.
6.	Click the Supplier link.
7.	Click the Find an Existing Value to update a current supplier. The system defaults to the Summary tab. <i>Note: if the Supplier does not exist and needs to be created in GeorgiaFIRST Financials, see business process SP.020.010 – Adding/Updating a Supplier for steps that should be completed prior to continuing this business process.</i>
8.	Click the Identifying Information tab.
9.	Click the Withholding checkbox to alert the system that this supplier needs to have Withholding information added to the profile.
10.	Navigate down the page and click the arrow to expand the Additional ID Numbers section.
11.	In the ID Numbers section, click the magnifying glass icon to search the Type. Here is a list of ID types including TIN (tax identification number) and W2 (social security number).
12.	Click the TIN link to assign a Tax Identification Number or W2 to assign a W2/Social Security Number to this supplier.
13.	Enter the Supplier's tax identification/social security number in the ID Number field. There should be 9 digits only in this field (no characters).
14.	Click on the Location tab.
15.	On the Withholding location, navigate to the Details section and click the 1099 link.
16.	Verify the Supplier has a default location. <i>Note: Each supplier must have one default location, but can also have multiple locations. A supplier might also have certain locations defined that are 1099 reportable, while others are not. All locations that are 1099 reportable need to have the 1099 information populated.</i>

Step	Action
17.	In the 1099 Information section, click on the search icon for the Entity field. Select " IRS. "
16.	Using the search icon for the Type field, select " 2025M " or " 2025N " based on the correct IRS Classification.
17.	Click on the search icon for the Jurisdiction field and select " FED. "
37.	Click to place a checkmark in the Default Jurisdiction box to indicate which jurisdiction is the default.
38.	Use the search icon to search for the Default Class field and select the desired value.
39.	Click on the search icon for the 1099 Status field and select " RPT " for Reporting Only.
40.	Navigate down to the 1099 Reporting Information section.
41.	Click on the search icon for the Entity field and select " IRS. "
42.	Click the search icon for the Address field. Select the desired value from the available addresses.
43.	Enter the Taxpayer Identification Number into the field.
44.	Click the OK button.
45.	Click the Save button.
46.	Click the Summary tab. Review the information for accuracy.