

## Creating a File for a Previous Year

- If you are a new user or have never created a file for a particular company and need to create a file for a previous year; follow these instructions: Begin at the *Main Menu*, scroll down and select the *New Company* button.

MAIN MENU Earliest Tax Year: 2005

Logged in as: 1099Express Destinie Pearson, destinie@1099express.com CustID: 33689

FILE NUMBER	TAX YEAR	FILING COMPANY	FORM TYPE	MOVE FILES TO CHECKOUT	E-FILED	STATUS
169641	2020	<a href="#">Joans Company 458678942</a>	1099-NEC	<input type="checkbox"/>	<input type="checkbox"/>	Waiting-UnPaid
169747	2021	<a href="#">Joans Company 458678942</a>	1099-NEC	<input type="checkbox"/>	<input type="checkbox"/>	Waiting-UnPaid

Click the **GREEN LINK ABOVE** to Add/Edit that Company's forms.

If you have completed a filing company and are ready to checkout, please check the box associated with that company and click Checkout.

- NEW COMPANY** ← Start here to setup a NEW company for any Tax Year ([more info](#))
- CHECKOUT** ← Select files above to pay and print for your forms ([more info](#))
- FILE MANAGER** ← Click here to View 1096/W-3's, Bring Files Forward and View e-File Confirmations ([more info](#))
- EDIT ACCOUNT** ← Edit or change your login credentials

- Fill out the company information as required and type in the desired tax year. Click save.

### Setup Company/Filer - Form 1099-NEC

**Filer Setup - Form 1099-NEC**

SSN or EIN:  (Enter with or without dashes)

Tax Year:  (Enter current or previous years)

Filer Name:  (Company)

Filer is Foreign:  NO  Yes

Filer Name2:  Optional

Address:

Address2:

City:

State:

Zip:

Forward to States  NO  Yes

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**Filer Setup - 1099 Series - Some Optional Fields**

Contact:  Optional

Title:  Optional

Phone:  \* Required - printed on form

Fax:  Optional

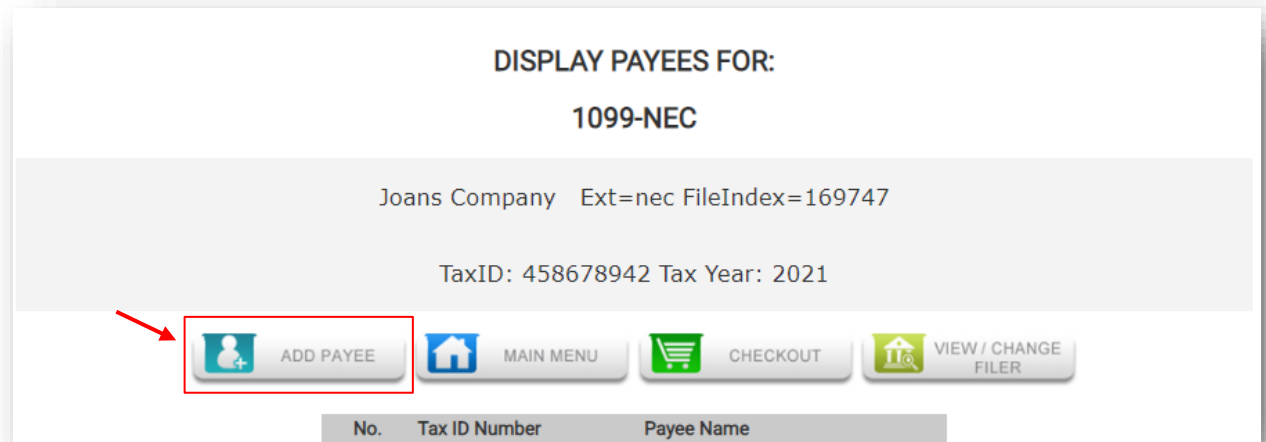
E-Mail:  Optional

- A file with **green letters** will be created at the *Main Menu*, click on the green letters. This will take you to the *DISPLAY PAYEES* page. Click the *Add Payee* button to put in the recipient's information and click *save*.

FILE NUMBER	TAX YEAR	FILING COMPANY	FORM TYPE	MOVE FILES TO CHECKOUT	E-FILED	STATUS
169641	2020	Joans Company 458678942	1099-NEC	<input type="checkbox"/>	<input type="checkbox"/>	Waiting-UnPaid
169747	2021	Joans Company 458678942	1099-NEC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Waiting-UnPaid

Click the **GREEN LINK ABOVE** to Add/Edit that Company's forms.

If you have completed a filing company and are ready to checkout, please check the box associated with that company and click Checkout.







- Repeat the process for additional payees.
  
- ***If you are a returning user and have previously created a file for the company you need a previous year for, you can follow these instructions:***
  - Begin at the *Main Menu*, scroll down and click *File Manager*.
  - At the *File Manager* page, locate the company file, and select it by clicking the circle to the right of the file name.
  - Scroll down and click on *Bring Company Forward*.
  - Return to the *Main Menu*, you will see the file you just created with green letters.

- Click on the **green letters** to go to the *DISPLAY PAYEES* page.

**DISPLAY PAYEES FOR:**  
**1099-NEC**

Joans Company Ext=nec FileIndex=169641

TaxID: 458678942 Tax Year: 2020

No.	Tax ID Number	Payee Name
1	568974123	<a href="#">Smith Plumbing</a>
2	321587541	<a href="#">Georgies Cleaning</a>

- Click on the *VIEW/CHANGE FILER* button, which is the last button on the right side of the page.
- When the filer/company information appears, change the *Tax Year*, click *save*.

### Setup Company/Filer - Form 1099-NEC

**Filer Setup - Form 1099-NEC**

SSN or EIN:  (Enter with or without dashes)

**Tax Year:**  (Enter current or previous years)

Filer Name:  (Company)

Filer is Foreign:  NO  Yes

Filer Name2:  Optional

Address:

Address2:

City:

State:

Zip:

NEC not filed to States  NO  Yes

**Filer Setup - 1099 Series - Some Optional Fields**


Contact:  Optional

Title:  Optional

Phone:  \* Required - printed on form

Fax:  Optional

E-Mail:  Optional



- Go back and add the payees you need to add.

***\*If you are trying to create a previous year for a 1099-NEC entry that is prior to 2020, you must use the 1099-Misc Form. The 1099-NEC Form did not exist prior to Tax Season 2020.\****