

Reviewing 1099 Tax Records



Knowledge Base Article

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Overview

This article describes how to view the information that will be generated on the 1099 form for program beneficiaries.

Important: A security user group assignment of **SSN Administrator and State PASSS Supervisor** is required to view 1099 records.

Navigating to the 1099 Tax Records

1. From the Ohio SACWIS **Home** screen, click the **Financial** tab.
2. Click the **Payment** tab.
3. Click the **Tax Records** link on the side navigation bar.



The **Tax Records Filter Criteria** screen appears.

4. Provide a **Recipient Name** or **Provider Name** for the desired tax records.
5. Make selections from the dropdown menus to filter desired tax records.
6. Click the **Search** button.

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Home
Intake
Case
Provider
Financial
Administration

Services
Eligibility
Payment
Benefits

Tax Records Filter Criteria

Recipient (First Name):	Recipient (Last Name):	~ OR ~	Provider Name:
<input type="text"/>	<input type="text"/>		<input type="text"/>

Recipient ID:	TIN:	Tax Year:	Record Type:
<input type="text"/>	<input type="text"/>	<input type="text" value="2023"/>	<input type="text"/>

Search

The search results appear in the **Search Results** grid.

Note: The results are only viewable. A worker cannot edit the 1099 details listed on this screen. If changes are required for the Recipient/Provider record, changes should be completed on the Overview screen. The changes will then be reflected on the Tax Records screen once the Tax Records batch is regenerated.

7. To **View** the **Person Overview** screen, click the link in the appropriate row.

Recipient ID:	TIN:	Tax Year:	Record Type:
<input type="text"/>	<input type="text"/>	<input type="text" value="2023"/>	<input type="text"/>
Search			

Search Results

Result(s) 1 to 25 of 826 / Page 1 of 34 Results per page: Go

Recipient Name / ID	Recipient Address	TIN	Tax Year	Taxable Amount	Record Type
Sacwis, Susie / 123456	123 Test Rd Test, OH 12345	123-45 6789	2023	\$20,000.00	1099-G
Test, Recipient / 456789	121 Test Rd Test, OH 12345	000-11 2222	2023	\$30,000.00	1099-G

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If you have additional questions pertaining to this Deployment Communication, please contact the [Customer Care Center](#).