

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.

Home Intake		Case	Provider	Financial	Administration	
	Services Eli	gibility Payment	Benefits			
	<>					
Crea	te Payment Requests					
Payn	nent Requests Roster					
Disb	urse Payment					
Payn	nent Search					
Agen	ncy Repayment Plan					
State	Disbursements					
<u>Crea</u>	te Subsidy Payment					
Prov	ider Payment Info					
Prov	ider Payment Plan					
Kinst	nip Support Program					
State	Repayment Plan					
Tax F	Records					

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.



Services Eligibility Payment Benefits Create Payment Requests Payment Provider Stitter Criteria Recipient (First Name): Provider Name): Provider Requests • OR ~ State Disbursements State Payment Into Provider Payment Into Provider Payment Into	Administration	
Create Payment Requests Payment Requests Payment Requests Roster Disburse Payment Payment Search Agency Repayment Plan State Disbursements Create Subsidy Payment Provider Payment Info Provider Payment Plan		
Create Payment Requests Payment Requests Roster Disburse Payment Payment Search Agency Repayment Plan State Disbursements Create Payment Info Provider Payment Info Provider Payment Plan		
Payment Requests Roster Disburse Payment Payment Search Agency Recayment Plan State Disbursements Create Subsidy Payment Provider Payment Info Provider Payment Plan Provider Pa		
Disburse Payment Recipient (First Name): Provider Name: Payment Search ~ OR ~ Agency Repayment Plan ~ OR ~ State Disbursements		
Payment Search Agency Repayment Plan State Disbursements Create Subsidy Payment Provider Payment Info Provider Payment Plan		
Agency Repayment Plan State Disbursements Create Subsidy Payment Provider Payment Info Provider Payment Plan		
State Disbursements Create Subsidy Payment Provider Payment Info Provider Payment Plan		
Create Subsidy Payment Provider Payment Info Provider Payment Plan		
Provider Payment Info Provider Payment Plan		
Provider Payment Plan		
KINSNIP SUPPORT Program Recipient ID: IIN: Iax Year: Record Type:		
State Repayment Plan		
> Tax Records		

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:	~		R	ecord Type:	
Search							
Search Results							
Result(s) 1 to 25 of 826 / Page 1 of 34						Results p	per page:
						25	Go
Recipient Name / IE		Recipient Address		TIN	Tax Year	Taxable Amount	Record Type
Sacwis, Susie / 123456	123 Te 12345	est Rd Test, OH		123- 4 5 6789	2023	\$20,000.00	1099-G
Test, Recipient / 456789	121 Te 12345	121 Test Rd Test, OH 12345		000-11 2222	2023	\$30,000.00	1099-G



If you have additional questions pertaining to this Deployment Communication, please contact the <u>Customer Care Center</u>.

