Pages / ... / CDM+ 9.3/DonorWorks 9.1

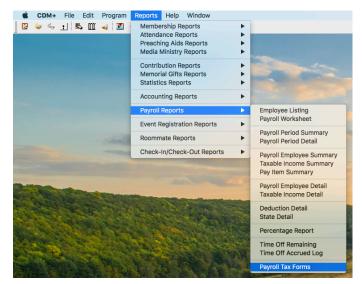
1099 Reports

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+.

e e e e e e e e e e e e e e e e e e e		Tax Forms		
Form FE 2015 1099–MISC FE 2015 1099–MISC Instructi		Payer	First Community	Church 🔽
		Annual		
			Year 2015	
Form Description	1			
[Annual] Use this to process corrections, reprint, or proc			g the process you	can make
History			Cancel	Show Form

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 a1099 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.

• • •			Payer Records				
100	Find records where All Results					e	Find
Print	Description First Community Church		 Federal ID Number 61749573 			_	Advanced Find
Window Options	First Community Church		61749573				Show All
Grid							
Split	•						1 result
Description	n: First Community Church			* Fed	eral ID Nu	nber: 61	749573
mpany		Contact		• 5	tates		
* Nam	e: First Community Church	* First Name:	Ruth	×	State KY	Tax ID	
Trade Nam	ie:	* Last Name:	Stokes				
* Address	1: 123 Main St	* Title:	Bookkeeper				
Address	2:	Address:					
* Cit	ty: Big City	* Phone:	859/555-1234 Ext:				
* Stat	e: KY * Zip: 40123 -						
* Phon	e: 859/555-1234 Ext:						
Fa	ж:						
* Ema	il: bookkeeper@fcc-bigcity.org						
941 Depos	itor Frequency: 🧿 Monthly 🔵 Semiweekly				Add State]	
			(* required field)				
Add		√ Default					X 🎦 Cancel Save

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.

- ÷	Find records where All R	esults 🛛 👻					6	Find	
Print		First Name		t Name		on/Title		Advanced Fin	
Window	MA01 NE01	Bill Marie	Mart		Custo	dian ry Attendanct			
Options	PA01	Dean		erson	Senior Minister			Show All	
Grid	ST01	Ruth	Stok		Office				
Split									
								4 results	
	Employee Info	Pay Items	Deductions	Liabilities	Time Off	Accounts	Comme	nts	
	State: Kentucky Local 1: County Ta		Single Married	rehold		Federal: 0 State: 0			
	Local 1: County Ta Local 2:	ix ~	Married Head of Hou	isehold					
	Local 1: County Ta	ix ~	Married						
	Local 1: County Ta Local 2: Check Option	ix ~	Married Head of Hou 2 Information	ployee]		
	Local 1: County Ta Local 2:	ix ~	Married Head of Hou Information Statutory Em	nployee Plan]		
	Local 1: County Ta Local 2: Check Option	ix ~	Married Head of Hou Information Statutory Em Retirement P	nployee Plan Sick Pay]		
	Local 1: County Ta Local 2: Check Option	ix ~	Married Head of Hou Information Statutory Em Retirement P Third-Party S	nployee Plan Sick Pay				×	

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.

Page viewed 8 times by 3 users since Dec 28, 2015

Like Be the first to like this

No labels