

Reviewing 1099 Tax Records



Knowledge Base Article

Reviewing 1099 Tax Records

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Reviewing 1099 Tax Records

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** or **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.

Reviewing 1099 Tax Records

Home
Intake
Case
Provider
Financial
Administration

Services
Eligibility
Payment
Benefits

[Create Payment Requests](#)
[Payment Requests Roster](#)
[Disburse Payment](#)
[Payment Search](#)
[Agency Repayment Plan](#)
[State Disbursements](#)
[Create Subsidy Payment](#)
[Provider Payment Info](#)
[Provider Payment Plan](#)
[Kinship Support Program](#)
[State Repayment Plan](#)
▶ Tax Records

Tax Records Filter Criteria

Recipient (First Name):
Recipient (Last Name):
~ OR ~
Provider Name:

Recipient ID:
TIN:
Tax Year:
Record Type:

Search

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

Note: If the Tax Record is updated, the changes will be reflected on the Tax Records screen once the Tax Records batch is regenerated.

Viewing Payments

- To view payments, click the **View Payments** hyperlink.

Recipient ID:
TIN:
Tax Year:
Record Type:

Search

Search Results

Updates to records for a tax year must be completed by January 15th of the following year

Result(s) 1 to 25 of 1145 / Page 1 of 46 Results per page: Go

View payment	Recipient Name / ID	Recipient Address	TIN	Tax Year	Taxable Amount	Record Type	
View payments	Sacwis, Susie / 1234567	123 Test Rd Test, OH 12345	123-44-5678	2023	\$10,000.00	1099-G	resend 1099
View payments	Smith, Jane / 121212	111 Test Rd Test, OH 12345		2023	\$20,000.00	1099-G	resend 1099

Reviewing 1099 Tax Records

The **State Disbursement** screen displays.

Home Intake Case Provider **Financial** Administration

Workload Action Items Services Eligibility **Payment** Benefits Statistical & Expenditure Reports Invoicing

<>

- Create Payment Requests
- Payment Requests Roster
- Disburse Payment
- Payment Search
- Agency Repayment Plan
- State Disbursements**
- Create Subsidy Payment
- Provider Payment Info
- Provider Payment Plan
- Kinship Support Program
- State Repayment Plan
- Tax Records

State Disbursement Filter Criteria

Person ID:

Provider ID:

Expedite Status:

Date Range of Payment: -

Start Date End Date

Warrant Month/Year:

Warrant Status:

Service Category:

Service Type:

Voucher Related ID:

Sort By:

State Disbursements

Result(s) 1 to 1 of 1 / Page 1 of 1

	Person Name / ID	Service Type	Payment Dates	Voucher Related ID	Warrant Date	Warrant/EFT Status	Warrant Amount
payee details ^	Sacwis, Susie / 123456 (Jane, Jones / 123123)	OAGP	-		07/10/2023	Warrant Redeemed	\$10,000.00

2. To view payee details, click the **Payee Details** button.
3. Click the **Close** button to return to the **Tax Records** screen.

Reviewing 1099 Tax Records

Search

Clear Form

State Disbursements

Result(s) 1 to 1 of 1 / Page 1 of 1

	Person Name / ID	Service Type	Payment Dates	Voucher Related ID	Warrant Date	Warrant/EFT Status	Warrant Amount
payee details ✓	Sacwis, Susie / 123456 (Jones, Jane / 123123)	OAGP	-		07/10/2023	Warrant Redeemed	\$10,000.00
Payee Person ID: 123456		Payee Name: Sacwis, Susie		Payee Address: 123 Test Rd, Test OH 12345			

Close

Resending a 1099 Record

The Resend 1099 function can be used to have the printed 1099 resent to the recipient but will not make any changes to the records that have already been sent to the IRS.

Note: For further guidance on navigating the State Disbursement screens, refer to this Knowledge Base Article: [State Disbursements in Ohio SACWIS](#)

1. From the **Tax Records** screen, click the **Resend 1099** link.

Recipient ID: TIN: Tax Year: Record Type:

Search

Search Results

Updates to records for a tax year must be completed by January 15th of the following year

Result(s) 1 to 25 of 1145 / Page 1 of 46

Results per page:

25

Go

View payment	Recipient Name / ID	Recipient Address	TIN	Tax Year	Taxable Amount	Record Type	
View payments	Sacwis, Susie / 1234567	123 Test Rd Test, OH 12345	123-44-5678	2023	\$10,000.00	1099-G	resend 1099
View payments	Smith, Jane / 121212	111 Test Rd Test, OH 12345		2023	\$20,000.00	1099-G	resend 1099

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A message displays verifying you want to resend the 1099. Click the **OK** button.

sacwis-uat.jfs.ohio.gov says

Resend of a 1099 for Susie Sacwis for Tax Year 2023 has been selected. Selecting OK will resend the 1099 to be reprinted. Selecting Cancel will prevent resending the 1099.

OK Cancel

A message will display verifying the data was saved.

✔ Your data has been saved. ✕

Tax Records Filter Criteria

Note: The **Resend 1099** hyperlink is no longer available.

Recipient ID: TIN: Tax Year: 2023 Record Type:

Search

Search Results

Updates to records for a tax year must be completed by January 15th of the following year

Result(s) 1 to 25 of 1145 / Page 1 of 46

Results per page:

25

View payment	Recipient Name / ID	Recipient Address	TIN	Tax Year	Taxable Amount	Record Type	
View payments	Sacwis, Susie / 1234567	123 Test Rd Test, OH 12345	123-44-5678	2023	\$10,000.00	1099-G	
View payments	Smith, Jane / 121212	111 Test Rd Test, OH 12345		2023	\$20,000.00	1099-G	resend 1099

Reviewing 1099 Tax Records

Update/Resend 1099 Record

The **Update/Resend 1099** function can be used to correct a previously printed 1099 and both resend the corrected form to the recipient as well as update the information being sent to the IRS.

1. Click the **Update/Resend 1099** link.

Recipient ID: TIN: Tax Year: Record Type:

Search

Search Results

Updates to records for a tax year must be completed by January 15th of the following year

Result(s) 1 to 25 of 1145 / Page 1 of 46

Results per page:

View payment	Recipient Name / ID	Recipient Address	TIN	Tax Year	Taxable Amount	Record Type	
View payments	Sacwis, Susie / 1234567	123 Test Rd Test, OH 12345	123-44-5678	2023	\$10,000.00	1099-G	
View payments	Smith, Jane / 121212	111 Test Rd Test, OH 12345		2023	\$20,000.00	1099-G	update / resend 1099

Note: Any updates to records for a tax year must be completed by January 15th of the following year. This means that updates to tax records, such as payment amounts, addresses or name changes for the provider in 2024 must be completed by 1/15/2025 in order for these changes to be reflected on tax records to be sent to the IRS and the provider.

A message will display verifying the data was saved.

✔ Your data has been saved.

Tax Records Filter Criteria

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Navigating to Person Overview

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

Recipient ID: TIN: Tax Year: Record Type:

Search

Search Results

Updates to records for a tax year must be completed by January 15th of the following year

Result(s) 1 to 25 of 1145 / Page 1 of 46

Results per page:

25

View payment	Recipient Name / ID	Recipient Address	TIN	Tax Year	Taxable Amount	Record Type
View payments	Sacwis, Susie / 1234567	123 Test Rd Test, OH 12345	123-44-5678	2023	\$10,000.00	1099-G
View payments	Smith, Jane / 121212	111 Test Rd Test, OH 12345		2023	\$20,000.00	1099-G

The **Person Overview** screen displays.

2. To edit the recipient's information, click the **Profile** link on the side navigation bar.

- Person Overview
- Profile**
- Education
- Medical
- Employment
- Military
- Background
- Delinquency
- CANS Assessment(s)
- SACWIS History
- Relationships

PERSON NAME / ID:
Sacwis, Susie / 123456

RACE: *White*

Female Age 46, DOB 12/11/1977

HISPANIC / LATINO: *No*

123 Test Rd

Test, Oh 12345

HAIR COLOR:

EYE COLOR:

ENVIRONMENTAL HAZARDS:

AKA Names

The **Person Demographic** screen displays.

Reviewing 1099 Tax Records

Basic	Demographics	Address	Additional	Characteristics	Safety Hazard
Person Information					
Prefix:	<input type="text"/>				
First Name: *	<input type="text" value="Susie"/>	Middle Name:	<input type="text" value="Elaine"/>		
Last Name: *	<input type="text" value="Sacwis"/>	Suffix:	<input type="text"/>		
<input type="button" value="Populate AKA Name"/>					
Gender: <input type="radio"/>	<input type="text" value="Female"/>	SSN: <input type="text" value="XXX-XX-XXXX"/>	<input checked="" type="radio"/> Retain	<input type="radio"/> Add/Edit	

Note: Name can be updated on the **Basic** tab, and tax return address on the **Address** tab. SSN can be updated on the **Confidential Information** tab which requires a security of SSN Admin to view.

Navigating to Provider Overview

1. Click the **Provider** tab.
2. Click the **Provider Search** tab.
3. Enter **Provider ID**.
4. Click the **Search** button.

Home	Intake	Case	Provider	Financial	Administration			
Workload	<input type="button" value="Provider Search"/>	Provider Match	Recruitment	Inquiry	Training	Contracts	Agency Certifications	KCCP Pre-Screening Tool

Search For Provider Profile			
Provider ID: <input type="text"/>			
OR			
Provider Name: <input type="text"/>	Member Last Name: <input type="text"/>	Member First Name: <input type="text"/>	Member Middle Name: <input type="text"/>
Provider Category: <input type="text"/>			
Agency Type: <input type="text"/>			
Agency: <input type="text"/>			
Provider Type: <input type="text"/>	<input checked="" type="checkbox"/> Include "Closed" Provider Type Status		

Reviewing 1099 Tax Records

[Address, Contact and Provider Reference Criteria](#) ▾

Name Match Precision
Returns results matching entered names including AKA names/nicknames

Fewer Results More Results

The Provider displays in the search results grid.

Search Results				
Result(s) 1 to 1 of 1 / Page 1 of 1				
	Provider Name / ID	Provider Status	Provider Category	Address
view edit	Test, Provider / 121212	ACTIVE	AGENCYCONTRACT	222 Test Rd, Test OH 12345

[View Provider Type Information](#) ▾

5. Select the **View** link.

The **Provider Overview** screen displays.

6. To edit the Providers information, click **Provider Information**.

- Provider Overview**
- [Activity Log](#)
- [Forms/Notices](#)
- [Contracts](#)
- [Service Credentials](#)
- [Prevention Services Approval](#)
- [Placements/Services](#)
- [Intake Reports](#)

PROVIDER NAME / ID:
Test, Provider / 121212

CATEGORY / STATUS:
Agency Contract / Active

PRIMARY ADDRESS:
222 Test Rd, Test OH 12345

PRIMARY CONTACT:
Work:

Provider Actions

[Provider Information](#)

Approval/Certification Spans

The **Provider Details** screen displays.

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PROVIDER NAME / ID: **Test, Provider / 121212** CATEGORY: *Agency Contract*

Basic | Address | Members

Provider Name Information

Provider Name	Effective Date	End Date
Test, Provider	08/04/2006	

Provider Type Information

Closed Type Status: Exclude Include Foster to Adopt (1692): Exclude Include

Provider Type/Child Name	Agency	Type Effective Date	Type End Date	Type Status
view Network Provider	Test, Provider	04/21/2006		Active

Provider Status Information

Note: If the recipient is a **Non-home LLC Provider**, the recipient will be directed to the Provider record when they select the **Recipient Name/ID**. Name can be updated on the **Basic** tab, and tax return address on the **Address** tab. **TIN** can be updated on the **Basic** Tab but requires user to be logged in as ODCY Employee.

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