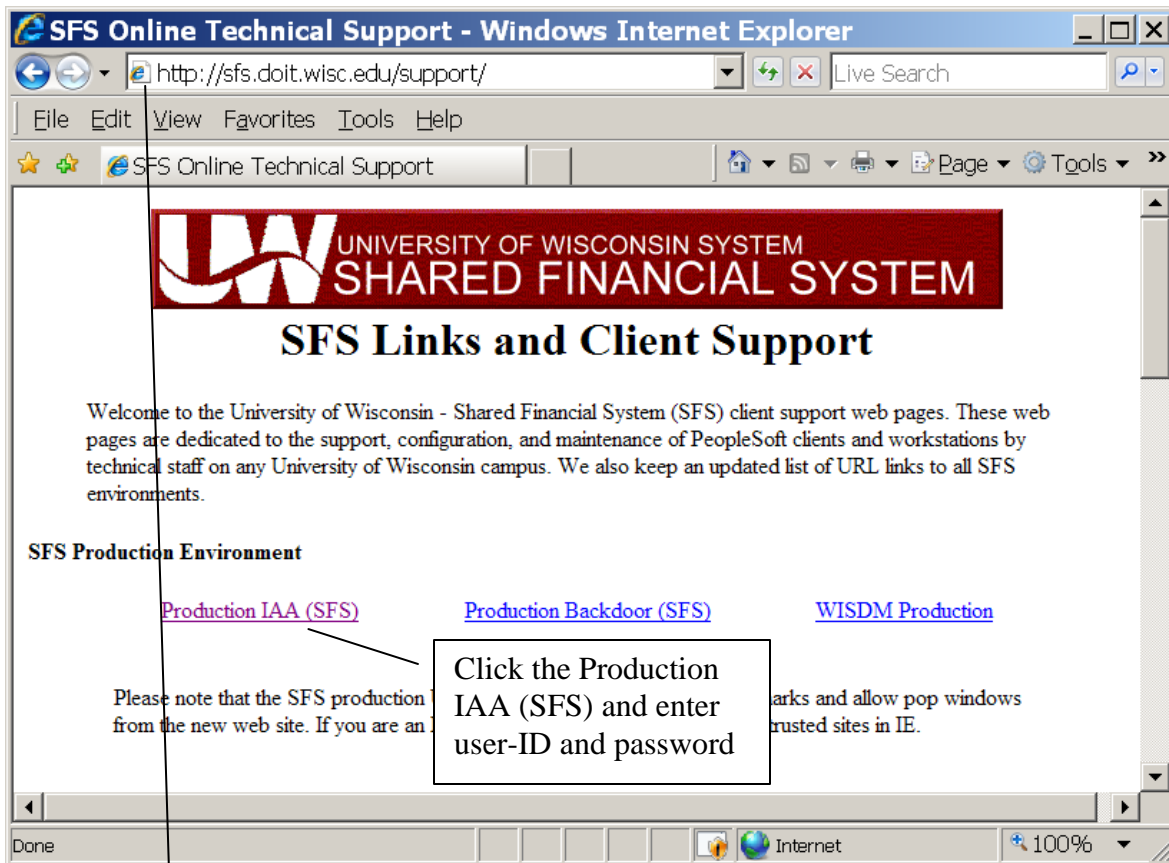


ADD/UPDATE 1099-MISC/1042S RECORDS

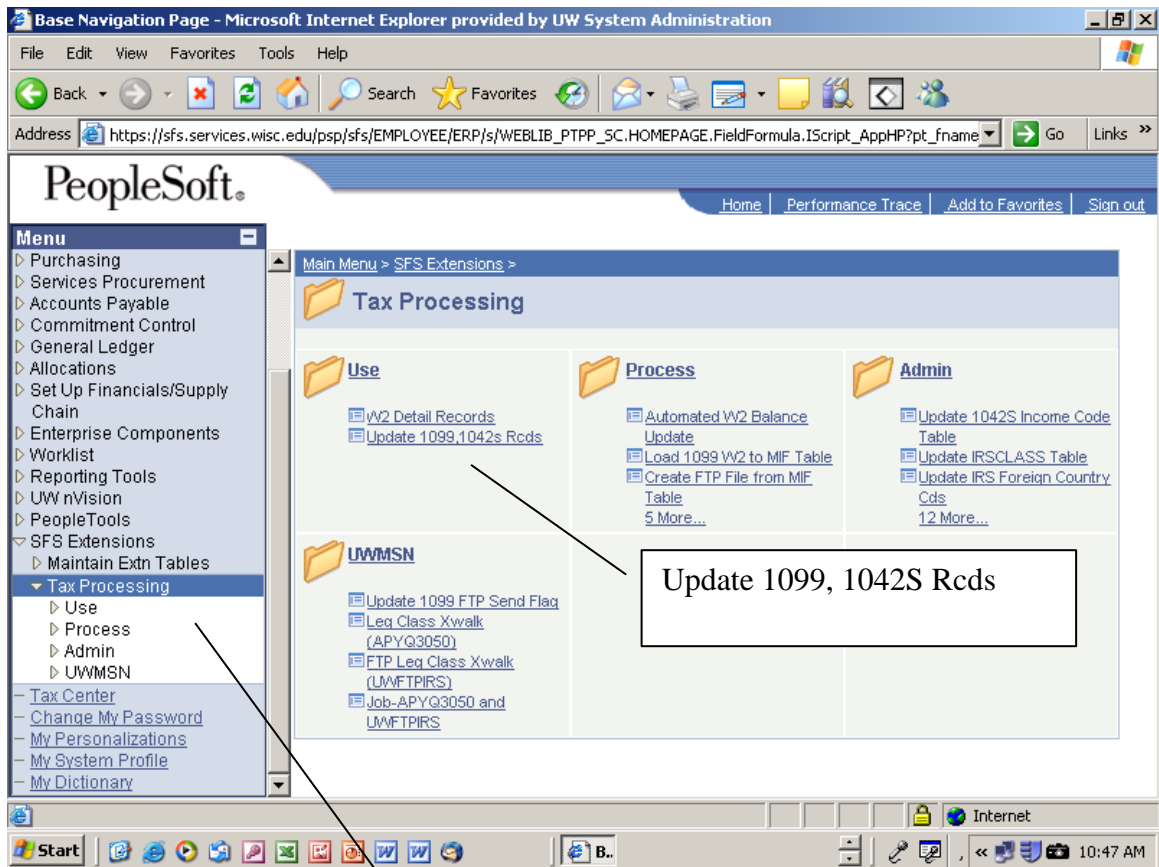
We have screens in SFS to facilitate entering new 1099-Misc and 1042's as well as updating existing documents.

The following screen prints go through the navigation within SFS to Add and Update 1099-Misc and 1042S records. Log in under the URL for SFS Production is:

<http://sfs.doit.wisc.edu/support/>



Saving this as a Favorite will save you a lot of time when logging in.



Update 1099, 1042S Rcds

Navigate to—
SFS Extensions
Tax Processing
Use
Update 1099, 1042S Rcds

1) Add a new 1099/1042S record.

The screenshot shows the PeopleSoft interface for updating 1099 and 1042S records. The browser window title is "Update 1099,1042s Rcds - Microsoft Internet Explorer provided by UW System Administration". The address bar shows a URL from sfs.services.wisc.edu. The main content area has a "Menu" on the left and a form titled "Update 1099,1042s Rcds". The form has two tabs: "Find an Existing Value" and "Add a New Value". The "Add a New Value" tab is active. The form fields include: "Tax Year" (with a dropdown showing '0'), "MIF Taxpayer ID Nbr:" (empty), "Item Number:" (with a dropdown showing '9999'), "MIF Taxpayer Name:" (empty), and "Business Unit:" (empty). Below the form is a yellow "Add" button and two links: "Find an Existing Value" and "Add a New Value".

Callout boxes provide the following instructions:

- Tab to Add a 1099-Misc:** Points to the "Add a New Value" tab.
- Enter Year:** Points to the "Tax Year" dropdown.
- Enter Tax ID:** Points to the "MIF Taxpayer ID Nbr:" field.
- Leave Item Number blank:** Points to the "Item Number:" dropdown.
- Enter Name For individuals enter: Last name space First name space Middle initial. Commas should not be used.** Points to the "MIF Taxpayer Name:" field.
- Enter Business Unit:** Points to the "Business Unit:" field.
- Click to Add:** Points to the yellow "Add" button.

Fill in items except Item Number. Do not change the Item Number as the system automatically generates this number.

There are two panels (tabs)—1099 Address and 1042S Tax WH. To add a 1099-Misc click on the 1099 Address Tab. Enter address, codes if appropriate, etc

1099 Address tab
Add address, City/Province, State, zip and foreign country code (see below for further information)

Change to Employer ID if a business

1099 is active

Check 1099 (or for 1042S see page 8)

Check if Address is a Foreign Country

1099 Status Information used by UW System only

**N=No--Automatically uses most recent address
Y=Yes--Uses address on this record**

IRS Code:
 1 RENT
 2 ROYALTIES
 3 OTHER
 6 MEDICAL
 7 NON EMP COMP
 14 ATTORNEY

Enter Voucher Number, IRS Code for 1099's, Account and Amount.

For U.S. and foreign addresses, please enter as follows:

Addr 1 = official street address

Addr 2=supplemental information as P.O. Box in addition to street address

City=Enter city or town; **DO NOT** enter a foreign postal code in this field

State=enter U.S. state code; otherwise leave blank

Postal Code=enter valid Zip Codes

Province Code=enter Canadian province code; otherwise leave blank

Country Code=enter country code from IRS Foreign Table. **DO NOT** enter U.S. (see pages 10 and 11 for IRS country codes)

Foreign Ind=Must be checked for a foreign country address

CLICK ON SAVE ICON AT BOTTOM.

US State and Possession and their abbreviations

State	Code	State	Code
Alabama	AL	Montana	MT
Alaska	AK	Nebraska	NE
American Samoa	AS	Nevada	NV
Arizona	AZ	New Hampshire	NH
Arkansas	AR	New Jersey	NJ
California	CA	New Mexico	NM
Colorado	CO	New York	NY
Connecticut	CT	North Carolina	NC
Delaware	DE	North Dakota	ND
District of Columbia	DC	North Mariana Islands	MP
Federated States of Micronesia	FM	Ohio	OH
Florida	FL	Oklahoma	OK
Georgia	GA	Oregon	OR
Guam	GU	Palau	PW
Hawaii	HI	Pennsylvania	PA
Idaho	ID	Puerto Rico	PR
Illinois	IL	Rhode Island	RI
Indiana	IN	South Carolina	SC
Iowa	IA	South Dakota	SD
Kansas	KS	Tennessee	TN
Kentucky	KY	Texas	TX
Louisiana	LA	Utah	UT
Maine	ME	Vermont	VT
Marshall Islands	MH	Virginia	VA
Maryland	MD	Virgin Islands	VI
Massachusetts	MA	Washington	WA
Michigan	MI	West Virginia	WV
Minnesota	MN	Wisconsin	WI
Mississippi	MS	Wyoming	WY
Missouri	MO		

2) Navigate to find an existing 1099-Misc:

To retrieve a record by known variables:

The screenshot shows the PeopleSoft web interface for updating 1099 and 1042S records. The browser window title is "Update 1099,1042s Rcds - Microsoft Internet Explorer provided by UW System Administration". The address bar shows the URL: https://sfs.services.wisc.edu/psp/sfs/EMPLOYEE/ERP/c/UW_TAX_PROCESSING.UW_1099_DETAIL_PLG.GBL?FolderPath=POF. The page features a "Menu" on the left with options like "Commitment Control", "General Ledger", and "SFS Extensions". The main content area is titled "Update 1099,1042s Rcds" and includes a search form with the following fields:

- Tax Year:** A dropdown menu set to "=" and a text box containing "2005".
- MIF Taxpayer ID Nbr:** A dropdown menu set to "begins with" and an empty text box.
- Item Number:** A dropdown menu set to "=" and an empty text box.
- MIF Taxpayer Name:** A dropdown menu set to "begins with" and an empty text box.
- Business Unit:** A dropdown menu set to "begins with" and an empty text box.

Below the search form are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria". The "Search Results" section below indicates that only the first 300 results are displayed. Three callout boxes provide instructions:

- A box pointing to the "Find an Existing Value" tab says: "Use first tab for updating info".
- A box pointing to the search fields says: "Enter Tax Year and Tax ID Number or first three alpha characters of last name to get list".
- A box pointing to the "Search" button says: "Click on Search".

To retrieve a record by using the Search capabilities:

Update 1099,1042s Rcds

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

UW Tax Year: = [dropdown] 2005

MIF Taxpayer ID Nbr: begins with [input]

MIF Payment Date: = [dropdown]

Item Number: = [dropdown]

MIF Taxpayer Name: begins with [input]

Business Unit: begins with [dropdown] UWSTP

Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Add a New Value

Enter Tax Year and Business Unit

Click on Search

Update 1099,1042s Rcds

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Tax Year: = [dropdown] 2005

MIF Taxpayer ID Nbr: begins with [input]

Item Number: = [dropdown]

MIF Taxpayer Name: begins with [input]

Business Unit: begins with [dropdown]

Search | Clear | Basic Search | Save Search Criteria

Search Results

Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.

View All | First | 1-100 of 300 | Last

Tax Year	MIF Taxpayer ID Nbr	Item Number	MIF Taxpayer Name	Business Unit
2005	000000000	1	ENVISION	UWSTP
2005	000000000	1	NETSUPPORT INC	UWSTP

Scroll to find name
Click on name

Click on OK

3) After UW System uploads all 1099-Misc records on SFS the first of January, we will contact all campuses to add the 1042S records for non-resident aliens. Change the 1099-Misc record to a 1042S record by clicking on 1042S in the 1042S Indicator box and navigate to complete the 1042S Tax W/H panel information.

Check 1042S Tax Indicator (don't click Save just yet)

Then navigate to 1042S Tax WH Tab

1042 Record Tab

Enter Income Code (see below)

Enter one:
 0-Non-exempt 5-Int Exempt
 1-US Trade 6-IntermedWH
 2-IRC 7-W/H Foreign
 3-Not US 8-US Branch
 4-Tax Trty 9-Rep Inc Exempt

Enter Withholding Rate (ex. 30)--Percent

This amount is calculated

Enter Country Code (see pages 10 and 11)

Enter Fed Tax (Dollars=xx,xxx.xx)

None
 01-Individual
 02-Corp
 06-Gov Org
 07-Tax Exempt Org
 08-Private Fndtn
 09-Artist/athlete
 10-Estate
 11-US Branch
 17-Auth For Ag
 20-Unknown

MIF 1042S Income Code	Description	Inactive Indicator
12	Copyrights, recording, publish	Active
15	Scholarship/Fellowship Grants	Active
16	Independent Personal Services	Active
18	Compensation for Teaching	Active
19	Compensation During Studying &	Active
20	Compensation-Artist/Athlete	Active
50	Other Income	Active

CLICK ON SAVE BUTTON WHEN DONE.

Country Codes from the IRS Instructions for Form 1042-S

Note: Country codes that are lined through are US Territories and should not be used (see State abbreviations above)

Country Codes

Select the appropriate code from the following list and enter it in box 16 (country code of recipient). Also use the following codes to complete box 18 (country code of NQI), if applicable. See the instructions for box 16 (and box 18 if applicable) on page 15 before selecting a country code. **Note.** Countries bolded and italicized are those with which the United States had entered into an income tax treaty at the time these instructions were printed.

Country	Code
Afghanistan	AF
Akrotiri	AX
Albania	AL
Algeria	AG
American Samoa	AQ
Andorra	AN
Angola	AO
Anguilla	AV
Antarctica	AY
Antigua and Barbuda	AC
Argentina	AR
Armenia¹	AM
Aruba	AA
Ashmore and Cartier Islands²	AT
Australia	AS
Austria	AU
Azerbaijan¹	AJ
Bahamas, The	BF
Bahrain	BA
Baker Island	FQ
Bangladesh	BG
Barbados	BB
Belarus¹	BO
Belgium	BE
Belize	BH
Benin	BN
Bermuda	BD
Bhutan	BT
Bolivia	BL
Bosnia-Herzegovina	BK
Botswana	BC
Bouvet Island	BV
Brazil	BR
British Indian Ocean Territory	IO
Brunei	BX
Bulgaria	BU
Burkina Faso	UV
Burma	BM
Burundi	BY
Cambodia	CB
Cameroon	CM
Canada	CA
Cape Verde	CV
Cayman Islands	CJ
Central African Republic	CT
Chad	CD
Chile	CI
China	CH
Christmas Island²	KT
Clipperton Island	IP
Cocos (Keeling) Islands²	CK
Colombia	CO
Comoros	CN
Congo (Brazzaville)	CF
Congo, Democratic Republic of (Kinshasa)	CG
Cook Islands	CW

Coral Sea Islands Territory²	CR	Kingman Reef	KQ
Costa Rica	CS	Kiribati	KR
Cote D'Ivoire (Ivory Coast)	IV	Korea, North	KN
Croatia	HR	Korea, South	KS
Cuba	CU	Kosovo	KV
Cyprus	CY	Kuwait	KU
Czech Republic	EZ	Kyrgyzstan¹	KG
Denmark	DA	Laos	LA
Dhekelia	DX	Latvia	LG
Djibouti	DJ	Lebanon	LE
Dominica	DO	Lesotho	LT
Dominican Republic	DR	Liberia	LI
Ecuador	EC	Libya	LY
Egypt	EG	Liechtenstein	LS
El Salvador	ES	Lithuania	LH
Equatorial Guinea	EK	Luxembourg	LU
Eritrea	ER	Macau	MC
Estonia	EN	Macedonia	MK
Ethiopia	ET	Madagascar (Malagasy Republic)	MA
Falkland Islands (Islas Malvinas)	FK	Malawi	MI
Faroe Islands	FO	Malaysia	MY
Fiji	FJ	Maldives	MV
Finland	FI	Mali	ML
France	FR	Malta	MT
French Guiana³	FG	Marshall Islands	RM
French Polynesia	FP	Martinique³	MB
French Southern and Antarctic Lands	FS	Mauritania	MR
Gabon	GB	Mauritius	MP
Gambia, The	GA	Mayotte	MF
Georgia¹	GG	Mexico	MX
Germany	GM	Micronesia, Federated States of	FM
Ghana	GH	Midway Islands	MQ
Gibraltar	GI	Moldova¹	MD
Great Britain (United Kingdom)	UK	Monaco	MN
Greece	GR	Mongolia	MG
Greenland	GL	Montenegro	MJ
Grenada	GJ	Montserrat	MH
Guadeloupe³	GP	Morocco	MO
Guam	GQ	Mozambique	MZ
Guatemala	GT	Namibia	WA
Guernsey	GK	Nauru	NR
Guinea	GV	Navassa Island	BQ
Guinea-Bissau	PU	Nepal	NP
Guyana	GY	Netherlands	NL
Haiti	HA	Netherlands Antilles	NT
Heard Island and McDonald Islands	HM	New Caledonia	NC
Holy See	VT	New Zealand	NZ
Honduras	HO	Nicaragua	NU
Hong Kong ⁵	HK	Niger	NG
Howland Island	HQ	Nigeria	NI
Hungary	HU	Niue	NE
Iceland	IC	Norfolk Island²	NF
India	IN	Northern Ireland⁴	UK
Indonesia	ID	Northern Mariana Islands	GQ
Iran	IR	Norway	NO
Iraq	IZ	Oman	MU
Ireland	EI	Pakistan	PK
Isle of Man	IM	Palau	PS
Israel	IS	Palmyra Atoll	LQ
Italy	IT	Panama	PM
Jamaica	JM	Papua New Guinea	PP
Jan Mayen	JN	Paracel Islands	PF
Japan	JA	Paraguay	PA
Jarvis Island	DQ	Peru	PE
Jersey	JE	Philippines	RP
Johnston Atoll	JQ	Pitcairn Island	PC
Jordan	JO	Poland	PL
Kazakhstan	KZ	Portugal	PO
Kenya	KE	Puerto Rico	RQ
		Qatar	QA

Reunion ³	RE	Spratzly Islands	PG	Uruguay	UY
Romania	RO	Sri Lanka	CE	Uzbekistan ¹	UZ
Russia	RS	Sudan	SU	Vanuatu	NH
Rwanda	RW	Suriname	NS	Venezuela	VE
St. Barthelemy	TB	Svalbard	SV	Vietnam	VM
St. Helena	SH	Swaziland	WZ	Virgin Islands (British)	VI
St. Kitts (St. Christopher and Nevis)	SC	Sweden	SW	Virgin Islands (U.S.)	VQ
St. Lucia	ST	Switzerland	SZ	Wake Island	WQ
St. Martin	RN	Syria	SY	Wallis and Futuna	WF
St. Pierre and Miquelon	SB	Taiwan	TW	Western Sahara	WI
St. Vincent and the Grenadines	VC	Tajikistan ¹	TI	Yemen	YM
Samoa	WS	Tanzania	TZ	Zambia	ZA
San Marino	SM	Thailand	TH	Zimbabwe	ZI
Sao Tome and Principe	TP	Timor-Leste	TT	Other Country	OC
Saudi Arabia	SA	Togo	TO	Unknown Country	UC
Senegal	SG	Tokelau	TL		
Serbia	RB	Tonga	TN		
Seychelles	SE	Trinidad and Tobago	TD		
Sierra Leone	SL	Tunisia	TS		
Singapore	SN	Turkey	TU		
Slovak Republic (Slovakia)	LO	Turkmenistan ¹	TX		
Slovenia	SI	Turks and Caicos Islands	TK		
Solomon Islands	BP	Tuvalu	TV		
Somalia	SO	Uganda	UG		
South Africa	SF	Ukraine	UP		
South Georgia and the South Sandwich Islands	SX	United Arab Emirates	AE		
Spain	SP	United Kingdom (England, Wales, Scotland, No. Ireland)	UK		

¹ These countries are parties to the United States treaty with the Commonwealth of Independent States.

² These countries are covered under the United States treaty with Australia.

³ These countries are covered under the United States treaty with France.

⁴ Northern Ireland is covered under the United States treaty with the United Kingdom.

⁵ Hong Kong is not covered under the United States treaty with China.