Quick Start Guide

2025

version 6.1

Contents

Overview

1099-Prep version 6.1 offers several ways to collaborate. If you have a company, you can invite others to assist in the submission process by creating users accounts for those people and assigning roles to those use accounts.

If another company is preparing forms for you in 1099-Prep (e.g., an accounting firm), they can invite you to assist in that process as a user.

When users access 1099-Prep, they will be able to use features of the application based on their role.

See sub-sections for how to add new users, assign roles to user accounts, and access 1099-Prep (as a user) by invitation.

- User Management
  - Adding Users
  - Assigning User Roles
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- User Access
  - Accessing 1099-Prep for the First Time
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User Management

Adding new users requires a user with the "Company Owner" or "Admin" role to:

1. Create user accounts.
2. Send 1099-Prep email invitations to new users.
3. Assign roles to user accounts.

> **NOTE:** "Company Owner" and "Admin" roles are automatically granted to the user account created at initial set-up.

New users access 1099-Prep by:

1. Accessing 1099-Prep email invitation.
2. Clicking the invitation link in the email.
3. Creating a password and logging in.

Roles assigned to user accounts determine what users can do in 1099-Prep.

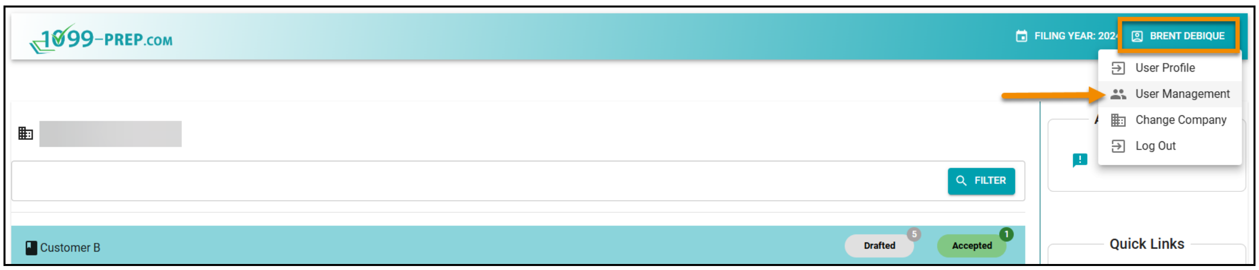
See sub-sections for more detail.

Adding Users

To add new users, a user with the "Company Owner" or "Admin" role must log into 1099-Prep and do the following:

1. Click the **User Options** drop-down menu and click **User Management**.

   > **NOTE:** If you do not see **User Management** in User Options, then your account does not have the "Admin" or "Company Owner" role. Log in with the appropriate user account.



2. Click **Users** in the left-side panel.

3. Follow instructions in the *Adding Users* topic in 1099-Prep Help, here:

   https://app.1099-prep.com/userGuide/Content/C_Features/1099_H3_Features_UM_Users_Adding_Users.htm.

> **NOTE:** After adding a new user, an email invitation is automatically sent to the email address you provided for the user.

Assigning User Roles

Users must have a role assigned to their account to perform actions in 1099-Prep or see companies and customers in the interface.

> **IMPORTANT:** Roles are per customer (or customer group) and not at the user level. This means users will only be able to perform actions granted by a role in the customer or customer groups you select, not for all customers in 1099-Prep. See steps below.

To assign user roles, do the following:

1. Click the **User Options** drop-down menu and click **User Management** (see Adding Users for an example image).
2. Click **User Permissions** in the left-side panel.
3. Find the name of a user and click the **Manage Permissions** icon in the grid.
4. Follow instructions in the *Assigning Permissions to User Groups*topic in 1099-Prep Help, here:

   https://app.1099-prep.com/userGuide/Content/C_Features/1099_H3_Features_UM_User_Groups_Assigning_Permissions_to_User_Groups.htm

See Role Definitions for role definitions and usage.

Role Definitions

Roles grant users permissions to perform actions in 1099-Prep and see company and customer information. **Users can be assigned more than one role.**

> **NOTE:** A "customer" in 1099-Prep is a logical grouping of payers used for either permissions or billing. "Customers" are not part of submissions to the IRS and are only used for organization purposes.

To assign roles to user accounts, see Assigning User Roles.

Sub-sections define of roles and how users should use roles assigned to their account.

Role	Definition
Read Only	Users can view payers, recipients, and forms but cannot edit them. Users can run reports. Users cannot submit forms.
Preparer	Users can create forms or the import tax data. Users can run reports. Users cannot submit forms. **NOTE:** If you would like a user to create and then confirm the forms before a submission, you can give the **Preparer** and **Reviewer** roles.

<table>
<tr><th>Role</th><th>Definition</th></tr>
<tr><td>Reviewer</td><td>Users can view forms that have been prepared.

If the review feature is enabled, users can use review functions to ready forms for submission and restart the review process as necessary.

Users cannot submit forms.

NOTE: For more information on Review features, see Reviewing Forms topic in 1099-Prep Help, here:

https://app.1099-prep.com/userGuide/Content/C_Features/1099_H2_Features_Forms_Reviewing_Forms.htm</td></tr>
<tr><td>Submitter</td><td>Users can add forms to the cart that are ready for submission and submit them to the IRS.

Users cannot add or edit forms.

Users can run reports.

NOTE: If you would like a user to be able to review and then submit, you can give them the Reviewer role and the Submitter role.</td></tr>
<tr><td>Admin</td><td>Users can add, edit, review, submit, and run reports and are granted all actions of other roles.</td></tr>
</table>

User Access

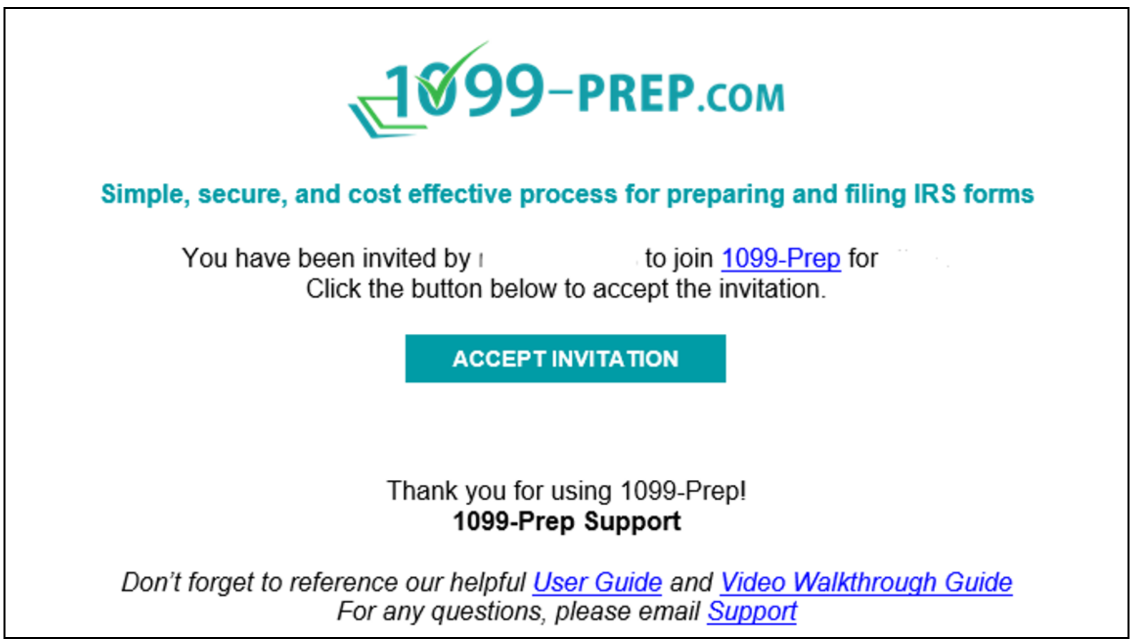
New users receive an email that allows them access 1099-Prep.

Accessing 1099-Prep for the First Time

New users access 1099-Prep by opening their email and finding the 1099-Prep email invitation sent from noreply@1099-prep.com with the subject “Welcome to 1099-Prep!”

Users click the **ACCEPT INVITATION** link to access 1099-Prep and then create a login.

Example email:



1099-PREP.COM

Simple, secure, and cost effective process for preparing and filing IRS forms

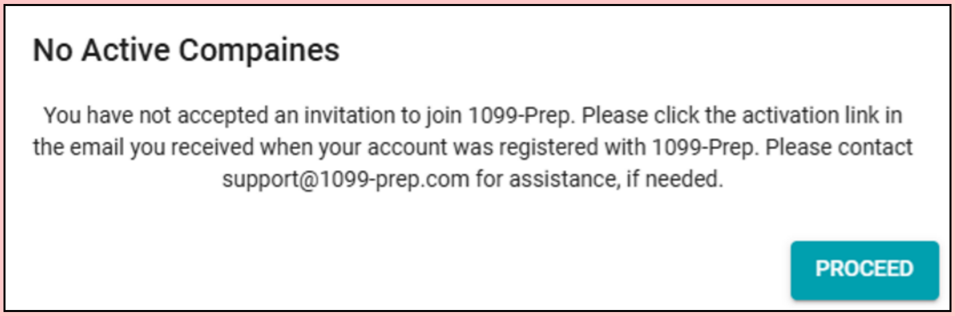
You have been invited by to join 1099-Prep for
Click the button below to accept the invitation.

ACCEPT INVITATION

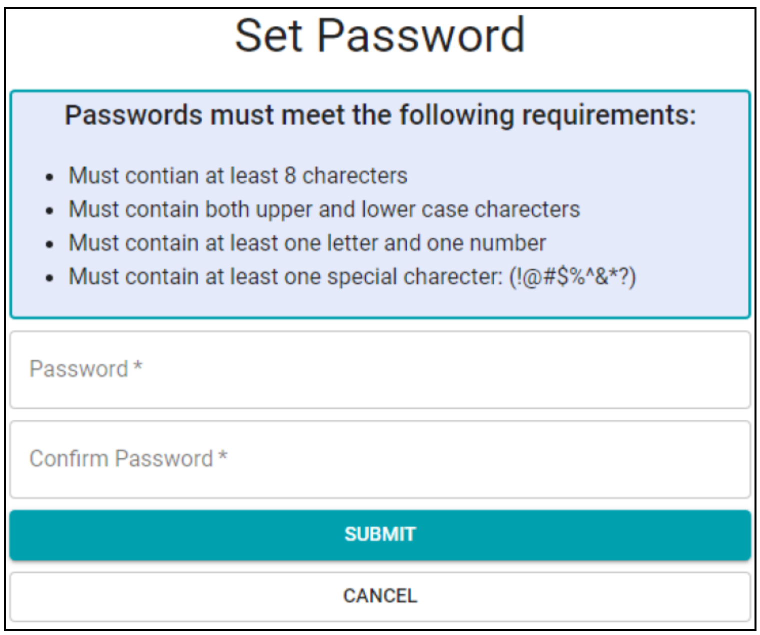
Thank you for using 1099-Prep!
1099-Prep Support

Don’t forget to reference our helpful User Guide and Video Walkthrough Guide
For any questions, please email Support

IMPORTANT: If a new user attempts to login to 1099-Prep without using the invitation link sent to their email, the user will receive the following message:



After logging in, new users must create a password to access 1099-Prep:



IMPORTANT: If a user cannot not see any customers in the Customer Dashboard, they should contact the user that created their account and have their user role adjusted.

User Actions by Role

After adding new users and assigning roles, users are ready to use 1099-Prep.

The table below provides useful links and information to help users understand how to use actions of their assigned role(s).

IMPORTANT: If a user cannot not see any customers in the Customer Dashboard, they should contact the user that created their account and have their user role adjusted.

Assigned Role	Using the Role	1099-Prep Help Links
Preparer	Choose a customer then add payer, recipients, and forms	**Payers:** https://app.1099-prep.com/userGuide/Content/C_Features/1099_H3_Features_Payers_Payer_Field_Definitions.htm **Recipients:** https://app.1099-prep.com/userGuide/Content/C_Features/1099_H3_Features_Recipients_Recipient_Field_Definitions.htm **Forms:** https://app.1099-prep.com/userGuide/Content/C_Features/1099_H2_Features_Forms_Add_and_Prep_Forms.htm

Assigned Role	Using the Role	1099-Prep Help Links
	Optionally, payers export existing payer, recipient, and form data and import data into the current tax year.	**Download and populate an export template:** https://app.1099-prep.com/userGuide/Content/C_Features/1099_H3_Features_Reporting_Exporting_Templates.htm **NOTE:** There are instructions on the export template in orange. Do not remove these instructions. Payer fields are in gray, Recipient fields in green, and Form fields in blue. Bold fields are required. **Import completed export template:** https://app.1099-prep.com/userGuide/Content/C_Features/1099_H2_Features_Import_Importing_New_Data.htm **Verify import results:** https://app.1099-prep.com/userGuide/Content/C_Features/1099_H2_Features_Import_Import_History.htm **Correct any errors in the import:** https://app.1099-prep.com/userGuide/Content/C_Features/1099_H3_Features_Import_History_Resolving_Import_Failures.htm

Assigned Role	Using the Role	1099-Prep Help Links
Reviewer	Complete the review process by verifying or denying forms.	**Reviewing forms:** https://app.1099-prep.com/userGuide/Content/C_Features/1099_H2_Features_Forms_Reviewing_Forms.htm
Submitter	Add forms to the cart, individually or in bulk.	**Adding forms to the cart:** https://app.1099-prep.com/userGuide/Content/C_Features/1099_H2_Features_Cart_Pay_Adding_Forms_to_Cart.htm
	Review the cart.	**Accessing the cart:** https://app.1099-prep.com/userGuide/Content/C_Features/1099_H2_Features_Cart_Pay_Accessing_Cart.htm
	Select delivery options and make payment.	**Making payment:** https://app.1099-prep.com/userGuide/Content/C_Features/1099_H2_Features_Cart_Pay_Making_Payment.htm