How to run the 1099R   Transaction Code:
                                                                      PU19

Purpose   Use this procedure when you need to create a 1099R.

Trigger   Use this procedure as needed for 1099R validation purposes.

Prerequisites   The 1099R process is **only** for the **Board of Volunteer Firefighters** (Pers. Area 2201)

End User Roles   Tax Processor Role.

Change History	Change Description
11/8/2011	Created

Menu Path   Human Resources ⟶ Americas ⟶ USA ⟶ Subsequent activities   Period-
                     Independent ⟶ Payroll supplement ⟶ PU19 Tax Reporter

Transaction Code   PU19

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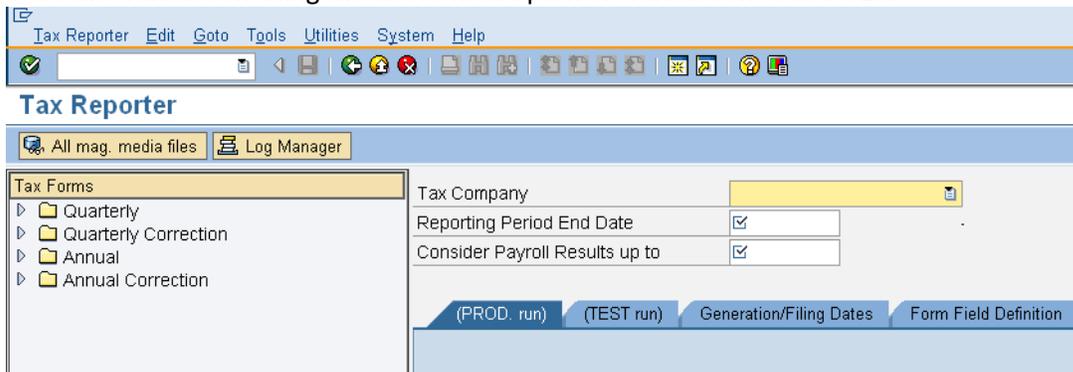

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error	**Example**: Make an entry in all required fields. **Action**: Fix the problem(s) and then click (Enter) to validate and proceed.
Warning	**Example**: Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. **Action**: If an action is required, perform the action. Otherwise, click (Enter) to validate and proceed.
Confirmation or	**Example**: Save your entries. **Action**: Perform the required action to proceed.

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IF	GOTO
To reprint a 1099R	**Step 20**

1. Start the transaction using the above menu path or transaction code **PU19**.

2. Complete the following fields:

Field Name	R/O/C	Description
Tax Company	R	Select your agency's Tax Company ID. ⓘ Agencies that have more than one tax identification number (agencies with sub-areas) have the option to roll them all into one report. To view a specific agency, just enter that agency's tax company information. **Example:** 2201 (Board of Volunteer Firefighters)
Reporting Period End Date	R	The Reporting Period End Date. **Example:** 12/31/2010
Consider Payroll Results up to	R	The Consider Payroll Results up to. ⓘ Enter the Quarter End Date. (Using the same format above.)

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		Example:	12/31/2010
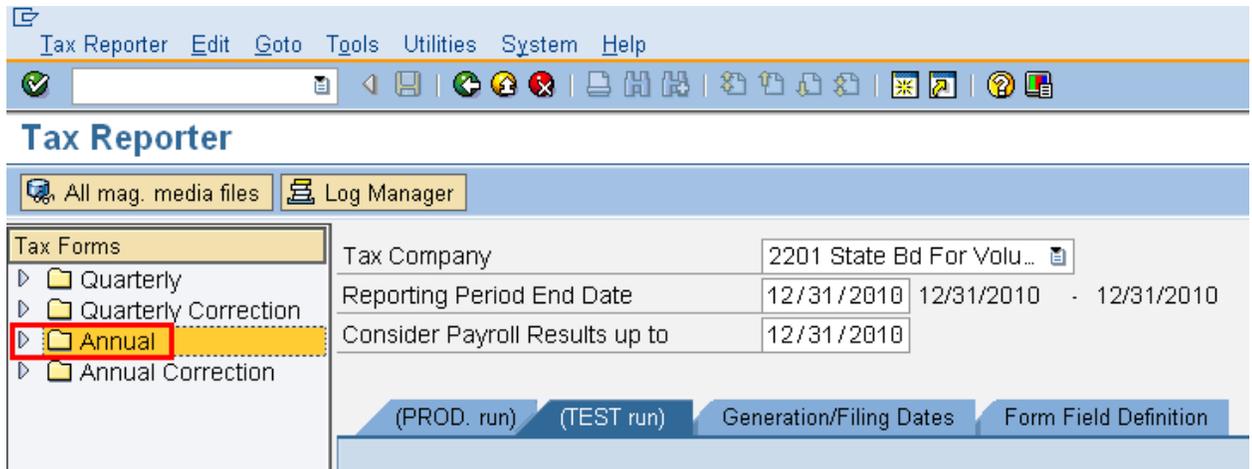
3. Click the arrow in front of the *Annual Folder:*
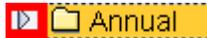
4. Click

5. Select the tab

   Note: Prior to executing any form in the Tax Reporter, review the Tax Reporter Log Manager to see if the form has already been run within the past seven days
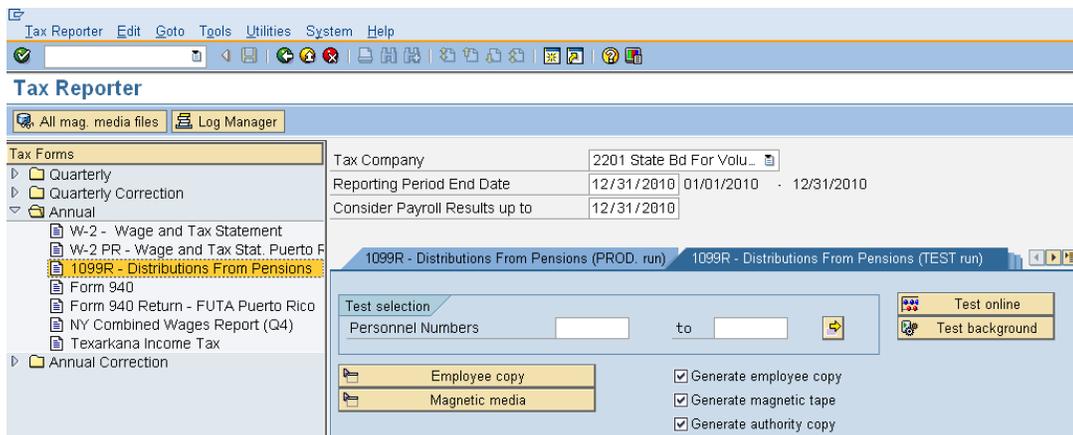
6.   **Uncheck** *Generate magentic tape* **and** *Generate authority copy*
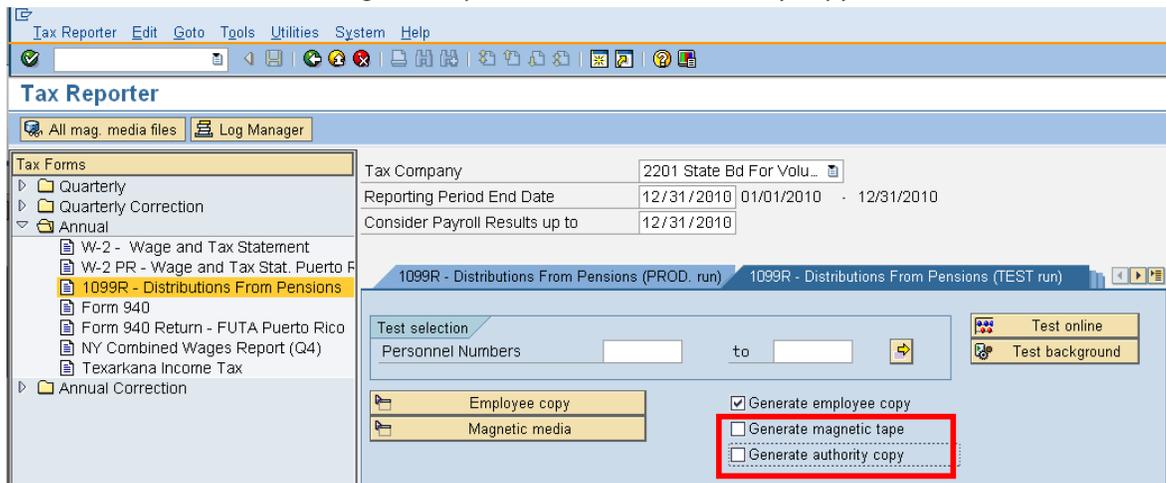
7. Click [Employee copy]

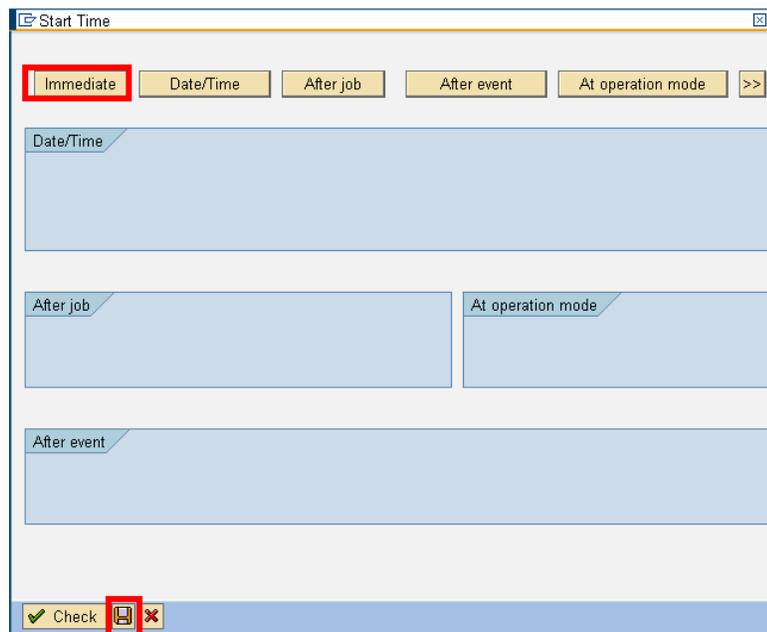8. Under [Details - Employee Copy] enter the Personnel Number(s)
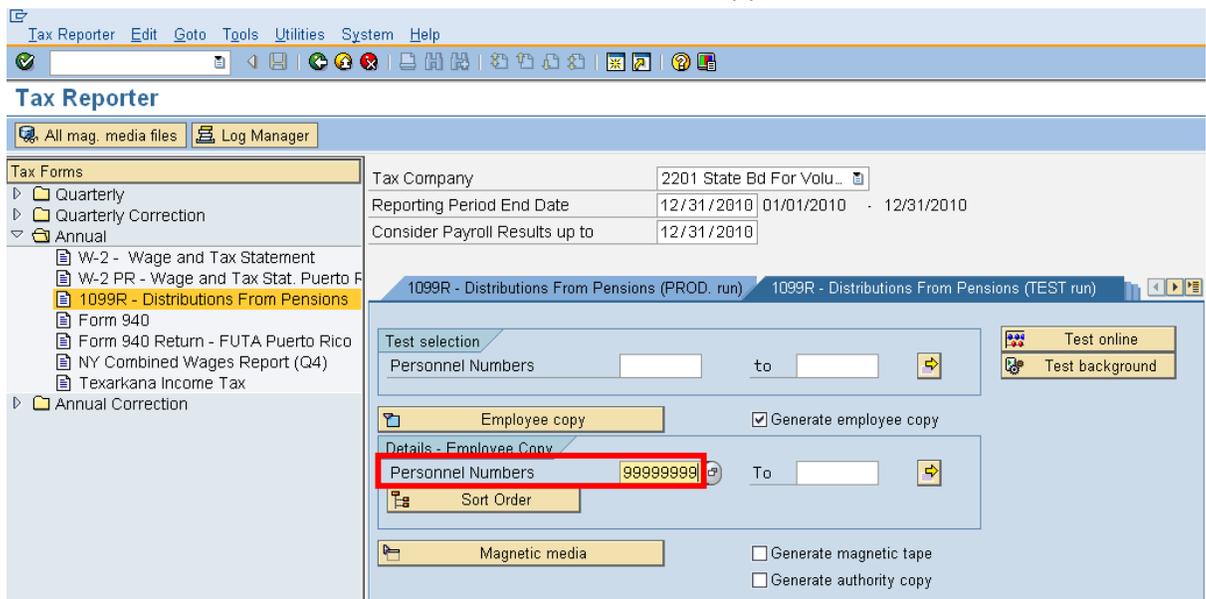
If you are running this for **one** or **two** employees click [Test online]
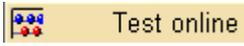
If you are running this for **multiple** employees click ⚙ Test background
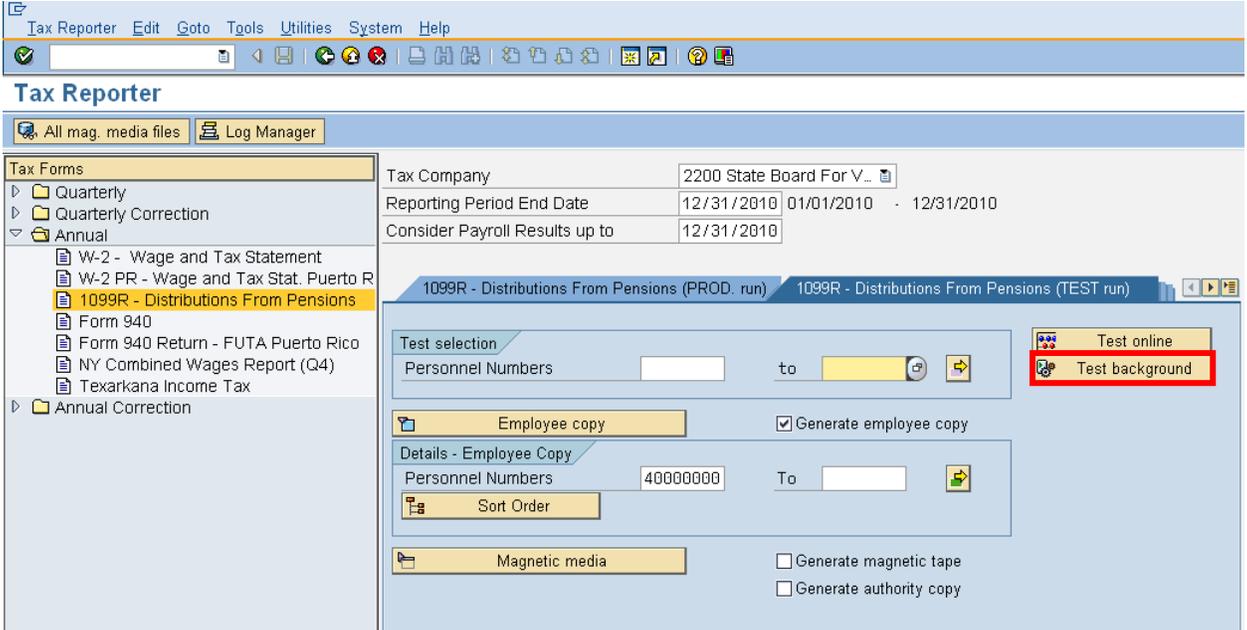
9. Once you click **Test background** you will receive the *Start Time* pop-up screen.

10. Click **Immediate**

11.

12. Click ![save icon] save

   Note: The status bar will display the message "Job has Started"
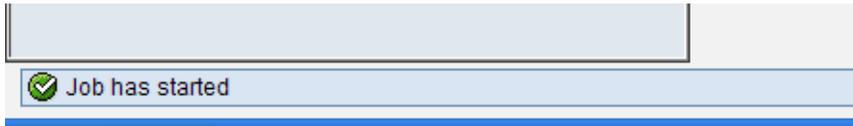
13. To view the Forms click ![Log Manager] on the application toolbar of the *Tax Reporter*
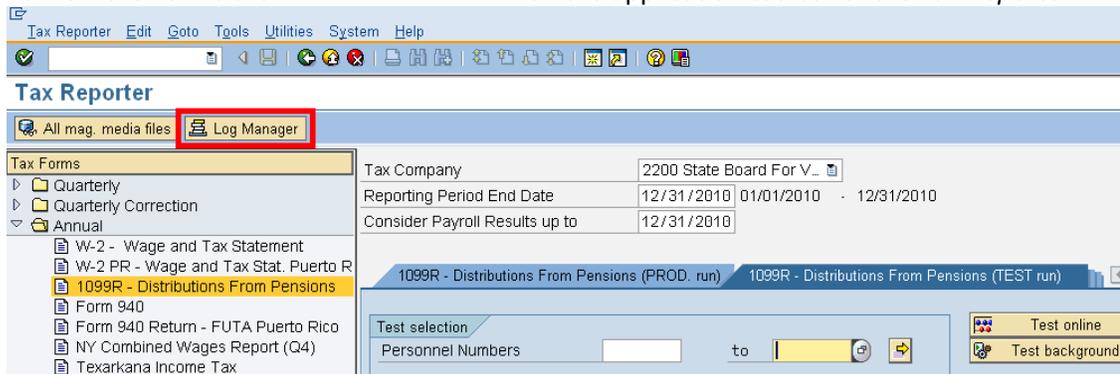
14. To view the Forms, click on the folder to the **left** of the **Test folder**. To access the form, click on the arrow next to the run you wish to display
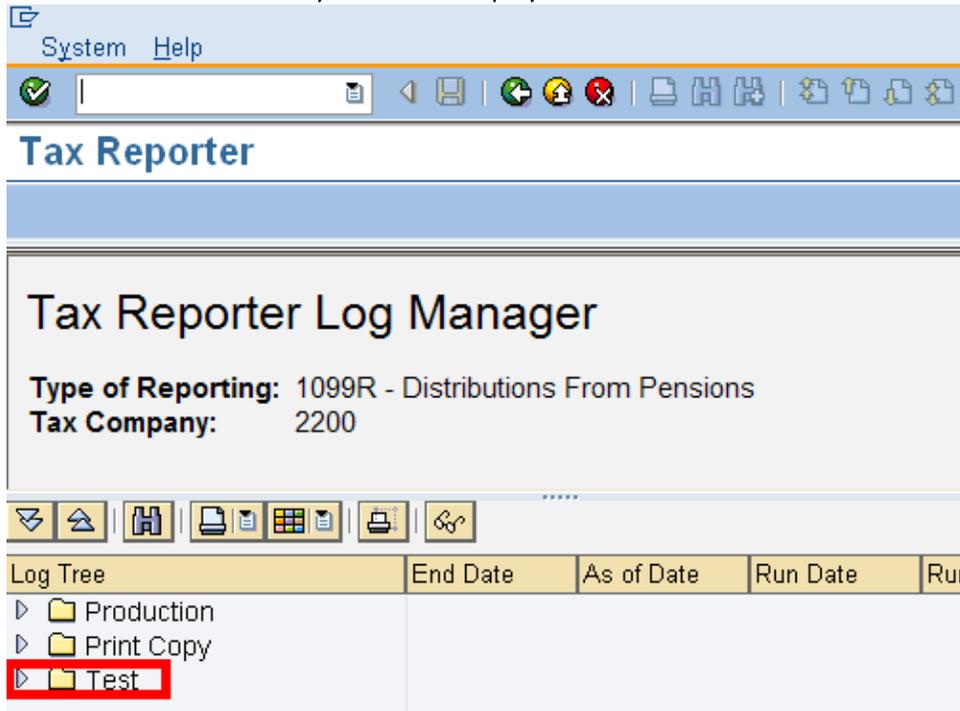
15. Select the [▽ 📑 Selection criteria / Output]
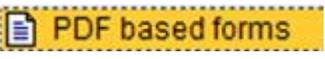
16. Click [📄 PDF based forms] to open the PDF based forms.

17. Click the spool number to view:

ℹ️ Reports generated for 1099R process:

- **HR_F_1096_09:** 1096 Annual Summary and Transmittal of U.S. Information Returns. (Delivered SAP Form with total dollar amounts).

- **ZHR_F_1099R_CUST**: 1099R Employee Custom CCYY (Customized from with SOW notice to recipient)

- **HR_F_1099R:** 1099R Employer Copy (Delivered SAP Form)

- **HR_F_945_09:** 945 Annual Tax Return (Delivered SAP form with total dollar amounts)

18. The spool will display:
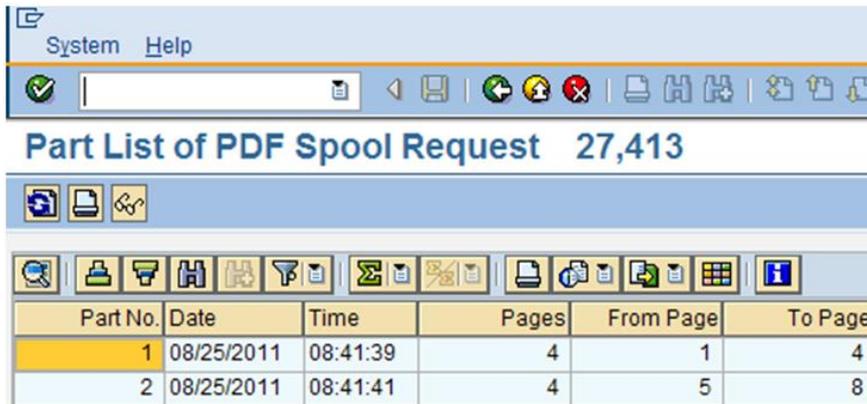
Tip: There are two ways to open the forms.

1. Highlight the line to display and click (display)
2. Double click on the line to view.

Tip: There are two ways to print the forms.

1. From the spool file select the Form to print, the click (print) to print.
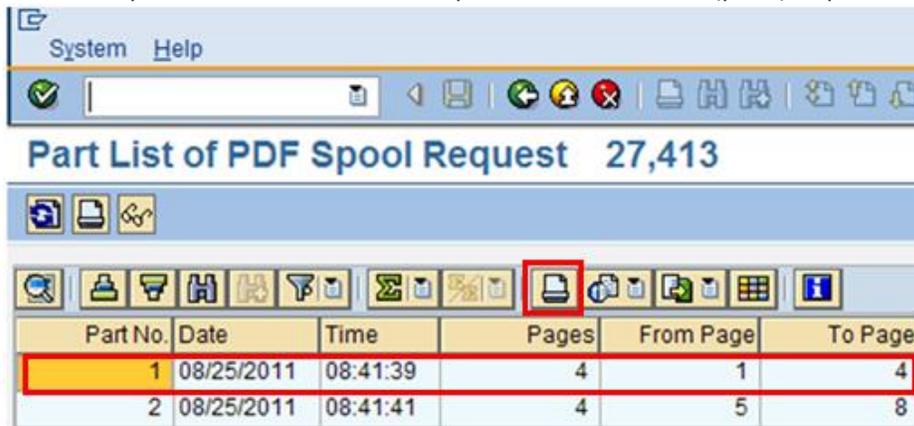
2. While viewing the form, clicking the [print icon] (print)

19. Click [Back icon] (Back) twice to return back to the Tax Reporter screen.

20. To **reprint** an employee's 1099R select 1099R - Distributions From Pensions (PROD. run)

21. Click [Employee copy button] to enter the personnel number

22. Uncheck **Generate magentic tape and Generate authority copy**

23. Click

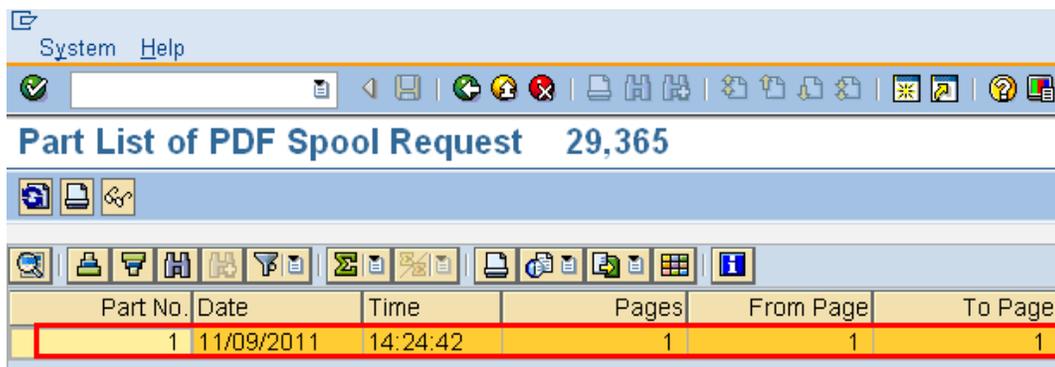**24.** From the **Choose online or background print** pop-up click **online**
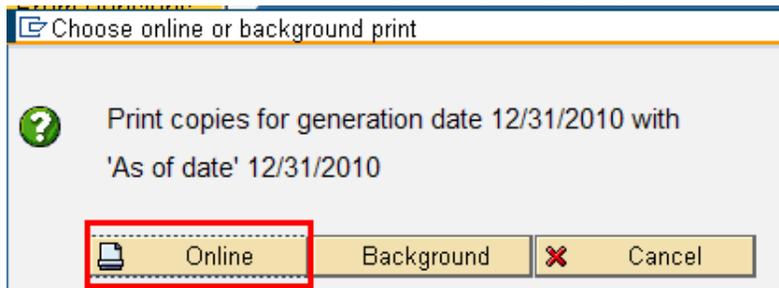
25. Click [+ Forms] to display the forms

Tax Reporter

| Explanations | Choose | Expand all | Collapse all | Set section | Properties |

1099R - Distributions From Pensions Tax Reporter output

```
    Forms                    PDF Forms generated
        2201 1099-R Employer Copy
        2201 1096 Annual Summary              FED
        2201 945 Annual Tax Return            FED
        2201 1099-R Employee Custom 2010

    Forms                    SAPScript Forms generated
    Magnetic Media           Magnetic Media files
    Reports                  Reports generated
    Tax Reporter Log         Messages for the run
```

26. Double click the text to view/print.

27. Select and double click the line item

Part List of PDF Spool Request   29,365

Part No.	Date	Time	Pages	From Page	To Page
1	11/09/2011	14:24:42	1	1	1

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28. To print from the Spool Request, click (Print)
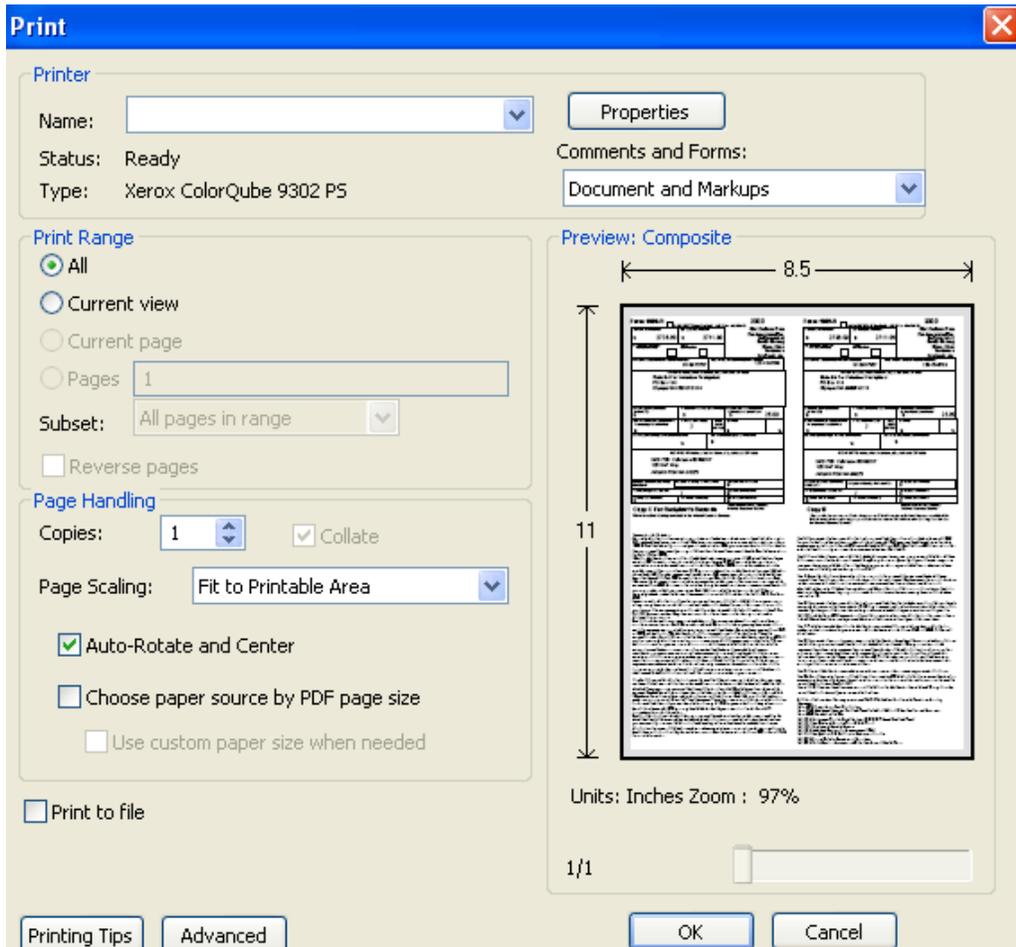
29. Click [OK] .
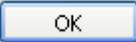
Results
You have created the 1099R.

You have successfully reprinted an employees' **1099R** |

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