#### **Directions for Accessing 1099s through SPA**

Access SPA, under your PROFILE in SPA you will find a link to "1099 Tax Document". Click this link.

SPA – Link is available under the profile drop down.

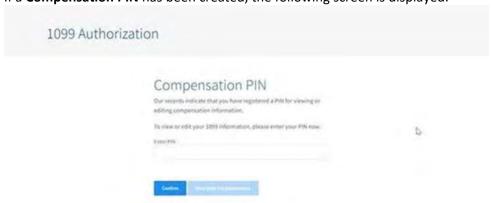


Or, you may also access the link through "REPORTS", by clicking on the link entitled "1099 Tax Document".

SPA – Link is available under Reports.

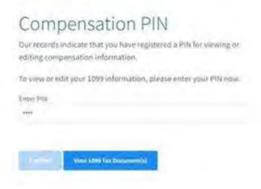


If a **Compensation PIN** has been created, the following screen is displayed.



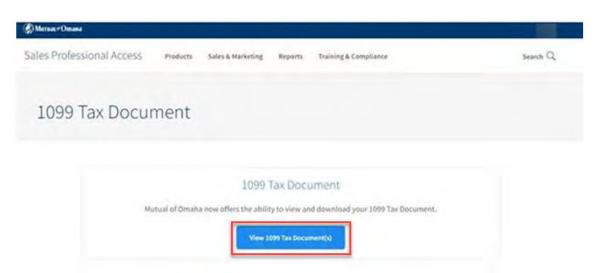
After the PIN is entered, the producer must click on View 1099 Tax Document

# 1099 Authorization



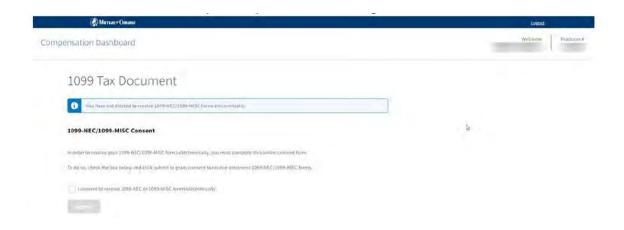
After entering the PIN, the following screen will come up.

If you do <u>not</u> have a Compensation PIN, the following screen comes up directly.

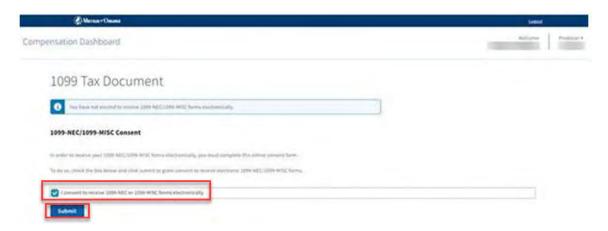


After clicking on the **View 1099 Tax Document(s)** button in the screen print above, the next screen will ask for consent to receive 1099s electronically.

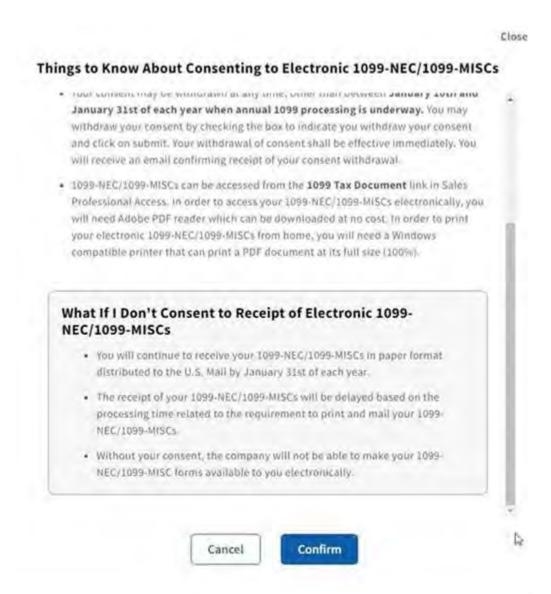
During the first view of the 1099 Tax Document application, having <u>not</u> yet elected to receive 1099 forms electronically, you will see the following.



The first step to consent - click in box to consent, then, click on submit. **NOTE: Upon** consenting to receive 1099s electronically, you will no longer receive 1099s in the mail. If you want them electronically, then proceed.



After Submitting, the terms and conditions are displayed. From this screen **scroll down** for the **Confirm** button to become **blue** and eligible to select.



The view after confirming to receive 1099s electronically - one 1099 is showing in screen shot, but you may have multiple 1099s available.



You may choose to "View" your 1099 or "Download" it for filing, printing, etc.

#### As a reminder:

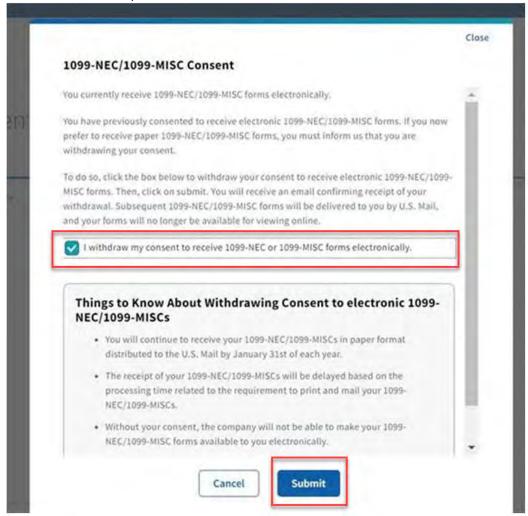
- If you Opt-in, you will receive your 1099s on SPA going forward electronically and will <u>no</u> longer be mailed a 1099 through the U.S. Postal Service (USPS).
- If you do not opt-in, you will be mailed your 1099s, and will <u>not</u> be able to view them on SPA.

NOTE: You may also elect to Opt-out of receiving 1099s electronically at any time, and your 1099s will be mailed through USPS. You may choose either option, but viewing 1099s on SPA electronically <u>and</u> having them mailed through USPS is <u>not</u> one of the options.

When clicking the link to withdraw consent, the screen will be presented.



To withdraw consent, click in the box. The Submit button will then turn blue. Click Submit.



The following screen will be displayed indicating you have withdrawn consent to receive 1099s electronically.



### ADMIN ASSISTANT – (Assistants do not have ability to consent or withdraw consent)

If you have **OPTED IN** to receive a 1099 electronically, the assistant will be able access as explained above. Only assistants with Full permission in SPA will be eligible to view the 1099s.

If you have not **OPTED IN** or have **OPTED OUT**, then the assistant will <u>not</u> be able to access or view 1099s through SPA.

If you have a Compensation PIN assigned for SPA already, the assistant will need the compensation pin to access the 1099. Without the Compensation PIN the Assistant will <u>not</u> be able to view the 1099s.

An Assistant will see the following when you have elected to receive 1099s electronically.

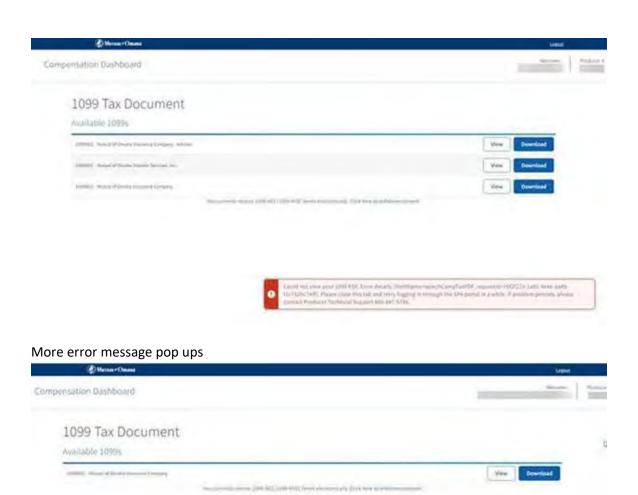


If errors should be encountered while accessing the 1099s in SPA, please contact Technical Support 800-847-9785. Please provide them with screen prints of the error(s) if encountered.

Sample error message when SPA session has expired:



Sample error message when there is a problem retrieving 1099 to display



## 1099 Tax Document application FAQs

**Q**: If you are a producer with an assistant, and they receive the error "Portlet Not Available" when clicking on the link to the 1099 Tax Document application.

**A**: An assistant with moderate or limited permission levels are not eligible to access the 1099 Tax Document application. Only assistants with full permission levels are eligible to access the 1099 Tax Document application.

**Q**: An assistant does not have the link to provide consent to receive their 1099 tax document electronically.

**A**: Assistants are not eligible to consent to the 1099 Tax Document application. The producer themselves will need to login and provide consent.

**Q**: If you are in the 1099 application and are receiving an error message when selecting a choice from the online.

**A**: For security, there is a **10-minute timeout**. When no activity occurs for 10 minutes in the 1099 application, you are logged out and must start a new session.

**Q**: If you are in the 1099 application and are receiving a message that an error occurred, "Could not save your action. Please close this tab and retry logging in through the SPA portal in a while. If the problem persists, please contact Technical Support 800-847-9785."

**A**: This could be that the user has been inactive for over 1 hour from SPA sign-in and timed out. They will be logged out of the 1099 application and need to sign back into SPA if they want to continue. The error message may also report error details. Please request the user supply a screen print of the error message, it will be helpful when researching the error if signing back into SPA does not resolve the error.

**Q**: An assistant is logged into SPA, enters the 1099 application, the assistant name is displayed under Welcome, and the Production number reflects those they are assisting. **A**: The Production number field will reflect the number that the assistant is "viewing as" from SPA. A future enhancement will include a Name field to display the name associated to the number.