1099 Information Sessions

December 8, 2025 – 1pm-2pm

February 10, 2026 – 11am-12pm





Presenters

Gwen Earp, Business Systems Manager

Crystal Cole, Business Systems Analyst

Jennifer Pacheco, Audit, Risk & Compliance Services Director

Kathleen Tolbert, Tax and Cost Allocation Specialist Lead



Agenda

- •Welcome
- •NCFS 1099 Security Roles
- What's New
- •NCFS 1099 Maintenance Report Information
- •1099 Coding on Invoices in NCFS
- NCFS QRG Training Links
- •1099 Deadlines and Dates
- Agency questions





NCFS 1099 Security Roles

Gwen Earp

NCFS 1099 Security Roles

NC AP Tax Reports JR

- Security role to view and print the 1099 reports under the Tax reports folder in NCFS.
 - RPTAP017-1099 MISC report (1099 MISC forms)
 - RPTAP018-1099 G report (1099 G forms)
 - RPTAP019-1099 NEC report (1099 NEC forms)
 - RPTAP022-1099 Maintenance Report

Report Path: Shared Folders>Custom>FBR Custom>Report>Accounts
Payable>Tax Reports

Tax Reports

- NC 1099 G Report (RPTAP018)
- NC 1099 Invoice Maintenance Report (RPTAP022)
- NC 1099 MISC Report (RPTAP017)
- NC 1099 NEC Report (RPTAP019)



1099 Security Roles

NC AP Invoice Management

 Security role to enter and maintain invoices with the appropriate 1099 codes.

NC AP Agency Payment Management

Security role to pay the 1099 invoices.





What's New for 2025

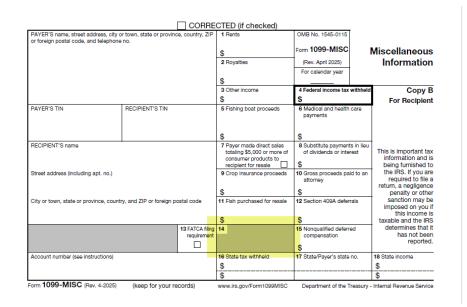
Gwen Earp

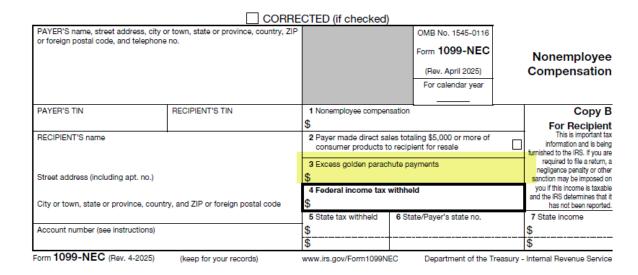
What's New



IRS Form Changes

- The box for Excess Golden Parachute payments moved from the 1099 MISC form to the 1099 NEC form in 2025. This change will not affect state agencies. This category is not used by state government.
- Examples of how the MISC and NEC forms 2025 will look when printed.





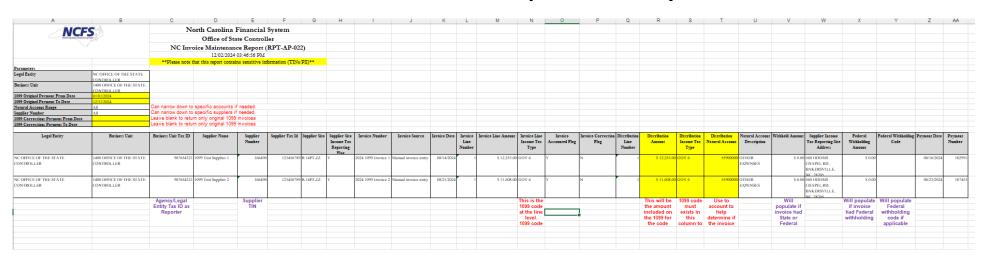
What's New



- RPTAP022 1099 Maintenance Report
 - Invoice group was added to assist the agencies in reviewing invoices for 1099 coding
- Reporting Thresholds
 - There are no changes to reporting thresholds for 2025



RPTAP022-1099 Maintenance Report – Key Columns



Key fields

- Supplier name/number
- Invoice Line Income Tax type
- Invoice Distribution Tax type
- Filter suggestions
 - Service accounts
 - Suppliers without Inc
 - Source for interfaced invoices
 - Invoice Group



RPTAP022-1099 Maintenance Report-Original 1099 Invoices

Summary

- 1099 Original Payment From and To date parameters for the 1099 original invoices
- 1099 Correction Payment From and To date parameters will remain blank to return only 1099 original 1099 invoices

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~AIC	ECLER	North Carolina Financial							
- NCFS									
North Carolina Finan	cial System	Office of State Controller							
	\Box	NC Invoice Maintenance Report							
		12/02/2024 03:46:56 PM							
		**Please note that this report contains sensitive							
n		Please note that this report contains sensitive							
Parameters	NC OFFICE OF THE STATE	٦							
Legal Entity	CONTROLLER								
Business Unit	All	╡							
1099 Original Payment From Date	01/01/2024	1099 Calendar year payment from date							
099 Original Payment To Date	12/31/2024	1099 Calendar year payment to date							
Natural Account Range	All	1055 careridar year payment to date							
Supplier Number	All	╡							
1099 Corrections Payment From Date		Leave blank to return only original 1099 invo	ices						
1099 Corrections Payment To Date		Leave blank to return only original 1099 invo							
2000 Collections Layment To Date		zeare brank to retain only original 2005 into							
Legal Entity	Business Unit	Business Unit Tax ID	Supplier Name	Supplier Number	Supplier Tax ID	Income Tax Type	1099 Original Invoices Amount	1099 Corrections Invoices Amount	Total Amount
	· .	▼		₩	~			_	
NC OFFICE OF THE STATE	1400 OFFICE OF THE STATE	987654321	1099 Supplier 1	203975	111111111	MISC3	\$ 36.00	\$ 0.00	\$ 36
CONTROLLER	CONTROLLER								
NC OFFICE OF THE STATE	1400 OFFICE OF THE STATE	987654321	1099 Supplier 2	205510	2222222222	DAU/AR	\$ 3,000.00	\$ 0.00	\$ 3,000
CONTROLLER	CONTROLLER								
NC OFFICE OF THE STATE	1400 OFFICE OF THE STATE	987654321	1099 Supplier 3	148104	3333333333	DAU/AR	\$ 5,000.00	\$ 0.00	\$ 5,000
CONTROLLER	CONTROLLER								
NC OFFICE OF THE STATE CONTROLLER	1400 OFFICE OF THE STATE CONTROLLER	987654321	1099 Supplier 4	122802	4444444444	DAU/AR	\$ 160.00	\$ 0.00	\$ 160
NC OFFICE OF THE STATE	1400 OFFICE OF THE STATE	097454321	1099 Supplier 5	211617	555555555	COVIA	\$ 14,126.00	\$ 0.00	\$ 14,126
CONTROLLER	CONTROLLER	901034021	1099 Supplier 5	211017	33333333	, , ,	2 14,120.00	7	2 17,120
NC OFFICE OF THE STATE	1400 OFFICE OF THE STATE	987654321	1099 Supplier 6	145150	666666666	GOV 6	\$ 27,216.00	\$ 0.00	\$ 27,216
CONTROLLER	CONTROLLER								• ,
NC OFFICE OF THE STATE	1400 OFFICE OF THE STATE	987654321	1099 Supplier 7	146692	777777777	GOV 6	\$ 1,312.00	\$ 0.00	\$ 1,312
CONTROLLER	CONTROLLER								
NC OFFICE OF THE STATE	1400 OFFICE OF THE STATE	987654321	1099 Supplier 8	144953	888888888	DAU/AR	\$ 520.00	\$ 0.00	\$ 520
	CONTROLLER								
NC OFFICE OF THE STATE	1400 OFFICE OF THE STATE	987654321	1099 Supplier 9	150484	9999999999	MISC3	\$ 11.00	\$ 0.00	\$ 11
NC OFFICE OF THE STATE CONTROLLER	1400 OFFICE OF THE STATE CONTROLLER								
NC OFFICE OF THE STATE CONTROLLER NC OFFICE OF THE STATE	1400 OFFICE OF THE STATE CONTROLLER 1400 OFFICE OF THE STATE		1099 Supplier 9 1099 Supplier 10	150484 119278		MISC3 DAU/AR	\$ 11.00 \$ 2,964.52		
CONTROLLER NC OFFICE OF THE STATE CONTROLLER NC OFFICE OF THE STATE CONTROLLER NC OFFICE OF THE STATE	1400 OFFICE OF THE STATE CONTROLLER 1400 OFFICE OF THE STATE CONTROLLER	987654321	1099 Supplier 10	119278	1000001000	DAU/AR	\$ 2,964.52	\$ 0.00	\$ 2,964
NC OFFICE OF THE STATE CONTROLLER NC OFFICE OF THE STATE CONTROLLER NC OFFICE OF THE STATE	1400 OFFICE OF THE STATE CONTROLLER 1400 OFFICE OF THE STATE CONTROLLER 1400 OFFICE OF THE STATE	987654321			1000001000			\$ 0.00	\$ 2,964
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RPTAP022-1099 Maintenance Report-Original 1099 Invoices

Detail

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	CONTROLLER																									
	1400 OFFICE OF THE STATE																									
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ment From Date ment To Date	12/31/2024																									
Range	A II	Can narrow down to	specific accounts i	if needed.																						
	All		specific suppliers it																							
s Payment From Date		Leave blank to retu	irn only original 1099	9 invoices																						
is Payment To Date		Leave blank to retu	rn only original 1099	9 invoices																						
Legal Entity	Business Unit	Business Unit Tax ID	Supplier Name	Supplier	Supplier Tax Id	Supplier Site	Supplier Site	Invoice Number	Invoice Source	Invoice Date	Invoice Line Number	Invoice Line Amount	Invoice Line	Invoice	Invoice Correction	n Distribution	Distribution	Distribution	Distribution	Natural Account	Withheld Amount	Supplier Income		Federal Withholding	Payment Date	e P
				Number			Income Tax						Income Tax	Accounted Flag	Flag	Line	Amount		Natural Account	Description		Tax Reporting Site	Withholding	Code		3
							Reporting						Type			Number		Type				Address	Amount			
HE STATE	1400 OFFICE OF THE STATE	987654321	1099 Test Supplier 1	166490	123456789	R.14PT.ZZ	Y	2024 1099 Invoice	Manual invoice entry	08/14/2024		S 12,253.00	GOV 6	Y	N	1	S 12,253.00	GOV 6	55900000	OTHER	\$0.00	560 ODOMS	\$ 0.00		08/16/2024	24
	CONTROLLER																			EXPENSES		CHAPEL RD,				
	1																					BAKERSVILLE,				
	1400 OFFICE OF THE STATE					R.14PT.22																NC 28705				+
THE STATE	CONTROLLER	987654321	1099 Test Supplier 2	166490	123456789	R.14PT.ZZ	Y	2024 1099 Invoice 2	2 Manual invoice entry	08/21/2024	1	\$ 11,608.00	GOV 6	Y	N	'	\$ 11,608.00	GOV 6	55900000	EXPENSES		560 ODOMS CHAPEL RD.	\$ 0.00		08/23/2024	24
	CONTROLLER																			EAPENSES		BAKERSVILLE.				
																						NC 28705				
		Agency/Legal		Supplier									This is the					1099 code			Will			Will populate		
		Entity Tax ID as		TIN									1099 code				the amount	must	account to		populate if		if invoice	Federal		
		Reporter											at the line level.				included on the 1099 for	exists in this	help determine if		invoice had State or		had Federal withholding	withholding code if		
													1099 code				the code		the invoice		Federal			applicable		



RPTAP022-1099 Maintenance Report-Original & Correction 1099 Invoices

Summary

- 1099 Original Payment From and To date parameters for the 1099 original invoices
- 1099 Correction Payment From and To date parameters for the 1099 correction invoices to correct the original 1099s. (Corrections Payment dates will be 1/1/20XX-3/31/20XX for the year after the original 1099 invoice payment dates)



North Carolina Financial Office of State Controller NC Invoice Maintenance Report (RPT-AP-022)

12/03/2024 07:30:17 AM

**Please note that this report contains sensitive

		Please note that this report contains sensitive
Parameters		
Legal Entity	NC OFFICE OF THE STATE	
	CONTROLLER	
Business Unit	All	
1099 Original Payment From Date	1/1/2023	1099 Calendar year payment from date
1099 Original Payment To Date	12/31/2023	1099 Calendar year payment to date
Natural Account Range	All	
Supplier Number	All	
1099 Correction Payment From Date	01/01/2024	1099 Correction invoices payment from date
1099 Correction Payment To Date	03/31/2024	1099 Correction invoices payment to date

Legal Entity	Business Unit	Business Unit Tax ID	Supplier Name ▼	Supplier Numbe 🏋	Supplier Tax ID ▼	Income Tax Typ∈ ▼	1099 Original Invoices Amour	1099 Corrections Invoices	Total Amount
NC OFFICE OF THE STATE CONTROLLER	1400 OFFICE OF THE STATE	566000732	1099 Supplier 1	145085	123456789	MISC 6	\$ 10,276.00	\$ (10,276.00)	\$ 0.00
	CONTROLLER								
NC OFFICE OF THE STATE CONTROLLER	1400 OFFICE OF THE STATE	566000732	1099 Supplier 2	145086	245678901	GOV 6	\$ 0.00	\$ 10,276.00	\$ 10,276.00
	CONTROLLER								

RPTAP022-1099 Maintenance Report-Original & Correction 1099 Invoices

Detail

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Parameters																
Legal Entity	NC OFFICE OF THE STATE CONTROLLER															
Business Unit	All	1														
1099 Original Payment From Date	01/01/2023															
1099 Original Payment To Date	12/31/2023	1														
Natural Account Range	All															
Supplier Number	All	1														
1099 Correction Payment From Date	01/01/2024															
1099 Correction Payment To Date	03/31/2024															
		1														
T 177 ()	D															
Legal Entity	Business Unit	Invoice Date	Invoice Line	Invoice Line	Invoice Line	Invoice	Invoice Correction	Distributio	Distribution Distribut	Distributio	Natural Account	Withheld	Supplier Income Tax	Federal	Federal	Payment Date
Legal Entity	Business Unit	Invoice Date	Invoice Line Number	Invoice Line Amount	Invoice Line Income Tax Type	Accounted	Invoice Correction Flag	Distributio n Line	Distribution Distribut Amount ion	Distributio n Natural	Natural Account Description	Withheld Amount	Supplier Income Tax Reporting Site Address		Withholding	Payment Date
Legal Entity	Business Unit	Invoice Date							Amount ion Income							Payment Date
Legai Entity	Business Umt	Invoice Date				Accounted		n Line	Amount ion	n Natural				Withholdi	Withholding	Payment Date
	▼	~	Number	Amount	Income Tax Type	Accounted		n Line	Amount ion Income Tax Tyne	n Natural Account	Description	Amount	Reporting Site Address	Withholdi ng Amount	Withholding	·
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NC OFFICE OF THE STATE CONTROLLER	1400 OFFICE OF THE STATE CONTROLLER	10/09/2023	Number	Amount	Income Tax Type DAU/AR	Accounted		n Line	Amount ion Income Tax Type v	n Natural Account	Description The expenses	Amount	Reporting Site Address **S60 ODOMS CHAPEL RD, BAKERSVILLE, NC, 28705	Withholdi ng Amount * 0.00	Withholding	11/15/2023
	1400 OFFICE OF THE STATE	~	Number	Amount	Income Tax Type DAU/AR	Accounted		n Line	Amount ion Income Tax Tyne	n Natural Account	Description	\$ 0.00	Reporting Site Address	Withholdi ng Amount	Withholding	·
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NC OFFICE OF THE STATE CONTROLLER NC OFFICE OF THE STATE CONTROLLER	1400 OFFICE OF THE STATE CONTROLLER 1400 OFFICE OF THE STATE CONTROLLER	10/09/2023 10/09/2023	Number	\$ 3,594.00 \$ 3,906.00	Income Tax Type DAU/AR DAU/AR	Accounted		n Line	Amount ion Income Tax Type. \$ 3,594.00 DAU/AR \$ 3,906.00 DAU/AR	n Natural Account \$559000000	Description OTHER EXPENSES OTHER EXPENSES	\$ 0.00 \$ 0.00 \$ 0.00	Reporting Site Address 560 ODOMS CHAPEL RD, BAKERSVILLE, NC, 28705 560 ODOMS CHAPEL RD, BAKERSVILLE, NC, 28705	Withholdi ng Amount \$ 0.00	Withholding	11/15/2023 11/15/2023
NC OFFICE OF THE STATE CONTROLLER NC OFFICE OF THE STATE CONTROLLER	1400 OFFICE OF THE STATE CONTROLLER 1400 OFFICE OF THE STATE CONTROLLER 1400 OFFICE OF THE STATE CONTROLLER 1400 OFFICE OF THE STATE	10/09/2023 10/09/2023	Number 1 2	\$ 3,594.00 \$ 3,906.00 \$ (7,500.00)	Income Tax Type DAU/AR DAU/AR	Accounted		n Line	Amount ion Income Tax Type. \$ 3,594.00 DAU/AR \$ 3,906.00 DAU/AR	n Natural Account 559000000 559000000 559000000	Description OTHER EXPENSES OTHER EXPENSES	\$ 0.00 \$ 0.00 \$ 0.00	Reporting Site Address 560 ODOMS CHAPEL RD, BAKERSVILLE, NC, 28705 560 ODOMS CHAPEL RD, BAKERSVILLE, NC, 28705 560 ODOMS CHAPEL RD, BAKERSVILLE, NC, 28705 560 ODOMS CHAPEL RD,	Withholdi ng Amount \$ 0.00	Withholding	11/15/2023 11/15/2023
NC OFFICE OF THE STATE CONTROLLER	1400 OFFICE OF THE STATE CONTROLLER CONTROLLER	10/09/2023 10/09/2023 03/26/2024 11/08/2023	Number 1 2 2	\$ 3,594.00 \$ 3,906.00 \$ (7,500.00) \$ 2,776.00	DAU/AR DAU/AR DAU/AR DAU/AR	Accounted		n Line	Amount ion Income Tax Type. \$ 3,594.00 DAU/AR \$ 3,906.00 DAU/AR \$ (7,500.00) DAU/AR \$ 2,776.00 DAU/AR	n Natural Account 559000000 559000000 559000000	Description OTHER EXPENSES OTHER EXPENSES OTHER EXPENSES OTHER EXPENSES	\$ 0.00 \$ 0.00 \$ 0.00	Reporting Site Address 560 ODOMS CHAPEL RD, BAKERSVILLE, NC, 28705	Withholding	Withholding	11/15/2023 11/15/2023 03/27/2024 11/15/2023
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NC OFFICE OF THE STATE CONTROLLER	1400 OFFICE OF THE STATE CONTROLLER	10/09/2023 10/09/2023 03/26/2024 11/08/2023 03/26/2024	Number 1 2 2 1 2	\$ 3,594.00 \$ 3,906.00 \$ (7,500.00) \$ 2,776.00	DAU/AR DAU/AR DAU/AR DAU/AR DAU/AR DAU/AR	Accounted		n Line	Amount ion Income Tax Type. \$ 3,594.00 DAU/AR \$ 3,906.00 DAU/AR \$ (7,500.00) DAU/AR \$ 2,776.00 DAU/AR \$ (2,776.00) DAU/AR	n Natural Account 559000000 559000000 559000000 559000000	OTHER EXPENSES OTHER EXPENSES OTHER EXPENSES OTHER EXPENSES OTHER EXPENSES	\$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00	Reporting Site Address 560 ODOMS CHAPEL RD, BAKERSVILLE, NC, 28705	### Withholding Amount	Withholding	11/15/2023 11/15/2023 11/15/2023 03/27/2024 11/15/2023 03/27/2024
NC OFFICE OF THE STATE CONTROLLER	1400 OFFICE OF THE STATE CONTROLLER 1400 OFFICE OF THE STATE 1400 OFFICE OF THE STATE	10/09/2023 10/09/2023 03/26/2024 11/08/2023	Number 1 2 2 1 2	\$ 3,594.00 \$ 3,906.00 \$ (7,500.00) \$ 2,776.00	DAU/AR DAU/AR DAU/AR DAU/AR DAU/AR DAU/AR	Accounted		n Line	Amount ion Income Tax Type. \$ 3,594.00 DAU/AR \$ 3,906.00 DAU/AR \$ (7,500.00) DAU/AR \$ 2,776.00 DAU/AR	n Natural Account 559000000 559000000 559000000 559000000	Description OTHER EXPENSES OTHER EXPENSES OTHER EXPENSES OTHER EXPENSES	\$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00	Reporting Site Address 560 ODOMS CHAPEL RD, BAKERSVILLE, NC, 28705 560 ODOMS CHAPEL RD, 560 ODOMS CHAPEL RD,	Withholding	Withholding	11/15/2023 11/15/2023 03/27/2024 11/15/2023
NC OFFICE OF THE STATE CONTROLLER	1400 OFFICE OF THE STATE CONTROLLER	10/09/2023 10/09/2023 03/26/2024 11/08/2023 03/26/2024	Number 1 2 2 1 1 1 1	\$ 3,594.00 \$ 3,906.00 \$ (7,500.00) \$ 2,776.00	DAU/AR DAU/AR DAU/AR DAU/AR DAU/AR DAU/AR DAU/AR DAU/AR DAU/AR	Accounted		n Line	Amount ion Income Tax Type. \$ 3,594.00 DAU/AR \$ 3,906.00 DAU/AR \$ (7,500.00) DAU/AR \$ 2,776.00 DAU/AR \$ (2,776.00) DAU/AR	n Natural Account 559000000 559000000 559000000 559000000 559000000	OTHER EXPENSES OTHER EXPENSES OTHER EXPENSES OTHER EXPENSES OTHER EXPENSES	\$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00 \$ 0.00	Reporting Site Address 560 ODOMS CHAPEL RD, BAKERSVILLE, NC, 28705	### Withholding Amount	Withholding	11/15/2023 11/15/2023 11/15/2023 03/27/2024 11/15/2023 03/27/2024

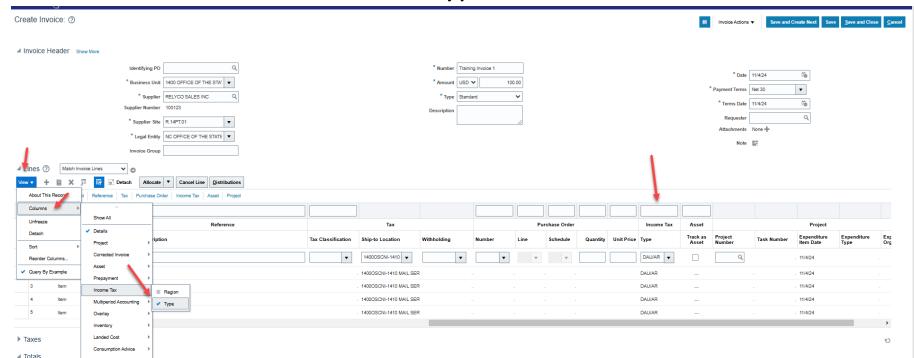


1099 Codes on Invoices in NCFS

1099 Codes Creating Invoices in NCFS

To update 1099 code when entering invoice

- Under lines section, scroll to Income Tax section and under Type chose the appropriate 1099 code.
- If Income Tax column is not visible, under the Line section click View then Columns and add income tax type column.

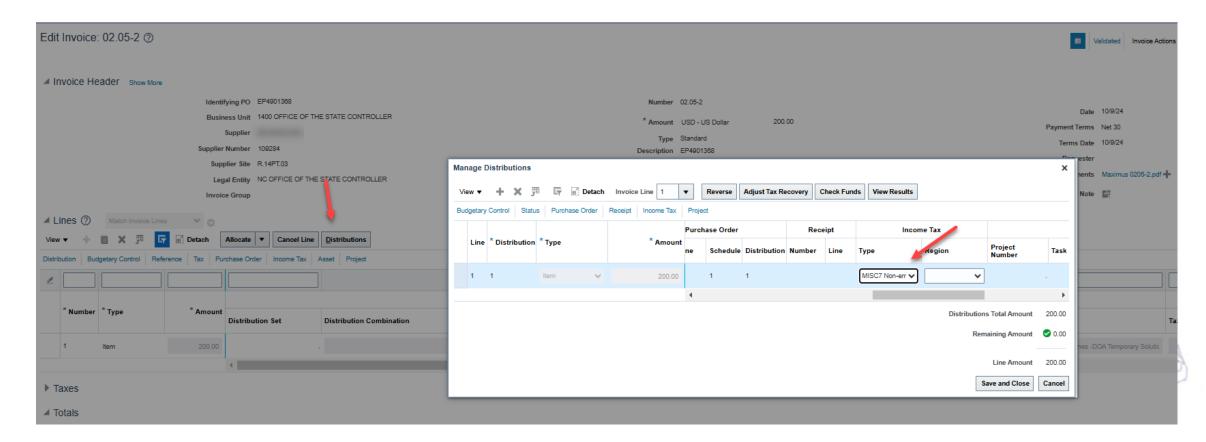




1099 Codes Invoice Maintenance in NCFS

To update 1099 code on invoice after entered or paid

- Under Edit mode of invoice click on Distributions under lines
- Update the Income Tax type to the appropriate 1099 code





1099 Reminders

1099 Reminders

- Verify interfaced invoices are flagged with the appropriate 1099 codes prior to the original file submission date.
- When printing 1099 forms, print one or a few forms to test form within the 1099 envelope. Suggest using "Fit to Paper" scale when printing 1099 form
- Use the 1099 Maintenance report to estimate the number of forms/envelopes needed for printing.
 - Under Summary tab, remove DAU/AR default 1099 code from column G (Income Tax Type)
 - Filter for the 1099 codes for the separate forms
 - MISC7-1099 NEC form
 - All other MISC 1099 codes-1099 MISC form
 - GOV codes-1099 G form
 - Filter Income Tax Type Amount column for greater than or equal to \$600 to leave the suppliers that will receive a 1099 form





QRG Training Links

QRG Training Links

- AP-33 1099 Codes and Descriptions
- AP-38 Run 1099 Report & Update 1099 Code on an Invoice After Payment
- AP-39 Printing 1099 Form
- AP-41 1099 Zero Dollar Invoices
- AP-42 Printing 1099 Correction Form





Key Dates for Tax Year 2025

Key Dates for Tax Year 2025

1099 PROCESSING SCHEDULE FOR CALENDAR YEAR 2025							
Jan 1- December 31, 2025	Review 1099 AP-022 1099 Maintenance Report for 1099 flagging or changes.						
October 15, 2025	Link for 1099 Contact Form sent to agency users to provide a main 1099 contact for each agency and the agency's phone number to print on the 1099 forms.						
December 31, 2025	2025 calendar year reporting cycle ends.						
January 29, 2026	Last day to make changes to 1099 data in NCFS prior to OSC generating the original 1099 electronic IRS file. All changes should be completed by midnight.						
January 1-31, 2026	2025 1099 forms are available for printing in NCFS. Forms must be postmarked to suppliers by January 31 st . <u>AP-39 Printing 1099 Form</u>						
January 30, 2026	OSC will submit the electronic 1099 file to the IRS.						
January 31, 2026	IRS required deadline date for issuing printed 1099 forms to recipients and filing the IRS electronic file.						
February 2, 2026	Agencies may record 1099 changes in NCFS for 2025 1099s using zero-dollar invoices. AP-41 Zero Dollar Invoices						
March 29, 2026	Last day to enter 1099 corrections with zero-dollar invoices in NCFS. Zero-dollar invoices must be in paid status and accounted by midnight.						
March 30, 2026	2025 1099 correction forms are available for printing in NCFS. OSC will submit the electronic 1099 corrections file to the IRS. AP-42 Printing 1099 Correction Form						





Questions?

