CSVictory

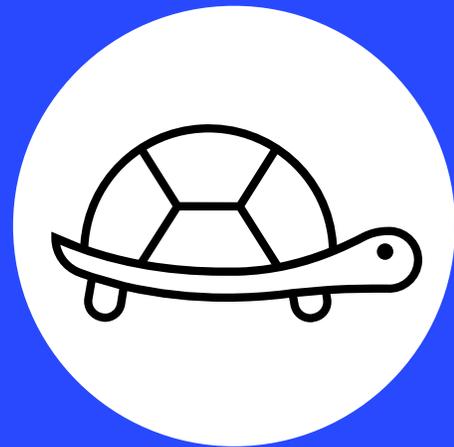## 1099-MISC Excel & CSV Upload

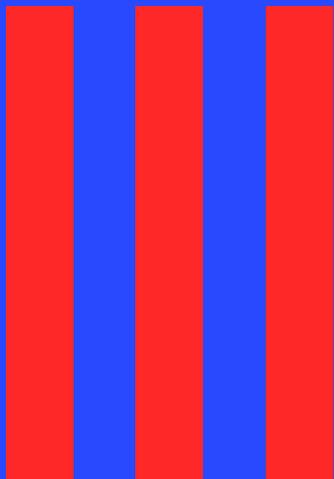# Slow and Steady Wins the Race

Starting Now

Use an excel file to collect and organize 1099-MISC information throughout the year
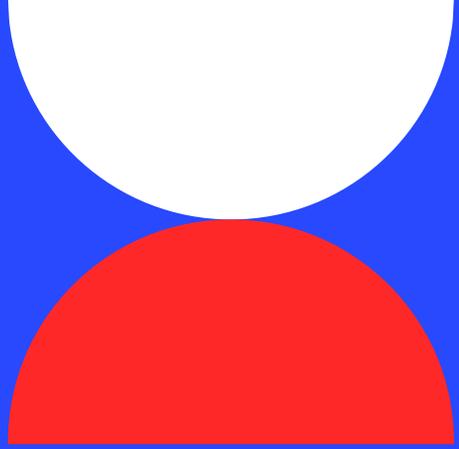
January 2027

Download IRS template

Transfer completed information on to the template

Upload the CSV data file to generate individual forms

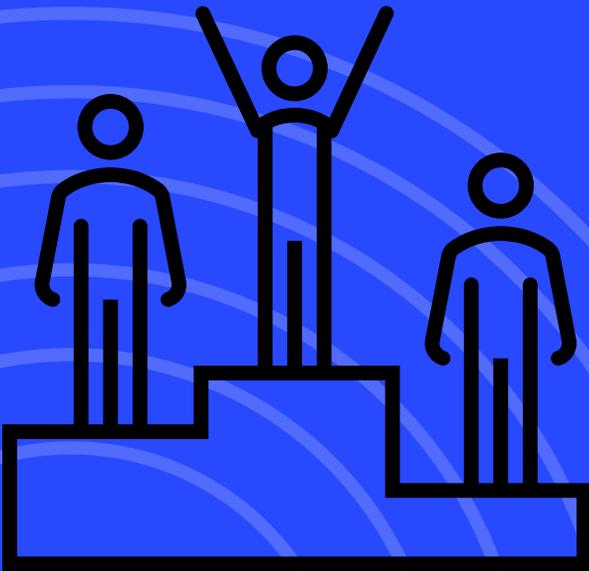# WHY could using Excel and CSV files be a good choice?

Efficient

Less Stressful

Improve Accuracy

Embrace Technology

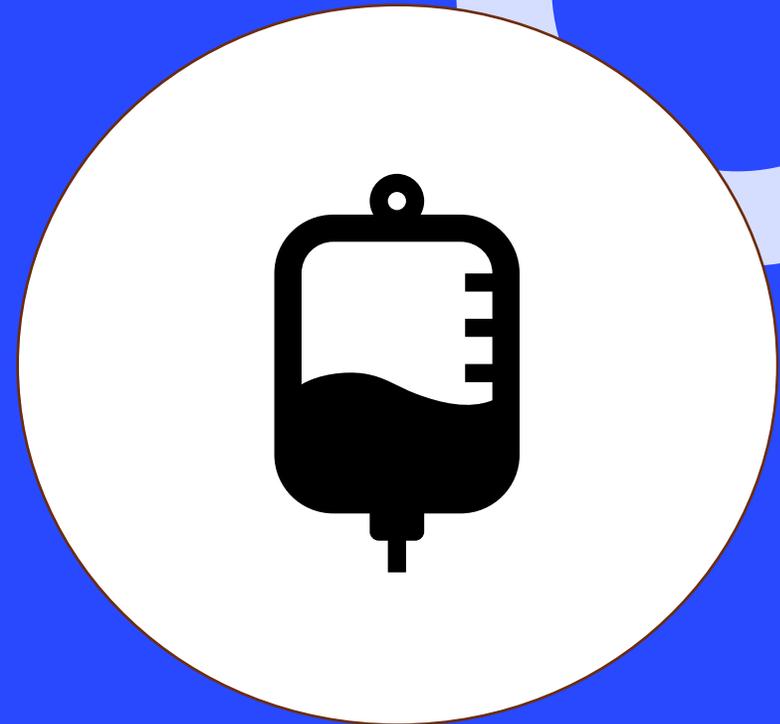Not Complicated

How it Works

.XLS vs .CSV files

XLS = has the extras
- Formatted
- User friendly
- Easy reviewing & editing

CSV = raw data only
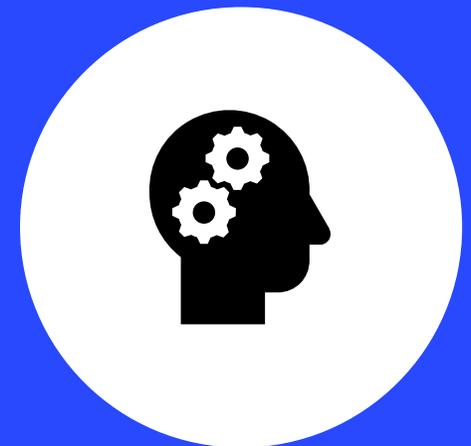- Small & simple
- Portable/Vendor-neutral
- Universal Compatibility

Things to Keep in Mind

- A correctly completed W9 is essential.

- The IRIS recognizes two basic types of entities: Individual and Business.

- Combine Federal/State Filing (CF/SF) enables the IRS to transmit the 1099-MISCs to the OTC without data entry in OKTap.

Examples:

Oliver Wendell Douglas Trust

3A: Individual/sole proprietor or Trust/estate

Part 1-TIN   43-1234567

This is a Business

Old MacDonald Farm and

Mother Hubbard Land & Cattle

3A: LLC- P Corp

Part 1-TIN   98-7654321

This is a Business

Jeremy Clarkson Living Trust

3A: Individual/sole proprietor or Trust/estate

Part 1-TIN   358-22-1658

This is an Individual

The Instructions and Working Data File

Headers, descriptions, and examples won't be a part of the CSV file; they are in the excel spreadsheet to make data entry easier.

Each row of data from line 12 down represents a 1099-MISC to be generated; list the total payments if someone is paid for more than one program.

Districts don't need to enter something in every column.

The template distributed by the OCC has many hidden columns- some you will fill in later and some won't be used at all.

File configuration must match up with the IRS template; do not delete columns.

TEMPLATE FORMATTING GUIDELINES

Keep your entries within the constraints of the IRS instructions (listed in line 5) regarding data length, allowable characters, what columns to use for which TIN Type, etc.

From the Examples in line 6 & 7 below: If the "Taxpayer ID Number" (column U) is an SSN (XXX-XX-XXXX), you will enter SSN in as the "Recipient TIN Type" (column T), use columns Y thru AB for the name; you will not use columns W & X at all.

Columns with a Yellow shaded header are only used for overflow text.

1099-MISC Working Data File

Recipient Information

	Recipient TIN Type	Recipient Taxpayer ID Number	Recipient Name Type	Recipient Business or Entity Name Line 1	Recipient Business or Entity Name Line 2	Recipient First Name	Recipient Middle Name	Recipient Last Name (Surname)	Recipient Suffix
	T	U	V	W	X	Y	Z	AA	AB
5	*Enter SSN or EIN - based on the number format in column U*	*SSN or EIN number; digits and dashes only; SSN is formatted as XXX-XX-XXXX; EIN format is XX-XXXXXXX*	*I for individual (SSN/XXX-XX-XXXX) or B for business (EIN/XX-XXXXXXX)*	*Use if Recipient Name Type is B; max length is 40 characters; may only contain alphabet letters, numbers, blank space ( ), and the following special characters: hyphen (-), pound (#), parentheses (), ampersand (&), and apostrophe ('); do not use if Recipient Type is I*	*Same guidelines as Line 1; use this space for extra characters over the 40 characters allowed in line 1; use only if Line 1 is completely filled - probably won't be used*	*Required if Recipient Name Type is I; required if Last Name is filled out; max length is 20 characters; may only contain alphabet letters, space between words ( ) and hyphens (-); do not use if Recipient Type is B*	*Initial or Name; max length is 20 characters; may only contain alphabet letters, blanks between words ( ) and hyphens (-); do not use a period (.)*	*Required if Recipient Name Type is I; required if First Name is filled out; max length is 20 characters; may only contain alphabet letters, space between words ( ), hyphen (-), and apostrophe ('); do not Use if Recipient Type is B*	*Suffix (Jr or III etc); max length is 20 characters; may only contain alphabet letters, space between words ( ) and hyphens (-); do not use a period (.)*
6	SSN	XXX-XX-XXXX	I			Joseph	J	Dirt	Jr
7	SSN	XXX-XX-XXXX	I			Jeremy		Clarkson Living Trust	
8	EIN	XX-XXXXXXX	B	Oliver Wendell and Lisa Douglas Trust					
9	EIN	XX-XXXXXXX	B	Old MacDonald Farm and Mother Hubbard	Land & Cattle Company LLC				

Ready for action? LET'S GO

Disclaimer:
Screen recordings are in this power point, but if something doesn't work right - I'll switch screens and go live within the excel file

Remember as you are entering data:

Make sure any long numbers remain formatted as text and do not convert to scientific notation (1.045E+5) or another format.

Only use the allowable characters, ex: do not use periods in certain columns.

Maximum characters per line/blank includes spaces between words.

Do not add extra spaces; no cell can contain leading, trailing, or adjacent spaces.

Finishing Up at Year-End:
un-freeze panes and un-hide columns

COLOR CODED COLUMNS

The different sections of the worksheet are shaded different colors for ease of viewing

Pink is the tax year and form type

Blue is the district information

Green is the recipient details

Yellow areas will *likely* be unused

Grey shaded zones will have no data entered

District Information

Enter the district information in columns A through S on the first row of data; then copy/paste to each line that will generate a separate 1099-MISC.

Enter it once, copy to every line where needed!

Type in the district's info. Then select data, right click-copy; select destination zone, right-click-paste.

Now, the district's data is in each line that has recipient data.

Each row can be made into a separate 1099-MISC.

We are ready for one last review of the data and then transfer everything to the IRIS CSV template.

Review and Double Check your Data

- No duplicate TINs
- Numbers appear in correct format
- Only allowable characters have been used
- Required columns contain data
- Un-needed columns are blank
- No extra spaces anywhere
- Combined Federal/State Filing is implemented

IRS

Step 1: Dashboard
Step 2: Upload CSV with Form Data
Step 3: Select the year
Step 4: Select the form type
Step 5: Download the template

CSV File Upload

Follow the steps below to upload multiple forms at once using a CSV file.

1. Download File Template

Please select the tax year of the form you would like to download.

Tax Year
2025

Please select the form type that you would like to download.

Form Type
Select One
1099-MISC

Download

2. Complete CSV

Visit the Template Formatting Guidelines page to download formatting guidelines for your form type.

3. Upload File

Browse and upload your file. Each row in your file will be uploaded as a separate form. Your CSV file will not be retained in the system.

Important Information About File Upload

1) Only 1 file can be uploaded at a time.

2) Only 250 forms are permitted per file.

3) Only CSV templates provided by the IRS can be used. The file will need to be saved as a CSV UTF-8 (Comma Delimited) (*.csv). This type of CSV file will allow all special characters to be saved correctly.

Browse or drop the csv file here.

Open both the XLS and the CSV files
verify that all the column headers are the same

Transfer the Data

In the Excel file, select the lines with data, right click and choose copy
In the CSV file, click on the number in the left margin of the first row where you want the data to go, right click and paste value
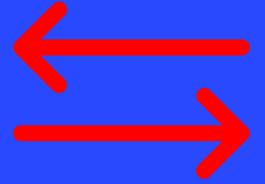
Save your CSV file & Return to IRIS to Upload

Browse or Drop the file into IRIS.

File appears in the light blue shaded area.

Click Start to Upload.

3. Upload File

Browse and upload your file. Each row in your file will be uploaded as a separate form. Your CSV file will not be retained in the system.

Important Information About File Upload

1) Only 1 file can be uploaded at a time.

2) Only 250 forms are permitted per file.

3) Only CSV templates provided by the IRS can be used. The file will need to be saved as a CSV UTF-8 (Comma Delimited) (*.csv). This type of CSV file will allow all special characters to be saved correctly.

🔗 Browse or drop the csv file here.

ℹ **Current Uploaded File**

2025 - 1099-MISC - IRIS Template.csv   (Remove)

Start

If at first you don't succeed...

Browse or drop the csv file here.

ⓘ **Current Uploaded File**

2025 - 1099-MISC - IRIS Template.csv (Remove)

❗ **The uploaded file contains one or more errors. Please correct the following and re-upload.**

Row	Column Title	Error Message
17	Recipient First Name	Recipient First Name may only contain alphabet letters, blanks ( ) an
53	Recipient Business or Entity Name Line 1	Recipient Business or Entity Name Line 1 may only contain alphabet parentheses (), ampersand (&), and apostrophe (') and may not inclu

Rows per page: 5 ▼ 1–2 of 2 ‹ ›

Start

IRIS will not let you proceed if there is an error in uploading

In this example the issues were: T.J. & LLC.

To correct:
Open the CSV
Find & Fix errors
Re-Save
Re-Upload

Review Form Information

On this page, you can review information and delete specific rows if needed.

Then select Add All to upload your forms and move them to the Unsubmitted Forms area.

THE FINISH LINE

Once the individual 1099-MISC Forms are in IRIS, you just follow the normal process that we all are familiar with:

PRINT   REVIEW   DISTRIBUTE   SUBMIT

Questions?

Please scan the QR code to give us your feedback!
https://forms.office.com/g/LhLGt8a5Hu

A Training Takeaway document will be distributed soon.

1099-MISC: Excel & CSV files for upload