1099-MISC Excel & CSV Upload
Training Takeaways

February 2026

This training resource is designed to help conservation district directors and employees stay informed of key points discussed in recent web-based training. The document should be listed on the district's meeting agenda for discussion and review.

The Basics

The IRS IRIS portal that is utilized to generate 1099-MISC forms has an upload option that can be used to import data as a batch rather than manually entering all the required information. Use of .xlsx and .csv files to utilize this option, along with basic information about W9 forms and excel training tips will help make next tax season much smoother.

Potential Benefits

- Efficient
  - Increased program allocations result in more payments to producers and a great column of 1099s being generated; batch uploads can lessen the workload for district office staff.
  - Time and keystrokes can be saved.
    - Entering information once and then copying it to all the areas needed.
    - Using autofill when it's correct.
- Less Stressful
  - There is no tight deadline if work on the 1099 process begins at the beginning of a new year.
  - Data is entered gradually as payments are made, rather than saving all the work until the deadline is near.
- Improve Accuracy
  - Entering a small amount of data each month rather than a large volume of data in a short timeframe results in fewer typographical errors.
  - Less stress = fewer mistakes.
  - Excel data can easily be checked for correctness and proper formatting.
- Embrace Technology
  - Forms will not be typed or handwritten again.
  - Online document generation will continue to be required.
  - The templates allow staff to use technology to improve office processes.
- Not Complicated
  - The upload method has been successfully used for two years.
  - Instructions and videos are available for learning the process.
  - The District Services Team can provide additional assistance if needed.

Details about XLSX and CSV Files

- Both file types look like a grid, with rows and columns.
- .xlsx files can have extra features that are helpful while using the documents.
  - Formatted
  - User friendly
  - Easy reviewing & editing

For additional questions or guidance, please contact the
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- .csv files are raw data that are good for transferring data to a website or other software, but they aren't as easy to use as an excel file.
  - Small & simple
  - Portable/Vendor-neutral
  - Universal Compatibility

Key Factors to the Process
- Start now, collect data throughout the year.
- A correctly completed W9 is essential.
  - Section 3a must be completed.
  - Part I will determine if the entity is a Business or Individual.
- The IRS recognizes two basic types of entities for 1099 purposes.
  - 2-7 formatted TIN (##-#######) is a Business.
  - 3-2-4 formatted TIN (###-##-####) is an Individual.
- Each TIN should be listed only once in the excel file; if there are multiple program payments, the total of all payments should be combined on one line.
- Combined Federal/State Filing (CF/SF) enables the IRS to transmit the 1099-MISCs to the Oklahoma Tax Commission without data entry in OKTap.
- Keep entries within the constraints of the IRS instructions regarding data length, allowable characters, and what columns to use for which TIN type.
- Many columns in the templates won't be used by the district but cannot be deleted; columns headers in the .xls and .csv files must match IRS formatting requirements.
- The OCC excel template spreadsheet is color coded to simplify usage.
- The IRIS portal will identify any errors that occur during the upload, so that corrections can be made before the data is added to the website.

Steps for the District to Use for the Batch Method
- Now:
  - Download the excel Working Data File from the OCC's website.
  - Obtain W9s and enter data as payments are made to producers.
- After year-end:
  - Enter the district's information once and copy it to each line needed.
  - In the IRIS Dashboard next January, download the IRS CSV template.
  - Transfer text from the Working Data File to the blank IRIS CSV template.
  - Save the newly created CSV data file.
  - Upload the district's data file into IRIS; resulting in each line of data being converted to a separate 1099-MISC form.
  - Review and add the data to the portal.
  - The Print-Review-Distribute-Submit process is the same for the batch as it is for manual entries.

Excel tips included
- Un-freeze Panes
- Un-hide Columns
- Selecting and Copying Data
- Paste and Paste Special

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