

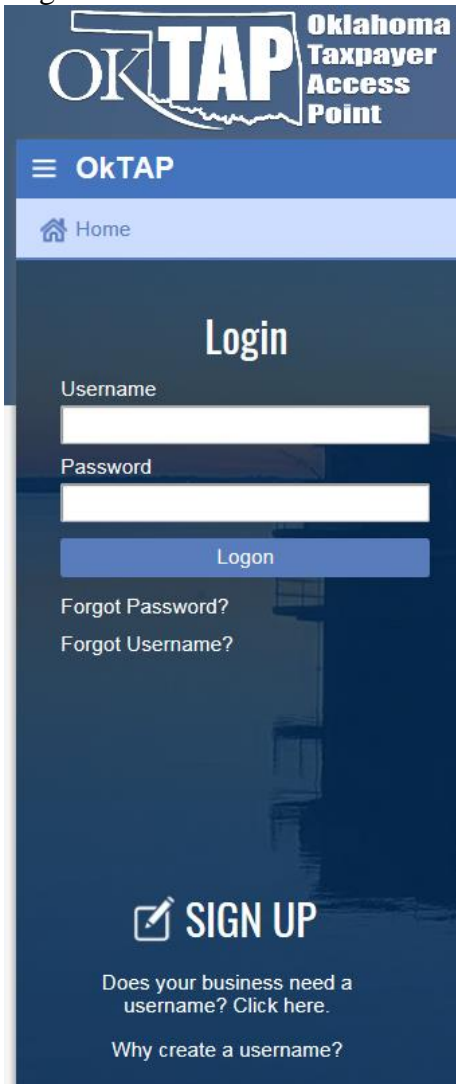
## Instructions for using the 1099 Data Entry program

The data entry program is located on OkTAP.

OkTAP web address: <https://OkTAP.tax.ok.gov/OkTAP/Web>

You must have an OkTAP account to use the data entry program. If you do not have an OkTAP account see the instructions at the end of this document for creating one.

Log in to OkTAP



OKTAP Oklahoma Taxpayer Access Point

OkTAP

Home

### Login


Username

Password

Logon

[Forgot Password?](#)

[Forgot Username?](#)


 **SIGN UP**

Does your business need a username? [Click here.](#)







[Why create a username?](#)



Under the “I want to” column choose “W-2/1099/500-B filing center”

 **I Want To**







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-  [View my profile](#)
-  [Send us a message](#)
-  [Add access to another account](#)
-  [Add third party access](#)
-  [Make a payment](#)
-  [W-2/1099/500-B filing center](#)

Under “W2 Center” choose “1099 and 500-B Data Entry”

**W2 Center**


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 <a href="#">1099 and 500-B Data Entry</a>	1099 and 500-B Data Entry
 <a href="#">Import Bulk 1099 Files</a>	Attach Bulk 1099 files
 <a href="#">W-2 and W-3: Import files</a>	W-2 and W-3: Import files
 <a href="#">W-2C and W-3C: Import Files</a>	W-2C and W-3C: Import Files
 <a href="#">W-2 and W-3: Data Entry</a>	W-2 and W-3: Data Entry
 <a href="#">W-2 Corrections Manual Entry</a>	W-2 Corrections for previously submitted W-2s

Fill out the Payer Information form – note this information will be populated to all of your 1099s or 500-Bs. Any box that has the little orange tag in the corner is required to be populated. The boxes with the down arrows contain valid responses. Use the drop-down arrow to populate those boxes.


- 1. Payer Information for 2018
- 2. Review


## Payer Information for 2018

 **Enter Payer Information**

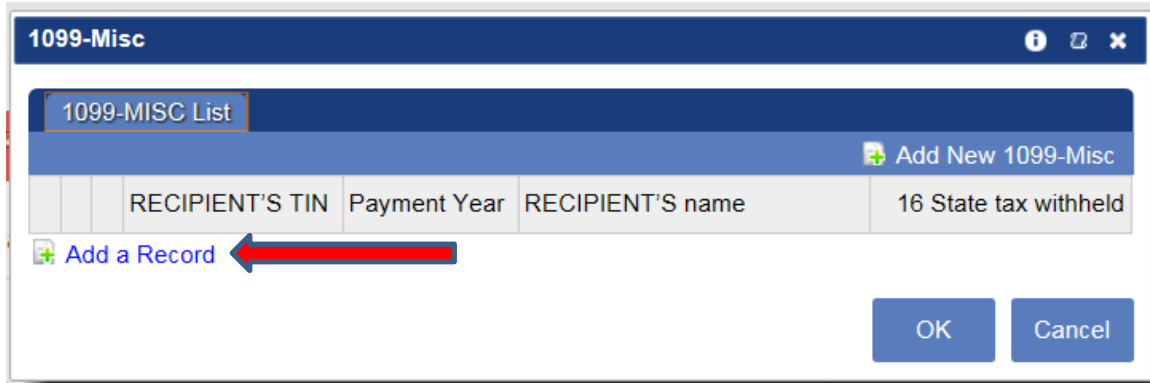
First Payer Name	<input type="text"/>	<b>Required</b>
Second Payer Name	<input type="text"/>	
Payer Id Type	<input type="text" value="Required"/>	<input type="button" value="v"/>
Payer TIN	<input type="text" value="Required"/>	
Payer Country	<input type="text" value="USA"/>	<input type="button" value="v"/>
Payer Street Address	<input type="text" value="Required"/>	
Payer City	<input type="text" value="Required"/>	
Payer State	<input type="text" value="Required"/>	<input type="button" value="v"/>
Payer Zip	<input type="text" value="Required"/>	
Payer Phone Number	<input type="text" value="Required"/>	
Payer Office Code	<input type="text"/>	

Once all the required boxes are populated, the list of available 1099s will be shown on the right side of the screen. Choose the type of 1099 or 500-B you want to enter then click on the blue hyperlink to begin data entry.

 **Click the link to choose the form, then Add a record**

<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 1099-Div</a>
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 1099-Int</a>
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 1099-MISC</a> 
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 1099-G</a>
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 1099-R</a>
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 1099-B</a>
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 1099-OID</a>
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 500-B</a>

A box will pop up on the screen, click the blue “Add a Record”




1099-Misc

1099-MISC List

+ Add New 1099-Misc

RECIPIENT'S TIN	Payment Year	RECIPIENT'S name	16 State tax withheld
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+ Add a Record 

OK Cancel

The 500-B and all types of 1099s work the same way. The top portion of the screen contains required information, the bottom portion of the screen contains optional information, that you may choose to include or not. Enter all the required information then click the “OK” button to save the document.

1099-Misc

1099-MISC List • New 1099-Misc Record

1099-Misc Delete this Record Copy row Add New 1099-Misc

**OTC required information**

Payment Year  
2018

Is this address in foreign country?  
 No  Yes

Country  
USA

Street address (including apt. no.)  
*Required*

City or town  
*Required*

State or province  
*Required*

ZIP or foreign postal code  
*Required*

1 Rents  
0.00

2 Royalties  
0.00

3 Other income  
0.00

7 Nonemployee compensation  
0.00

State  
OK

16 State tax withheld  
0.00

18 State income  
0.00

**Optional Fields From Form**

Account number

Payer Office Code

4 Federal income tax withheld  
0.00

5 Fishing boat proceeds  
0.00

6 Medical and health care payments

10 Crop insurance proceeds  
0.00

13 Excess golden parachute payments  
0.00


14 Gross proceeds paid to an attorney  
0.00

15a Section 409A deferrals  
0.00

15b Section 409A income

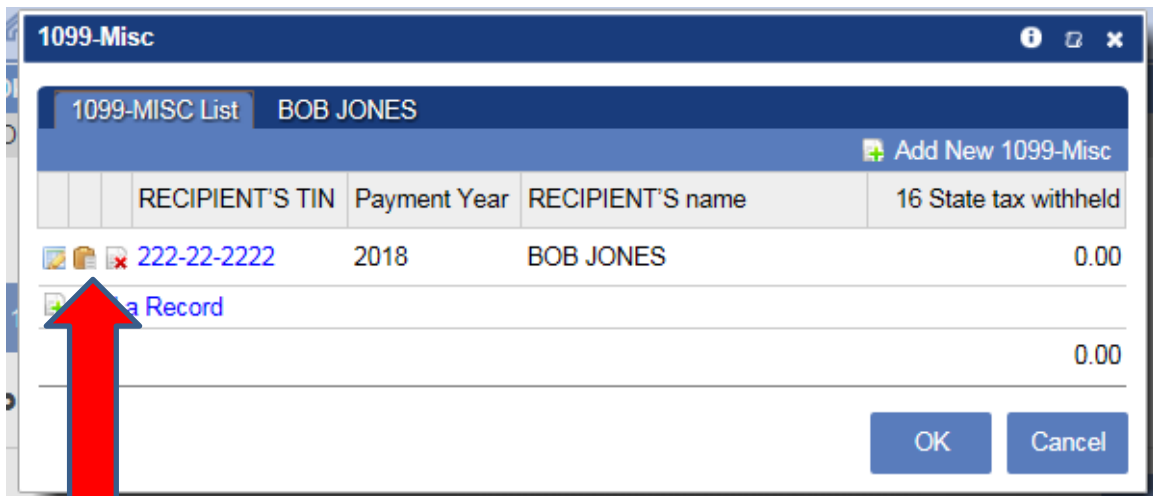
OK Cancel

After entering the information and clicking ok, you may select the blue hyperlink to see your entry. From here you can add another, edit an existing entry, or delete the entry.

 **Click the link to choose the form, then Add a record**


<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 1099-Div</a>
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 1099-Int</a>
<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes	<a href="#">Edit 1099-MISC</a> 
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 1099-G</a>
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 1099-R</a>
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 1099-B</a>
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 1099-OID</a>
<input type="checkbox"/> No	<input type="checkbox"/> Yes	<a href="#">Enter 500-B</a>





The first icon is - edit the document, the second icon is copy the document to a new document, the third icon is delete the document.



1099-Misc

1099-MISC List BOB JONES

 Add New 1099-Misc

	RECIPIENT'S TIN	Payment Year	RECIPIENT'S name	16 State tax withheld
  	<a href="#">222-22-2222</a>	2018	BOB JONES	0.00
	<a href="#">Add Record</a>			0.00

OK Cancel

**You must click Save Draft if you want your session to be saved. If you leave your session or OkTAP times out, nothing will be saved from your data entry unless you have clicked Save Draft**

1. Payer Information for 2018 2. Review

### Payer Information for 2018

Show Instructions

**Enter Payer Information** **Click the link to choose the form, then Add a record**

First Payer Name	<input type="text" value="PAYER FIRST NAME"/>	<input type="button" value="No"/> <input type="button" value="Yes"/>	<a href="#">Enter 1099-Div</a>
Second Payer Name	<input type="text"/>	<input type="button" value="No"/> <input type="button" value="Yes"/>	<a href="#">Enter 1099-Int</a>
Payer Id Type	<input type="text" value="FEIN"/>	<input type="button" value="No"/> <input checked="" type="button" value="Yes"/>	<a href="#">Edit 1099-MISC</a>
Payer TIN	<input type="text" value="12-3456789"/>	<input type="button" value="No"/> <input type="button" value="Yes"/>	<a href="#">Enter 1099-G</a>
Payer Country	<input type="text" value="USA"/>	<input type="button" value="No"/> <input type="button" value="Yes"/>	<a href="#">Enter 1099-R</a>
Payer Street Address	<input type="text" value="123 MAIN STREET"/>	<input type="button" value="No"/> <input type="button" value="Yes"/>	<a href="#">Enter 1099-B</a>
Payer City	<input type="text" value="OKLAHOMA CITY"/>	<input type="button" value="No"/> <input type="button" value="Yes"/>	<a href="#">Enter 1099-OLD</a>
Payer State	<input type="text" value="OKLAHOMA"/>	<input type="button" value="No"/> <input type="button" value="Yes"/>	<a href="#">Enter 500-B</a>
Payer Zip	<input type="text" value="73160"/>		
Payer Phone Number	<input type="text" value="(405) 123-4567"/>		
Payer Office Code	<input type="text"/>		



You can enter more than one type of document if you need to.

1. Payer Information for 2018 2. Review

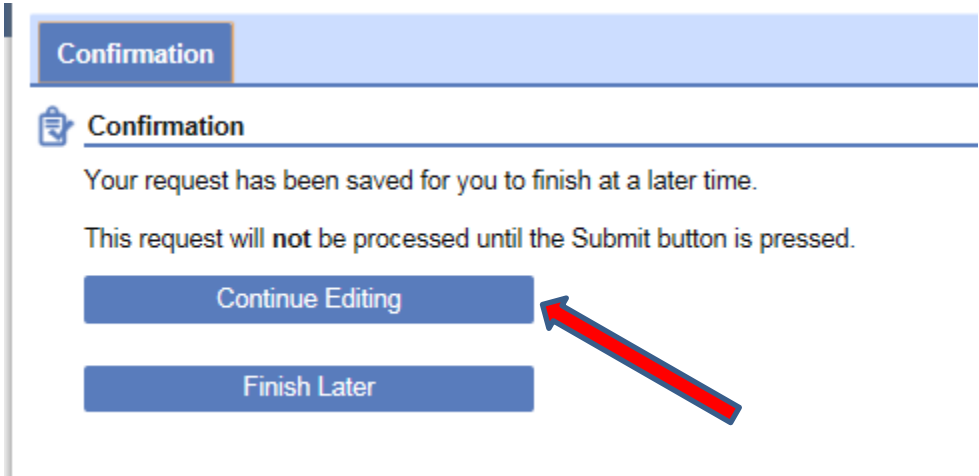
### Payer Information for 2018

Show Instructions

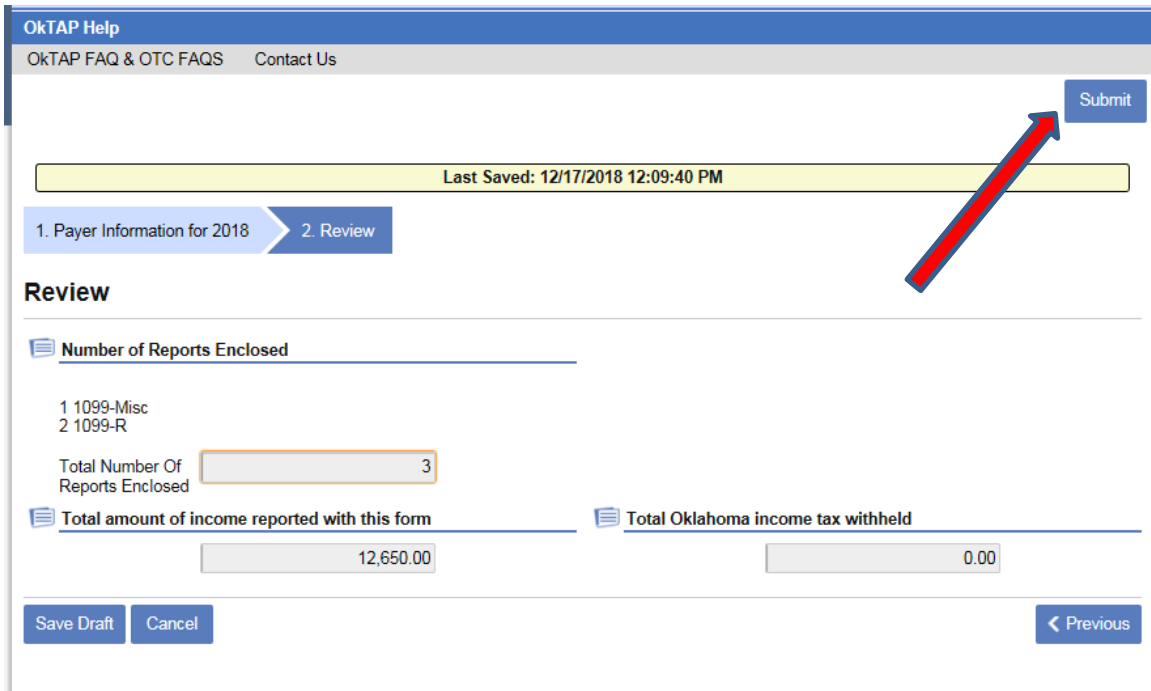
**Enter Payer Information** **Click the link to choose the form, then Add a record**

First Payer Name	<input type="text" value="PAYER FIRST NAME"/>	<input type="button" value="No"/> <input type="button" value="Yes"/>	<a href="#">Enter 1099-Div</a>
Second Payer Name	<input type="text"/>	<input type="button" value="No"/> <input type="button" value="Yes"/>	<a href="#">Enter 1099-Int</a>
Payer Id Type	<input type="text" value="FEIN"/>	<input type="button" value="No"/> <input checked="" type="button" value="Yes"/>	<a href="#">Edit 1099-MISC</a>
Payer TIN	<input type="text" value="12-3456789"/>	<input type="button" value="No"/> <input type="button" value="Yes"/>	<a href="#">Enter 1099-G</a>
Payer Country	<input type="text" value="USA"/>	<input type="button" value="No"/> <input checked="" type="button" value="Yes"/>	<a href="#">Edit 1099-R</a>
Payer Street Address	<input type="text" value="123 MAIN STREET"/>	<input type="button" value="No"/> <input type="button" value="Yes"/>	<a href="#">Enter 1099-B</a>
Payer City	<input type="text" value="OKLAHOMA CITY"/>	<input type="button" value="No"/> <input type="button" value="Yes"/>	<a href="#">Enter 1099-OLD</a>
Payer State	<input type="text" value="OKLAHOMA"/>	<input type="button" value="No"/> <input type="button" value="Yes"/>	<a href="#">Enter 500-B</a>
Payer Zip	<input type="text" value="73160"/>		
Payer Phone Number	<input type="text" value="(405) 123-4567"/>		
Payer Office Code	<input type="text"/>		

When you have finished entering your documents select the “Save Draft” button and choose “Continue Editing.”



Click the “Next” button to continue to the review screen. If everything looks OK, click the “Submit” button to finish your session. You will get a confirmation screen. Print it out or make note of the confirmation number in case you need proof that you have submitted your documents.





**Instructions for creating an OkTAP account:**

OkTAP: <https://OkTAP.tax.ok.gov/OkTAP/Web/>

To create an OkTAP account, go to the OkTAP website. Under the Login button is a link that says “Does your business need a username? Click here.” Click the link and follow the instructions on the screens. You will need your WTH (withholding account number) to sign up for the account. Any questions may be directed to [twebster@tax.ok.gov](mailto:twebster@tax.ok.gov) or (405) 521-3160.

