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General Instructions

Use this spreadsheet to file your 1099s issued for the year. Keep all supporting documentation in case of audit. Check [these resources](#) if you need more help.

Note: *This is the only approved template to upload your data. If you file 250 or more forms, you must use the fixed-length filing option. See [Publication 32, Online Filing and Paying of Withholding and Mineral Production](#).*

Follow these steps to complete and submit your return:

1. Complete and save your return.
2. Go to [Taxpayer Access Point \(TAP\)](#).
3. Log into your account and upload your file.

This spreadsheet has the following tabs:

- *Template Instructions*
- *Utah 1099 Template*

Important

- Don't copy or alter cells or their formatting.
- Don't leave blank lines in the spreadsheet. It will cause errors.
- Dropdown menus have been provided where possible.
- Use the **Paste Special** option and choose the **Values** radio box when copying data into the template.
- Microsoft Excel 2010 automatically saves files as .xlsx. You must save your file as .xls to upload.

Line-by-Line Instructions

Note: This template only contains columns for information required by the state of Utah rather than all the boxes on a federal form 1099.

Recipient's ID Type	Choose either social security number or FEIN.
Recipient's ID Number	Enter the social security number or FEIN with no dashes or spaces.
Recipient's Name	Enter full name.
Recipient's Street Address	Enter full street address.
Recipient's City	Recipient city.
Recipient's State	Recipient state.
Recipient's Zip	Enter 5- or 9-digit zip code.

Column 1	Gross distribution(s).
Column 2a	Enter the taxable amount.
Column 2b	Enter 'X' in the first sub column if the taxable amount hasn't been determined and another 'X' in the second sub column if the total distribution is taxable.
Column 3	Capital gain distribution(s).
Column 4	Federal income tax withheld.
Column 5	Employee contributions or insurance premiums.
Column 6	Net unrealized appreciation in employer's securities.
Column 7	Distribution code(s).
Column 8	If you received an annuity contract as part of a distribution, the value of the contract is shown See http://www.irs.gov/pub/irs-pdf/f1099r.pdf for details.
Column 9a	Percentage of distribution you received.
Column 9b	Total employee contribution.
Column 12	Utah tax withheld.
Column 14	Utah distribution.

References/Resources

Forms and Publications

The following forms and publications provide additional information:

- [Publication 14, Utah Withholding Tax Guide](#)
- [Publication 32, Online Filing and Paying of Withholding and Mineral Production](#)
- [Publication 58, Utah Interest and Penalties](#)

Information Updates

Contact the Tax Commission immediately if account information changes. Submit changes on the following forms:

- **TC-69**, *Utah State Business and Tax Registration* — open a new business or change ownership
- **TC-69C**, *Notice of Change for a Tax Account* — change address, close an outlet or account, and add or remove an officer or owner

Taxpayer Resources

The Tax Commission offers online workshops to help taxpayers understand Utah taxes. Visit tax.utah.gov/training for a list of all training resources.

See the Tax Commission's home page at tax.utah.gov for access to online services, forms, and publications.