

# 2018

Government of the  
District of Columbia,  
Office of the Chief  
Financial Officer, Office  
of Tax and Revenue



# [SPECIFICATIONS FOR FILING FORMS 1099/W-2G ELECTRONICALLY]

File formats and processing for electronic 1099/W-2G in the DC Taxpayer Portal

## Version Control

Version Number/Date	Comments
1.0 – 12/14/18	Initial Release for 2018

This document is re-issued every tax year and may be updated at any time to ensure that it contains the most current information. The Version Control Log will indicate what has changed from the initial publication.

### What's New:

Positions 723-734, State Income Tax Withheld, the amount must be entered, right justified and unused positions must be zero filled even though the IRS defines this field as optional.

### Reminders:

- The District of Columbia (DC) Office of Tax and Revenue (OTR) will no longer accept CD's or any other media for filing 1099/W2G. You must use the bulk upload or online data entry via <https://mytax.dc.gov/>.
- More information about how to bulk file will be explained later in these instructions. DC will continue to follow IRS Publication 1220 Tax Year 2018 (Rev. 9-2018) specifications for Forms 1097, 1098, 1099, 3921, 3922, 5498, and W-2G.
- The only 1099s that are accepted by DC are:  
1099-B      1099-DIV      1099-G      1099-INT  
1099-MISC      1099-OID      1099-R      1099-K
- Filers are not required to submit test files. The file format must conform to the specifications found in Part C (Record Format Specifications and Record Layouts) of Publication 1220. PDFs will not be accepted.
- **DC no longer participates in the Combined Federal/State Filing Program (CF/SF).**
- The submission due date of informational statements is
  - **January 31st of each year**
- Employers must file informational electronically if the number of forms is 25 or greater. If 24 or fewer, the employer may file electronically (online manual data entry). Reference the "DC Income Tax Withholding Statements Electronic Submission Temporary Act of 2012".
- Make sure that your data file is in a .txt or .zip format.
- If you use a reporting representative to submit your file, you are responsible for the accuracy of the file.

- Copies of federal Form 1099 must be submitted to report income of \$600 or more, or other payments subject to DC withholding, other than salaries or wages subject to withholding, paid to a DC resident individual in any calendar year.
- Dividends, endowment gains and other taxable income of \$600 or more are required to be reported unless excluded by regulations.

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## General Information

These are the instructions for filing 1099 or W-2G information to the DC OTR via electronic filing using the Internal Revenue Service (IRS) specifications for filing information returns electronically and your reporting requirement is 25 or more information returns.

Visit IRS.GOV for IRS Publication 1220 specifications.

**DO NOT send paper or PDFs of 1099 or W-2G if you have submitted your file(s) electronically. These are for your records.**

All submitters are required to create a logon ID through our web portal, MyTax.DC.gov, whether you are an employer, a payroll provider, a preparer, or enrolled agent. Please visit us online at <https://mytax.dc.gov/>. If you need assistance with obtaining a logon ID or authorizing a third-party to submit the 1099/W-2G, please review the tutorials/FAQs on the web portal. Instructions are also included in this guide.

## Filing

### Electronic Filing

You must file electronically if you are filing 25 or more information returns via the web portal, MyTax.DC.gov.

### Paper

Even if you are a small business filing fewer than 25 information returns, OTR encourages you to file electronically using our online manual data entry application or file upload method.

### Filing Options

#### Option 1 – Manual Online Entry (Small Business)

Filing 24 or fewer 1099/W2G? It's easy to file electronically with online data entry. This option is available for small business employers or preparers and allows the preparation and submission of up to 25 1099/W2G per report over a secure internet service. The ability for smaller to medium sized business to manually key in all the information on the 1099/W2G and forgo the file creation process and submission.

#### Option 2 – Bulk File Submission (Larger Businesses)

Filing 25 or more 1099/W-2Gs or using third-party bulk filing? It's easy to file electronically with 1099 File Upload. This electronic filing option is available for larger businesses and third-party bulk filers. Using approved software that generates the correct 1099 record format specifications, the bulk file submission allows an

employer/payroll provider or others to electronically submit their 1099/W-2Gs. To find a provider, search for 'Form 1099 Software Providers'. DC does not provide approval for these vendors.

### **Option 3 – Multiple Employer Submissions (Third Party Bulk Filers)**

This is the same process as option 1, with the difference being that a third-party can submit files containing multiple employers. The mechanics of submitting these Multi-Employer bulk submissions is the same as the Bulk File Submission.

## **1099/W-2G Data Requirements and File Acceptance**

Please refer to the IRS handbook to obtain additional information regarding data requirements and file acceptance to eliminate file rejection due to errors. Listed below are the 1099/W-2G record requirements for file creation of records to be submitted to the OTR:

- T – Transmitter Record (Required)
- A – Payer (Required)
- B – Payee (Required)
- C – Summary of Payee “B” records (Required)
- K - State Totals for CF/SF (Optional)
- F – End of Transmission (Required)

## **Employer/Employee Record Information**

### **Submitter’s Information**

#### **Record Length**

All employer records must adhere to the required record length for both 1099 and W-2G as follows: 750 positions.

Each record must terminate with a carriage return at the end of each row.

#### **‘T’ Transmitter Record**

It is imperative that the required Publication 1220 ‘T’ Record be entered in the designated positions. Failure to include correct and complete transmitter contact information may result in OTR rejecting your file submission.

#### **‘A’ Payer Record**

Identifies the person making payments. The payer is responsible for the completeness, accuracy, and timely submission of electronic files. Enter a blank in position 6 as DC is no longer a participant in the CF/SF Program.

### **'B' Payee Record**

Do not use decimal points (.) to indicate dollars and cents. Only enter the payment year (2018) in position 2-5.

**Positions 723-734, State Income Tax Withheld, the amount must be entered, right justified and unused positions must be zero filled even though the IRS defines this field as optional.**

### **'C' Summary of B Records**

Report the total number of payees and the totals of the payment amount fields for each payer and/or return. The 'C' record must follow the last 'B' record for each type of return for each payer.

### **'K' Record**

The 'K' Record is optional.

### **'F' End of Transmission Record**

Summary of the entire file. It is written after the last 'C' record (or last 'K' record, where applicable) of the entire file.

### **Upload File Specifications**

Files must be in the format .txt or .zip. Any files submitted that are 200MB (uncompressed) or larger will be rejected.

The maximum number of file attachments (less than 200MB) per file type is five (5).

For example:

File 1: 8.50 MB

File 2: 90 MB

File 3: 60 MB

More than five attachments can be submitted in an additional request.

### **Payroll Provider Registration**

You must have a MyTax.DC.gov web logon to access the electronic W2/1099 submission process. The person completing the registration will be considered the 'Administrator' of the account. Do not use an invalid Taxpayer Identification Number (TIN) when registering.

There are two methods to sign up to use MyTax.DC.gov:

- If you are a DC taxpayer, answer 'Yes'
  - Enter your Taxpayer Identification Number (TIN) and any notice you have received from the Office of Tax and Revenue (OTR). If you did not receive a notice, you can enter your last tax due amount or mark the "Last Tax Due is \$0.00" checkbox. If you do not know the last tax due amount, contact the account administrator.
- If you are not a DC taxpayer, answer 'No'
  - If you selected 'No' and the system prompts that an account exists for the FEIN entered, this is an indication that your company does have a presence in DC. Therefore, you will need to contact your company representative to obtain logon credentials to MyTax.DC.gov. If the individual within your company is unknown, a representative from OTR's Customer Service Administration (CSA) can assist you in identifying that person. Contact them at (202)759-1946 or email e-services.otr@dc.gov.

For either answer, complete all information, including a security question and an email address. Press 'Next' to continue.

1. Web Profile

**Web Profile**

**Login Information**

Do you currently or expect to file DC returns?  No  Yes

Username

First Name

Last Name

Email

Phone Type

Contact Phone

Alternate Phone

**In case you forget your password**

Secret Question

Secret Answer

Confirm Answer

**Authentication Contact**

Phone/Email  Phone  Email  None

Use Login Email?  No  Yes

Email



Home » New Login Request

1. Web Profile 2. Tax Profile

### Tax Profile

**TAXPAYER INFORMATION**

ID Type  FEIN  SSN

Your ID (SSN or FEIN)

Re-enter Your ID

**ACCOUNT VALIDATION**

Notice Number

OR

Account Type

Last Tax Due

Last Tax Due is \$0.00

You will see this screen if you answered 'No' to are you a DC taxpayer. Complete the information and click 'Next'.

Home » New Login Request

1. Web Profile 2. Signup

### Signup

**USER DEMOGRAPHICS**

Business Name

ID Type  FEIN  SSN

Your ID (SSN or FEIN)

Re-enter Your ID

Address

Street 2  Unit Type

WASHINGTON DISTRICT OF COLUMBIA

20002-4259 USA

In either instance, you will receive a registration summary screen.

**Sign-Up for MyTax.DC.gov**

Home > Sign-Up for MyTax.DC.gov

1. Web Profile > **2. Signup** > 3. Registration Summary

### Registration Summary

Please review the following information

**Username:** City Streets  
**Name:** Office Revenue  
**Email:** tax@gmail.com  
**Contact Phone:** (202) 442-0000  
**Alternate Phone:**

**In case you forgot your password:**  
 Secret Question: What is your favorite animal?  
 Secret Answer: \*\*\*\*\*

An email containing a temporary password and a link to log in will be sent to you.

Click Submit to complete this request.

[Cancel](#) [Previous](#) [Submit](#)

Once you have verified the above information, click 'Submit' and then 'Ok' or 'Cancel'.

You will then receive a confirmation page. An email will be sent to you to continue the process.

**Confirmation**

Home > Sign-Up for MyTax.DC.gov > Confirmation

**Confirmation**  
 27-Oct-2017

Your New Login Request has been submitted to the District of Columbia Office of Tax and Revenue.

To access this request for future use, please check the following:

Email: **tax@gmail.com**  
 Confirmation Code: **qdcmf3**

For questions regarding this confirmation, please contact the Customer Service Administration at e-services.otr@dc.gov

[Printable View](#)

[OK](#)

Once you have obtained your logon credentials, you are ready to add additional logons or continue to bulk processing.

## Adding Additional Logons

- After you or the account administrator has successfully logged into the account, additional logons can be added.

**Home** [Log Off](#)

**My Profile** **ALERTS** **I WANT TO**

00000-91276  
 BUSINESS EXAMPLE  
 100 MAIN ST  
 WASHINGTON DC 20009 USA

There are no alerts

[View My Web Profile](#)  
[Request Third Party Access](#)  
[Register a New Tax Account](#)  
[Send OTR a message](#)  
[Manage payments and returns](#)

**SUMMARY** **RECENT ITEMS** **NAMES AND ADDRESSES**

**MY ACCOUNTS**

<a href="#">Corporation Franchise Tax</a>	250-000036014	BUSINESS EXAMPLE	\$0.00
<a href="#">Register a New Tax Account</a>			

- After selecting 'My Profile' you will see 'Manage additional logons'

The screenshot shows the 'Profile' page with the following sections:

- PROFILE** (with an 'Edit' button):
  - Access Type : Administrator
  - Logon : businessexample
  - Name : JOHN DOE
  - Phone 1 : +1 (775) 750-1283
  - Email : kpaine@gentax.com
  - Authentication : Disabled
- ALERTS**: There are no alerts.
- I WANT TO**:
  - Change password
  - Manage payment methods
  - Manage additional logons** (circled in yellow)
  - Cancel online access
- STATUS**:
  - Last Logged On : 14-Nov-2016 14:27:08
  - Current As Of : 14-Nov-2016 14:26:06
- MYTAX.DC.GOV ACTIVITY** (with a 'More...' button):
  - Last Log On : There is no activity
  - Current Log On : Password Changed

- Proceed with additional logon until complete. Ensure 'Standard User' is selected from the 'Type of Access' drop down selection.

The screenshot shows the 'Add Logon' page with the following fields:

- Logon**: businessexampleW2
- Email**: businessexampleW2@gmail.com
- Confirm Email**: businessexampleW2@gmail.com
- Type of Access**: Standard User (selected in the dropdown)

Buttons for 'Save' and 'Cancel' are visible at the bottom right.

- This is the standard user view on MyTax.DC.gov.

The screenshot shows the 'Home' page with the following sections:

- Home** (with a 'Log Off' button):
  - My Profile**: 00000-91276, BUSINESS EXAMPLE, 100 MAIN ST, WASHINGTON DC 20009 USA
  - ALERTS**: There is 1 unread message
  - I WANT TO**:
    - View My Web Profile
    - Request Third Party Access
    - Send OTR a message
    - Manage payments and returns
- RECENT ITEMS: NAMES AND ADDRESSES**
- OPEN REQUESTS** (with a 'More...' button): There are no open requests
- UNREAD LETTERS** (with a 'More...' button): There are no unread letters
- UNREAD MESSAGES** (with a 'More...' button): 14-Nov-2016 Profile Updated

- On the far right of the home screen, you will see a list of common actions under the title of 'I Want To'.
- To the right of the 'I Want To' title, there is a button labeled More

[More...](#)

- Under **Bulk Processing**, press the link to access the **Submit W-2/1099** features.

Home » I Want To Log Off

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I WANT TO

- [View My Web Profile](#)
- [Request Third Party Access](#)
- [Send OTR a message](#)
- [Manage payments and returns](#)

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BULK PROCESSING

- [Request Access to Bulk Filing](#)
- [Submit W2/1099](#)

## W2/1099 Bulk Upload

Home » I Want To » W2/1099 Bulk Upload Log Off

1. Submission Instructions > 2. Filing Options

### Filing Options

Please select your desired filing option

Upload bulk submissions

Manually key individual W-2 or W-2c forms

Company Name: BUSINESS EXAMPLE

Contact Name: JANE DOE

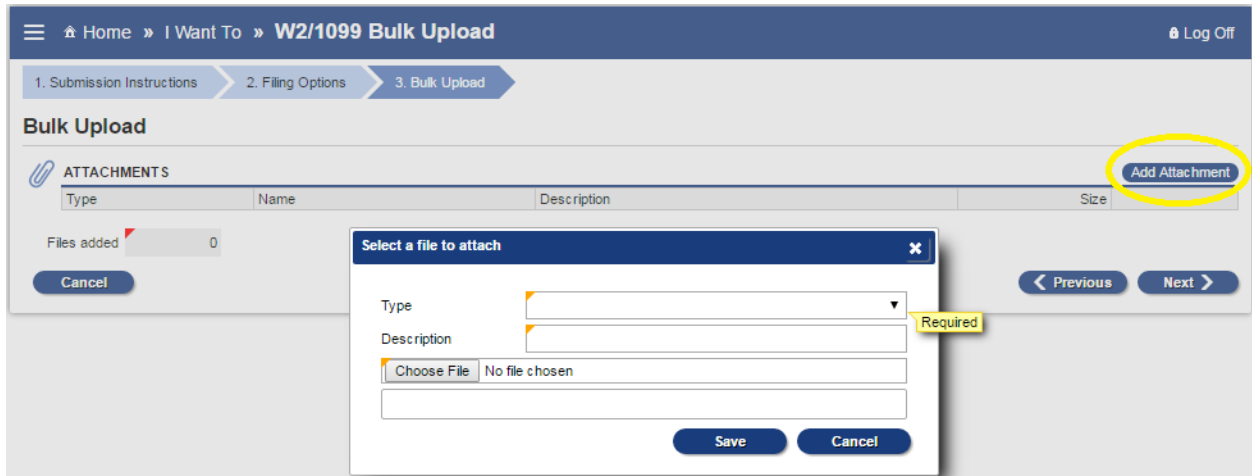
Contact Email: JANEDOE@GMAIL.COM

Contact Phone: (202) 111-2222      Extension:

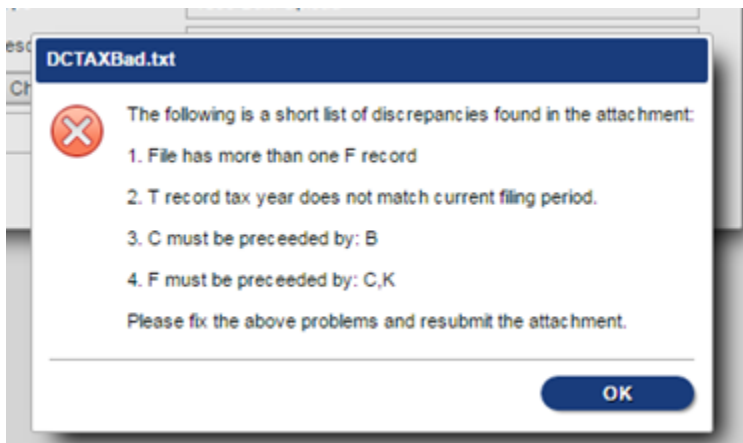
Fax Number:

[Cancel](#)      [Previous](#)      [Next](#)

- Select 'Upload bulk submissions'
- Step 1: Company Name
- Step 2: Contact information
  - Submitter and contact information needs to be the individual or company submitting the electronic 1099s/W2Gs.
- If the previous option was **"Upload Bulk Submission"** then the next step will be attaching the bulk submissions to the Electronic Submission request.
- From here, a pop-up screen will appear titled "Select a file to attach"
- Select your file(s) by clicking on 'Add Attachment'. Include the type of file submission and a description and save.
- Type: Tells the Portal that this is a W-2 or a 1099 bulk submission file
- Description: A free format text field that will distinguish between the attachments
- Example: 2018 Bulk Submission for DC Bagel
- Choose File: A navigation dialog to point to the file on the local machine



- If there are any errors, a list will automatically be displayed. You must correct the errors and resubmit the attachment.



### Common Errors

Validation	Error
Empty File	The File Contains No Records: "FileName"
File beginning with incorrect record type	File does not start with a correct identifier or is empty
Submitter FEIN	Invalid FEIN: "FieldValue"
Employee SSN	Invalid SSN: "FieldValue"
Tax Year	Invalid year: "FieldValue"
State Taxable Wages	This is a required field. Invalid value : "FieldValue"

DCSTATE.TXT



Invalid file line length on line 16

OK

## Recommendation

Use a text editor, such as Notepad++, to verify that the length of each line follows the requirements (W2: 512 1099: 750) Look for extra spaces at the end of a record or an extra blank line added to the end of the final record.

- If the file validation is successful, you will see the following:

Home » I Want To » W2/1099 Bulk Upload Log Off

1. Submission Instructions 2. Filing Options 3. Bulk Upload

### Bulk Upload

ATTACHMENTS Add Attachment

Type	Name	Description	Size
1099 Bulk Upload	1099.txt	1099test	30 Remove

Files added 1

Save and Finish Later Save Cancel Previous Next

NOTE: The submission can be paused at any time by clicking the ‘Save and Finish Later’ button on the bottom left. By pressing this, the Portal will save the submission without submitting it, allowing the user to finish the submission later.

## Manual submission of 1099/W-2G

If the option chosen was “**Manually key individual forms**”, verify the information is correct, as this will be automatically pulled into each individually keyed 1099/W2G.

Home » I Want To » W2/1099 Bulk Upload Log Off

1. Submission Instructions 2. Filing Options

### Filing Options

Please select your desired filing option

Upload bulk submissions

Manually key individual W-2 or W-2c forms

Company Name BUSINESS EXAMPLE

Contact Name JANE DOE

Contact Email JANEDOE@GMAIL.COM

Contact Phone (202) 111-2222 Extension

Fax Number

Cancel Previous Next

Home » I Want To » **W2/1099 Bulk Upload** Log Off

1. Submission Instructions > 2. Filing Options > 3. Verify Information

### Verify Information

Please be sure that the submitting company's Employer Identification Number (FEIN) has been provided and verify the address or enter another if the contact address is different from the submitting company's address.

Company FEIN

Submitter address is different from company address

Company Name

Mailing Address

City, State

Zip  Country

[Cancel](#) [Previous](#) [Next](#)

### Form Submission

Determine which type of form will be submitted or removed from the electronic submission

After pressing the form type a “List” screen will pop up and allow the user to manually enter the forms by pressing the “Add new <Form>” on the left of the window or on the top right of the List.

### Editing records before submission of file

- Editing an Online Data Entry file is easy; go to the 1099 Data Entry page and follow the steps listed below.
- To update the submitter and/or employer information, click on the link corresponding to the information you wish to update.
- To update the employee information, click on the "Update" link corresponding to the employee record you wish to update.
- To delete employee information, click on the "Delete" link corresponding to the employee record you wish to delete.

### File Status

The status of your 1099 submission will appear on the Submission History page. The statuses may be as follows:

- **PENDING** – A request was submitted, but the system has not yet picked it up for processing. At this stage, the request can be deleted.
- **PROCESSING** – A request was submitted, and the system is processing the file. No changes can be made at this stage.

- **COMPLETED** – The system has successfully processed the file. No changes can be made at this stage.
- **DELETED** – The request has been withdrawn by the submitter. No changes can be made at this stage.
- **NOT SUBMITTED** – A request is in progress and has not yet been submitted. At this stage, the request can be either edited or deleted.