Payee 1 / Portador 1

Name Of Payee - 1

Legal name of the individual paid

Type of Work (Be specific)

What did you pay them for specifically?

Dates Paid (Jan 5, 2023 - Jan 4, 2024)

Okay to separate by commas if more than one time period

Did you issue this individual a 1099 or W-2? / ¿Le emitió a esta persona un 1099 o un W-2?

○ No, we did not issue a 1099 or W-2 / No, no emitemos un 1099 o W-2.
○ Yes, 1099
○ Yes, W-2

Note: All individuals paid amounts exceeding $600 annually should be issued a W-2 or 1099.

1099 tax form is required to be issued if you pay an individual who provides work or services for you that exceeds $600 in a calendar year as an independent contractor/sole proprietor. Examples: DJs, lawyers, tax preparers (ask them, they may be exempt depending on how they classify themselves since they may work from home exclusively), babysitters for events, etc. DO NOT INCLUDE BUSINESSES WITH MULTIPLE EMPLOYEES!!!

W-2 employees are people like PTA District office staff. It is unusual for a unit or council to have W-2 employees.

Even if they do not qualify for a W-2 or 1099, if you pay them for work, you need to report them.

Do not include volunteers being reimbursed or school district employees who you pay through an invoice from the school district office such as afterschool art teachers who are under contract with the district and who receives a check from the school district rather than directly from you.
Once you have completed the online form: You will receive an email with a copy of your Workers Compensation Annual Payroll Report. The email goes to whoever listed their email first on the form.

It will give you detailed instructions of what comes next:

1) No one paid: Print a copy of the form and place in the Treasurer’s files. Upload the form to myPTEZ for the current fiscal year.

2) You paid people: Print a copy of the form and place in the Treasurer’s files. Upload the form to myPTEZ for the current fiscal year. Make payment to AIM Insurance for surcharge you owe, if any.