

Tax Information

HELPFUL TIPS

Filing Dates

Form No.	Due Dates To SSA ¹	Due Dates To Recipient
W-2	Last day of February	January 31
	To IRS	
W-2G	February 28	January 31
1099-MISC	February 28	January 31*
1099-INT	February 28	January 31
1099-DIV	February 28	January 31
1099-A	February 28	January 31
1099-B	February 28	February 15
1099-C	February 28	January 31
1099-G	February 28	January 31
1099-Q	February 28	January 31
1099-LTC	February 28	January 31 (To Insured and Policy holder)

Form No.	Due Dates To IRS ¹	Due Dates To Recipient
1099-SA	February 28	January 31
1099-OID	February 28	January 31
1099-PATR	February 28	January 31
1099-R	February 28	January 31
1099-S	February 28	February 15
1098	February 28	January 31 (To Payer/Borrower)
1098-E	February 28	January 31
1098-T	February 28	January 31 (Student)
5498	May 31	(To Participant) For FMV/RMD January 31; For Contributions, May 31

¹The due date is March 31 if filed electronically.

*February 15 if you are reporting payments in boxes 8 or 14.

Tax Form State Requirements

State	Number of Parts Required		State Acceptance of Electronic W-2
	FORM W-2	FORM 1099	
Alabama*	6	4	YES
Alaska	4	3	NO
Arizona	6	4	YES
Arkansas	6	4	YES
California	6	4	YES
Colorado	6	3	YES
Connecticut	6	4	YES
Delaware*	6	4	YES
Dist. of Columbia	6	4	YES
Florida	4	3	NO
Georgia	6	4	YES
Hawaii	6	4	NO
Idaho	6	4	YES
Illinois	6	3	YES
Indiana	6	4	YES
Iowa	6	4	YES
Kansas	6	4	YES
Kentucky*	6	3	YES
Louisiana	6	4	YES
Maine	6	4	YES
Maryland	6	4	YES
Massachusetts	6	4	YES
Michigan*	6	3	YES
Minnesota	6	4	YES
Mississippi	6	4	YES
Missouri*	6	4	YES

State	Number of Parts Required		State Acceptance of Electronic W-2
	FORM W-2	FORM 1099	
Montana	6	4	YES
Nebraska	6	3	YES
Nevada	4	3	NO
New Hampshire	4	3	NO
New Jersey	6	3	YES
New Mexico	6	3	YES
New York*	6	4+	YES
North Carolina	6	4	YES
North Dakota	6	4	YES
Ohio*	6	3	YES
Oklahoma	6	4+	YES
Oregon	6	4	YES
Pennsylvania*	6	3	YES
Rhode Island	6	4	YES
South Carolina	6	4	YES
South Dakota	4	3	NO
Tennessee	4	3	YES
Texas	4	3	NO
Utah	6	4	YES
Vermont	6	3	NO
Virginia	6	3	YES
Washington	4	3	NO
West Virginia	6	3	YES
Wisconsin	6	4	YES
Wyoming	4	3	NO

*Certain cities in AL, DE, KY, MI, MO, NY, OH and PA will require our 8-part all purpose form. +Requires 5-part 1099misc

Part Identification Guide

W-2 Part Identification

- Copy A – For Social Security Administration
- Copy 1 – For State, City or Local Tax Department (employer's copy to file)
- Copy B – For Employee's Federal Return
- Copy 2 – For State, City or Local Tax Department (employee's copy to file)
- Copy C – For Employee's Records
- Copy D – For Employer's Records

1099R Part Identification

- Copy A – For Internal Revenue Service
- Copy 1 – For State, City or Local Tax Department (For Payer to file)
- Copy B – For Recipient's Federal Return
- Copy C – For Recipient's Records
- Copy 2 – For Recipient's State, City or Local Tax Department (For Recipient to file)
- Copy D – For Payer's Records

1099 Part Identification

- Copy A – For Internal Revenue Service
- State Copy – For Payer to file with State Agency (if applicable)
- Copy B – For Recipient
- Copy C – For Payer's Records

1099 Misc. Part Identification

- Copy A – For Internal Revenue Service
- Copy 1 – State Copy (For Payer to file)
- Copy B – For Recipient
- Copy C – For Payer's Records
- Copy 2 – For State, City or Local Tax Dept. (For Recipient to file)

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Call: 877.526.3894 8 a m - 7 p m E S T