# Removing a Line from a 1099 Voucher 9.2

| Step | Action |
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| 1. | **Note:** This simulation is an example of a transaction. For security reasons, some financial information has been altered (i.e. Distribution line codes and supplier information).<br><br>When entering a transaction in the live TeamWorks Financials system please select all values and options based on your agency policy, paperwork on hand and current situation. |
| 2. | Begin by navigating to the **Withholding Invoice Line Update** page.<br><br>Click the **NavBar** link. |
| 3. | Click the **Navigator** link. |
| 4. | Click the **Suppliers** link. |
| 5. | Click the **1099/Global Withholding** link. |
| 6. | Click the **Maintain** link. |
| 7. | Click the **Update VoucherLine Withholding** link. |

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| 8. | Use the **Withholding Line Update** page to search for the desired supplier.<br><br>It is important to enter as much search criteria as possible on this page to narrow the search results and limit system processing times. |
| 9. | Enter the appropriate information into the **Supplier SetID** field<br><br>For this example, type **State**.<br><br>Supplier SetID = ▼ [　　　　　　　　] |
| 10. | For this example, the user knows the **Supplier ID**.<br><br>Click in the **Supplier ID** field.<br><br>Supplier ID begins with ▼ [　　　　　　　] |
| 11. | Enter the appropriate information into the **Supplier ID** field.<br><br>For this example, type **0000000126**.<br><br>Supplier ID begins with ▼ [　　　　　　　] |
| 12. | Click the **Search** button.<br><br>[ Search ] |
| 13. | For this example, click any field on the same row as the **GEORGIA CORRECTIONAL INDUSTRIES** link with the 000001 Supplier location.<br><br>Supplier SetID  Supplier ID  Supplier Location  Supplier Name  Withholding Applicable<br>STATE  0000000126  000001  GEORGIA CORRECTIONAL INDUSTRIES  Y |
| 14. | The **Withholding Invoice Line Update** page is used to update withholding information for a withholding Supplier at an invoice line level. One or multiple voucher lines can be updated at one time. This page is broken into the following sections:<br><br>**Vendor** provides a summary of the supplier you are going to update.<br>**Criteria** allows you to enter the Business Unit, Beginning and Ending Dates of the 1099 reporting year.<br>**Defaults** fields are not changed for this process. Withholding Entity defaults to 'IRS'.<br>**Tax Reporting Year** is used to enter the beginning and ending dates of the tax reporting year.<br>**Details** is used for updating the voucher lines. |
| 15. | In the Criteria section, enter appropriate information into the **Business Unit** field under which the 1099 is reported.<br><br>For this example, type **46700**.<br><br>Business Unit [　　　　　] |

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| 16. | The date range for the date search criteria must be within the calendar year in which the 1099 is reported.<br><br>Click in the **From Date** field.<br><br>From Date 07/10/2018 |
| 17. | Enter the appropriate starting date search criteria into the **From Date** field.<br><br>For this example, type **05/01/2017**.<br><br>From Date \| ☒ |
| 18. | The From Date and To Date must be within the same calendar year.<br><br>Click in the **To Date** field.<br><br>To Date 07/10/2018 |
| 19. | Enter the appropriate ending date search criteria into the **To Date** field.<br><br>For this example, type **07/10/2017**.<br><br>To Date 07/10/2018 ☒ |
| 20. | The date range for the **Tax Reporting Year** must be within the calendar year in which the 1099 is reported.<br><br>**Note**: The date range must be one calendar year beginning '01/01/XX' and ending '12/31/XX'.<br><br>Click in the **Start Date** field.<br><br>*Start Date 07/01/2018 |
| 21. | Enter the appropriate tax reporting year beginning date into the **Start Date** field.<br><br>For this example, type **01/01/2017**.<br><br>*Start Date 07/01/2018 ☒ |
| 22. | Click in the **End Date** field.<br><br>*End Date 07/10/2018 |
| 23. | Enter the appropriate tax reporting year last date into the **End Date** field.<br><br>For this example, type **12/31/2017**.<br><br>End Date 07/10/2017 ☒ |
| 24. | You are ready to **Search** for the every voucher entered for the selected supplier during the entered tax reporting year.<br><br>Click the **Search** button.<br><br>Search |

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| 25. | Listed in the **Details** section, the system returned the first 5 rows of 2484 search results. The following are the Current Withholding Details fields that can be updated:<br><br>**Current Withhold** checkbox indicates whether the line is set for Withholding (checked) or not.<br>**New Withhold** drop-down field allows you to set a new withhold status.<br>**Entity** is the tax authority.<br>**Type** defines the withholding at the highest level i.e. 1099.<br>**Jurisdiction** is another level of classification between the withholding type and class.<br>**Class** is a code used for each withholding type to define the activity, i.e. income or non-employee compensation. |
| 26. | To display the first 100 rows instead of the default 5 rows use the **View 100** link.<br><br>Click the **View 100** link.<br>View 100 |
| 27. | Move to the right side of the page to reveal the vertical scrollbar on the grid.<br><br>Click the **Horizontal** scrollbar. |
| 28. | For this example, the system displays the first 100 rows of 2484 Withholding Detail rows.<br><br>Use the **Vertical** scrollbar to move toward the bottom of the grid to review the Current Withholding Details vouchers. |
| 29. | Navigate to the second page of the list.<br><br>Click the **Show next row** button.<br>▶ |
| 30. | The system displays the second page including rows 101 through 200 of the 2484. |
| 31. | Return to the **First** page in the list.<br><br>Click the **First** link.<br>First |
| 32. | Collapse the rows to only display the default of 5 rows.<br><br>Click the **View 5** link.<br>View 5 |
| 33. | Now change the withholding to 'No' on the desired row.<br><br>Click the **New Withhold** drop-down list on row 1.<br><br>New Withhold |

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| 34. | Click the **N** in the New Withhold **drop-down** list. |
| 35. | After the line is changed from Withholding to No Withholding (N), the Type, Jurisdiction, and Class fields become empty. |
| 36. | Click the **New Withhold Details** tab. |
| 37. | Click the **Save** button. |
| 38. | A popup message appears reminding to verify the Tax Reporting Start and End date was entered correctly. If it is correct click **OK** to Save; otherwise, select **Cancel** to go back and make the proper updates.<br><br>Click the **OK** button. |
| 39. | After saving, the **New Withhold Details** page show what the new withholding status is, as well as the status of the update.<br><br>The status of the update will show 'Pending' until the Withholding Update Process is run. |
| 40. | Click **here** (http://www.surveymonkey.com/r/25KG2HH) to take a quick survey. |
| 41. | **Congratulations!** You have completed the Removing a Line from a 1099 Voucher topic. **End of Procedure.** |