

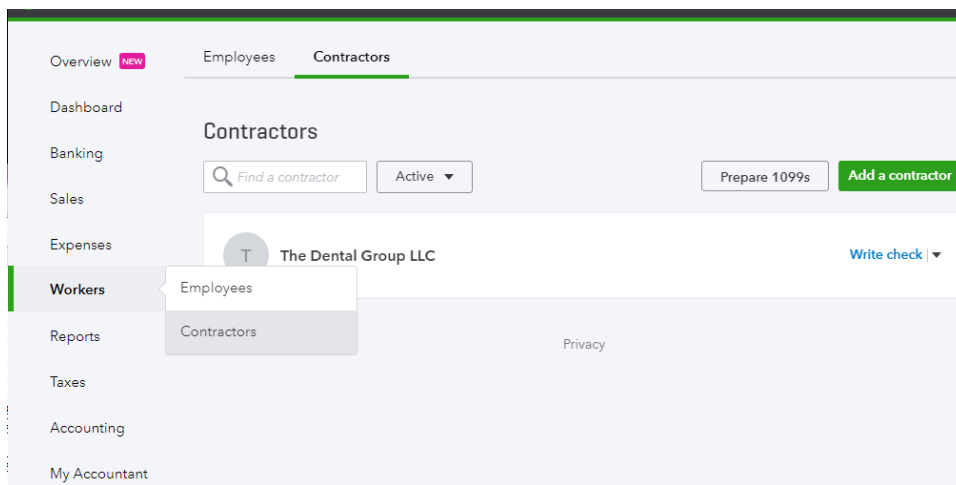
## RESOURCE

Updated January 2021

# Obtaining Form W-9 Information from Your Vendors for QuickBooks Online Users

QuickBooks Online provides a faster and more secure way for your vendors to fill out their name, address and identification number themselves. Here are the steps:

1. Click **Workers** on the left navigation panel, choose Contractors tab on the top and Click the **Add a contractor** button.



2. A new pop up window will show to add a contractor. All you need to fill out is the contractor Name and Email address and Click **Add contractor** button.

### Add a contractor

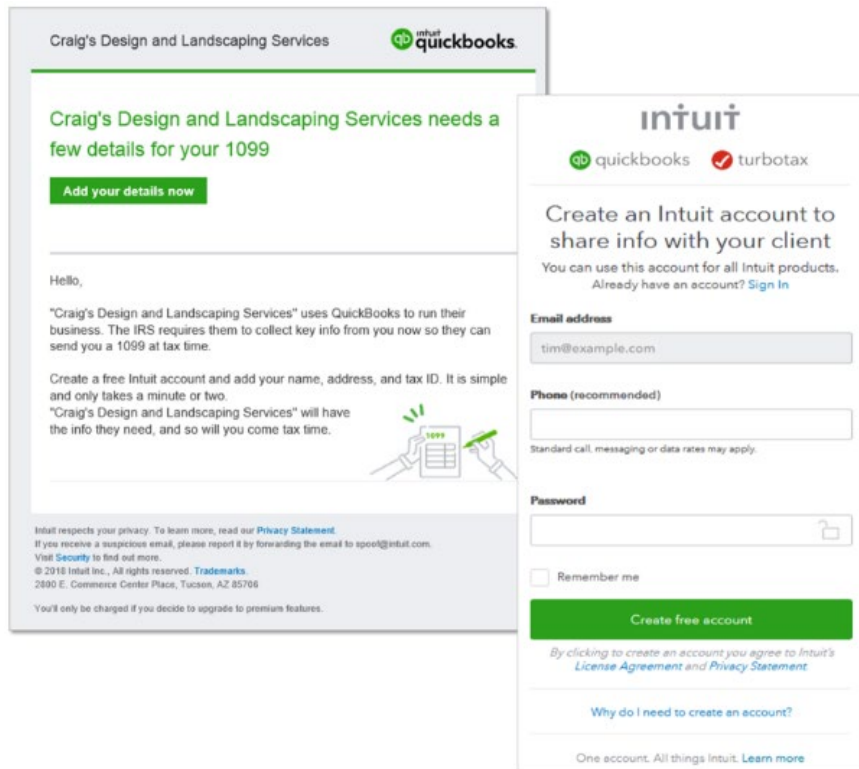
Name \*

Email \*

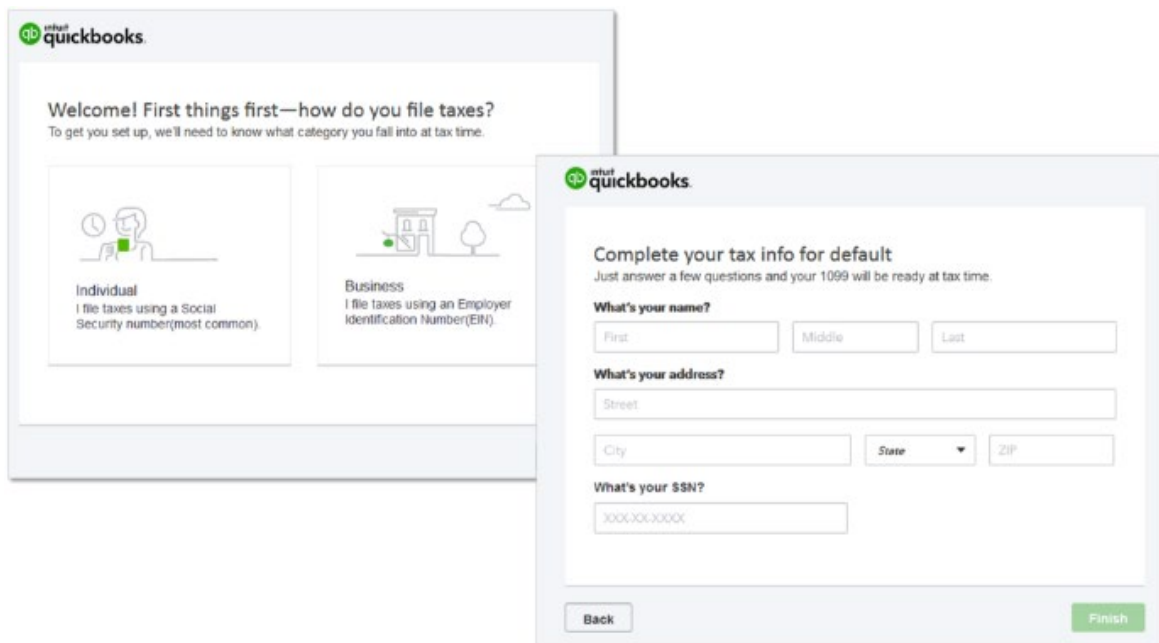
Email this contractor to complete their profile. They'll get their own account to safely share their personal details.  
[Preview](#)

**Add contractor**

- QuickBooks will send an invite via email to the contractor with a safe link to **Add your details now**.



- Once they create a free Intuit account, they will be prompted to answer a series of questions in a substitute W-9 form (their name, address and identification number). Once done, they click **Finish** and the information is saved and submitted to your QuickBooks Online company file.



5. This is how it will look on your QuickBooks Online company file.

The screenshot shows a 'Details' page for a contractor. Under the 'Personal details' section, the following information is displayed:

Contractor type	Name	Display name	Social Security number
Individual	Tim Example	Tim	XXXX22-4444

Email	Address
tim@example.com	123 Main Street Anytown, CA 56789

Another benefit for using this method is your contractors will have online access to the Forms 1099s that you prepare for no additional charge. They won't have to wait for the printed copy, or just in case they couldn't find the printed copy, they can always access the copy online. They simply need to click "yes" as shown in the screen below.

The image shows two overlapping screenshots from the QuickBooks Online interface. The top screenshot is a prompt titled "Do you want to give contractors online access to their 1099s? (NEW!)". It explains that contractors can view their 1099s and use the data in other applications. There are two radio button options: "Yes. Give my contractors online access to their 1099s through their own Intuit account. And also deliver printed 1099s to all of my contractors." and "No. Only deliver printed 1099s to my contractors. (Be sure to finish up by January 27 so we can deliver them on time.)". The bottom screenshot is titled "Set up contractors for online access to their 1099s" and states that online access is free and printed copies will still be mailed. It includes a "Contractors" section with the instruction: "Add any missing addresses here and we'll save them to your QuickBooks account. Need to fix an address? Update it in QuickBooks before you file." Below this is a table with columns for "Name" and "Email for delivery". The table contains two rows: "Acme Corporation" with email "acme@corporation.com" and "John Doe" with an empty email input field. At the bottom of the second screenshot, there is a link to "Download a copy of each 1099 for your records" and a "Continue" button.

**If you need to fix a contractor's email address, you make the changes in QuickBooks Online before you file.**

For more details about Forms 1099 E-File Service, please check out the Intuit website at <https://quickbooks.intuit.com/payroll/1099-efile/>