



MIGRATING PAYER & RECIPIENT DATA FROM EAGLE VIEW TO TAX-AID FILING

Step 1: Locate and download your Eagle View data.

Your Payer and Recipient Data is available to download to an Excel Document from the Eagle View website. Steps to download:

- a. Log In to <https://EagleViewfiling.efile1.com/login>
- b. Select “Payer” on left hand side of Dashboard
- c. Select “View All”
- d. Select “Download Payers and Recipients”

You will receive a download of your Payers and Recipients. Please note:

- **Payer information** is listed on the left columns of the file (columns A through K)
- **Recipient information for each payer** is on the right side of the file (columns L through V). (the data in the image below is from a test file, and not actual live information)



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	
1	Payer's TIN	Payer's name	Payer's street	Payer's city	Payer's state	Payer's county	Payer's ZIP	Payer's phone	Payer's email	Payer's Dependent	Recipient's first name	Recipient's last name	Recipient's address	Recipient's city	Recipient's state	Recipient's ZIP	Recipient's phone	Recipient's email	Recipient's 2nd name	Recipient's 2nd address	Recipient's 2nd city	Recipient's 2nd state	Recipient's 2nd ZIP	Recipient's 2nd phone	Recipient's 2nd email
2	41-1938555	Ed's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		458-85-9587	Bill	Smith	1275 Red Fox Rd.	Arden Hills	MN	US	55112							
3	41-1938555	Ed's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		325-69-5869	Jenny	Johnson	1276 Red Fox Rd.	Arden Hills	MN	US	55112							
4	41-1815455	Jim's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	6128010000	Steve@msn.com		458-58-8665	Wendy	Jacks	1277 Red Fox Rd.	Arden Hills	MN	US	55112							
5	41-1815455	Jim's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	6128010000	Steve@msn.com		458-96-9864	Jaime	Bowers	1278 Red Fox Rd.	Arden Hills	MN	US	55112							
6	47-4211055	Jeff's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		478-65-6985	Lynn	Johnson	1279 Red Fox Rd.	Arden Hills	MN	US	55112							
7	47-4211055	Jeff's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		256-65-9857	Bill	Hammers	1280 Red Fox Rd.	Arden Hills	MN	US	55112							
8	47-4211055	Jeff's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		258-65-9854	Jeff	Thomas	1281 Red Fox Rd.	Arden Hills	MN	US	55112							
9	47-4211055	Jeff's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		258-65-9857	Birdie	Harris	1282 Red Fox Rd.	Arden Hills	MN	US	55112							
10	47-4211055	Jeff's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		325-65-9587	Jack	Nelson	1283 Red Fox Rd.	Arden Hills	MN	US	55112							
11	47-4211055	Jeff's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		458-58-6325	Karsten	Linville	1284 Red Fox Rd.	Arden Hills	MN	US	55112							
12	47-4211055	Jeff's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		478-58-9658	Ann	Thornton	1285 Red Fox Rd.	Arden Hills	MN	US	55112							
13	47-4211055	Jeff's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		458-25-6521	Luke	Skywalker	1286 Red Fox Rd.	Arden Hills	MN	US	55112							
14	47-4211055	Jeff's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		365-65-6589	Daniel	Davis	1287 Red Fox Rd.	Arden Hills	MN	US	55112							
15	47-4211055	Jeff's Pizza	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		254-52-6985	Mason	Crosby	1288 Red Fox Rd.	Arden Hills	MN	US	55112							
16	47-4211060	Steve's Burgers	3660 Victoria St. N.	Shoreview	MN	US	55126	6516360000	Steve@msn.com		478-58-9854	Fran	Tarkenton	1289 Red Fox Rd.	Arden Hills	MN	US	55112							
17	47-4211060	Steve's Burgers	3660 Victoria St. N.	Shoreview	MN	US	55126	6516360000	Steve@msn.com		478-52-8598	Doreen	Walz	1290 Red Fox Rd.	Arden Hills	MN	US	55112							
18	47-4211058	John's Burger	3660 Victoria St. N.	Shoreview	MN	US	55126	9524740000	Steve@msn.com		471-65-9587	Barron	Brown	1291 Red Fox Rd.	Arden Hills	MN	US	55112							
19	47-4211058	John's Burger	3660 Victoria St. N.	Shoreview	MN	US	55126	9524740000	Steve@msn.com		254-56-9685	Kelly	Smith	1292 Red Fox Rd.	Arden Hills	MN	US	55112							
20	47-4211058	John's Burger	3660 Victoria St. N.	Shoreview	MN	US	55126	9524740000	Steve@msn.com		325-65-9685	Jeanie	Craig	1293 Red Fox Rd.	Arden Hills	MN	US	55112							
21	47-4211058	John's Burger	3660 Victoria St. N.	Shoreview	MN	US	55126	9524740000	Steve@msn.com		478-58-9857	Steve	Ferguson	1294 Red Fox Rd.	Arden Hills	MN	US	55112							
22	47-4211040	Elliott's Burge	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		478-58-9857	Nelly	Brown	1295 Red Fox Rd.	Arden Hills	MN	US	55112							
23	47-4211040	Elliott's Burge	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		325-65-9857	Janet	Jackson	1296 Red Fox Rd.	Arden Hills	MN	US	55112							
24	47-4211040	Elliott's Burge	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		254-56-8974	Dale	Davis	1297 Red Fox Rd.	Arden Hills	MN	US	55112							
25	47-4211040	Elliott's Burge	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		214-25-3265	Nigel	Larson	1298 Red Fox Rd.	Arden Hills	MN	US	55112							
26	47-4211040	Elliott's Burge	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		478-85-9857	Julie	Peterson	1299 Red Fox Rd.	Arden Hills	MN	US	55112							
27	47-4211040	Elliott's Burge	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		325-63-8957	Lori	Larson	1300 Red Fox Rd.	Arden Hills	MN	US	55112							
28	47-4211040	Elliott's Burge	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		478-58-9857	Angie	Taylor	1301 Red Fox Rd.	Arden Hills	MN	US	55112							
29	47-4211040	Elliott's Burge	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		125-25-5698	Mason	Brownell	1302 Red Fox Rd.	Arden Hills	MN	US	55112							
30	47-4211040	Elliott's Burge	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		458-59-9587	Denise	Harris	1303 Red Fox Rd.	Arden Hills	MN	US	55112							
31	47-4211040	Elliott's Burge	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		258-98-9857	Shirlee	Martinson	1304 Red Fox Rd.	Arden Hills	MN	US	55112							
32	47-4211040	Elliott's Burge	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		487-25-8547	Geoff	Hardenbergh	1305 Red Fox Rd.	Arden Hills	MN	US	55112							
33	47-4211040	Elliott's Burge	3660 Victoria St. N.	Shoreview	MN	US	55126	9522770000	Steve@msn.com		125-56-8574	Ken	Burleson	1306 Red Fox Rd.	Arden Hills	MN	US	55112							
34																									
35																									

Key observation: Each line represents one Recipient. The data is sorted by Payer. Thus, there are multiple lines for each payer depending on the number of recipients.

Security is key. As you migrate this information, understand it contains Personally Identifiable Information (PII) as defined by the Federal Trade Commission (FTC). So, keep this file in a safe place and store/share it accordingly. Also, due to the PII (Personally Identifiable Information) nature of the data listed in this file, we cannot migrate this data for you. It is important that you manage the process to ensure accuracy in this migration.

Step 2: Set up your account in the new Tax-Aid Filing application.

Go to www.EagleViewfiling.com and click on “GET STARTED”. This will take you to our new e-file site: www.taxaidfiling.com . Fill in the required fields and check for accuracy. We recommend you use the same email you used for the old system, but you may wish to update it if appropriate.

- Please fill in each field in full.
- You will notice we are requesting additional information. This is being done to have you be prepared to use new functions in our new system, including soon to be released payroll reporting forms 94x series.
- Note: if you are a professional tax preparer and mark this field as yes AND you are an ERO, you will be asked to upload your credentials.

Step 3: Migrate your Payer and Recipient information into the new system at Tax-Aid Filing.

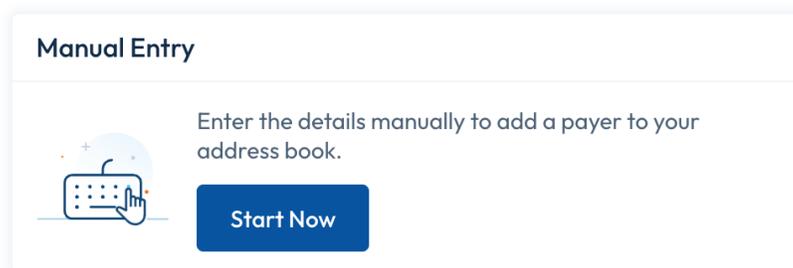
Once your account is set up you are ready to migrate all your Payer and Recipient information. Payers represent the collection of all companies that you will be filing informational returns on their behalf. This can be done manually, or by Bulk Upload.

A. MANUALLY ENTERING PAYERS

1. When logged into the Tax-Aid website, select “Add Payer” from the Dashboard.



2. Select “Start Now” under Manual Entry



3. Fill out all applicable fields in the form provided. When complete, select “Save”

Add Payer

Enter the payer's details to add them to your Address Book.

Basic Information

Type of TIN: EIN SSN Other EIN Reference number (Optional)

Payer name

DBA/Trade name (Optional)

Address Information

Country: Address line 1 Address line 2 (Optional)

City or town State ZIP code [Verify with USPS](#)

Contact Information (Optional)

First name Middle initial Last name Suffix

Email address Phone number

4. Your Payer will be added to the **Address Book** on the Dashboard, and can be accessed by selecting the **Address Book** link



This process can be repeated for an unlimited number of Payers. When saved, each individual Payer will be housed in the Address Book:

1099/W-2 Distribution Center Address Book 12 forms

Manage Payers Total No. of Payers: 6

Here is the list of payers added to your account. You can manage the recipients under each payer and their TIN Matching status.

Search by Payer's Name/Email/Phone/TIN Filter Total Filtered No. of Payers: 6

<input type="checkbox"/>	Payer Name	Trade Name	Payer TIN	TIN Success	Yet to Verify	In Progress	Failed	Action
<input type="checkbox"/>	Bill Jones ●	New York Business	SSN: XXX-XX-2584	-	11 View	-	-	<input type="button" value="⊕"/> <input type="button" value="✎"/> <input type="button" value="⋮"/>
<input type="checkbox"/>	Chris's Pizza ●	-	EIN: XX-XXX5498	-	57 View	-	-	<input type="button" value="⊕"/> <input type="button" value="✎"/> <input type="button" value="⋮"/>

B. MANUALLY ENTERING RECIPIENTS:

1. Access your list of Payers that have been entered by selecting the **Address Book**. Each Payer will be listed individually in the Address book.

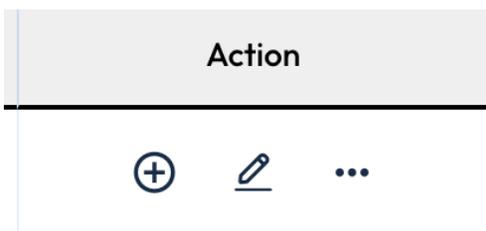
Manage Payers Total No. of Payers: 12

Here is the list of payers added to your account. You can manage the recipients under each payer and their TIN Matching status.

Search by Payer's Name/Email/Phone/TIN Filter Total Filtered No. of Payers: 12

<input type="checkbox"/>	Payer Name	Trade Name	Payer TIN	TIN Success	Yet to Verify	In Progress	Failed	Action
<input type="checkbox"/>	Bill Jones ●	New York Business	SSN: XXX-XX-2584	-	11 View	-	-	<input type="button" value="⊕"/> <input type="button" value="✎"/> <input type="button" value="⋮"/>
<input type="checkbox"/>	Chris's Pizza ●	-	EIN: XX-XXX5498	-	57 View	-	-	<input type="button" value="⊕"/> <input type="button" value="✎"/> <input type="button" value="⋮"/>

2. On the right-hand side of the screen, there will be an **“Action”** column. Several options are available under **Action**. To add a Recipient, please select the **“plus sign in the circle.”**



3. Select **“Start Now”** under Manual Entry.

Manual Entry



Enter the details manually to add a recipient to your address book.

[Start Now](#)

4. Fill out all applicable fields in the form provided. When completed, select “Save.”

Add Recipient

Applicable Form Type

1099/1098/5498 ACA/W-2

Select the sections you wish to correct and make the necessary changes.

TIN Information

Type of TIN: EIN SSN Other TIN Not Provided

SSN: Reference number (Optional):

Recipient Name

First name: Middle initial (Optional): Last name: Suffix (Optional):

Trade name/ DBA name: DOB (Optional):

Address Information

Country: Address line 1: Address line 2 (Optional):

City or town: State: ZIP code:

Contact Details

Email address (Optional): Phone number (Optional):

An email address is required to grant online access to form copies.

- This process can be repeated for an unlimited number of Recipients. When saved, each individual recipient will be housed in the Address Book on that individual Payer. The number of recipients on each Payer will be listed, and a link to VIEW.



- Click **“View”** for a list of recipients that have been entered and saved for that Payer. These can be edited by selecting the “pencil” under **Action** to the right.

Employee/Recipient Name	DBA name/Name cont	Email Address	Address	TIN Matching Status	Action
Carson Camrey R SSN: XXX-XX-9586	-	-	3344 Pennsylvania Ave. , Phoenix, AZ 85001	Yet to Verify	...
Gerald Stevens R SSN: XXX-XX-9857	-	-	1432 Park Place, Jackson, MS 39201	Yet to Verify	...
Harry Henderson R SSN: XXX-XX-6589	-	-	3421 St. Charles Place, Richmond, VA 23221	Yet to Verify	...
Jack Johnson R SSN: XXX-XX-5647	-	jack@msn.com	2314 Baltic Street, Bismark, ND 58501	Yet to Verify	...

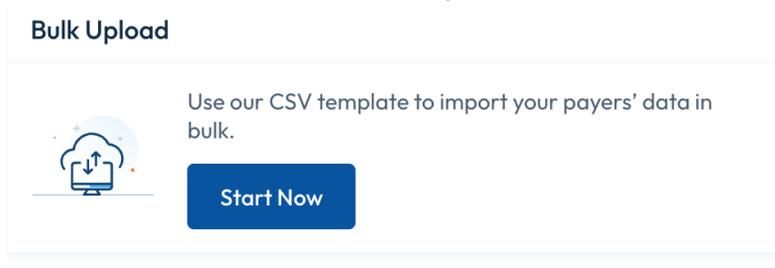
BULK UPLOAD OPTION:

If you have a number of Payers and Recipients, you may wish to “Bulk” upload the information from your Eagle view download data created in Step 1.

- When logged into the Tax-Aid website, select “Add Payer” from the Dashboard.



- Select “Start Now” under Bulk Upload



3. Under “Add Payers”

- a. Select **“Payer and Recipient Data”** under **Choose what you want to upload**

Add Payers

Choose what you want to upload
Select one of the following options to indicate the type of information you want to upload

Payer Data
Import only the payers' information.

Payer and Recipient Data
Import multiple payers along with their recipients.

- b. Choose **“Use Our Standard Template.”**

Choose Import Method
Select your preferred method for uploading the Payer data. [See how they work](#)

Use Our Standard Template
Download our CSV template, fill in the information, and upload it.

- c. Choose **Download Standard Template.** This will send the CSV template to your desktop.

Use Our Standard Template
Download the standard CSV template, enter the form data, and upload the file. [view instructions](#)

[Download Standard Template](#)

- d. The Payer and Recipient data that was provided on your Excel file from Eagle View can be **cut and pasted into the appropriate columns** on the Tax-Aid CSV template. A few important notes/hints:
 - Only columns with asterisks (*) are mandatory. Those columns without asterisks are optional.

- To see full column description, highlight the column headings and then auto format the columns to see the entire description.
- Do not delete or rename any column headers.
- Since the Eagle View file is in a different format, please follow the headers on the Tax-Aid CSV file as a guide to where to paste the information.
- Please note Column B, “Type of TIN,” must be completed. Example: 1=EIN, 2=SSN) For Payers, this is usually an EIN. You can tell this by the format of the next field. xx-xxx-xxxx is an SSN. xx-xxxxxxx is an EIN. This is a new field and one that you must fill in manually.

PAYER COLUMNS

<i>New field</i> Tax-Aid Filing field	<i>Comes from:</i> Old EagleView field	Comment
Payer reference		New field. Use this if you have an internal customer ID.
Payer Type of TIN*		New field. Enter 1 for EIN, 2 for SSN
Payer TIN*	Payers TIN	Copy and paste
Payer name*	Payers name	
Payer first name*		Only required if TIN type is SSN
Payer middle name		
Payer last name*		Only required if TIN type is SSN
Payer Suffix		New field.
Payer DBA Trade name		New field.
Payer Country*	Payer country	Enter US as appropriate
Payer Address*	Payers’ street	
Payer city*	Payers’ city or town	
Payer state*	Payers’ state	
Payer zip/Postal code*	Payers’ zip or foreign postal code	
Contact person		New field.
Contact person		New field.
Contact person		New field.
Suffix		New field.
Email address*	Payers’ email	
Phone number	Payers’ telephone no.	

“*” **Required field.** All other field are optional.

RECIPIENT COLUMNS

<i>New field</i> Tax-Aid Filing field	<i>Comes from:</i> Old EagleView field	Comment
Recipient reference	NA	New field. Use this if you have recipient or vendor IDs from your Payers
Recipient form type	NA	New field. Enter 1 = 1099/1098/5498, 2 = ACA/W-2, 3 Both . Enter as appropriate
Recipient TIN Type*	NA	New field. (1= EIN, 2=SSN, 3 = ITIN, 4 = ATIN, 5 = QI-EIN, 6 = WP-EIN, 7 = WT-EIN, 8 = NQI-EIN, 9 = TIN not provided)*
Recipient TIN*	Recipient's TIN	Copy and paste
Recipient name*		Complete when supplying an EIN
Recipient first name*	Recipient's first name	Complete when supplying an SSN
Recipient middle name	Recipient's middle initial	Copy and paste
Recipient last name*	Recipient's last name	Complete when supplying an SSN
Suffix	Recipient's suffix	Copy and paste
DBA Trade name		New field.
Recipient country*	Recipient's country	Enter US as appropriate
Recipient address 1*	Recipients' street address 1	Copy and paste
Recipient address 2	Recipients' street address 2	
Recipient city*	Recipient's city or town	Copy and paste
Recipient state*	Recipient's state	Copy and paste
Recipient zip/postal code*	Recipient's zip or foreign postal code	Copy and paste
Email address	Recipient's email	Copy and paste
	Recipient's telephone number	No longer required

“*” **Required field.** All other fields are optional

- e. When the data is complete in the Tax-Aid CSV file, the file can be saved and uploaded to the Tax-Aid website by ‘dragging and dropping’ or selecting the file from your computer:

✓

Test Payer CSV 2.csv ×

✓ Uploaded 11/21/24, 11:39 AM (ET) 1.56 kb

Continue To Preview

< Back

- f. CAUTION: Do not save this CSV file as an Excel file. Tax-Aid Filing only allows import of your data from a CSV formatted file.
- g. Once the file is uploaded, select **“Continue to Preview.”**
- h. On the **“Import Summary Payers”** screen, you can view total “Success” and “Error” Records for Payers.

Import Summary - Payers

Total Records: 6

Success Records: 6

Error Records: 0

Continue to Recipient Import

- i. Select **“Continue to Recipient Import”**
- j. On the **“Recipient Import Summary”** screen, you will be notified of “Success Records” or “Error Records.” If there are any errors, you will be provided a link to fix any errors and will be directed to the error by clicking that link.

Recipient Import Summary

Total Payers : 6

Payer Details	Total Records	Success Records	Error Records	Action
Ed's Pizza <small>EIN : XX-XXX8555</small>	2	2	0	-
Elliot's Burgers <small>EIN : XX-XXX1040</small>	11	11	0	-
Jeff's Pizza <small>EIN : XX-XXX1055</small>	10	10	0	-
Jim's Pizza <small>EIN : XX-XXX5455</small>	2	2	0	-
John's Burgers <small>EIN : XX-XXX1058</small>	3	3	0	-
Steve's Burgers <small>EIN : XX-XXX1060</small>	2	2	0	-

[Click here to unmask the TIN](#)

< Back

Continue to Import

- k. If no error exists, select **“Continue to Import”**
- l. The Payers and Recipients that you uploaded from the CSV template should be added and saved in the **Address Book**.

Manage Payers 6

[Upload history](#) [+ Add Payer](#)

Here is the list of payers added to your account. You can manage the recipients under each payer and their TIN Matching status.

<input type="checkbox"/>	Payer Name	Payer TIN	Trade Name	Recipients	Recipients TIN matching					Action
					TIN Success	Yet to Verify	In Progress	Failed	Not Applicable	
<input type="checkbox"/>	Ed's Pizza	EIN: XX-XXX8555	-	2	-	2	-	-	-	+ ✎ ⋮
<input type="checkbox"/>	Elliot's Burgers	EIN: XX-XXX1040	-	11	-	11	-	-	-	+ ✎ ⋮
<input type="checkbox"/>	Jeff's Pizza	EIN: XX-XXX1055	-	10	-	10	-	-	-	+ ✎ ⋮
<input type="checkbox"/>	Jim's Pizza	EIN: XX-XXX5455	-	2	-	2	-	-	-	+ ✎ ⋮
<input type="checkbox"/>	John's Burgers	EIN: XX-XXX1058	-	3	-	3	-	-	-	+ ✎ ⋮
<input type="checkbox"/>	Steve's Burgers	EIN: XX-XXX1060	-	2	-	2	-	-	-	+ ✎ ⋮

[Click here to unmask the TIN](#)