Check your recipients' names and TINs against IRS records before you file. List one recipient per row and we'll handle the rest.

How to use this workbook

1. Enter one recipient per row on the TIN Data tab, starting in row 2.
2. Don't rename, reorder, delete or insert columns.
3. Hover over a header cell for its format and a short description.
4. Both columns are required. A row missing a TIN or a name comes back as invalid.
5. Take the TIN and name from each recipient's Form W-9. Dashes, spaces and punctuation are fine. We clean them up.
6. Once done, save the Excel file (.xlsx), Login to your secure client portal (https://portal.1099fire.com). Navigate to TIN Matching (from the Tools menu) Scroll down to the Bulk TIN Matching section, click the Launch Bulk TIN Match button and then select or drag and drop your excel file.

What we clean up for you

Before we submit your file to the IRS, we:

- Strip characters the IRS won't accept, like commas, periods and apostrophes
- Remove dashes and spaces from TINs
- Trim names to the IRS's 40-character limit
- Remove duplicate name and TIN pairs (if two or more submitted rows match identically)
- Build the IRS bulk file from your spreadsheet

Your part is getting the names and numbers right.

Which name to enter

The IRS doesn't check the full name. It checks the first four letters of a person's last name, or the first four characters of a business's legal name. Get those right and most records match.

Recipient	What to enter
Individual	The name on their Social Security card. Middle names, initials and suffixes like Jr won't cause a mismatch.
Two last names	Enter both, in the same order as the Social Security card.
Corporation	Legal name from line 1 of the W-9, including Inc or Corp. Not the DBA.
Sole proprietor	The owner's name, even if they gave you an EIN.
Single-member LLC	The owner's name and TIN from line 1 of the W-9. If the LLC is taxed as a corporation, use the LLC's legal name.
Partnership	The partnership name from the W-9.
Estate	The decedent's name, followed by Estate.
Trust or nonprofit	The legal name from the W-9.

Common mistakes that cause a mismatch

- Using a DBA or trade name instead of the legal name
- A name change after marriage or divorce that was never updated with Social Security
- A transposed or missing digit in the TIN
- A sole proprietor's business name paired with the owner's SSN
- Guessing at a spelling instead of copying it from the W-9

Reading your results

Meaning	What to do
Match found for SSN, Match found for EIN, Match found for both SSN and EIN	Nothing. You're set.
NO Match	Check the name against this guide. If it still looks right, get a new W-9 or Social Security Card from the recipient.

Field reference

#	Col	Header	Required	Format	What to enter
1	A	TIN	Required	9 digits (dashes OK)	The recipient's SSN or EIN, from their Form W-9. Dashes or spaces are fine. We remove them before we submit.
2	B	Name	Required	Text	The recipient's legal name from line 1 of their W-9. For individuals, use the name on their Social Security card. For sole proprietors, use the owner's name, not the business name. Punctuation is fine. We strip anything the IRS won't accept.

Official IRS references

IRS Publication 1586 (name control rules) https://www.irs.gov/pub/irs-pdf/p1586.pdf
IRS Taxpayer Identification Number (TIN) Matching https://www.irs.gov/tax-professionals/taxpayer-identification-number-tin-matching
About Form W-9 https://www.irs.gov/forms-pubs/about-form-w-9
Instructions for the Requester of Form W-9 https://www.irs.gov/instructions/iw9

Questions? Call 1099FIRE at (480) 706-6474 or visit 1099fire.com. Name rules are from IRS Publication 1586 and the Instructions for the Requester of Form W-9.