

## TIN Matching

We are excited to bring you an updated TIN Matching experience that will provide **annual Subscribers** more control on which payers and recipients are added to the TIN request list.

Payers and Recipients will no longer be automatically added to the TIN request list. Instead, the user must now ‘check out’ the request at \$0 using the same steps a nonsubscriber takes to request TIN Matching.

Simply select to validate a specific payer or recipient TIN by clicking “Validate Now”. The request will be added to your cart at \$0 and you will continue with the regular checkout process as detailed below.

**Note:** Non Subscriber’s will have this optional service available TIN Validation at service cost \$1.00 which will be added to shopping cart & check out.

### Review Below Steps:

**Step 1:** In the Manage Payers or Manage Recipients section, select ‘Validate Now’ next to the payer or recipient’s name

Payer Details [Edit](#)

TIN

XX-XXX0221

 TIN Not Yet Validated  
[Validate Now](#)

**Step 2:** You will see “Added to Cart” message on the screen indicating the TIN request has been successfully added to the cart



**Step 3:** Once you have added desired TIN requests to the cart, navigate to your cart to see them added at \$0

### My Cart

Ready to file your forms? Please review the following information carefully. Making changes after checkout will result in additional fees. When you are ready, proceed to checkout.

[Remove Selected Items From Cart](#)

#### Other Items

Non-Recipient	Fee
TIN Matching (2)	\$0.00

#### Summary

Calendars/Forms/Doc	\$0.00
State Filing Fee	\$0.00
Other Fee	\$0.00
Website	\$0.00
Extended Tax (Individuals/Partnerships)	\$0.00

Enter your promo code  [Apply](#)

Total amount \$0.00

[Proceed to Checkout](#)

[Go back](#)

**Step 4:** Check out as normal

**Checkout Confirmation**

Please confirm your details below. Once OK'd, Place Order.

**Billing Information** ✓ ME

Billing Contact  
Autumn Robinson  
888-888-8888  
arobinson@complogix.com

Address  
Autumn Top  
1234 Oakwood Blvd  
West, FL 33000

Payment  
MasterCard  
XXXXXXXXXXXX  
1234567890  
XXXX-XXXX

**Summary**

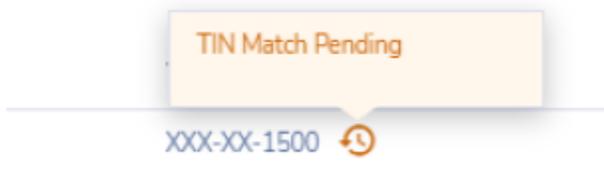
Federal/State Tax	\$0.00
State Pricing Fee	\$0.00
Other Fees	\$0.00
<b>Subtotal</b>	<b>\$4.00</b>
Estimated Tax (estimated per amount)	\$0.00
<b>Total Amount</b>	<b>\$4.00</b>

**Place Order**

By placing your order, you agree to our [Terms & Conditions](#)

Please take a moment to verify that you have completed your Payment correctly. In order to protect your funds, we'll process your Card, only if you check-in, we are requesting funds. This applies to the ACH and/or SWA, leaving your Cardback. We'll advise after you've placed your order.

**Step 5:** When viewing the payer or recipient, you will then see the request is 'Pending'



**Step 6:** Once TIN Match results display, you will then be able to view results in order to determine if Payer or Recipient TIN is valid or invalid