

How to Create and Print 1099-R Forms in **W2 Mate**[®]



Start by Opening
W2 Mate[®]
Program

www.W2Mate.com

Go to > Company > Open

1

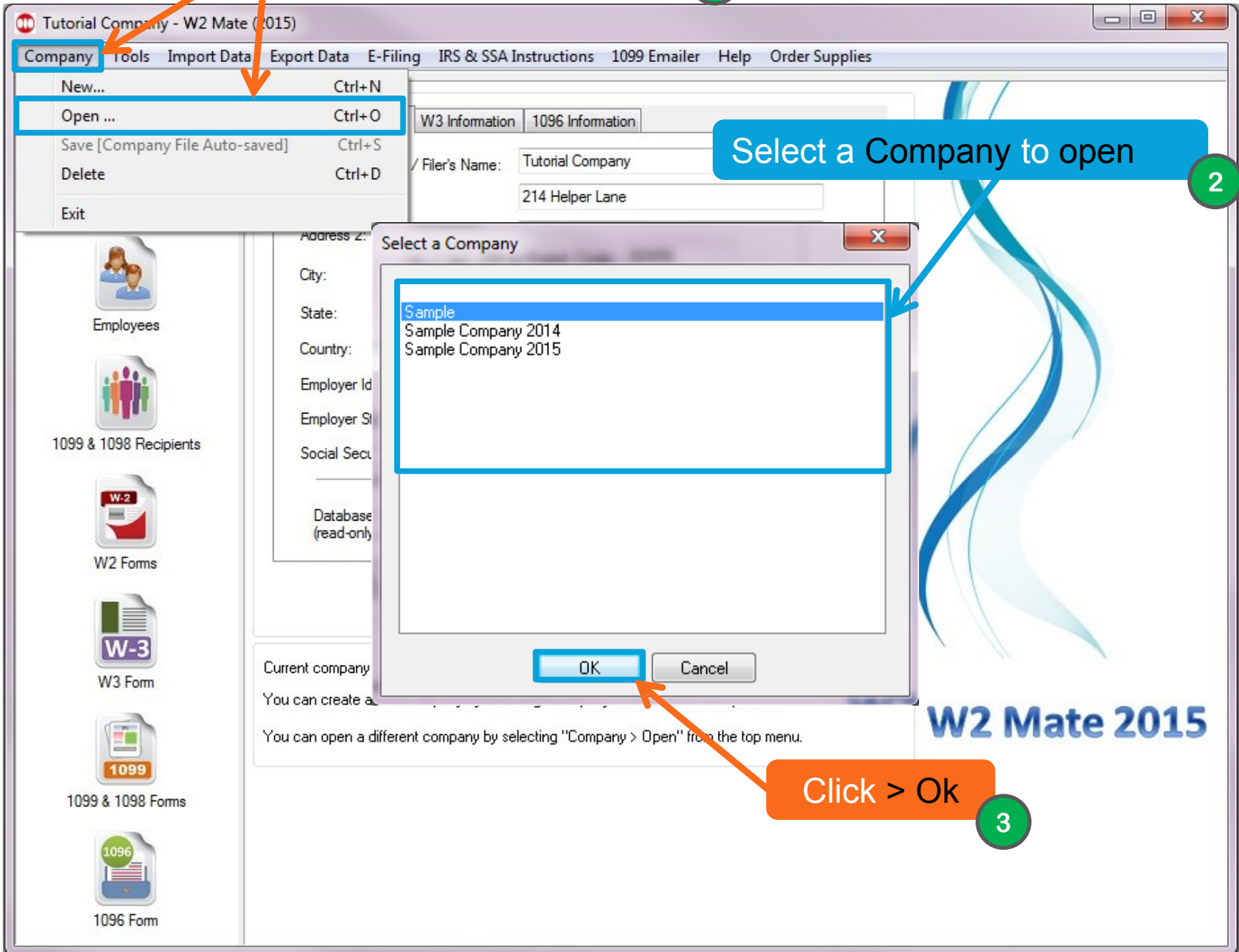
Select a Company to open

2

OK

Click > Ok

3



Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 E-mailer Help Order Supplies

Shortcuts

- Company
- Employees
- 1099 & 1098 Recipients**
- W2 Forms
- 1099 & 1098 Forms
- 1096

New 1099 / 1098 Recipient Modify Recipient Delete Recipient Sort Recipients By: Recipient's Name (Line One)

	Identification Number	Name (Line One)	Name (Line Two)	Account Number
1	444667894	Jane Doe	Smith	
6	00000000000	Sample	Sample	
7	514253648	Sample Sample		

Click > New 1099/1098 Recipients

5

Click > 1098&1099 Recipients

4

Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 E-mailer Help Order Supplies

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New 1099 / 1098 Recipient

General

Recipient's Tax Identification # 0000000000

Types of 1099 / 1098 Forms Received

- Form 1099-R
- Form 1099-MISC
- Form 1099-INT
- Form 1099-DIV
- Form 1099-R
- Form 1099-S
- Form 1098-T
- Form 1098
- Form 1099-A
- Form 1099-B
- Form 1099-C
- Form 1099-PATR
- Form 1099-OID
- Form 1099-K

Account # (optional)

2nd TIN not.

Name

Address1 (only used when "Type of 1099" is "1099-MISC")

Address2 (only used when "Type of 1099" is "1099-MISC")

City State Zip code Foreign Country

Non-US Address

Email Address (Optional)

This field is useful if you want to bulk email 1099s using "1099 E-mailer" software.

What is 1099 E-mailer?

Common 1099-MISC

The boxes below need to report / edit

Box 1 - Rents: 0.00

Box 7 - Nonemployee compensation: 0.00

Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]

OK Cancel

6 Fill in the Recipient's Tax Identification Number

7 Choose their 1099 form

Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 Emitter Help Order Supplies

Shortcuts

- Company
- Employees
- 1099 & 1098 Recipients
- W2 Forms
- W3 Form
- 1099 & 1098 Forms
- 1096

New Employee Mo

ort Employees By: SSN

New 1099 / 1098 Recipient

General

Recipient's Tax Identification # 00000000000

Types of 1099 / 1098 Forms Received Form 1099-R

Alt # (optional)

2nd TIN not

Name

Recipient Name Line One (Example: John Doe)

Recipient Name Line Two (optional, use if you need to)

Address

Address 1

Address 2 (only used when "Types of 1099 Forms Received" is "Form 1099-MISC")

City State Zip code Foreign Country

Non-US Address

Email Address (Optional)

This field is useful if you want to bulk email 1099s using "1099 Emitter" software.

What is 1099 Emitter?

Common 1099-MISC Payments

The boxes below can be used to enter common amounts reported on form 1099-MISC. Use the "1099 & 1098 Forms" screen, if you need to report / edit any other amounts on form 1099-MISC or any other form such as 1099-INT.

Box 1 - Rents: 0.00

Box 7 - Nonemployee compensation: 0.00

Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]

Click > OK

8

9

Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 Emailer Help Order Supplies

Shortcuts

- Company
- Employees
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- W3 Forms
- 1099 & 1098 Forms
- 1096 Form

1099 Recipient

Form 1099-R

Form Type

Select

Payer's name, street address, city, state, zip code, and Tel. #

Sample
123 Main St
chicago IL 60456
(521) 487-5974

PAYER'S Federal ID number 54-2897451 RECIPIENT'S ID number 444667894

RECIPIENT'S name Jane Doe

Street address (including apt. no.) 3321 Pine Drive

City, state, zip code Chicago IL 51478

10 Amount allocable to IRR within 5 years 0.00

11 1st year of desig. Roth contrib.

Account number (see ins.)

1 Gross distribution 0.00

2a Taxable amount 0.00

2b Taxable amount not determined

3 Capital gain (incl. in box 2a) 0.00

5 Employee contribs. /Desig. Roth contribs. or insurance premiums 0.00

7 Distribution codes IRA/SEP...

9a Your % of total distribution %

12 State tax withheld 0.00

15 Local tax withheld 0.00

4 Fed income tax 0.00

6 Net unrealized appreciation in employer's securities 0.00

8 Other 0.00 % 0

9b Total employee cont. 0.00

13 State / Payer's state number IL 123456

16 Name of locality

14 State distribution 0.00

17 Local distribution 0.00

OMB No. 1545-0119

2015

Click > 1099&1098 Forms

10

11 To Select a different form. Click > Select

Form Type

Select

Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 Emailer Help Order Supplies

Shortcuts

- Company
- Employees
- 1099 & 1098 Recipients
- W2 Forms
- W3 Form
- 1099 & 1098 Forms
- 1096 Form

1099 Recipient Form 1099-MISC

Select New

1099's Related Tasks Select

Form Type

OMB No. 1545-0115

2015

Form **1099-MISC**

4 Federal income tax withheld
0.00

6 Medical and health care payments
0.00

10 Crop insurance proceeds
0.00

12
12

14 Gross proceeds paid to an attorney
0.00

Payer's State Number 18 State income
23456 0.00

0.00

Payer's name, street address, city, state, and ZIP code
Sample
123 Main St
chicago
(521) 487-5974

PAYER'S Federal ID number
54-2897451

RECIPIENT'S name
Jane Doe

Street address (including apartment, suite, or unit number)
332 Line Drive

City, state, and ZIP code
Chicago

Account number

15a Section 409(a) amount
0.00

Select 1099 Form Type

1099 / 1098 Form Type

Please select the type of 1099 / 1098 form you would like to work with:

- Form 1099-MISC
- Form 1099-INT
- Form 1099-DIV
- Form 1099-R
- Form 1099-S
- Form 1098-T
- Form 1098
- Form 1099-A
- Form 1099-B
- Form 1099-C
- Form 1099-PATR
- Form 1099-DID
- Form 1099-K

12 Select your Form Type

13 Click > Ok

OK

Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 E-mailer Help Order Supplies

Shortcuts

- Company
- Employees
- 1099 & 1098 Recipients
- W2 Forms
- W3 Form
- 1099 & 1098 Forms
- 1096 Form

1099 Recipient

Select

Select your Recipient 14

Payer's name, street address, city, state, zip code, and Tel. #

Sample
123 Main St
chicago IL 60456
(521) 487-5974

PAYER'S Federal ID number 54-2897451 RECIPIENT'S ID number 444667894

RECIPIENT'S name Jane Doe

Street address (including apt. no.) 332 Line Drive

City, state, and ZIP Chicago IL 51478

10 Amount allocable to IRR within 5 years 0.00

11 1st year of desig. Roth contrib.

Account number (see ins.)

1 Gross distribution 0.00 OMB No. 1545-0119

2a Taxable amount 0.00 **2015**

2b Taxable amount not determined Form 1099-R

3 Capital gain (incl. in box 2a) 0.00 Total distribution

4 Fed income tax 0.00

5 Employee contribs. /Desig. Roth contribs. or insurance premiums 0.00

6 Net unrealized appreciation in employer's securities 0.00

7 Distribution codes IRA/SEP... 8 Other % 0.00 0

9a Your % of total distribution % 9b Total employee cont. 0.00

12 State tax withheld 0.00 13 State / Payer's state number IL 123456 14 State distribution 0.00

15 Local tax withheld 0.00 16 Name of locality 17 Local distribution 0.00

Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 EMailer Help Order Supplies

Shortcuts

- Company
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- W3 Form
- 1099 & 1098 Forms
- 1096 Form

1099 Recipient Form 1099-R Form Type

Select Next Previous Save Clear Print Create PDF Related Tasks Select

Payer's name, street address, city, state, zip code, and Tel. #

Sample
123 Main St
chicago IL 60456
(521) 487-5974

PAYER'S Federal ID number 54-2897451 RECIPIENT'S ID number 444667894

RECIPIENT'S name Jane Doe

Street address (including apt. no.) 332 Line Drive

City, state, and ZIP Chicago IL 51478

10 Amount allocable to IRR within 5 years 0.00

11 1st year of desig. Roth contrib.

Account number (see ins.)

1 Gross distribution 0.00 OMB No. 1545-0119

2a Taxable amount 0.00 **2015**

2b Taxable amount not determined Form 1099-R

3 Capital gain (incl. in box 2a) 0.00 Total distribution

4 Fed income tax 0.00

5 Employee contribs. /Desig. Roth contribs. or insurance premiums 0.00

6 Net unrealized appreciation in employer's securities 0.00

7 Distribution codes IRA/SEP...

8 Other 0.00 % 0

9a Your % of total distribution % 9b Total employee cont. 0.00

12 State tax withheld 0.00 13 State / Payer's state number IL 123456 14 State distribution 0.00

15 Local tax withheld 0.00 16 Name of locality 17 Local distribution 0.00

17

Fill in recipient(s) amounts (for example: Taxable amount, Gross distribution), and click "Save." Repeat this step for all other recipients you have added.

Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 E-mailer Help Order Supplies

Shortcuts

- Company
- Employees
- 1099 & 1098 Recipients
- W2 Forms
- W3 Form
- 1099 & 1098 Forms
- 1096 Form

1099 Recipient Form 1099-R Form Type

Select Next Previous Save Clear **Print** Create PDF Related Tasks Select

Payer's name, street address, city, state, zip code, and Tel. #

Sample
123 Main St
chicago IL
(521) 487-5974

PAYER'S Federal ID number 54-2897451 RECIPIENT'S ID number 444667894

RECIPIENT'S name Jane Doe

Street address (including apt. no.) 332 Line Drive

City, state, and ZIP Chicago IL 51478

10 Amount allocable to IRR within 5 years 0.00

11 1st year of desig. Roth contrib.

Account number (see ins.)

1 Gross distribution amount

2b Tax amount not determined

3 Capital gain (incl. in box 2a) 0.00

5 Employee contribs. /Desig. Roth contribs. or insurance premiums 0.00

7 Distribution codes IRA/SEP...

9a Your % of total distribution %

12 State tax withheld 0.00

15 Local tax withheld 0.00

OMB No. 1545-0119

2015

Form 1099-R

Total distribution

4 Fed income tax 0.00

6 Net unrealized appreciation in employer's securities 0.00

8 Other % 0.00 0

9b Total employee cont. 0.00

13 State / Payer's state number IL 123456

14 State distribution 0.00

16 Name of locality

17 Local distribution 0.00

Click > Print

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Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1

Shortcuts

- Company
- Employees
- 1099 & 1098 Recipients
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- 1099
- 1099 & 1098 Forms
- 1096

Select Recipient(s)

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Print 1099 Forms

Step 1: Please select the recipients you want to print 1099 Forms for

	Select	Recipient's ID #	Recipient's Name (Line One)	Recipient's Name (Line Two)
1	<input checked="" type="checkbox"/>	555667788	Sample	

Buttons: Select Current Recipient Only, Select All Recipients, Select None, Select Recipient Range, Find Recipient

Step 2: Please select the type of 1099 Form copy you want to print

Print a recipient / payer copy: Copy B-For Payer/Borrower
 Print DATA ONLY on a preprint Copy C-For Recipient/Lender
Instructions for Copy B
Instructions for Copy C
Furnish Copy B of this form to the recipient by February 1, 2016.

Mark as CORRECTED
 Mask Recipient's SSN on Copy B .
SSN must be formatted as XXXXX-XXXX for this option to work

File Copy A of this form with the IRS by February 29, 2016. If you file electronically, the due date is March 31, 2016. You can use W2 Mate Option #4 (Electronic Filing) in order to file electronically.

Step 3: If you are printing on a pre-printed form, please specify the horizontal and vertical offsets for printed data

Horizontal (inch)

0.00

Move data to...
 Move data to...

Buttons: Save to 1.00, 1.00

Click > Print a Recipient /Payer copy.
If printing a Recipient copy on blank paper.

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Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 Emailer Help Order Supplies

Shortcuts

New Employee Modify Employee Delete Employee Sort Employees By: SSN

Company

Employees

1099 & 1098 Recipients

W2 Forms

W3 Form

1099

1099 & 1098 Forms

1096

Print 1099 Forms

Step 1: Please select the recipients you want to print 1099 Forms for

	Select	Recipient's ID #	Recipient's Name (Line One)	Recipient's Name (Line Two)
1	<input type="checkbox"/>	555667788	Sample	

Select Current Recipient Only
Select All Recipients
Select None
Recipient Range
Add Recipient

Step 2: Please select the type of 1099 Form copy you want to print

Print a recipient / payer copy: Copy B-For Payer/Borrower Mark as CORRECTED
 Mask Recipient's SSN on Copy B. SSN must be formatted as XXXXX-XXXX for this option to work

Print DATA ONLY on a preprinted form [IRS Copy A on red-ink form or any other copy on pre-printed form]

Furnish Copy B of this form to the recipient by February 1, 2016.
File Copy A of this form with the IRS by February 29, 2016. If you file electronically, the due date is March 31, 2016. You can use W2 Mate Option #4 (Electronic Filing) in order to file electronically.

Step 3: If you are printing on a pre-printed form, please specify the horizontal and vertical offsets for printed data

Horizontal (inch) Vertical (inch) Vertical space between forms (DO NOT change unless you have to)

0.00 Move data to the LEFT 0.00 Move data UP
 Move data to the RIGHT Move data DOWN

Space between first and second form. Default is 1.0 Inch 1.00
Space between second and third form. Default is 1.0 Inch 1.00

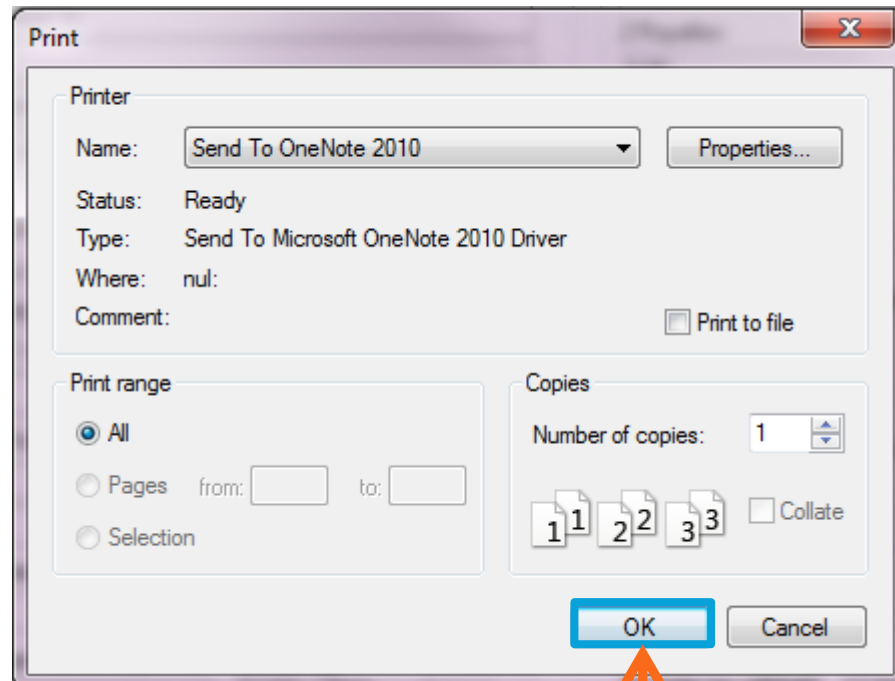
OK Cancel

Click > Print DATA ONLY.
If printing on pre-printed Laser Forms.

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Click > OK

22



Click > Ok 23

Congratulations. You know how to
**Create, Populate and Print 1099-R
Forms!**



www.W2Mate.com

1-800-507-1992