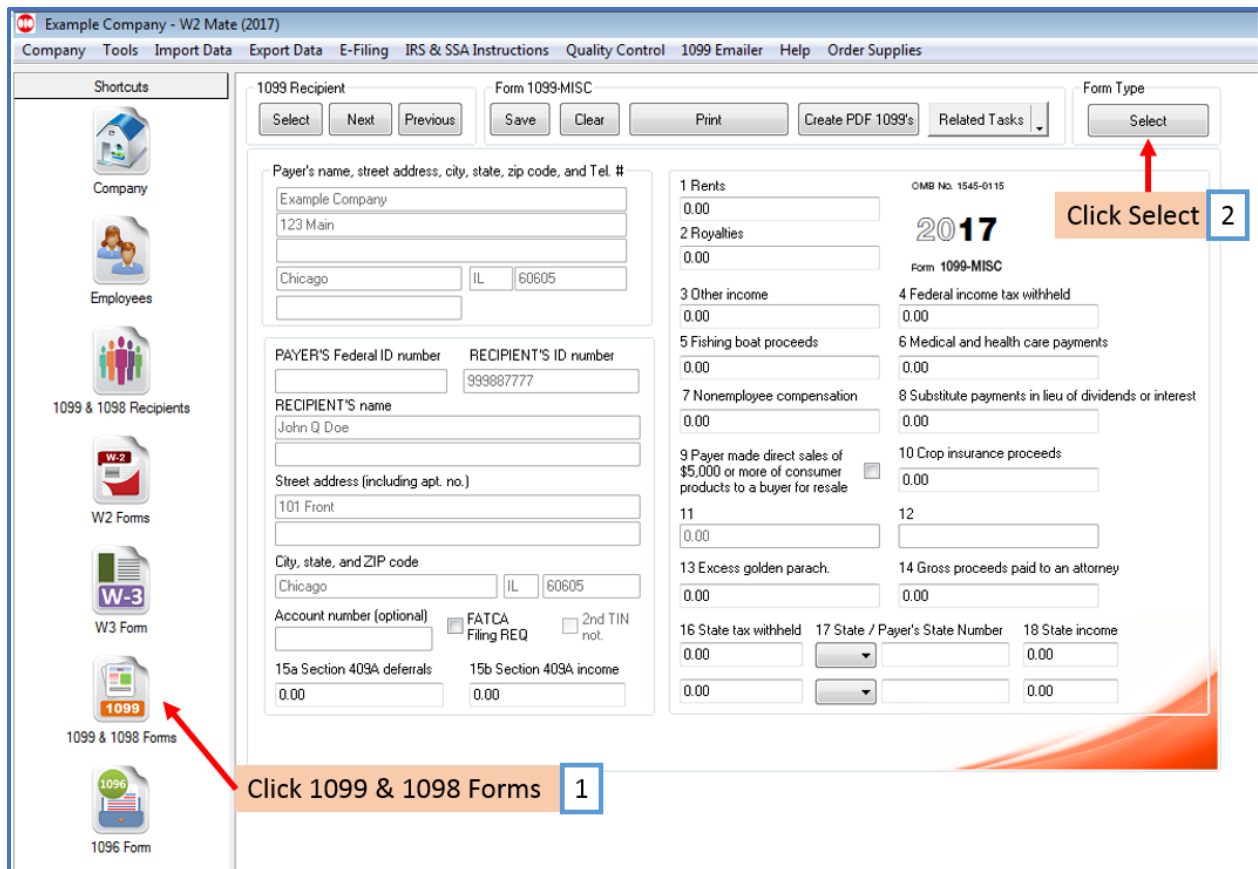


# How to Adjust offsets for Pre-Printed Forms

Make sure you have the correct Company open inside W2 Mate

Note: Print data on a blank piece of paper and hold this printed page up to the actual form to check the alignment prior to printing on the actual form(s).

1. Click 1099 and 1098 Forms in shortcuts
2. Click Select to choose form type



The screenshot shows the W2 Mate software interface for the year 2017. The title bar reads "Example Company - W2 Mate (2017)". The menu bar includes "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 Emailer", "Help", and "Order Supplies".

**Shortcuts:**

- Company
- Employees
- 1099 & 1098 Recipients
- W2 Forms
- W3 Form
- 1099 & 1098 Forms (highlighted with a red arrow and box 1)
- 1096 Form

**Form 1099-MISC:**

**1099 Recipient:**

- Select (highlighted with a red arrow and box 2)
- Next
- Previous
- Save
- Clear
- Print
- Create PDF 1099's
- Related Tasks
- Form Type

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

Example Company  
123 Main  
Chicago IL 60605

**PAYER'S Federal ID number** **RECIPIENT'S ID number**  
999887777

**RECIPIENT'S name**  
John Q Doe

**Street address (including apt. no.)**  
101 Front

**City, state, and ZIP code**  
Chicago IL 60605

**Account number (optional)** ☐ **FATCA Filing REQ** ☐ **2nd TIN not.**

**15a Section 409A deferrals** **15b Section 409A income**  
0.00 0.00

**1 Rents** 0.00  
**2 Royalties** 0.00  
**3 Other income** 0.00  
**5 Fishing boat proceeds** 0.00  
**7 Nonemployee compensation** 0.00  
**9 Payer made direct sales of \$5,000 or more of consumer products to a buyer for resale** ☐ 0.00  
**11** 0.00  
**13 Excess golden parach.** 0.00  
**16 State tax withheld** 0.00  
**17 State / Payer's State Number**  **18 State income** 0.00

**4 Federal income tax withheld** 0.00  
**6 Medical and health care payments** 0.00  
**8 Substitute payments in lieu of dividends or interest** 0.00  
**10 Crop insurance proceeds** 0.00  
**12** 0.00  
**14 Gross proceeds paid to an attorney** 0.00

**Click 1099 & 1098 Forms** 1

**Click Select** 2

3. Select the type of form

4. Click OK

The screenshot shows the W2 Mate software interface. A 'Select 1099 Form Type' dialog box is open in the center. The dialog box has a title bar 'Select 1099 Form Type' and a close button. Inside, it says '1099 / 1098 Form Type' and 'Please select the type of 1099 / 1098 form you would like to work with:'. There is a list of form types with radio buttons: Form 1099-MISC (selected), 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, and Form 1099-K. A red box highlights the list, and a red arrow points to the 'Form 1099-MISC' option with the text 'Select type of form' and a blue box with the number '3'. Another red arrow points to the 'OK' button with the text 'Click OK' and a blue box with the number '4'. The background shows the main software window with a menu bar (Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, 1099 Emailer, Help, Order Supplies) and a sidebar with shortcuts (Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms, 1096 Form). The main area has fields for '1099 Recipient' (Payer's name, street address, city, state, zip code, and Tel. #) and 'Form 1099-MISC' (Form Type, Federal income tax withheld, etc.).

## 5. Click Print

Example Company - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Quality Control 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 Next Previous Save Clear **Print** Create PDF 1099's Related Tasks Form Type Select

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

Example Company  
123 Main  
Chicago IL 60605

PAYER'S Federal ID number RECIPIENT'S ID number  
999887777

RECIPIENT'S name  
John Q Doe

Street address (including apt. no.)  
101 Front

City, state, and ZIP code  
Chicago IL 60605

Account number (optional) ☐ FATCA Filing REQ ☐ 2nd TIN not.

15a Section 409A deferrals 15b Section 409A income  
0.00 0.00

1 Rents 0.00  
3 Other income 0.00  
5 Fishing boat proceeds 0.00  
7 Nonemployee compensation 0.00  
9 Payer made direct sales of \$5,000 or more of consumer products to a buyer for resale ☐  
11 0.00  
13 Excess golden parach. 0.00  
16 State tax withheld 0.00  
17 State / Payer's State Number   
18 State income 0.00

CMB NO. 1545-0115  
2017  
Form 1099-MISC  
4 Federal income tax withheld 0.00  
6 Medical and health care payments 0.00  
8 Substitute payments in lieu of dividends or interest 0.00  
10 Crop insurance proceeds 0.00  
12 0.00  
14 Gross proceeds paid to an attorney 0.00

**Click Print 5**

6. Select Recipients

7. Select Print DATA ONLY on preprinted form

8. Adjust offsets for printing on the preprinted form as needed  
Horizontal (up and down) or Vertical (left and right)

Note: We suggest making adjustments of increments of .05 at a time

9. Click OK

The screenshot shows the 'Print 1099 Forms' dialog box in the W2 Mate software. The dialog box has three steps:

**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)
<input type="checkbox"/>	777889999	Jane A Test	
<input type="checkbox"/>	999887777	John Q Doe	
<input type="checkbox"/>	123456789	New	Recipient

Annotations for Step 1:

- 6: Select Recipients (points to the 'Select' column)
- 7: Select Print DATA ONLY (points to the 'Print DATA ONLY' radio button in Step 2)
- 8: Adjust offsets for printing on pre-printed forms (points to the offset settings in Step 3)

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

☐ Print a recipient / payer copy: Red Copy A for IRS on Regular Paper Using Color Printer (2 recipients per page)

☒ Print DATA ONLY on a preprinted form (IRS Copy A on red-ink form or any other copy on pre-printed form)

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

Horizontal (inch): ☐ Move data to the LEFT (0.00) ☒ Move data to the RIGHT (0.00)

Vertical (inch): ☐ Move data UP (0.00) ☒ Move data DOWN (0.00)

Vertical space between forms (DO NOT change unless you have to): Space between first and second form. Default is 1.0 Inch (1.00)

Annotation for Step 3:

- 9: Click OK (points to the 'OK' button)

10. Select printer

11. Click OK

The screenshot shows the W2 Mate software interface for the 2017 tax year. The main window displays the 1099-MISC form with fields for Payer's name, address, and various income types. A 'Print' dialog box is open in the foreground, showing the printer selection dropdown set to 'Send To OneNote 2016'. A red arrow points to this dropdown with the text 'Select printer'. Another red arrow points to the 'OK' button in the dialog box with the text 'Click OK'. The background form shows the 1099-MISC form with fields for Rents, Royalties, Other income, Federal income tax withheld, and State income.

Print data on a blank piece of paper until you have confirmed correct alignment with the actual pre-printed form, then print the data on the pre-printed form