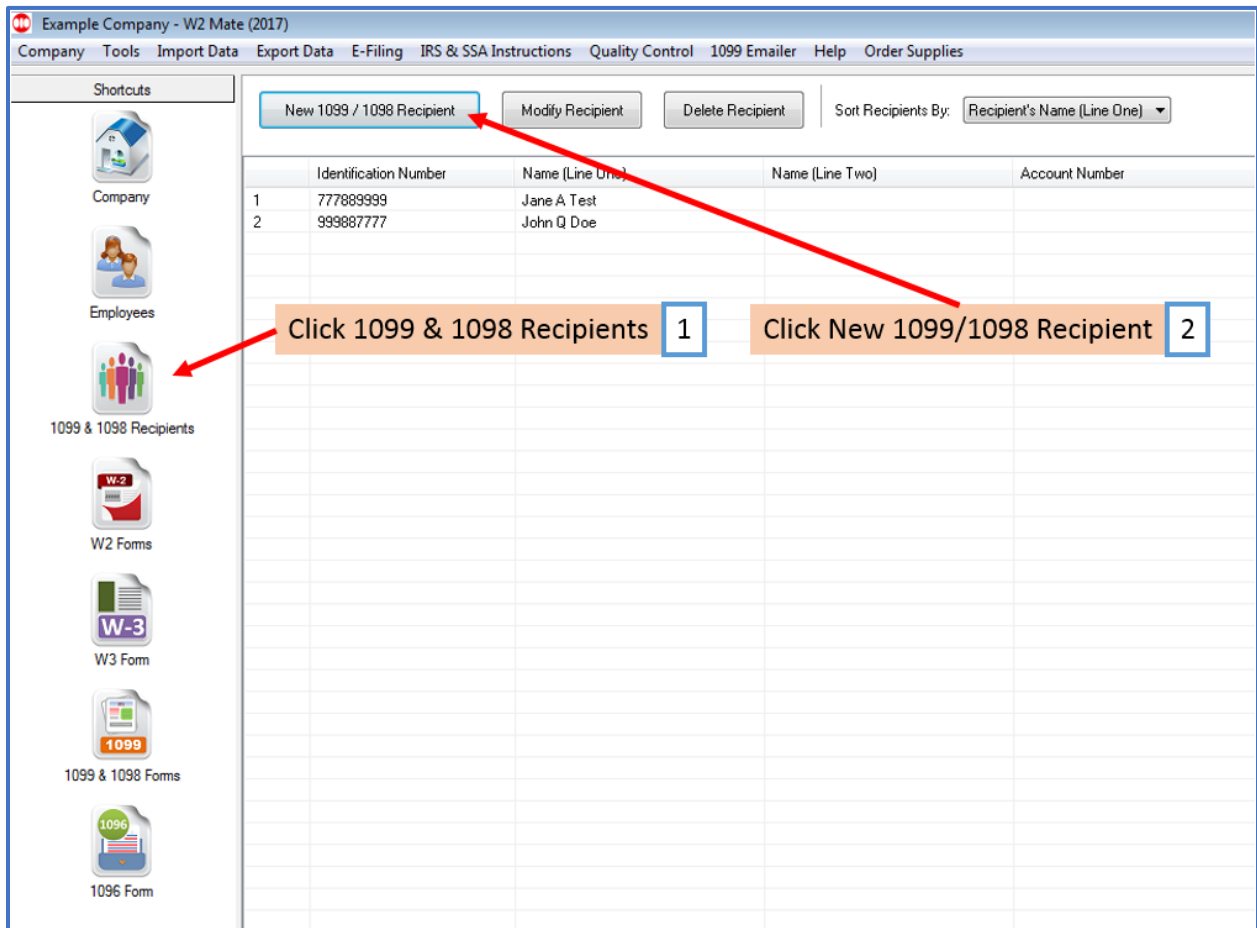


# How to Create a New Recipient

Make sure you have the correct Company open inside W2 Mate

1. Click 1099 & 1098 Recipients in shortcuts
2. Click New 1099/ 1098 Recipient



### 3. Select type of Forms this recipient will receive

The screenshot shows the W2 Mate software interface. At the top, there is a menu bar with options: Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, 1099 Emitter, Help, and Order Supplies. Below the menu bar, there are buttons for 'New 1099 / 1098 Recipient', 'Modify Recipient', and 'Delete Recipient'. A table lists recipients with columns for Identification Number, Name (Line One), Name (Line Two), and Account Number. The table contains two rows: 1. 777889999, Jane A Test; 2. 999887777, John Q Doe. A callout box with the number '3' points to the 'New 1099 / 1098 Recipient' dialog box. The dialog box has a 'Types of 1099 / 1098 Forms Received' dropdown menu with a red arrow pointing to it. The dropdown menu is open, showing a list of form types: Form 1099-INT, Form 1099-MISC (highlighted), 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. The dialog box also includes fields for Recipient's Tax Identification #, Name, Address, City, State, Zip code, Foreign Country, and Email Address. There are also checkboxes for 'Non-US Address' and 'Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]'. At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

Identification Number	Name (Line One)	Name (Line Two)	Account Number
1 777889999	Jane A Test		
2 999887777	John Q Doe		

**3** Select type of form(s) for new recipient

**Types of 1099 / 1098 Forms Received**

- Form 1099-INT
- Form 1099-MISC
- 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

#### 4. Complete Recipient's data

#### 5. Click OK

The screenshot shows the W2 Mate software interface. The main window is titled "Example Company - W2 Mate (2017)". The menu bar includes "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 Emitter", "Help", and "Order Supplies". The left sidebar contains shortcuts for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".

The main area displays a table of recipients with columns for "Identification Number" and "Name (Line One)". The table contains two rows:

	Identification Number	Name (Line One)
1	777889999	Jane A Test
2	999887777	John Q Doe

Overlaid on the table is a "New 1099 / 1098 Recipient" dialog box. The dialog box has a title bar and a close button. It contains the following sections:

- General**: Recipient's Tax Identification #, Types of 1099 / 1098 Forms Received (Form 1099-MISC), Account # (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).
- Common 1099-MISC Payments**: Box 1 - Rents, Box 7 - Nonemployee compensation.

At the bottom of the dialog box, there is a checkbox for "Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]" and two buttons: "OK" and "Cancel".

Annotations in the image include:

- A red arrow pointing to the "New 1099 / 1098 Recipient" dialog box title bar.
- A blue box with the number "4" next to the text "Complete New Recipient data".
- A red arrow pointing to the "OK" button.
- A blue box with the number "5" next to the text "Click OK".