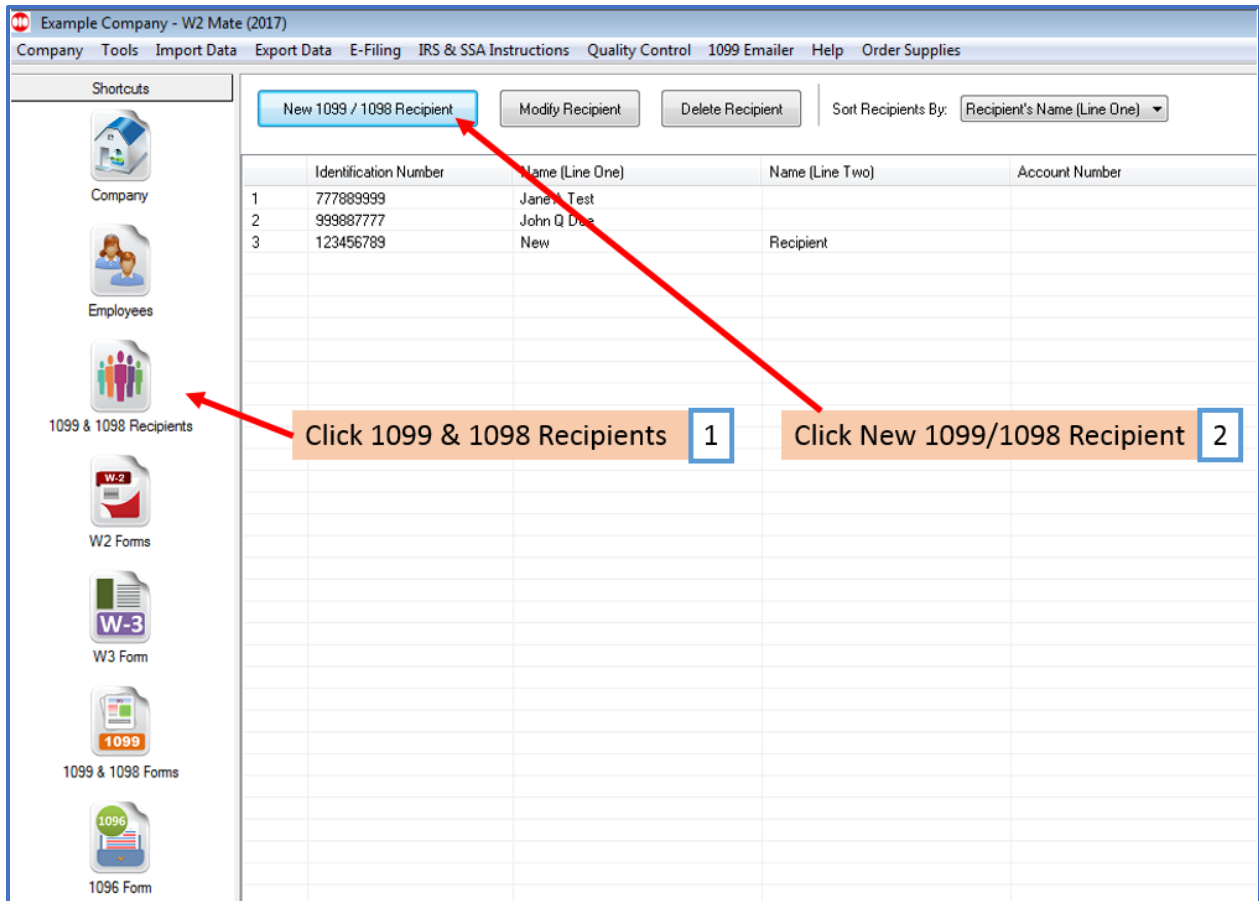


How to Create, Populate and Print 1099-A Forms

Make sure you have the correct Company open inside W2 Mate

Note: In order to use this feature you must purchase and enable W2 Mate Option #5 for Additional 1099 forms

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



3. Choose Form 1099-A

The screenshot shows the W2 Mate software interface. The main window title is "Example Company\$second name - W2 Mate (2017)". The menu bar includes "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 Emler", "Help", and "Order Supplies". On the left, there is a "Shortcuts" panel with icons for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form". The main area contains a "New 1099 / 1098 Recipient" dialog box. At the top of the dialog, there are buttons for "New 1099 / 1098 Recipient", "Modify Recipient", and "Delete Recipient", along with a "Sort Recipients By:" dropdown set to "Recipient's Name (Line One)". The dialog has a table header with columns: "Identification Number", "Name (Line One)", "Name (Line Two)", and "Account Number". The "General" section includes fields for "Recipient's Tax Identification #", "Name", "Address", "City", "State", "Zip code", "Foreign Country", and "Email Address (Optional)". A red box highlights the "Types of 1099 / 1098 Forms Received" dropdown menu, which is open and shows a list of form types: Form 1099-A (checked), Form 1099-MISC, Form 1099-INT, Form 1099-DIV, Form 1099-R, Form 1099-S, Form 1098-T, Form 1098, Form 1099-A (highlighted), Form 1099-B, Form 1099-C, Form 1099-PATR, Form 1099-OID, and Form 1099-K. A red arrow points from a callout box "Select Form 1099-A" to the highlighted "Form 1099-A" option. A blue box with the number "3" is also present next to the callout. The "Common 1099-MISC Payments" section has input fields for "Box 1 - Rents" and "Box 7 - Nonemployee compensation", both set to "0.00". There is a checkbox for "Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]". At the bottom of the dialog are "OK" and "Cancel" buttons.

4. Enter New Recipient information

5. Click OK

Example Company\$second name - W2 Mate (2017)

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

Shortcuts

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

Identification Number Name (Line One) Enter New Recipient data 4 count Number

New 1099 / 1098 Recipient

General

Recipient's Tax Identification # Types of 1099 / 1098 Forms Received Account # (optional) 2nd TIN not.

Form 1099-A

Name

Recipient Name Line One (Example: John Doe) Recipient Name Line Two (optional, use if you need to)

Address

Address 1 Email Address (Optional)

Address2 (only used when "Types of 1099 Forms Received" is "Form 1099-MISC")

City State Zip code Foreign Country

Non-US Address

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

Click OK 5

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

OK Cancel

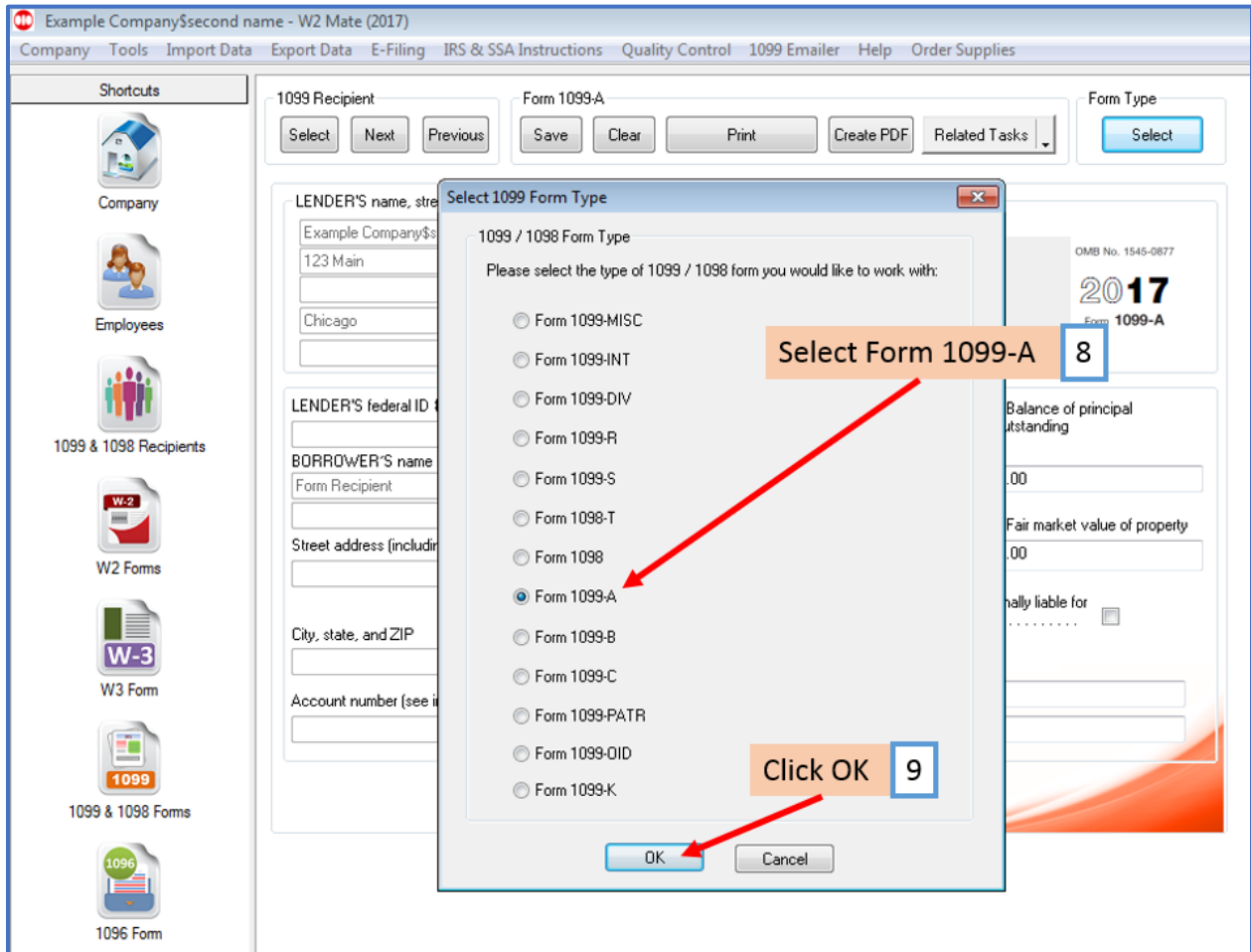
6. Choose 1099 & 1098 Forms in shortcuts

7. Click Select under form type

The screenshot displays the W2 Mate software interface for creating a 1099-MISC form. The interface includes a top menu bar with options like 'Company', 'Tools', 'Import Data', 'Export Data', 'E-Filing', 'IRS & SSA Instructions', 'Quality Control', '1099 Emailer', 'Help', and 'Order Supplies'. On the left, a 'Shortcuts' sidebar contains icons for 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W3 Form', '1099 & 1098 Forms', and '1096 Form'. The main workspace is titled '1099 Recipient' and 'Form 1099-MISC'. It features a 'Form Type' dropdown menu with a 'Select' button highlighted by a red arrow and a blue box labeled '7'. A red arrow points from the '1099 & 1098 Forms' shortcut icon to a 'Click 1099 & 1098 Forms' callout box labeled '6'. The form fields include 'Payer's name, street address, city, state, zip code, and Tel. #', 'PAYER'S Federal ID number', 'RECIPIENT'S ID number', 'Street address (including apt. no.)', 'City, state, and ZIP code', 'Account number (optional)', 'FATCA Filing REQ', '2nd TIN not', '15a Section 409A deferrals', '15b Section 409A income', and a grid of 18 numbered boxes for various income and tax amounts. The year '2017' is prominently displayed in the center.

8. Select Form 1099-A

9. Click OK



13. Fill in recipient(s) amounts (for example: Date of lender's acquisition, Fair market value, etc.)

14. Click Save

Note: Repeat this step for all other recipients you have added

Example Company\$second name - W2 Mate (2017)

Company Tools Import Data Export Instructions

Click Save 14 Complete Information for Recipient 13

1099 Recipient Form 1099-A

Select Next Previous Save Clear Print Create PDF Related Tasks Select

Form Type

LENDER'S name, street address, city, state, ZIP code & Tel. #

Example Company\$second name
123 Main
Chicago IL 60605

OMB No. 1545-0877
2017
Form 1099-A

LENDER'S federal ID # BORROWER'S identification #

BORROWER'S name

Street address (including apt. no.)

City, state, and ZIP

Account number (see instructions)

1 Date of lender's acquisition or knowledge of abandonment (mm/dd/yyyy)

2 Balance of principal outstanding

3

4 Fair market value of property

5 Check here if the borrower was personally liable for repayment of the debt

6 Description of property

15. Click Print

16. Select Recipients

17. Select copy to print

Note: To print a Recipient /Payer copy on blank paper choose the copy to print from the drop-down menu

To print the data on the preprinted IRS red form chose Print DATA Only

18. Click OK

Example Company\second name - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions **Click Print 15** Help Order Supplies

Shortcuts

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

1099 Recipient Form 1099-A

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

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)
<input type="checkbox"/>	987654321	Form Recipient	
<input type="checkbox"/>	777889999	Jane A Test	
<input type="checkbox"/>	999887777	John Q Doe	

Select Recipients 16

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

Mark as CORRECTED
 Mask Recipient's Tax ID Number on Copy B.

Furnish Copy B of this form to the recipient by January 31, 2018.
File Copy A of this form with the IRS by February 28, 2018. If you file electronically, the due date is April 2, 2018. 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 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

Click OK 18

OK Cancel

19. Select the correct printer

20. Click OK

