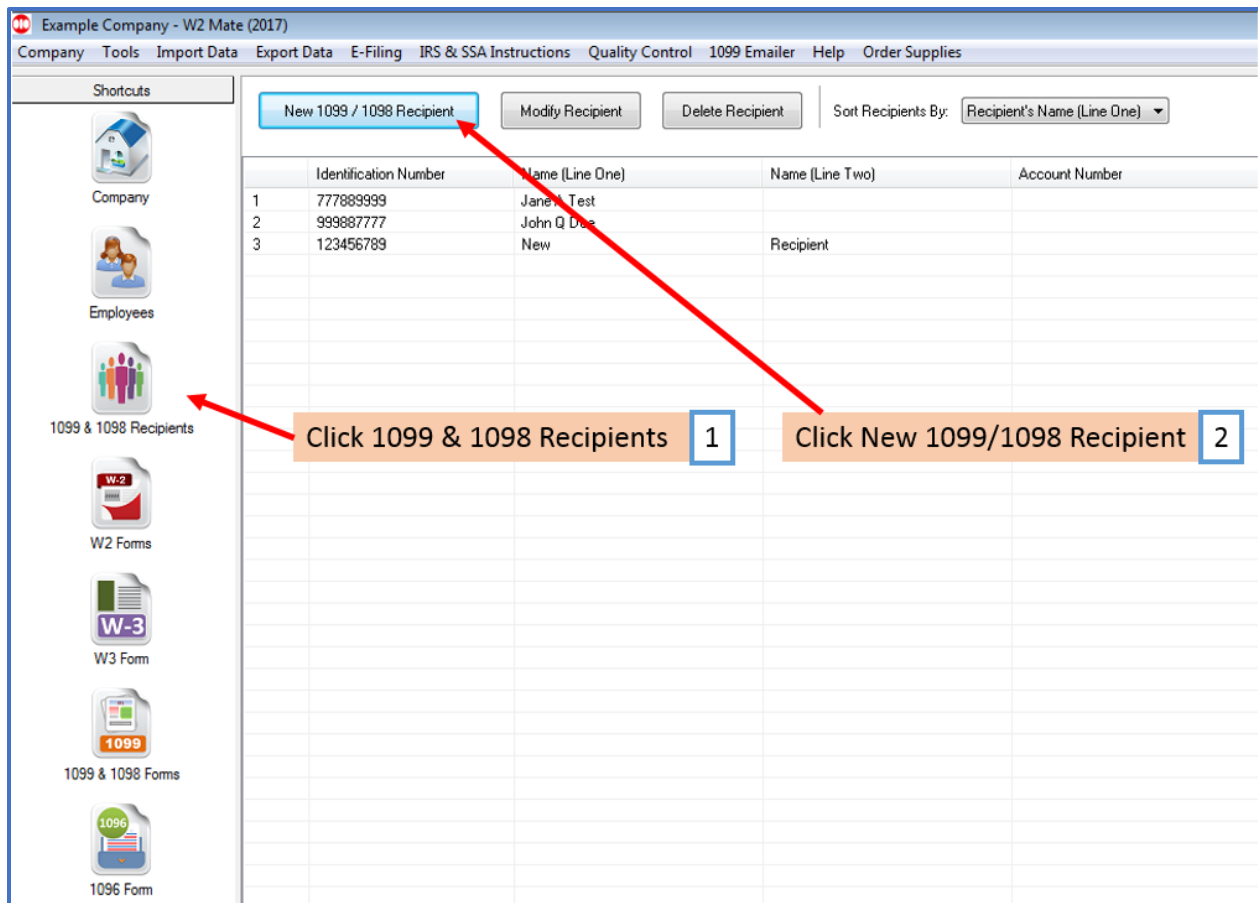


How to Create, Populate and Print 1099-DIV Forms

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-DIV

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 Emitter", "Help", and "Order Supplies". On the left, there is a "Shortcuts" sidebar with icons for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form". The "1099 & 1098 Recipients" icon is highlighted.

The main area displays a "New 1099 / 1098 Recipient" dialog box. At the top, 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 box has a "General" tab. It contains the following fields and options:

- Recipient's Tax Identification #**: Input field.
- Account # (optional)**: Input field.
- 2nd TIN not**:
- Name**: Input field.
- Recipient Name Line One (Example)**: Input field.
- Recipient Name Line Two (optional, use if you need to)**: Input field.
- Address**: Input field.
- Address 1**: Input field.
- Address 2 (only used when "Types of 1099 / 1098 Forms Received" is "1099-MISC")**: Input field.
- City**: Input field.
- State**: Dropdown menu.
- Zip code**: Input field.
- Foreign Country**: Non-US Address
- Email Address (Optional)**: Input field.
- What is 1099 Emitter?**: Button.

A dropdown menu titled "Types of 1099 / 1098 Forms Received" is open, showing the following options:

- Form 1099-DIV
- 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

An orange callout box with the text "Select Form 1099-DIV" and a blue box with the number "3" points to the "Form 1099-DIV" option in the dropdown menu.

Below the address fields, there is a section for "Common 1099-MISC Payments". It includes the following text: "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."

There are two input fields for common payments:

- Box 1 - Rents:** Input field with "0.00".
- Box 7 - Nonemployee compensation:** Input field with "0.00".

At the bottom of the dialog box, there is a checkbox labeled "Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]".

Buttons for "OK" and "Cancel" are located at the bottom right of the dialog box.

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 E-mailer Help Order Supplies

Shortcuts

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

New 1099 / 1098 Recipient

Modify Recipient Delete Recipient Sort Recipients By: Recipient's Name (Line One)

Enter New Recipient data 4

New 1099 / 1098 Recipient

1 General

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

3 Form 1099-DIV

4

Name

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

Address

Address 1 Email Address (Optional)

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

City State Zip code Foreign Country Non-US Address

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 5

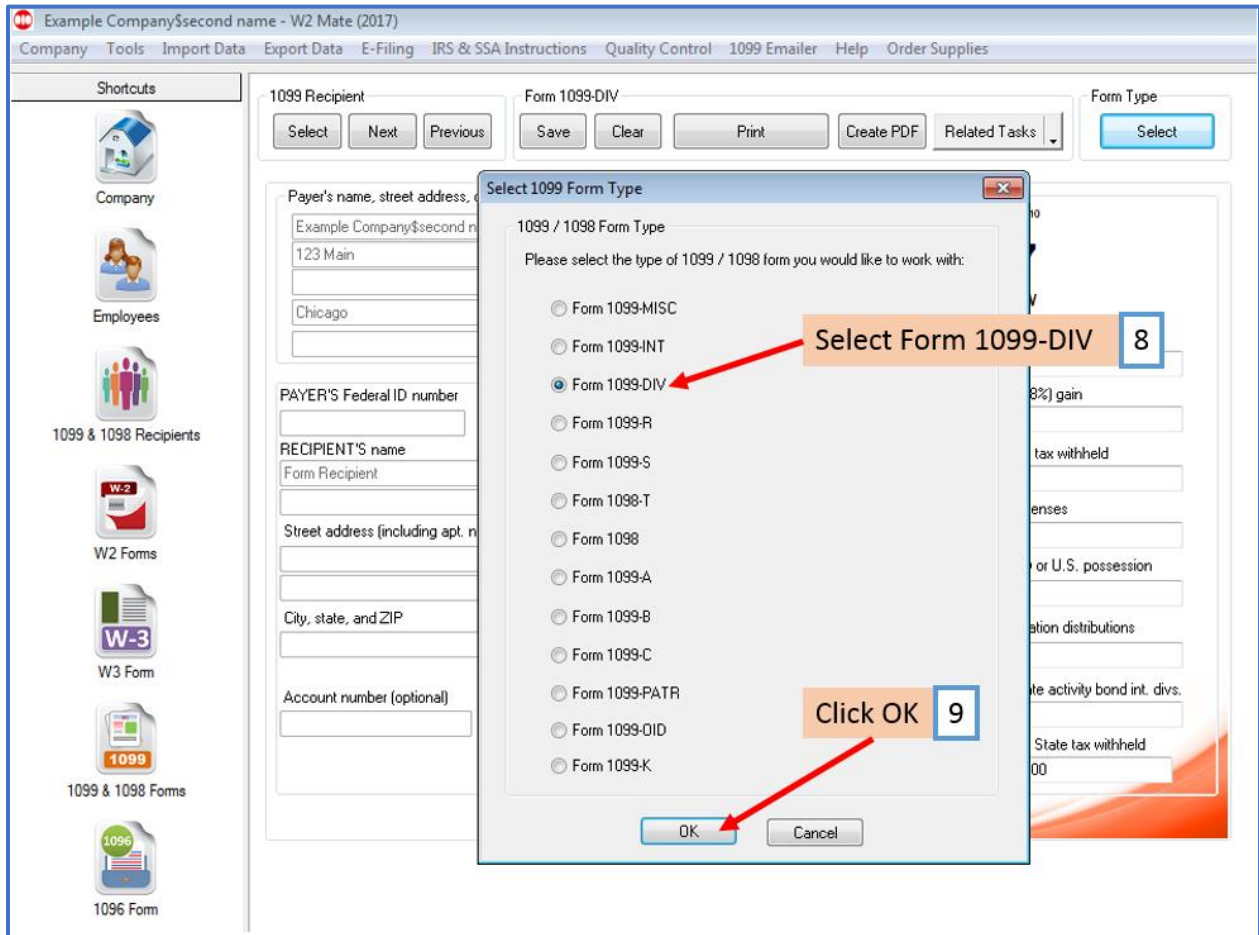
6. Choose 1099 & 1098 Forms in shortcuts

7. Click Select under form type

The screenshot displays the W2 Mate software interface for 'Example Company - W2 Mate (2017)'. The interface includes a menu bar with options like 'Company', 'Tools', 'Import Data', 'Export Data', 'E-Filing', 'IRS & SSA Instructions', 'Quality Control', '1099 E-mailer', 'Help', and 'Order Supplies'. A 'Shortcuts' sidebar on the left 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 'Click Select' callout points to this button. Another callout labeled '6' points to the '1099 & 1098 Forms' icon in the sidebar. 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 403A deferrals', '15b Section 403A income', and a grid of 18 numbered fields for various income and tax amounts, all with '0.00' or '0.00' as default values. The year '2017' and 'Form 1099-MISC' are prominently displayed.

8. Select Form 1099-DIV

9. Click OK



10. Click Select under Recipient

11. Select 1099-DIV Recipient

12. Click OK

Example Company\$second name - W2 Mate (2)

Company Tools Import Data Export Data E Click Select 10 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-DIV Form Type

Select Next Previous Save Clear Print Create PDF Related Tasks Select

Select 1099 Recipient

The list below includes ONLY the recipients who receive 1099-DIV forms, since the "1099 Form Type" currently selected is 1099-DIV. To change the 1099 form type, please click the "Select" button under "1099 Form Type".

	Identification Number	Name (Line One)	Name (Line Two)	Account Number
1	987654321	Form Recipient		
2	777889999	Jane A Test		
3	999887777	John Q Doe		
4	123456789	New	Recipient	

Select Recipient 11

Click OK 12

OK Cancel

13. Fill in recipient(s) amounts (for example: Total ordinary dividends, Qualified dividends, etc.)

14. Click Save

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

The screenshot shows the W2 Mate software interface for creating a Form 1099-DIV. The window title is "Example Company\$second name - W2 Mate (2017)". The menu bar includes "Company", "Tools", "Import Data", "Export", "Instructions", and "Quality".

On the left sidebar, there are shortcuts for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".

The main form area is titled "Form 1099-DIV" and includes the following sections:

- 1099 Recipient:** A navigation bar with buttons for "Select", "Next", "Previous", "Save", "Clear", "Print", "Create PDF", "Related Tasks", and "Form Type". A red arrow points to the "Save" button, which is enclosed in a blue box labeled "14".
- Payer's name, street address, city, state, zip code, and Tel. #:** Fields for "Example Company\$second name", "123 Main", "Chicago", "IL", and "60605".
- PAYER'S Federal ID number:** (Empty field)
- RECIPIENT'S ID number:** "987654321"
- RECIPIENT'S name:** "Form Recipient"
- Street address (including apt. no.):** (Empty field)
- City, state, and ZIP:** (Empty fields)
- Account number (optional):** (Empty field)
- FATCA Filing REQ:**
- 2nd TIN not:**
- Dividend Amounts:** Fields for "1a Total ordinary dividends", "1b Qualified dividends", "2a Total capital gain distr.", "2b Unrecap. Sec. 1250 gain", "2c Section 1202 gain", "2d Collectibles (28%) gain", "3 Nondividend distributions", "4 Federal income tax withheld", "5 Investment expenses", "6 Foreign tax paid", "7 Foreign country or U.S. possession", "8 Cash liquidation distributions", "9 Noncash liquidation distributions", "10 Exempt-interest dividends", "11 Specified private activity bond int. divs.", "12 State", "13 State identification no", and "14 State tax withheld".
- OMB No. 1545-0110** and **2017** are displayed in the top right.

A red arrow points from the "Save" button to the main form area, which is enclosed in a red box and labeled "13".

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

1099 Recipient Form 1099-DIV Form Type

Select Next Previous Save Clear **Print** Create PDF Related Tasks 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)
1	<input type="checkbox"/>	987654321	Form Recipient	
2	<input type="checkbox"/>	777889999	Jane A Test	
3	<input checked="" type="checkbox"/>	999887777	John Q Doe	
4	<input type="checkbox"/>	123456789	New	Recipient

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 Recipient
 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

Click OK 18

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

OK Cancel

19. Select the correct printer

20. Click OK

