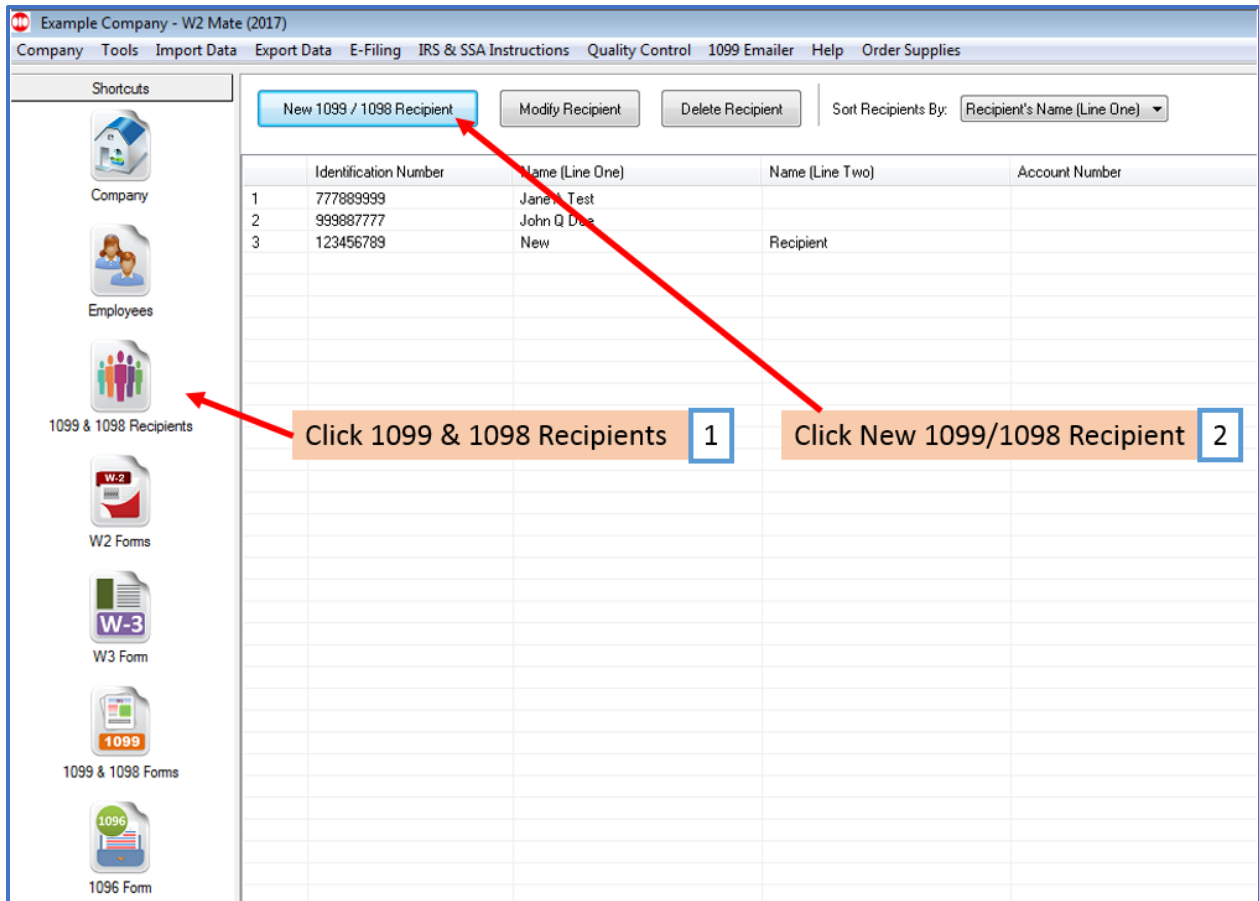


# How to Create, Populate and Print 1099-OID Forms

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-OID

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 main area contains 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" section with the following fields:

- Recipient's Tax Identification #
- Name: Recipient Name Line One (Example), Recipient Name Line Two (optional, use if you need to)
- Address: Address 1, Address 2 (only used when "Types of 1099 / 1098 Forms Received" is "Form 1099-MISC")
- City, State, Zip code, Foreign Country (with a "Non-US Address" checkbox)
- Email Address (Optional)

A dropdown menu titled "Types of 1099 / 1098 Forms Received" is open, showing a list of form types with checkboxes:

- Form 1099-OID
- 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 (B-MISC)
- Form 1099-K

A red arrow points from a callout box "Select Form 1099-OID 3" to the selected "Form 1099-OID" option in the dropdown.

Below the address fields, there is a "Common 1099-MISC Payments" section with 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." It includes input fields for "Box 1 - Rents" (0.00) and "Box 7 - Nonemployee compensation" (0.00).

At the bottom, there is a checkbox "Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]" and "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 Emler 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

General

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

Form 1099-OID

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 Emler?

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 filing]

OK Cancel

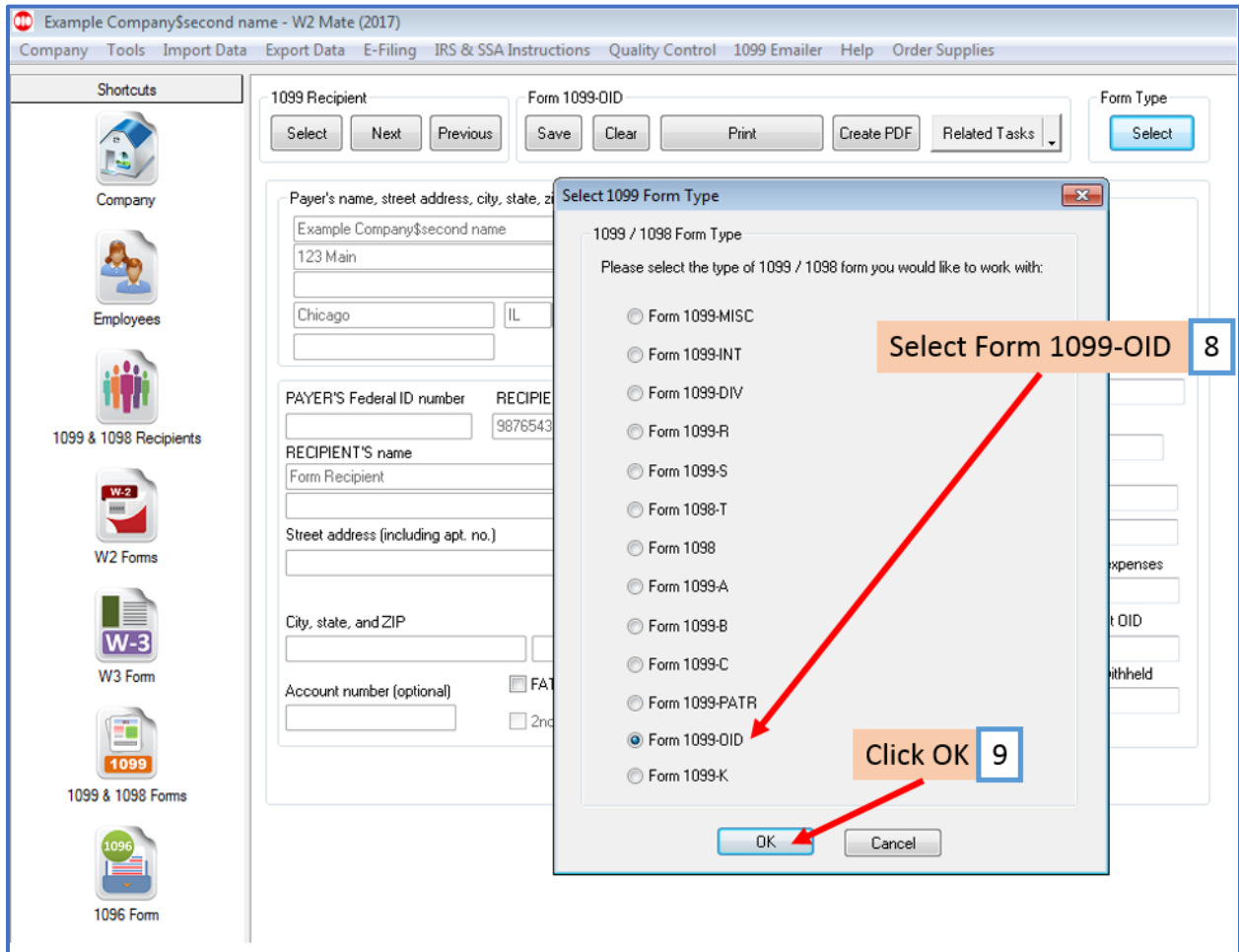
6. Choose 1099 & 1098 Forms in shortcuts

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 callout box labeled '6' points to the '1099 & 1098 Forms' icon in the sidebar. The form fields include: Payer's name (Example Company), address (123 Main, Chicago, IL 60605), PAYER'S Federal ID number (777999999), RECIPIENT'S ID number, Recipient name (Jane A.), Street address (505 Main), City, state, and ZIP code (Chicago, IL 60605), Account number (optional), FATCA Filing REQ, 2nd TIN not, 15a Section 409A deferrals (0.00), 15b Section 409A income (0.00), and various income categories (1-14) with values of 0.00. The year '2017' is displayed prominently. A 'Click Select' callout points to the 'Select' button in the 'Form Type' dropdown.

8. Select Form 1099-OID

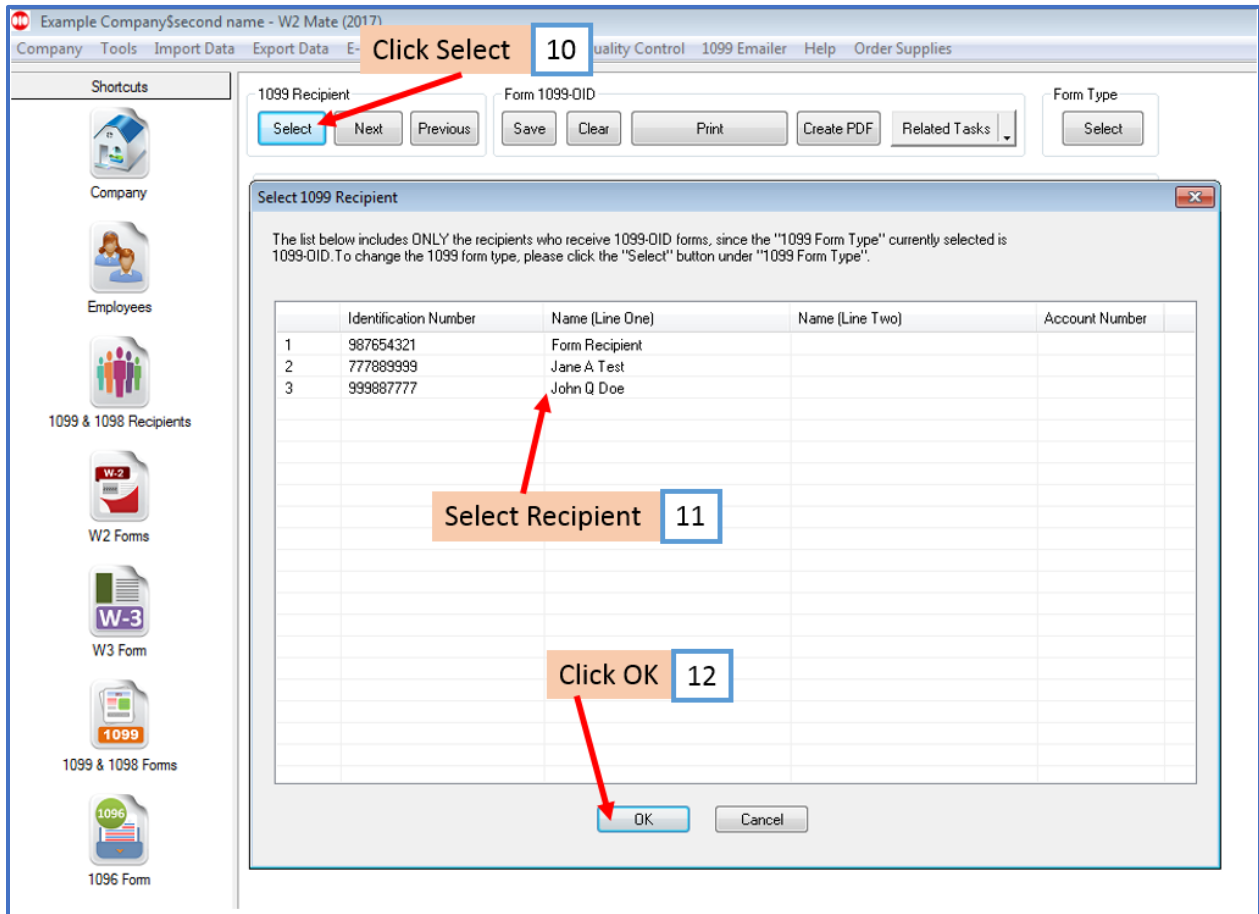
9. Click OK



10. Click Select under Recipient

11. Select 1099-OID Recipient

12. Click OK



13. Fill in recipient(s) amounts (for example: Early withdrawal penalty, Market discount, 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 Exp... Click Save 14 Instructions Qua Complete Information for Recipient 13

1099 Recipient Form 1099-OID Form Type

Select Next Previous Save Clear Print Create PDF Related Tasks Select

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

Example Company\$second name  
123 Main  
Chicago IL 60605

PAYER'S Federal ID number RECIPIENT'S ID number  
RECIPIENT'S name  
Form Recipient  
Street address (including apt. no.)  
City, state, and ZIP  
Account number (optional)  FATCA Filing REQ  
 2nd TIN not.

1 Original issue discount for 2017  
0.00 OMB No. 1545-0117  
2017  
Form 1099-OID  
2 Other periodic interest  
0.00  
3 Early withdrawal penalty  
0.00  
4 Federal income tax withheld  
0.00  
5 Market discount  
0.00  
6 Acquisition premium  
0.00  
7 Description  
8 Original issue discount on U.S. Treas. oblig.  
0.00  
9 Investment expenses  
0.00  
10 Bond premium  
0.00  
11 Tax-exempt OID  
0.00  
12 State  
13 State identification no  
14 State tax withheld  
0.00

Shortcuts

Company

Employees

1099 & 1098 Recipients

W2 Forms

W3 Form

1099

1099 & 1098 Forms

1096 Form

15. Click Print

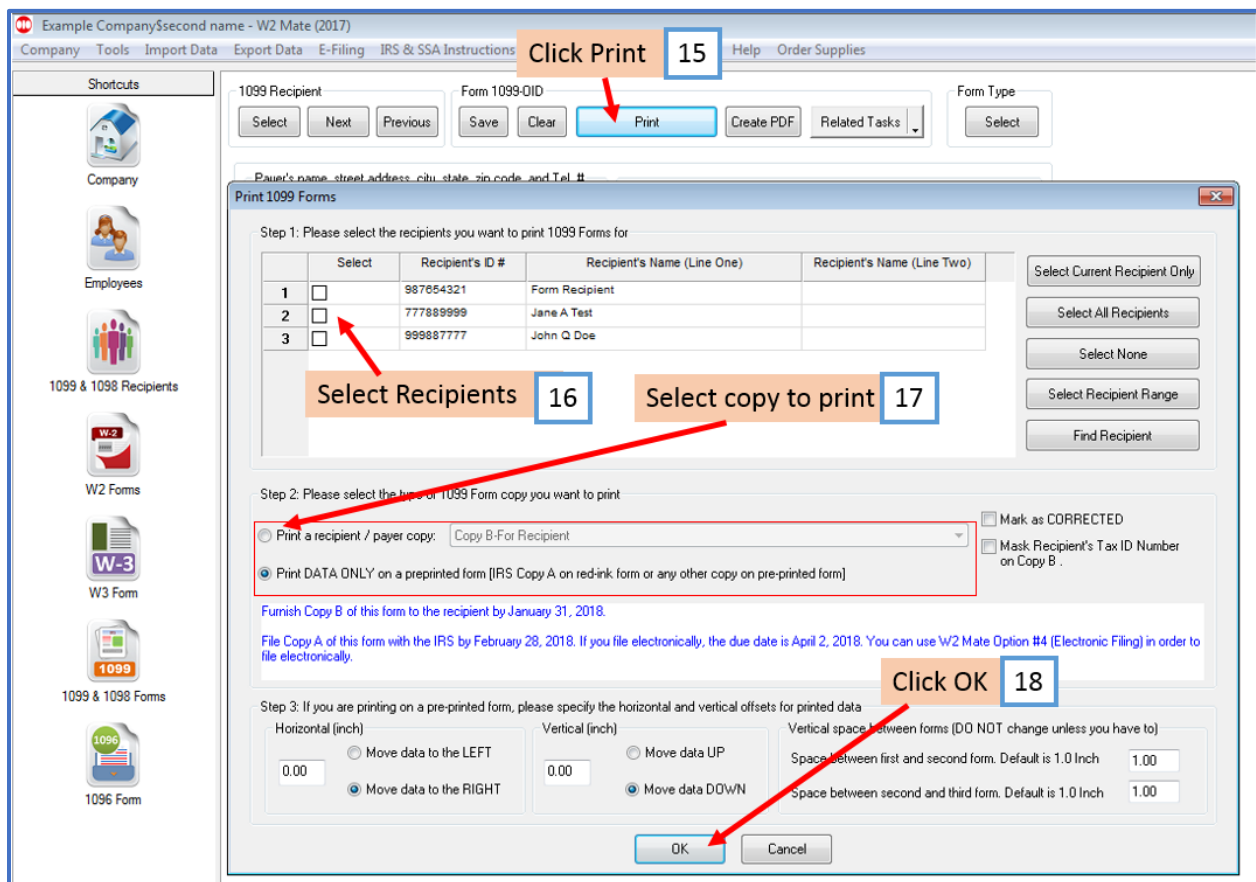
16. Select Recipients

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





19. Select the correct printer

20. Click OK

