

How to Create, Populate and Print 1099-PATR 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

Example Company - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer 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)	Name (Line Two)	Account Number
1	777889999	Jane M Test		
2	999887777	John Q Doe		
3	123456789	New	Recipient	

1099 & 1098 Recipients

Click 1099 & 1098 Recipients 1

Click New 1099/1098 Recipient 2

3. Choose Form 1099-PATR

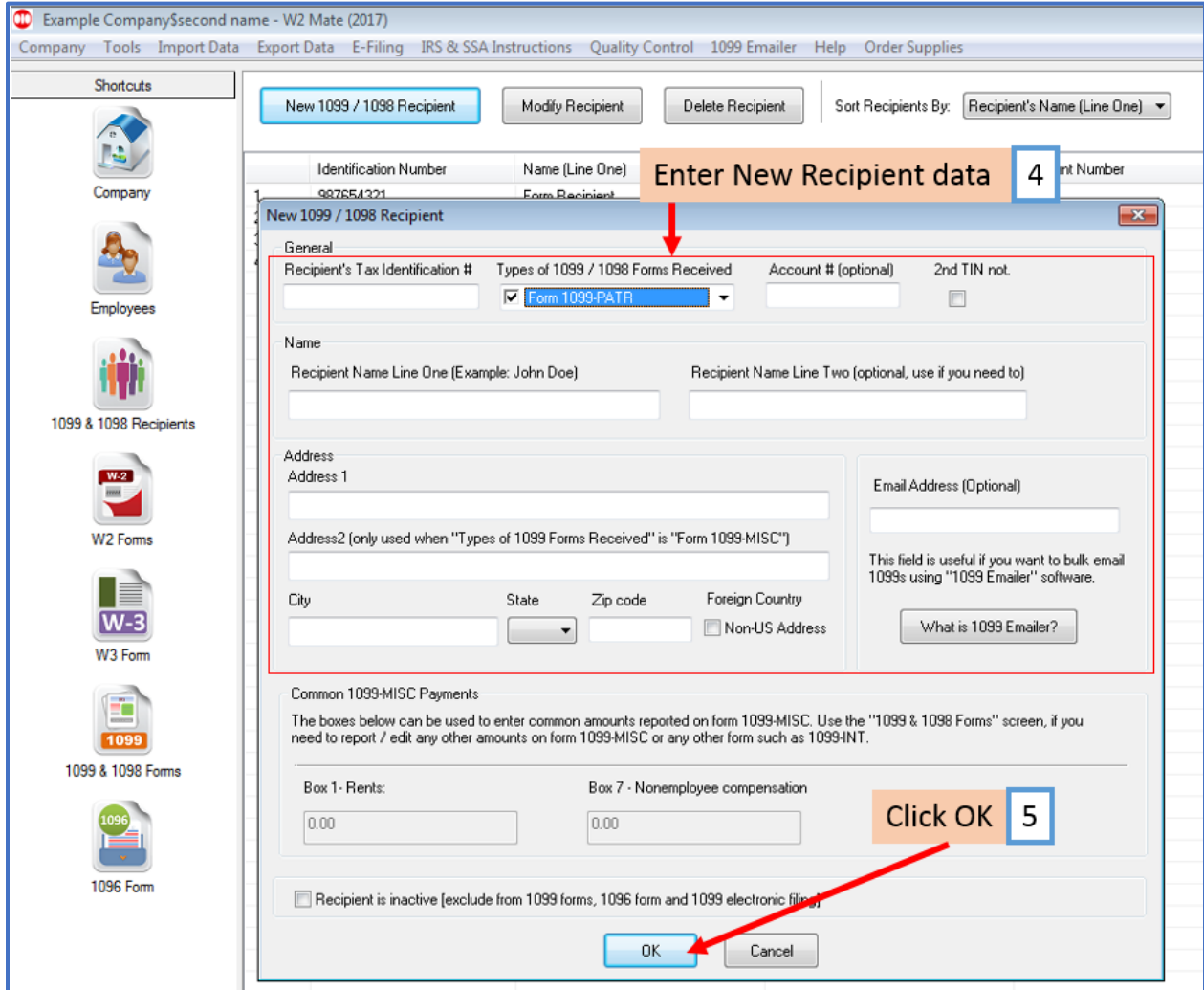
The screenshot shows the W2 Mate software interface. On the left is a sidebar with shortcuts for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms, and 1096 Form. The main window displays a table of recipients and a modal dialog box titled "New 1099 / 1098 Recipient".

The dialog box has the following sections:

- General:** Includes fields for Recipient's Tax Identification #, Name (Line One and Line Two), Account # (optional), and 2nd TIN not.
- Types of 1099 / 1098 Forms Received:** A dropdown menu with a list of form types. "Form 1099-PATR" is selected and highlighted in blue. A red arrow points to this selection, and a callout box with the text "Select Form 1099-PATR 3" is positioned next to it.
- Address:** Fields for Address 1, Address 2 (only used when "Types of 1099 / 1098 Forms Received" is "1099-MISC"), City, State, Zip code, and Foreign Country. There is also a checkbox for "Non-US Address".
- Email Address (Optional):** A text field with a note: "This field is useful if you want to bulk email 1099s using '1099 Emitter' software." and a button "What is 1099 Emitter?".
- Common 1099-MISC Payments:** A section with a note: "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 contains two input fields: "Box 1 - Rents" (value: 0.00) and "Box 7 - Nonemployee compensation" (value: 0.00).
- Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]:** A checkbox.
- Buttons:** "OK" and "Cancel" at the bottom.

4. Enter New Recipient information

5. Click OK



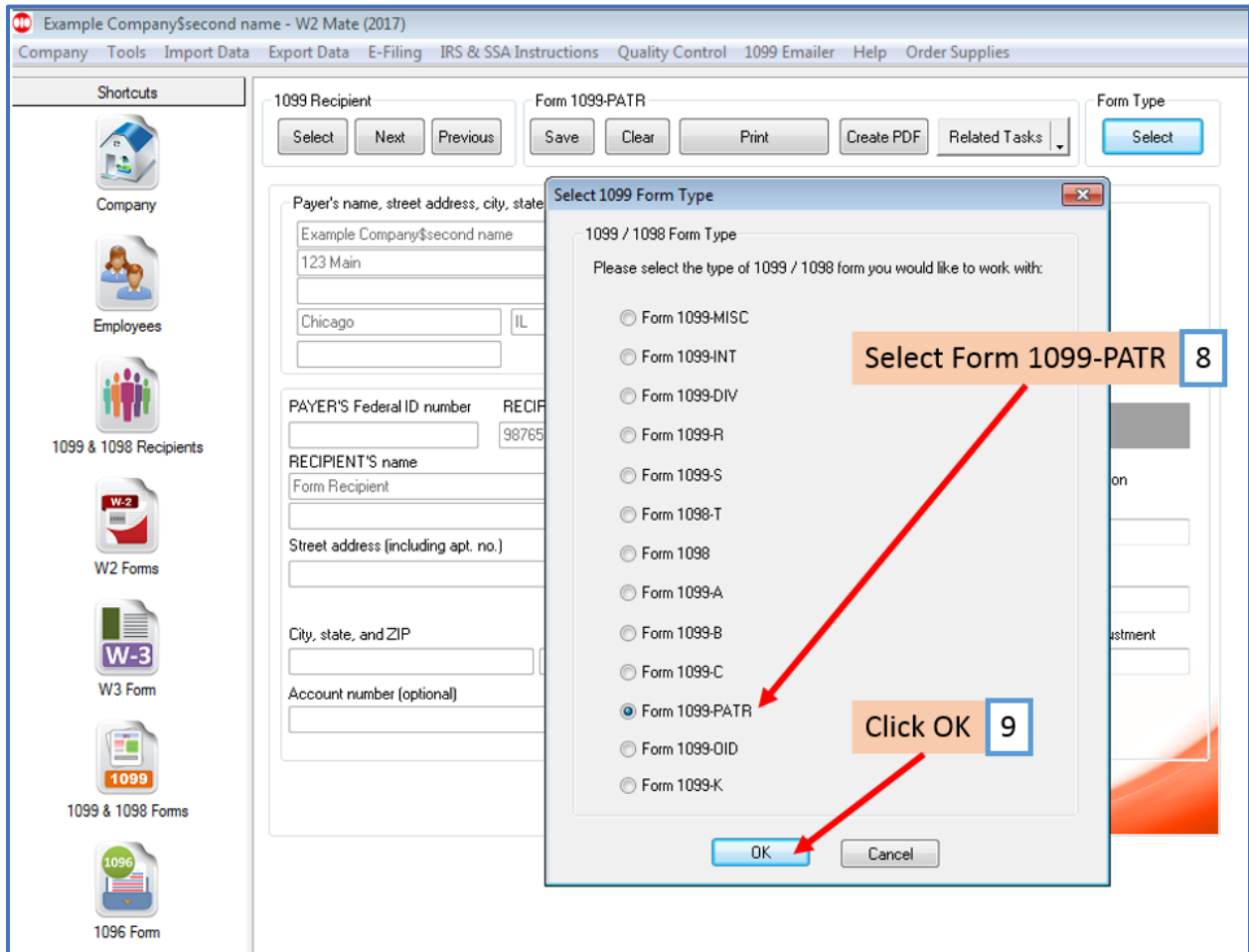
6. Choose 1099 & 1098 Forms in shortcuts

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'. A left sidebar contains 'Shortcuts' for 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W3 Form', '1099 & 1098 Forms', and '1096 Form'. The main area 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' shortcut in the sidebar. The form fields include: Payer's name (Example Company), address (123 Main, Chicago, IL 60605), PAYER'S Federal ID number (777999999), and RECIPIENT'S ID number (Jane A.). The right side of the form contains 18 numbered fields for various income and tax amounts, all currently set to 0.00. The year '2017' is displayed in the center.

8. Select Form 1099-PATR

9. Click OK



10. Click Select under Recipient

11. Select 1099-PATR Recipient

12. Click OK

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

Company Tools Import Data Export Data E-File **Click Select 10** Utility Control 1099 Emailer Help Order Supplies

1099 Recipient Form 1099-PATR 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-PATR forms, since the "1099 Form Type" currently selected is 1099-PATR. 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		

Select Recipient 11

Click OK 12

OK Cancel

13. Fill in recipient(s) amounts (for example: Patronage dividends, Nonpatronage distributions, 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 Data Click Save 14 Actions Qu. Complete Information for Recipient 13

Shortcuts

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

1099 Recipient Form 1099-PATR Form Type Select

Select Next Previous Save Clear Print Create PDF Related Tasks

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
987654321

RECIPIENT'S name
Form Recipient

Street address (including apt. no.)

City, state, and ZIP

Account number (optional) 2nd TIN not.

1 Patronage dividends	0.00	OMB No. 1545-0118
2 Nonpatronage distributions	0.00	2017
3 Per-unit retain allocations	0.00	Form 1099-PATR
4 Federal income tax withheld	0.00	
5 Redemption of nonqualified notices and retain allocations	0.00	6 Domestic production activities deduction
		0.00
		7 Investment credit
		0.00
8 Work opportunity credit	0.00	9 Patron's AMT adjustment
		0.00
10 Other credits and deductions	0.00	

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-PATR Form Type

Select Next Previous Save Clear **Print 15** 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)
<input type="checkbox"/>	987654321	Form Recipient	
<input type="checkbox"/>	777889999	Jane A Test	
<input type="checkbox"/>	999887777	John Q Doe	

Select Recipients 16

Select copy to print 17

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

Print a recipient / payer copy: Copy B-For Recipient Mark as CORRECTED

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

Move data to the LEFT 0.00 Move data UP 0.00 Space between first and second form. Default is 1.0 Inch 1.00

Move data to the RIGHT Move data DOWN 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

