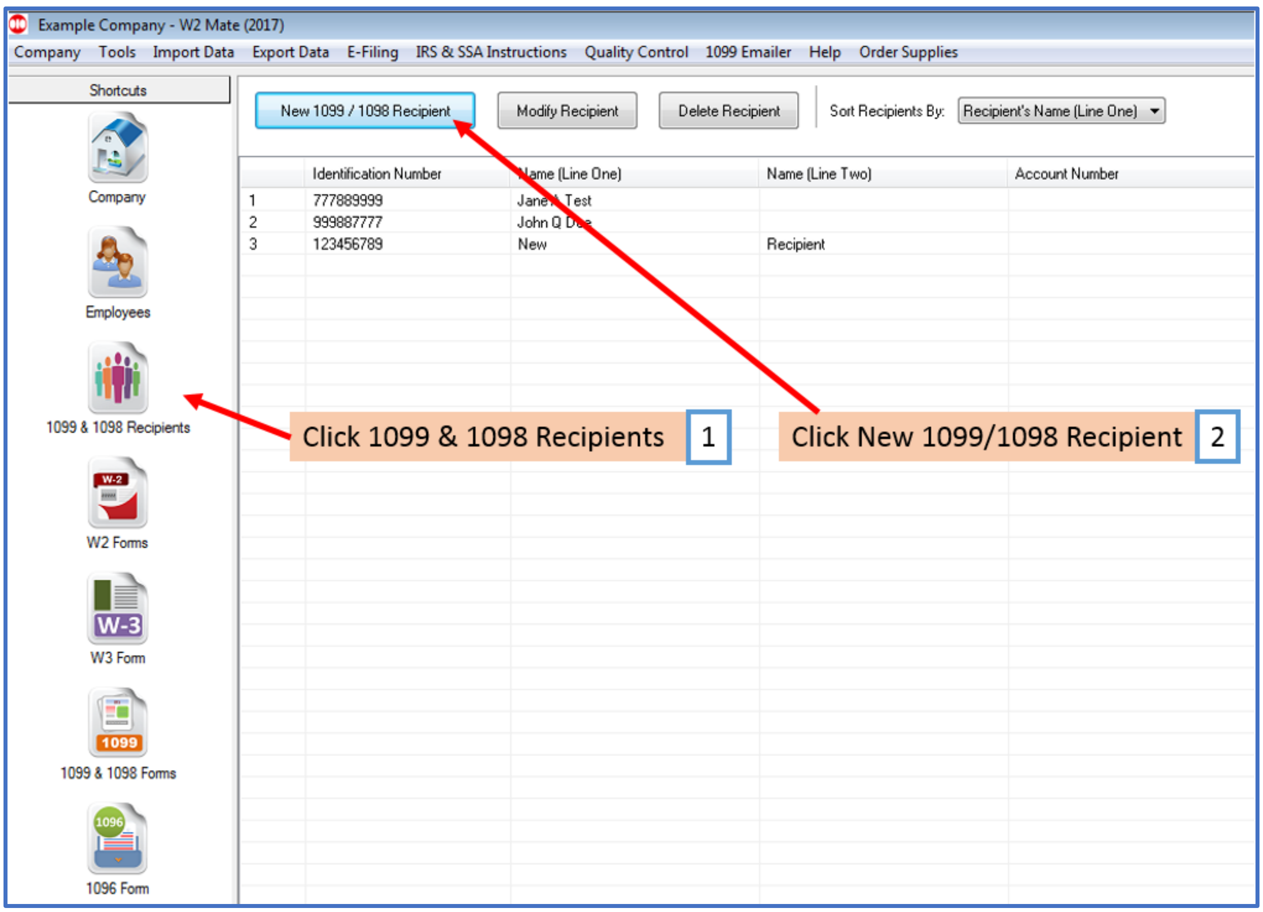
How to Create, Populate and Print 1099-R Forms

Make sure you have the correct Company open inside W2 Mate

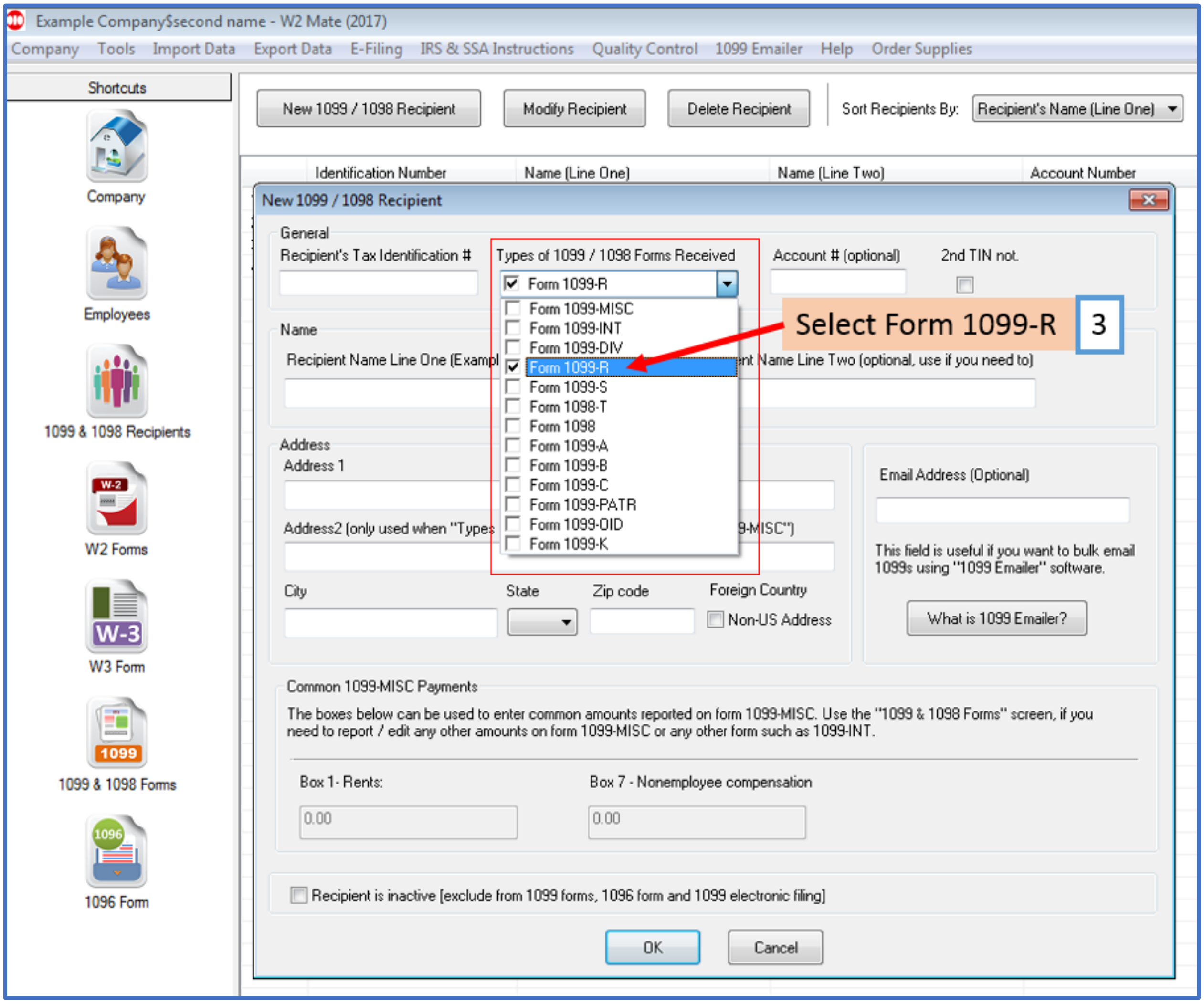
Note: In order to use this feature you must purchase and enable W2 Mate Option #5 for Additional 1099 forms

1. Click 1099 & 1098 Recipients in shortcut

2. Click New 1099/1098 Recipient

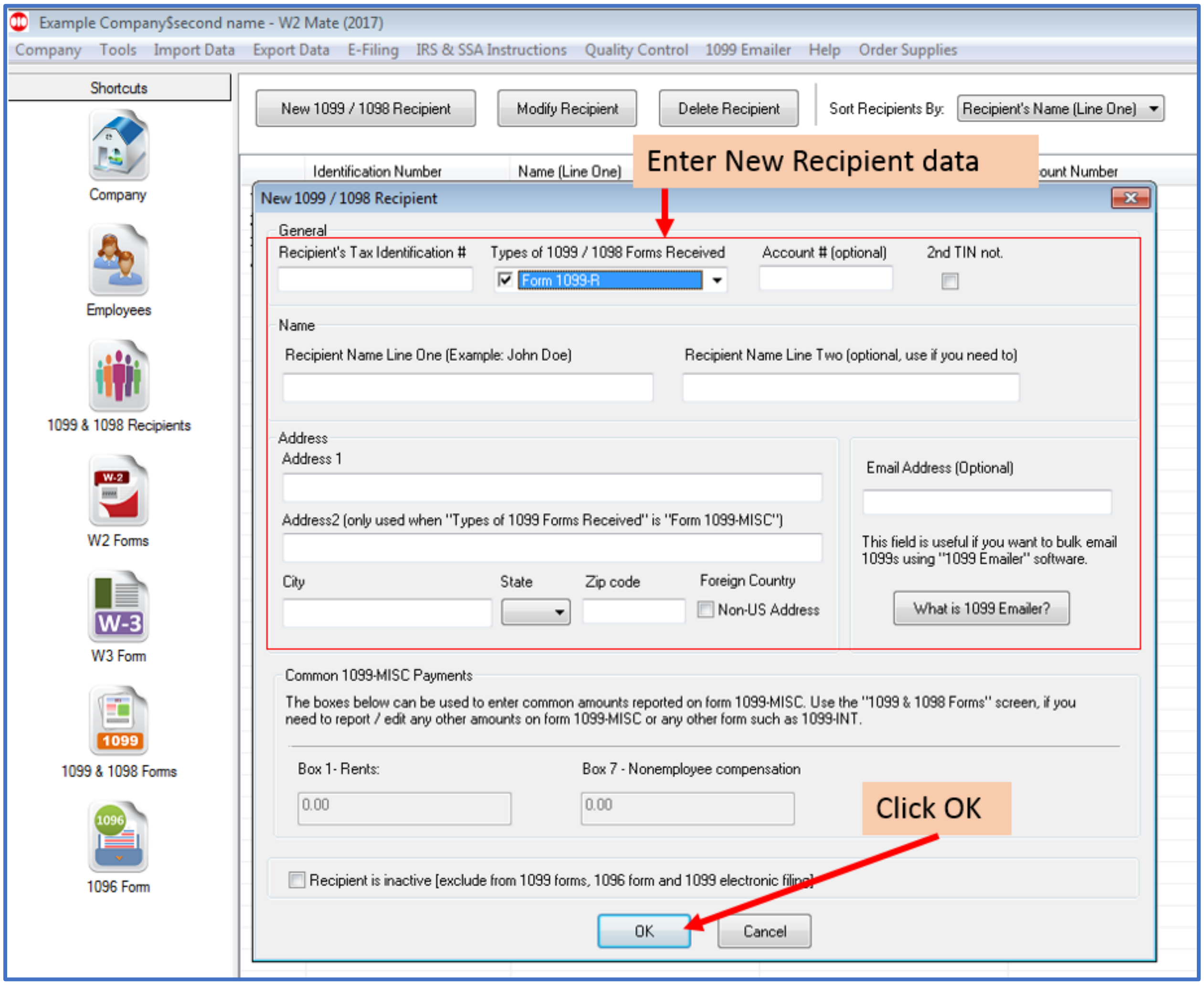


3. Choose Form 1099-R



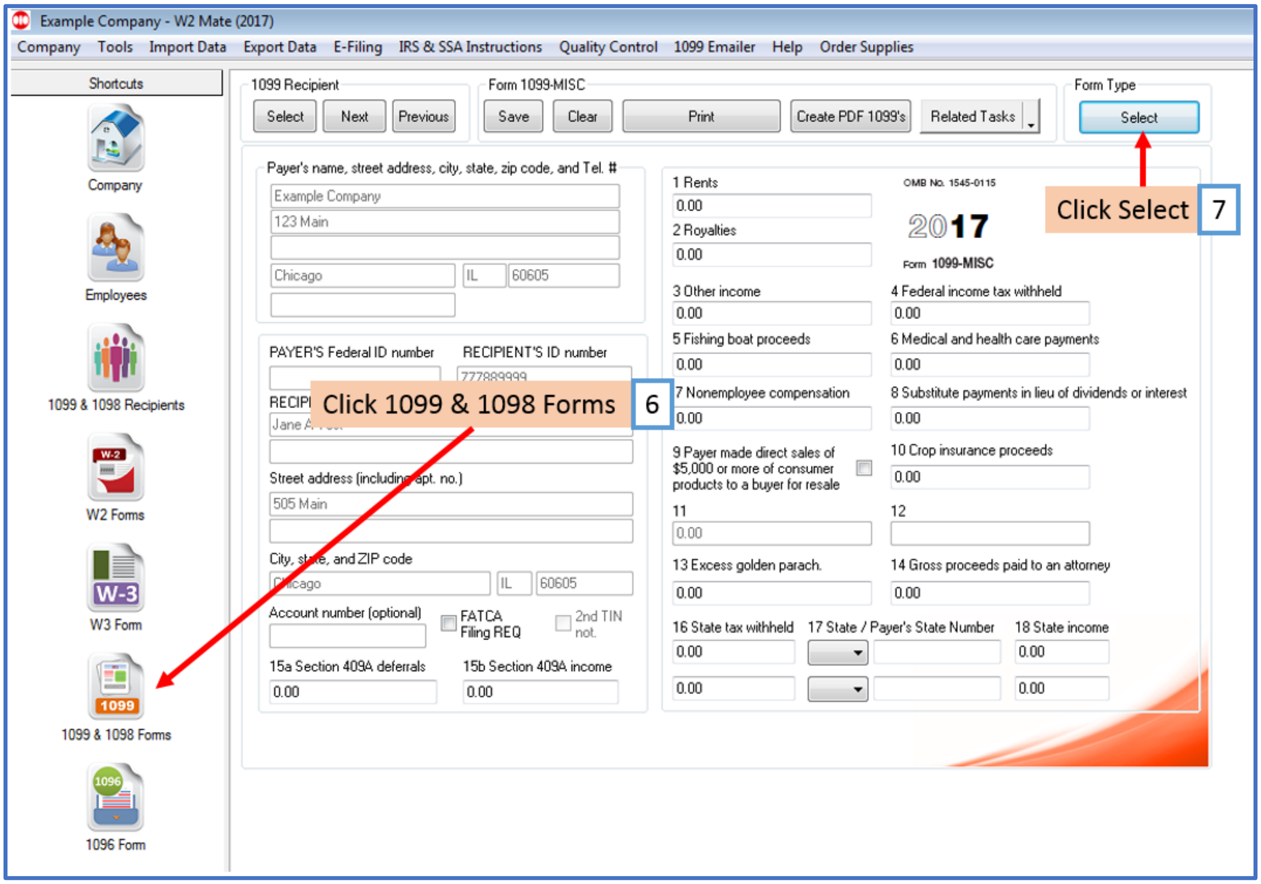
4. Enter New Recipient information

5. Click OK



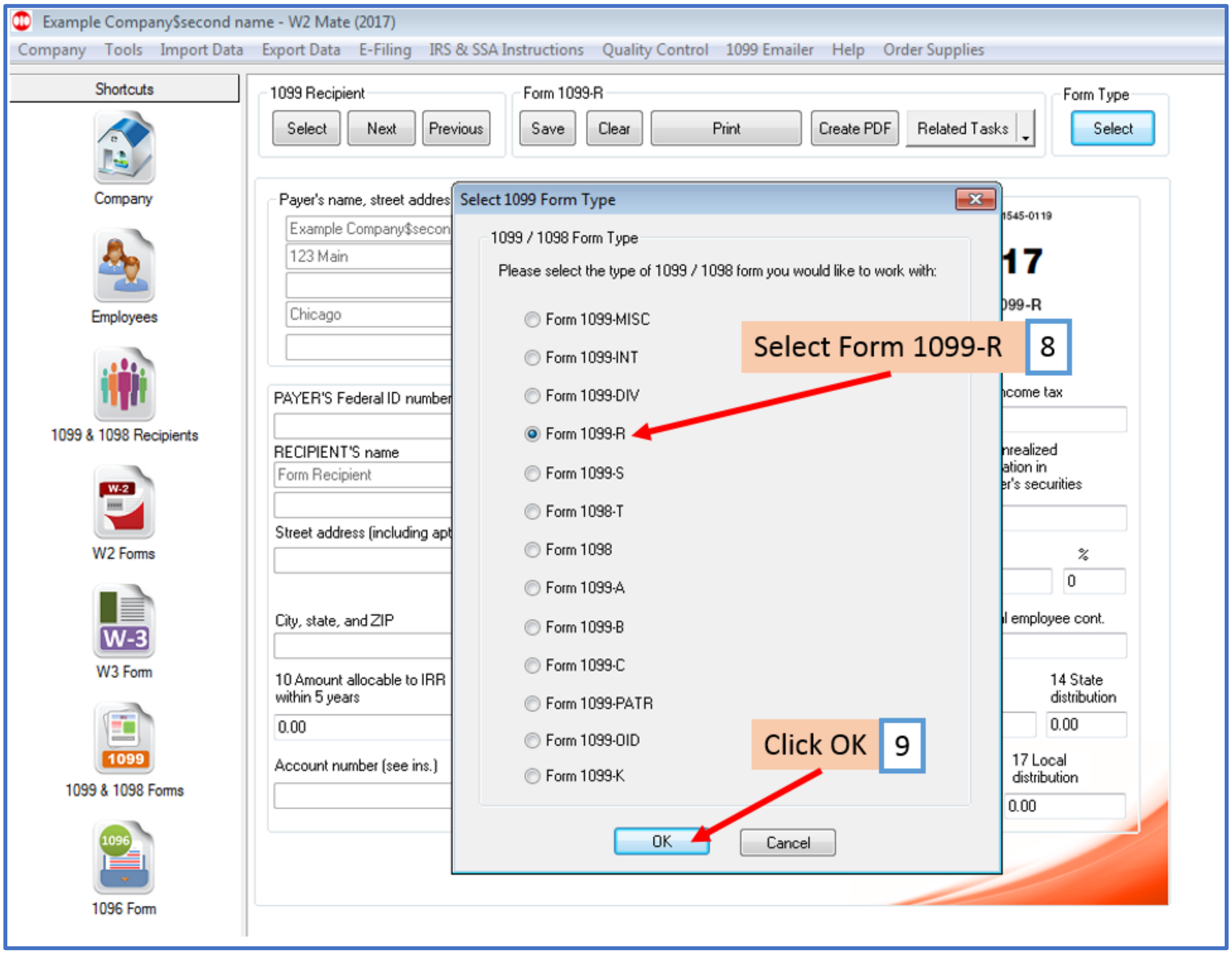
6. Choose 1099 & 1098 Forms in shortcuts

7. Click Select under form type



8. Select Form 1099-R

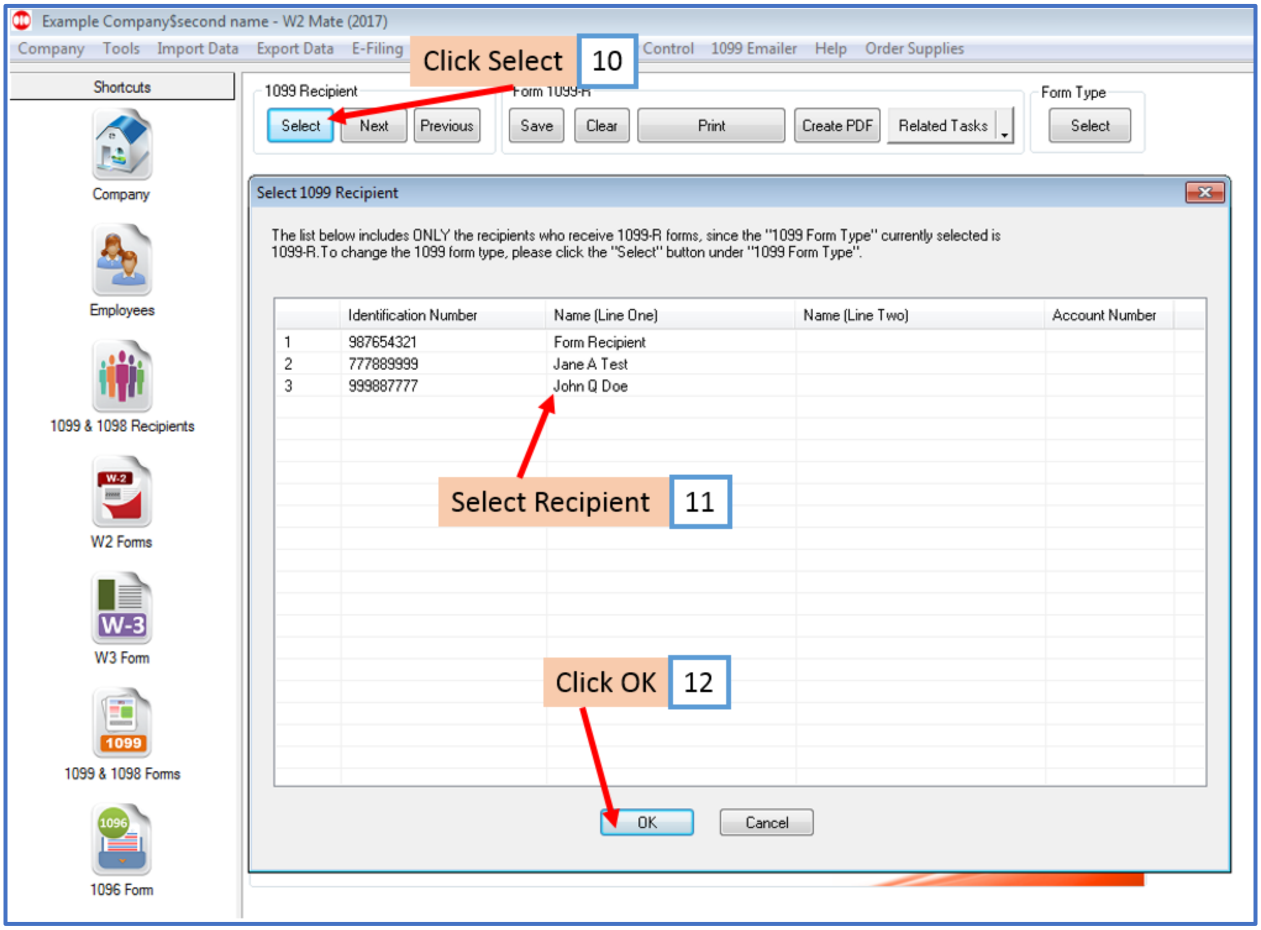
9. Click OK



10. Click Select under Recipient

11. Select 1099-R Recipient

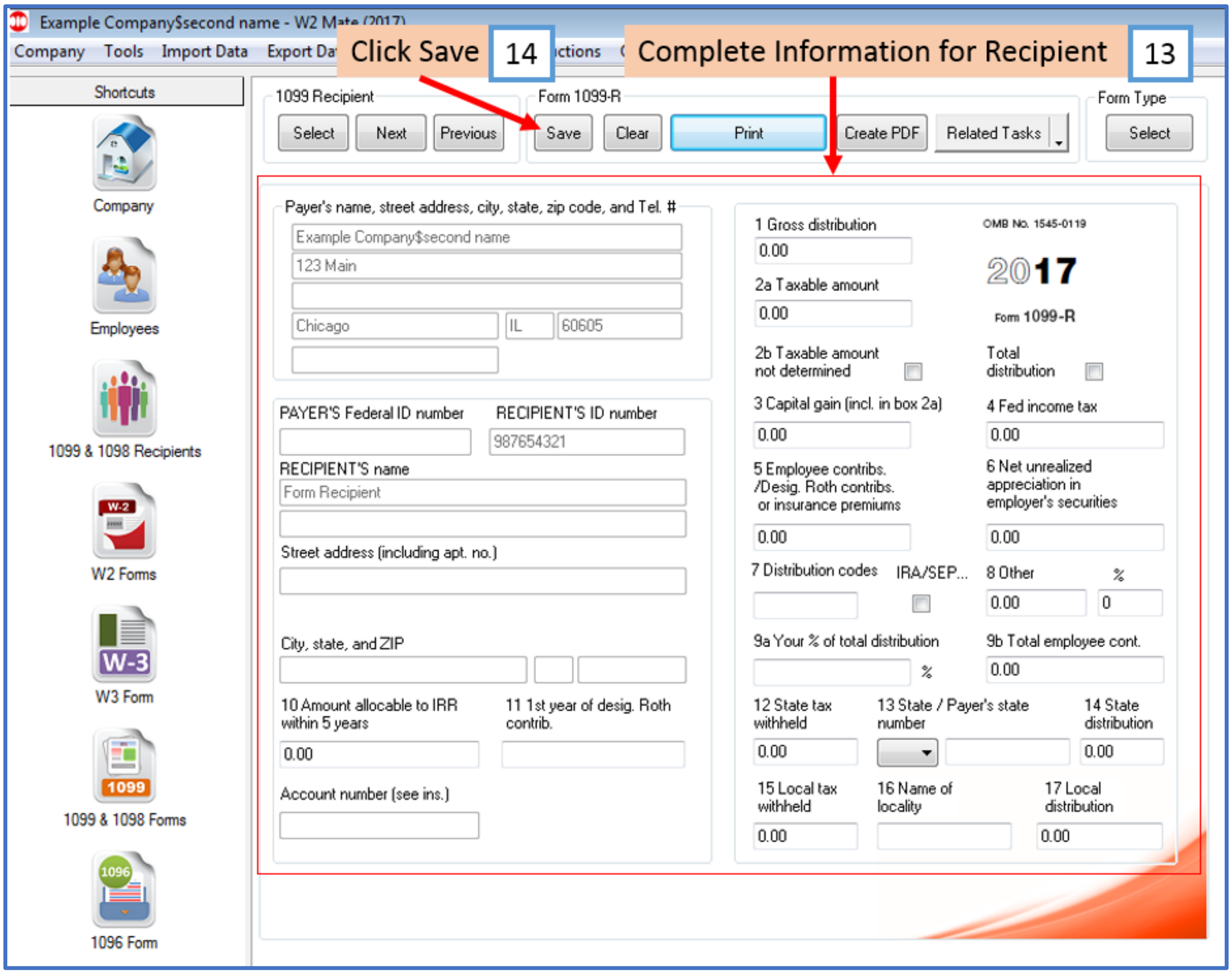
12. Click OK



13. Fill in recipient(s) amounts (for example: Taxable amount, Gross distribution, etc.)

14. Click Save

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



15. Click Print

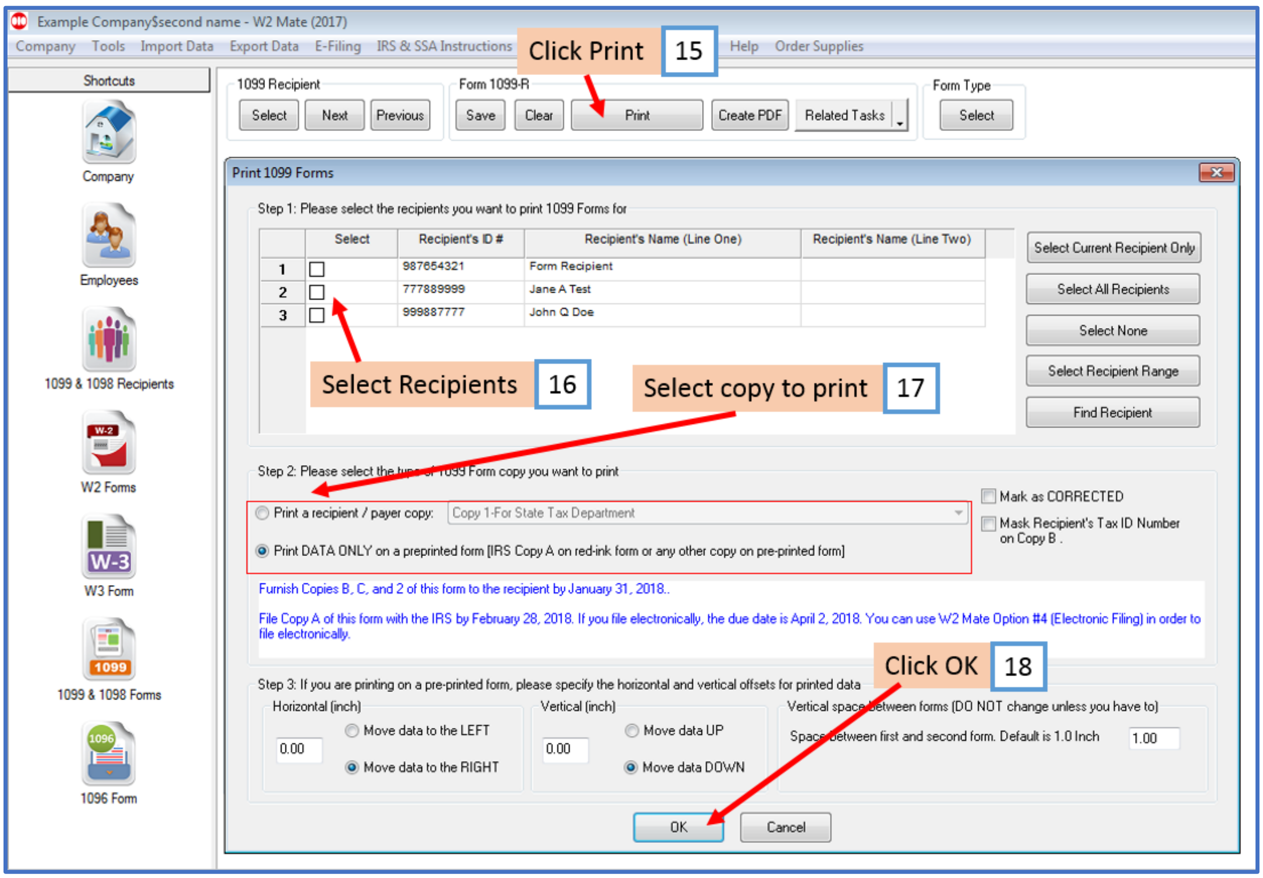
16. Select Recipients

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