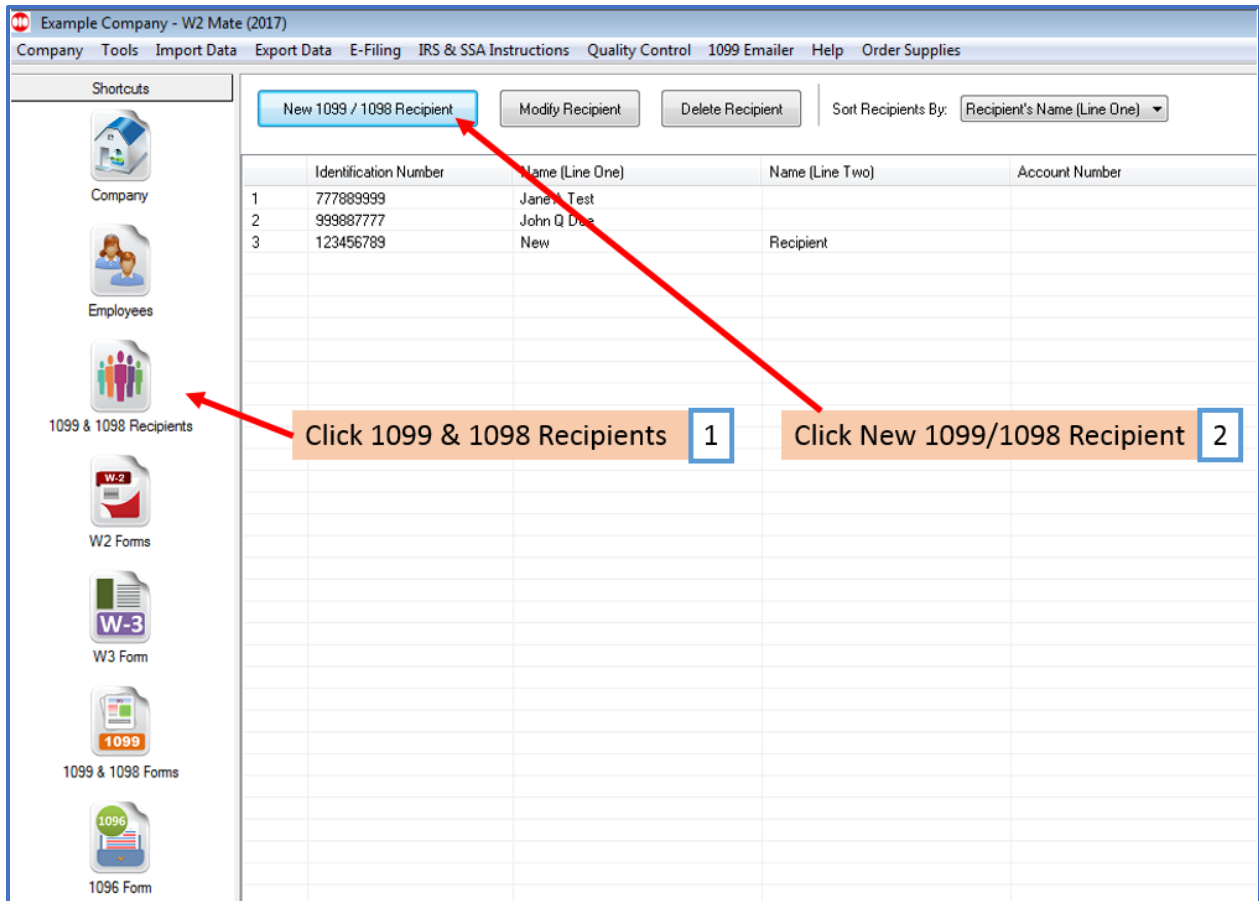


# How to Create, Populate and Print 1099-R Forms

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

The screenshot shows the W2 Mate software interface. The main window is titled "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 side, 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 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" section with the following fields:

- Recipient's Tax Identification #
- Types of 1099 / 1098 Forms Received (dropdown menu with "Form 1099-R" selected)
- Account # (optional)
- 2nd TIN not.
- 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 "1099-MISC")
- City
- State
- Zip code
- Foreign Country
- Non-US Address
- Email Address (Optional)

A red arrow points to the "Form 1099-R" option in the dropdown menu. A blue box with the number "3" is next to the text "Select Form 1099-R".

Below the "General" section is the "Common 1099-MISC Payments" section, which includes:

- Box 1 - Rents: 0.00
- Box 7 - Nonemployee compensation: 0.00
- Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]

At the bottom of the dialog box 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 EMailer 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

Identification Number Name (Line One) Account Number

**New 1099 / 1098 Recipient**

General

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

Form 1099-R

Name

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

Address

Address 1

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

City State Zip code Foreign Country

Non-US Address

Email Address (Optional)

This field is useful if you want to bulk email 1099s using "1099 EMailer" software.

What is 1099 EMailer?

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

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

OK Cancel

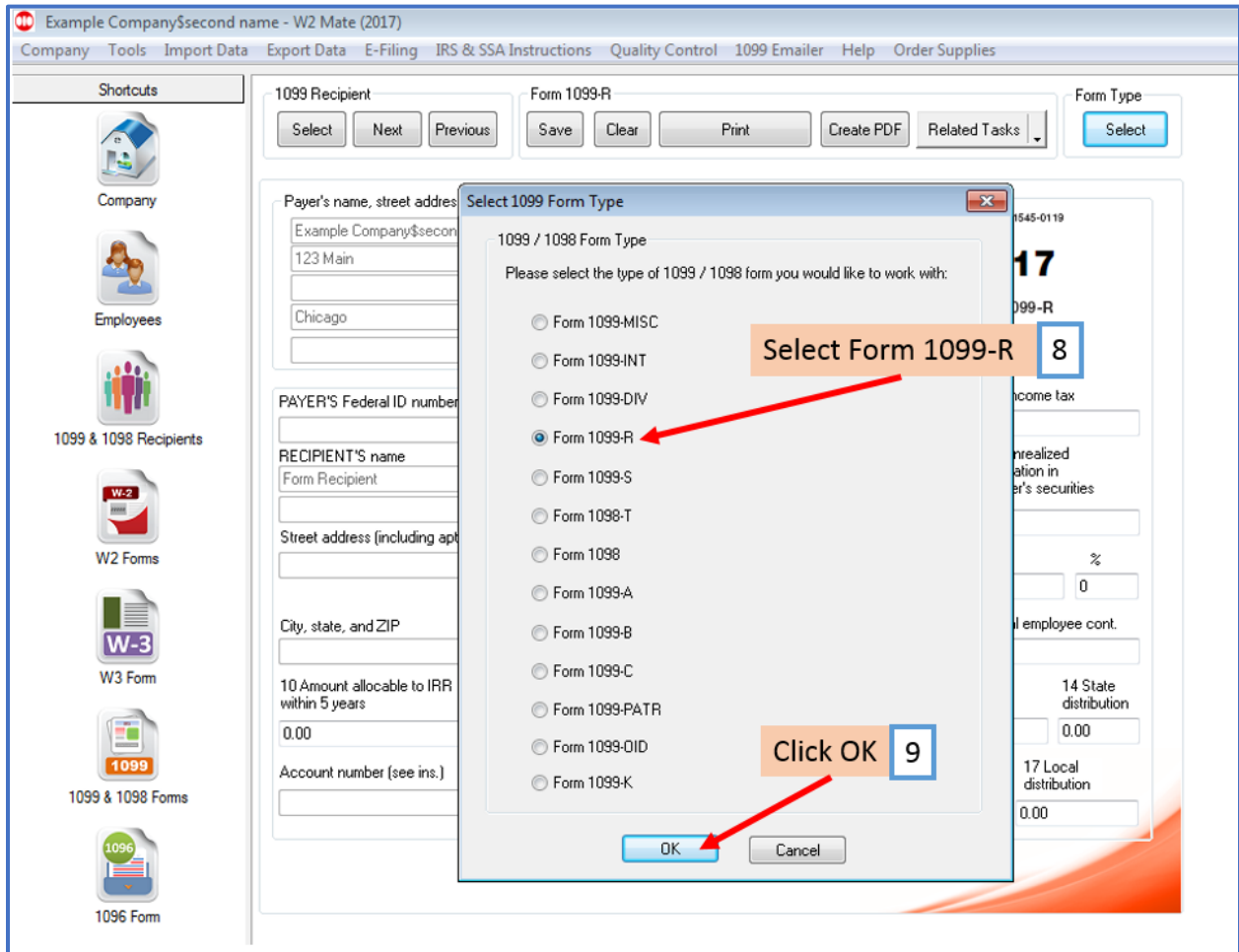
6. Choose 1099 & 1098 Forms in shortcuts

7. Click Select under form type

The screenshot displays the W2 Mate software interface for '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 Emailer', '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 red arrow points from the '1099 & 1098 Forms' shortcut icon to a blue box labeled '6' containing the text 'Click 1099 & 1098 Forms'. 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 list of 18 numbered items (1-18) with associated values, mostly 0.00. The year '2017' is prominently displayed. The OMB No. 1545-0115 is also visible.

8. Select Form 1099-R

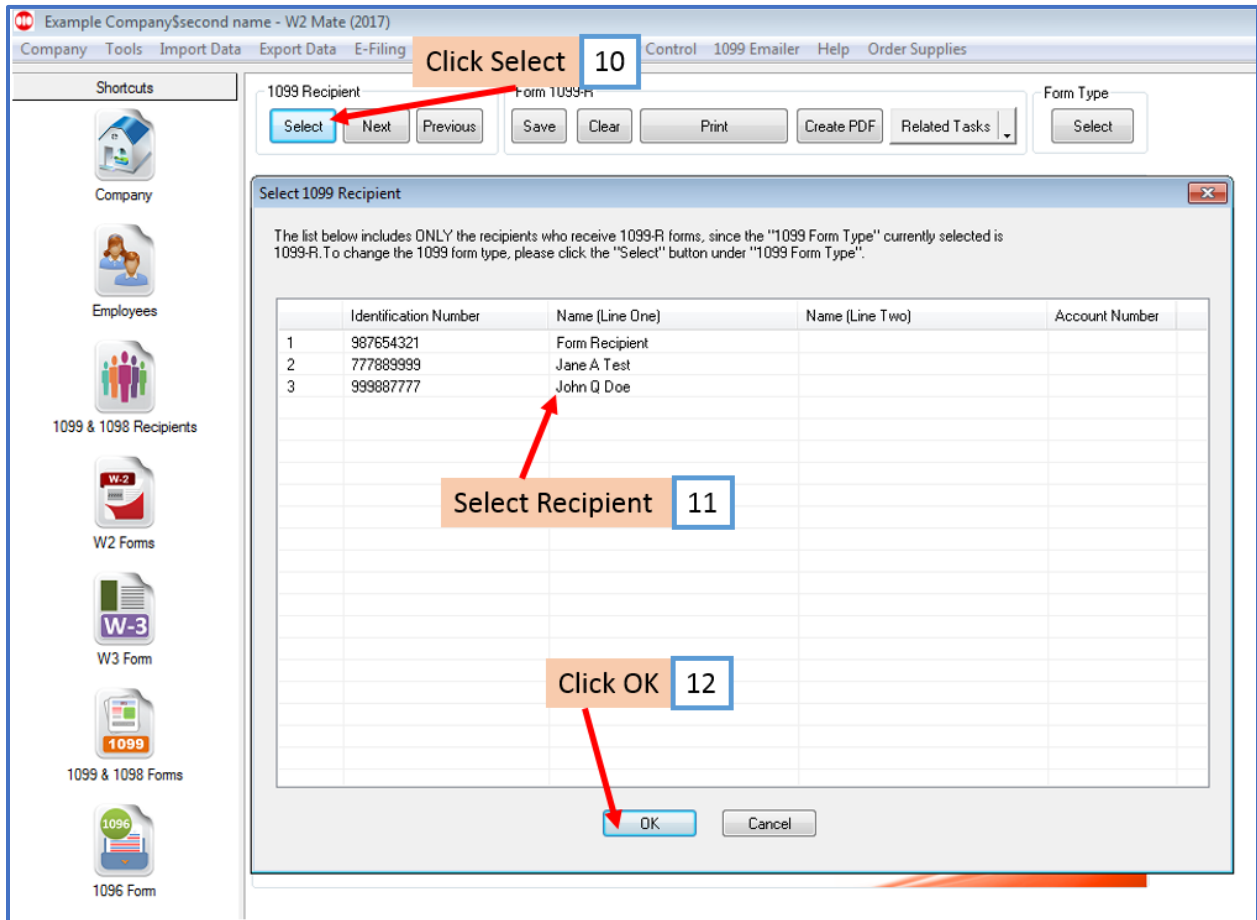
9. Click OK



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

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

Company Tools Import Data Export Data Click Save 14 Actions Complete Information for Recipient 13

1099 Recipient Form 1099-R

Select Next Previous Save Clear Print Create PDF Related Tasks Form Type 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  
987654321

RECIPIENT'S name  
Form Recipient

Street address (including apt. no.)

City, state, and ZIP

10 Amount allocable to IRR within 5 years 11 1st year of desig. Roth contrib.  
0.00

Account number (see ins.)

1 Gross distribution 0.00 OMB No. 1545-0119  
2a Taxable amount 0.00 2017  
2b Taxable amount not determined Total distribution  
3 Capital gain (incl. in box 2a) 0.00 Form 1099-R  
4 Fed income tax 0.00  
5 Employee contribs. /Desig. Roth contribs. or insurance premiums 0.00 6 Net unrealized appreciation in employer's securities  
7 Distribution codes IRA/SEP... 8 Other %  
9a Your % of total distribution % 9b Total employee cont. 0.00  
12 State tax withheld 13 State / Payer's state number 14 State distribution  
0.00 0.00  
15 Local tax withheld 16 Name of locality 17 Local distribution  
0.00 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

The screenshot shows the 'Print 1099 Forms' dialog box in the W2 Mate software. The dialog is titled 'Print 1099 Forms' and contains the following elements:

- Step 1:** A table with columns 'Select', 'Recipient's ID #', 'Recipient's Name (Line One)', and 'Recipient's Name (Line Two)'. The table contains three rows of recipient data. A red arrow points to the 'Select' column, and a callout box labeled '16' points to the first row.
- Step 2:** A section for selecting the type of copy to print. A red box highlights the 'Print DATA ONLY on a preprinted form' option. A red arrow points to this option, and a callout box labeled '17' points to it.
- Step 3:** A section for specifying horizontal and vertical offsets for printed data. A red arrow points to the 'OK' button, and a callout box labeled '18' points to it.

Callout boxes with numbers 15, 16, 17, and 18 are placed over the 'Print' button, the 'Select' column, the 'Print DATA ONLY' option, and the 'OK' button, respectively. Red arrows indicate the sequence of actions: clicking 'Print' (15), selecting recipients (16), selecting the copy type (17), and clicking 'OK' (18).



19. Select the correct printer

20. Click OK

