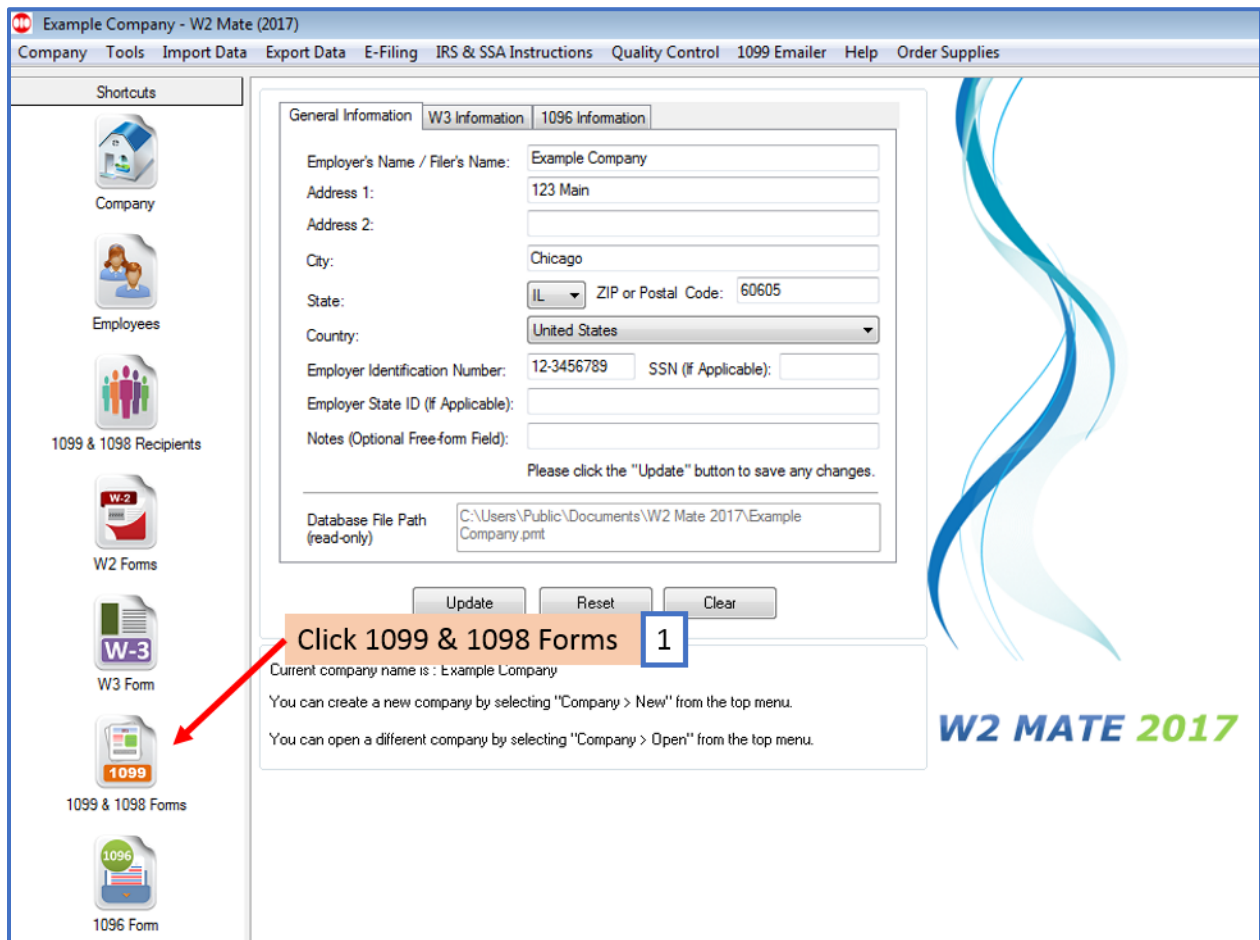


How to Edit Data on a 1099-A Form

Make sure you have the correct Company open inside W2 Mate

1. Click 1099 & 1098 Forms from the Shortcuts menu



2. Click Select under Form Type

The screenshot shows the W2 Mate software interface for creating a 1099 form. The window title is "Example Company - W2 Mate (2017)". The menu bar includes "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 Emailer", "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 is titled "1099 Recipient" and "Form 1099-A". It contains several buttons: "Select", "Next", "Previous", "Save", "Clear", "Print", "Create PDF", "Related Tasks", and "Form Type". A red arrow points to the "Select" button under "Form Type".

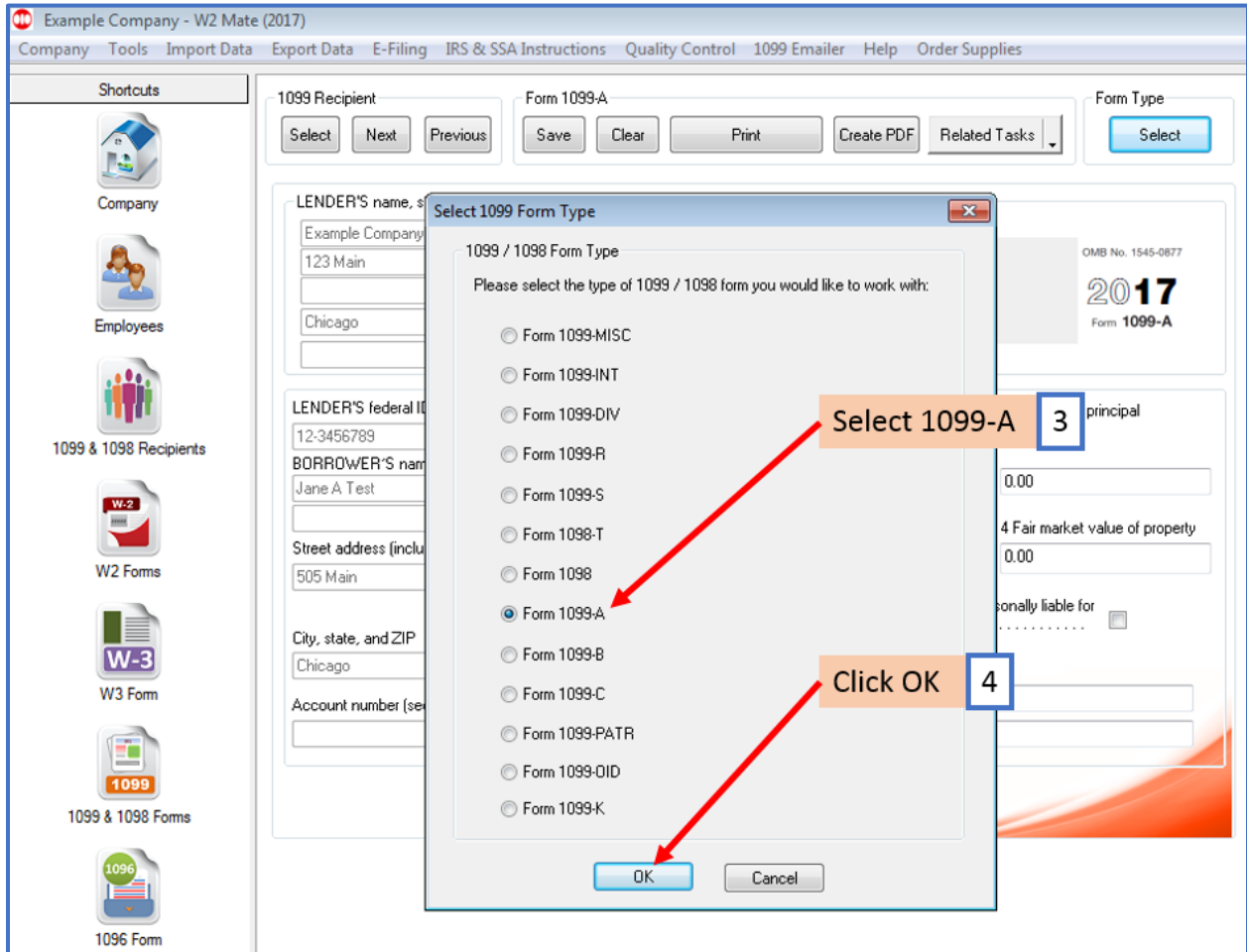
The form fields are as follows:

- LENDER'S name, street address, city, state, ZIP code & Tel. #**
Example Company
123 Main
Chicago IL 60605
- LENDER'S federal ID #**: 12-3456789
BORROWER'S identification #: 777889999
- BORROWER'S name**: Jane A Test
- Street address (including apt. no.)**: 505 Main
- City, state, and ZIP**: Chicago IL 60605
- Account number (see instructions)**: [Empty field]
- 1 Date of lender's acquisition or knowledge of abandonment (mm/dd/yyyy)**: [Empty field]
- 2 Balance of principal outstanding**: 0.00
- 3**: [Redacted field]
- 4 Fair market value of property**: 0.00
- 5 Check here if the borrower was personally liable for repayment of the debt**:
- 6 Description of property**: [Empty field]

A callout box with the text "Click Select 2" and a blue square around the number "2" is positioned over the "Form Type" area. The form also displays "2017 Form 1099-A" and "No. 1545-0877".

3. Select Form 1099-A

4. Click OK



5. Click Select under 1099 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

1099 Recipient Form 1099-A Form Type

Select Next Previous Save Clear Print Create PDF Related Tasks Select

Click Select 5 Street address, city, state, ZIP code & Tel. #

123 Main

Chicago IL 60605

1099 & 1098 Recipients

W2 Foms

W3 Fom

1099 & 1098 Foms

1096 Form

LENDER'S federal ID # 12-3456789 BORROWER'S identification # 777889999

BORROWER'S name Jane A Test

Street address (including apt. no.) 505 Main

City, state, and ZIP Chicago IL 60605

Account number (see instructions)

1 Date of lender's acquisition or knowledge of abandonment (mm/dd/yyyy)

2 Balance of principal outstanding 0.00

3

4 Fair market value of property 0.00

5 Check here if the borrower was personally liable for repayment of the debt

6 Description of property

OMB No. 1545-0877

2017 Form 1099-A

8. Edit 1099-A Data as needed

9. Click Save

Example Company - 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

1099 Recipient Form 1099-A

Select Next Previous Save Clear Print Create PDF Related Tasks Select

LENDER'S name, street address, city, state, ZIP code & Tel. #

Example Company
123 Main
Chicago IL 60605

LENDER'S federal ID # 12-3456789 BORROWER'S identification # 777889999

BORROWER'S name Jane A Test

Street address (including apt. no.) 505 Main

City, state, and ZIP Chicago IL 60605

Account number (see instructions)

OMB No. 1545-0877
2017
Form 1099-A

1 Date of lender's acquisition or knowledge of abandonment (mm/dd/yyyy)

2 Balance of principal outstanding 0.00

3 Fair market value of property 0.00

4 Fair market value of property 0.00

5 Check here if the borrower was personally liable for repayment of the debt

6 Description of property

Click Save 9 Edit Data 8

10. Click Yes

The screenshot shows the W2 Mate (2017) software interface. The main window is titled "Example Company - W2 Mate (2017)" and contains 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". On the left 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 is for "Form 1099-A" and includes fields for "LENDER'S name, street address, city, state, ZIP code & Tel. #", "LENDER'S federal ID #", "BORROWER'S name", "Street address (including apartment, suite, or unit #)", "City, state, and ZIP", and "Account number (see instructions)". A "Form Type" dropdown is set to "1099-A". A confirmation dialog box is overlaid on the form, asking "Are you sure you want to save the current fields?". The dialog has a yellow warning icon and two buttons: "Yes" and "No". A red arrow points from the "Click Yes 10" text to the "Yes" button. The "Click Yes 10" text is also highlighted with a blue box.