

# How to Edit Data on a 1099-INT Form

Make sure you have the correct Company open inside W2 Mate

1. Click 1099 & 1098 Forms from the Shortcuts menu

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

General Information W3 Information 1096 Information

Employer's Name / Filer's Name: Example Company

Address 1: 123 Main

Address 2:

City: Chicago

State: IL ZIP or Postal Code: 60605

Country: United States

Employer Identification Number: 12-3456789 SSN (if Applicable):

Employer State ID (if Applicable):

Notes (Optional Free-form Field):

Please click the "Update" button to save any changes.

Database File Path (read-only) C:\Users\Public\Documents\W2 Mate 2017\Example Company.pmt

Update Reset Clear

**Click 1099 & 1098 Forms 1**

Current company name is : Example Company

You can create a new company by selecting "Company > New" from the top menu.

You can open a different company by selecting "Company > Open" from the top menu.

**W2 MATE 2017**

## 2. Click Select under Form Type

Example Company - W2 Mate (2017)

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1099 Recipient Form 1099-INT

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  
123 Main  
Chicago IL 60605

PAYER'S Federal ID number 12-3456789 RECIPIENT'S ID number 777889999

RECIPIENT'S name  
Jane A Test

Street address (including apt. no.)  
505 Main

City, state, and ZIP  
Chicago IL 60605

Account number (optional) ☐ FATCA Filing REQ ☐ 2nd TIN not.

Payer's RTN (optional)

OMB No. 1545-0047

2017 Form 1099-INT

1 Interest income 0.00

2 Early withdrawal penalty 0.00

3 Interest on U.S. Savings Bonds and Treas. obligations 0.00

4 Federal income tax withheld 0.00

5 Investment expenses 0.00

6 Foreign tax paid 0.00

7 Foreign country or U.S. possession

8 Tax-exempt interest 0.00

9 Specified private activity bond interest 0.00

10 Market discount 0.00

11 Bond premium 0.00

12 Bond prem. on Treas. oblig. 0.00

13 Bond premium on tax-exempt bond 0.00

14 Tax-ex & tax cre. bond CUSIP #

15 State 16 State identification no 17 State tax with. 0.00

Click Select 2

3. Select Form 1099-INT

4. Click OK

The screenshot displays the W2 Mate software interface. A modal dialog box titled "Select 1099 Form Type" is open, prompting the user to "Please select the type of 1099 / 1098 form you would like to work with:". The dialog lists several form types: Form 1099-MISC, Form 1099-INT (selected), 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, and Form 1099-K. Two red arrows with callouts are present: one pointing to "Form 1099-INT" with the text "Select 1099-INT 3", and another pointing to the "OK" button with the text "Click OK 4". The background interface includes a sidebar with shortcuts for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms, and 1096 Form. The main area shows a "1099 Recipient" form with fields for Payer's name, address, PAYER'S Federal ID number, RECIPIENT'S name, address, and account number. A "Form 1099-INT" tab is active, and a "Form Type" dropdown is set to "Select".

## 5. Click Select under 1099 Recipient

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1099 Recipient Form 1099-INT

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

Click Select 5

123 Main  
Chicago IL 60605

PAYER'S Federal ID number 12-3456789 RECIPIENT'S ID number 777889999

RECIPIENT'S name Jane A Test

Street address (including apt. no.) 505 Main

City, state, and ZIP Chicago IL 60605

Account number (optional) ☐ FATCA Filing REQ ☐ 2nd TIN not.

Payer's RTN (optional)

1 Interest income 0.00

2 Early withdrawal penalty 0.00

3 Interest on U.S. Savings Bonds and Treas. obligations 0.00

4 Federal income tax withheld 0.00

5 Investment expenses 0.00

6 Foreign tax paid 0.00

7 Foreign country or U.S. possession

8 Tax-exempt interest 0.00

9 Specified private activity bond interest 0.00

10 Market discount 0.00

11 Bond premium 0.00

12 Bond prem. on Treas. oblig. 0.00

13 Bond premium on tax-exempt bond 0.00

14 Tax-ex & tax cre. bond CUSIP # 15 State 16 State identification no 17 State tax with. 0.00

OMB No. 1545-0112

2017

Form 1099-INT

7. Click OK

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8. Edit 1099-INT Data as needed

9. Click Save

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1099 Recipient

Select Next Previous

Form 1099-INT

Click Save 9

Edit Data 8

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

Example Company

123 Main

Chicago IL 60605

PAYER'S Federal ID number 12-3456789

RECIPIENT'S ID number 777889999

RECIPIENT'S name Jane A Test

Street address (including apt. no.) 505 Main

City, state, and ZIP Chicago IL 60605

Account number (optional)

☒ FATCA Filing REQ

☐ 2nd TIN not.

Payer's RTN (optional)

OMB No. 1545-0112

2017

Form 1099-INT

1 Interest income 0.00

2 Early withdrawal penalty 0.00

3 Interest on U.S. Savings Bonds and Treas. obligations 0.00

4 Federal income tax withheld 0.00

5 Investment expenses 0.00

6 Foreign tax paid 0.00

7 Foreign country or U.S. possession

8 Tax-exempt interest 0.00

9 Specified private activity bond interest 0.00

10 Market discount 0.00

11 Bond premium 0.00

12 Bond prem. on Treas. oblig. 0.00

13 Bond premium on tax-exempt bond 0.00

14 Tax-ex & tax cre. bond CUSIP #

15 State

16 State identification no

17 State tax with. 0.00

## 10. Click Yes

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1099 Recipient Form 1099-INT

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  
123 Main  
Chicago IL 60605

Payer's RTN (optional)

OMB No. 1545-0112

1 Interest income 0.00

2 Early withdrawal penalty 0.00

3 Interest on U.S. Savings Bonds and Treas. obligations

PAYER'S Federal ID number 12-3456789

RECIPIENT'S name Jane A Test

Street address (including apartment, suite, or unit number) 505 Main

City, state, and ZIP Chicago IL 60605

Account number (optional)

FATCA Filing REQ

2nd TIN not.

7 Foreign country or U.S. possession 0.00

9 Specified private activity bond interest 0.00

10 Market discount 0.00

11 Bond premium 0.00

12 Bond prem. on Treas. oblig. 0.00

13 Bond premium on tax-exempt bond 0.00

14 Tax-ex & tax cre. bond CUSIP #

15 State 16 State identification no

17 State tax with. 0.00

W2 Mate (2017)

Are you sure you want to save the current fields?

Yes No

Click Yes 10