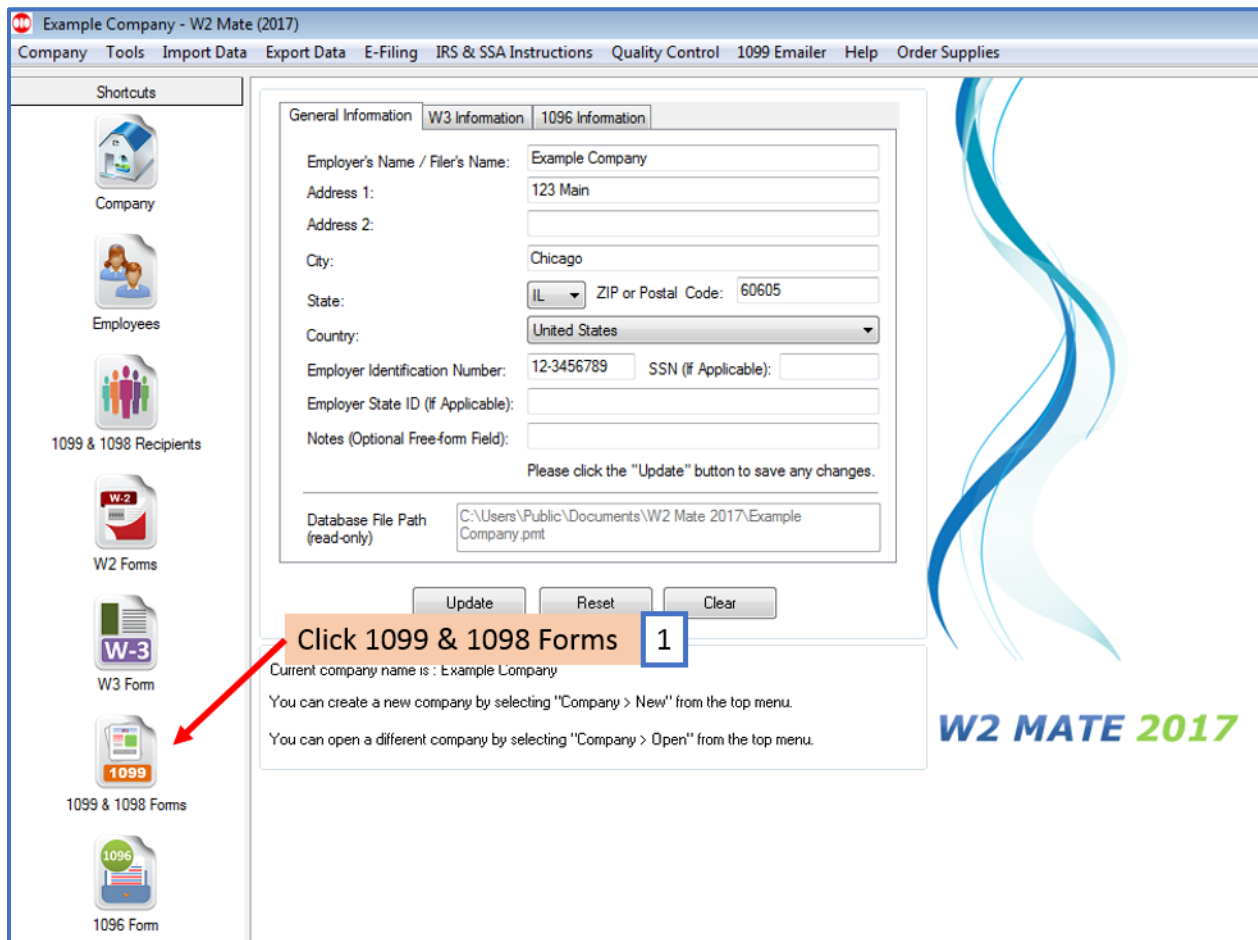


# How to Edit Data on a 1099-OLD Form

Make sure you have the correct Company open inside W2 Mate

1. Click 1099 & 1098 Forms from the Shortcuts menu

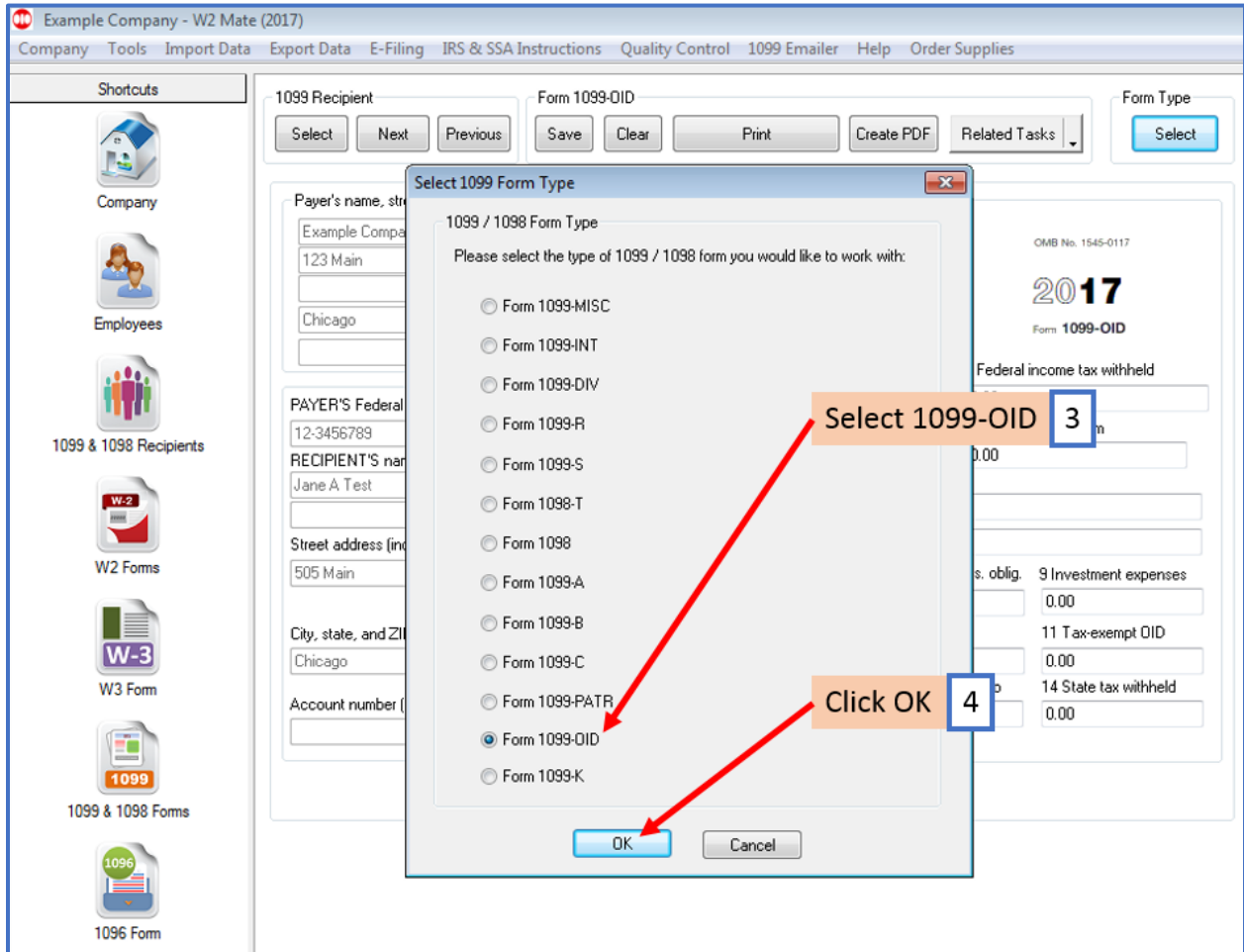


## 2. Click Select under Form Type

The screenshot displays the W2 Mate software interface for the year 2017. The main window is titled "Example Company - W2 Mate (2017)" and features a menu bar with options: 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 central area is titled "1099 Recipient" and "Form 1099-OID". It contains several input fields and buttons. A red arrow points to the "Form Type" dropdown menu, which is currently set to "2". A callout box with the text "Click Select 2" is positioned over the dropdown menu. The form includes fields for Payer's name, street address, city, state, and zip code, as well as Payer's and Recipient's Federal ID numbers, Recipient's name, street address, city, state, and ZIP. It also includes checkboxes for "FATCA Filing REQ" and "2nd TIN not". The right side of the form displays various tax-related fields, including "1 Original issue discount for 2017", "2 Other periodic interest", "3 Early withdrawal penalty", "4 Federal income tax withheld", "5 Market discount", "6 Acquisition premium", "7 Description", "8 Original issue discount on U.S. Treas. oblig.", "9 Investment expenses", "10 Bond premium", "11 Tax-exempt OID", "12 State", "13 State identification no", and "14 State tax withheld". The year "2017" and "Form 1099-OID" are prominently displayed in the center-right area.

3. Select Form 1099-OID

4. Click OK



5. Click Select under 1099 Recipient

The screenshot shows the W2 Mate software interface for the year 2017. The main window is titled "Example Company - W2 Mate (2017)". The menu bar includes "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 E-mailer", "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-OID". It contains several buttons: "Select", "Next", "Previous", "Save", "Clear", "Print", "Create PDF", "Related Tasks", and "Form Type" with a "Select" button. A red arrow points to the "Select" button, and a callout box says "Click Select" with a blue box around the number "5".

The form fields are as follows:

- Address, city, state, zip code, and Tel. #  
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.

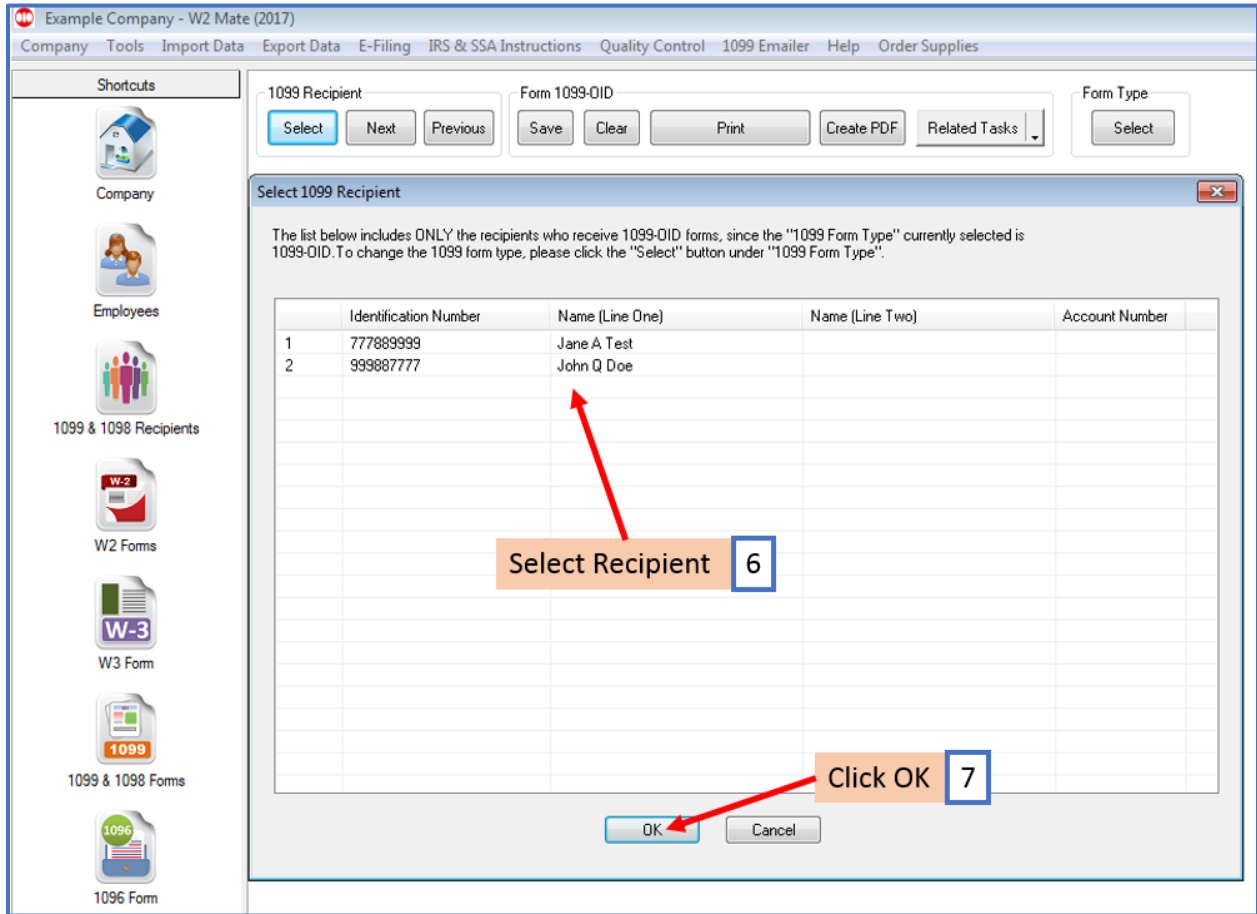
On the right side, there are 14 numbered fields for tax amounts, all set to 0.00:

- 1 Original issue discount for 2017: 0.00
- 2 Other periodic interest: 0.00
- 3 Early withdrawal penalty: 0.00
- 4 Federal income tax withheld: 0.00
- 5 Market discount: 0.00
- 6 Acquisition premium: 0.00
- 7 Description:
- 8 Original issue discount on U.S. Treas. oblig.: 0.00
- 9 Investment expenses: 0.00
- 10 Bond premium: 0.00
- 11 Tax-exempt OID: 0.00
- 12 State: (dropdown menu)
- 13 State identification no:
- 14 State tax withheld: 0.00

Additional information includes "OMB No. 1545-0117" and "Form 1099-OID 2017".

6. Select Recipient

7. Click OK



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-OID 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-OID forms, since the "1099 Form Type" currently selected is 1099-OID. 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	777889999	Jane A Test		
2	999887777	John Q Doe		

Select Recipient 6

Click OK 7

OK Cancel

8. Edit 1099-OID 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-OID

Click Save 9

Edit Data 8

Select Next Previous Save Clear Print Create PDF Related Tasks 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.

1 Original issue discount for 2017 0.00 OMB No. 1545-0117

2 Other periodic interest 0.00

3 Early withdrawal penalty 0.00 4 Federal income tax withheld 0.00

5 Market discount 0.00 6 Acquisition premium 0.00

7 Description

8 Original issue discount on U.S. Treas. oblig. 0.00 9 Investment expenses 0.00

10 Bond premium 0.00 11 Tax-exempt OID 0.00

12 State 13 State identification no 14 State tax withheld 0.00

2017 Form 1099-OID

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, there 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 titled "1099 Recipient" and "Form 1099-OID". It features a "Form Type" dropdown set to "1099-OID" and a "Form Year" of "2017". The form fields include: "Payer's name, street address, city, state, zip code, and Tel. #", "PAYER'S Federal ID number", "RECIPIENT'S name", "Street address (including apartment)", "City, state, and ZIP", "Account number (optional)", "1 Original issue discount for 2017", "2 Other periodic interest", "3 Early withdrawal penalty", "4 Federal income tax withheld", "10 Bond premium", "12 State", "13 State identification no", "9 Investment expenses", "11 Tax-exempt OID", and "14 State tax withheld". A modal dialog box is open in the center with the title "W2 Mate (2017)" and the message "Are you sure you want to save the current fields?". The dialog has "Yes" and "No" buttons. A red arrow points from the "Click Yes" text to the "Yes" button. The number "10" is highlighted in a blue box in the top right corner of the dialog.