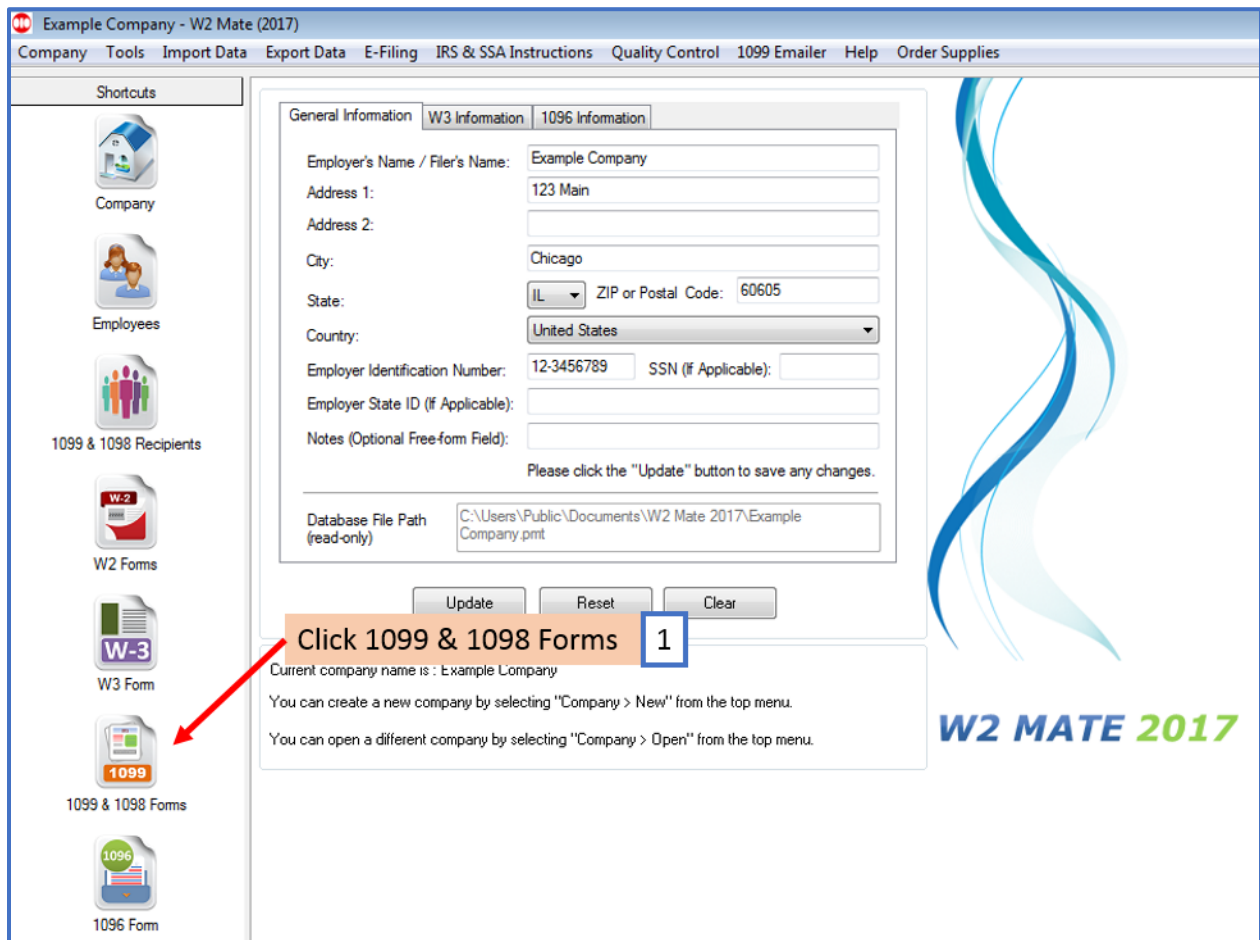


# How to Edit Data on a 1099-PATR Form

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

Example Company - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 E-mailer Help Order Supplies

Shortcuts

- Company
- Employees
- 1099 & 1098 Recipients
- W2 Forms
- W3 Form
- 1099 & 1098 Forms
- 1096 Form

1099 Recipient Form 1099-PATR Form Type

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) 2nd TIN not.

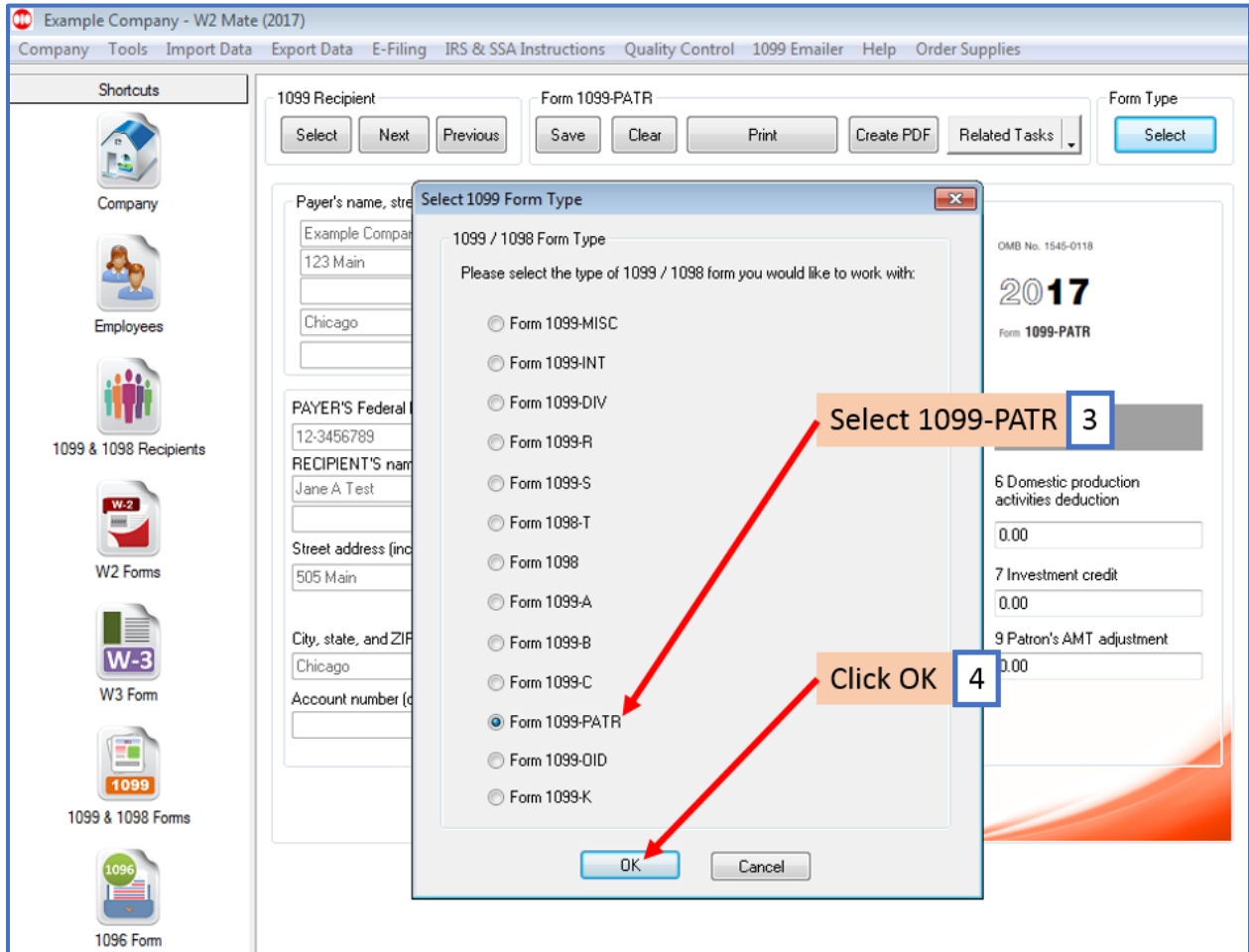
1 Patronage dividends 0.00  
2 Nonpatronage distributions 0.00  
3 Per-unit retain allocations 0.00  
4 Federal income tax withheld 0.00  
5 Redemption of nonqualified notices and retain allocations 0.00  
6 Domestic production activities deduction 0.00  
7 Investment credit 0.00  
8 Work opportunity credit 0.00  
9 Patron's AMT adjustment 0.00  
10 Other credits and deductions 0.00

2017 Form 1099-PATR

Click Select 2

3. Select Form 1099-PATR

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-PATR Form Type

Select Next Previous Save Clear Print Create PDF Related Tasks Select

Click Select 5 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) 2nd TIN not

1 Patronage dividends 0.00

2 Nonpatronage distributions 0.00

3 Per-unit retain allocations 0.00

4 Federal income tax withheld 0.00

5 Redemption of nonqualified notices and retain allocations 0.00

6 Domestic production activities deduction 0.00

7 Investment credit 0.00

8 Work opportunity credit 0.00

9 Patron's AMT adjustment 0.00

10 Other credits and deductions 0.00

OMB No. 1545-0118

2017

Form 1099-PATR

Company

Employees

1099 & 1098 Recipients

W2 Forms

W3 Form

1099 & 1098 Forms

1096 Form

6. Select Recipient

7. Click OK

The screenshot shows the W2 Mate (2017) software interface. The main window displays the '1099 Recipient' section with buttons for 'Select', 'Next', 'Previous', 'Save', 'Clear', 'Print', 'Create PDF', 'Related Tasks', and 'Form Type'. A dialog box titled 'Select 1099 Recipient' is open, showing a list of recipients. The list has the following data:

|   | Identification Number | Name (Line One) | Name (Line Two) | Account Number |
|---|-----------------------|-----------------|-----------------|----------------|
| 1 | 777889999             | Jane A Test     |                 |                |
| 2 | 999887777             | John Q Doe      |                 |                |

Annotations in the image include a red arrow pointing to the 'Select Recipient' button (labeled 6) and another red arrow pointing to the 'OK' button (labeled 7) in the dialog box.

8. Edit 1099-PATR 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

1099 Recipient Form type

Select Next Previous Save Clear Print Create PDF Related Tasks Select

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) 2nd TIN not

1 Patronage dividends 0.00 OMB No. 1545-0118

2 Nonpatronage distributions 0.00

3 Per-unit retain allocations 0.00

4 Federal income tax withheld 0.00

5 Redemption of nonqualified notices and retain allocations 0.00

6 Domestic production activities deduction 0.00

7 Investment credit 0.00

8 Work opportunity credit 0.00

9 Patron's AMT adjustment 0.00

10 Other credits and deductions 0.00

2017  
Form 1099-PATR

Company  
Employees  
1099 & 1098 Recipients  
W2 Forms  
W3 Form  
1099 & 1098 Forms  
1096 Form

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". A left sidebar lists shortcuts for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form". The main area is for editing a "Form 1099-PATR" for a "1099 Recipient". It includes fields for Payer's name, address, city, state, and zip code, and a list of 10 items with values of 0.00. A modal dialog box titled "W2 Mate (2017)" is open, displaying a warning icon and the text "Are you sure you want to save the current fields?". The dialog has "Yes" and "No" buttons. A red arrow points from a callout box containing the text "Click Yes" and the number "10" to the "Yes" button.