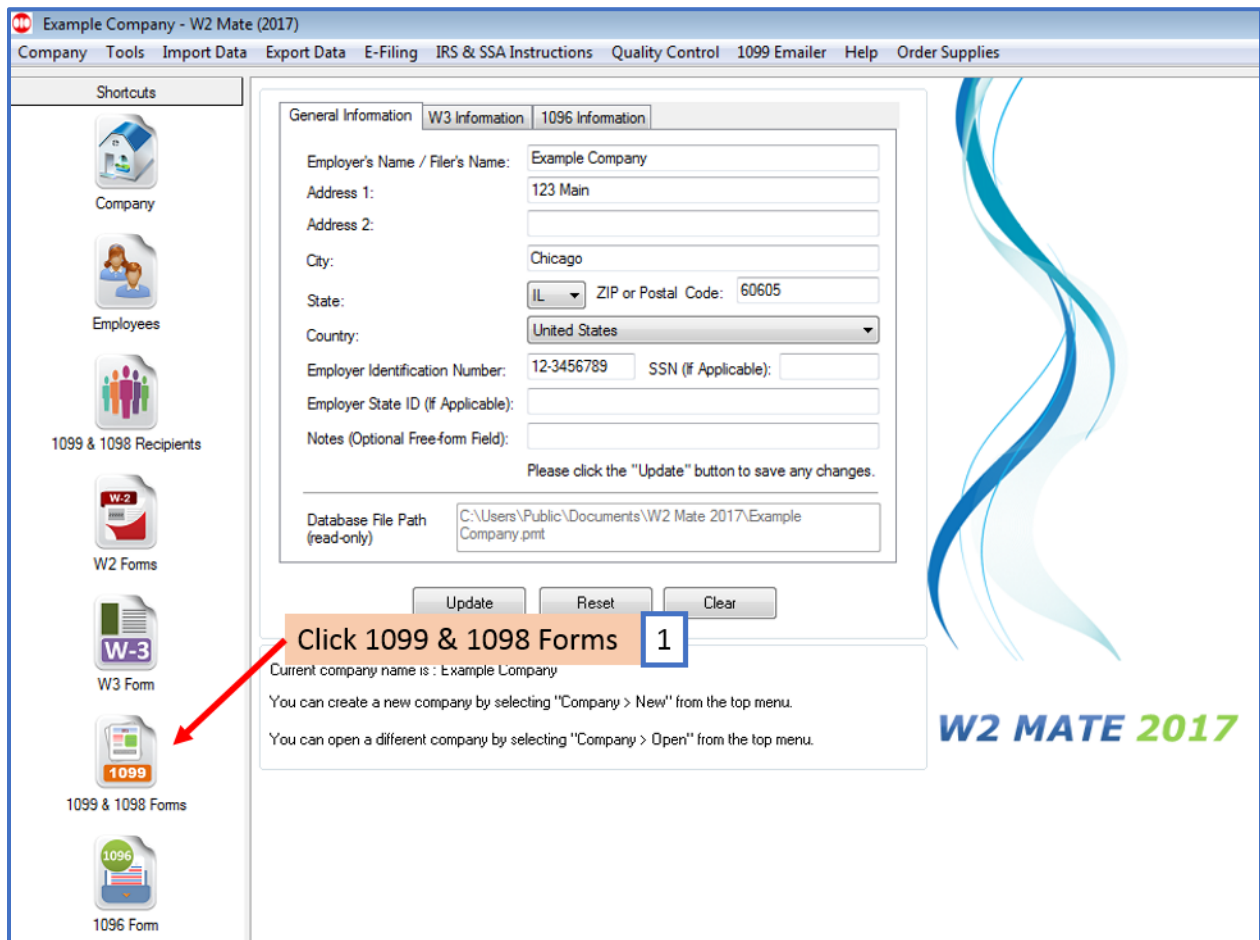


# How to Edit Data on a 1099-R Form

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 Emitter Help Order Supplies

Shortcuts

1099 Recipient Form 1099-R 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

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

Account number (see ins.)

1 Gross distribution 0.00  
2a Taxable amount 0.00  
2b Taxable amount not determined   
3 Capital gain (incl. in box 2a) 0.00  
5 Employee contribs./Desig. Roth contribs. or insurance premiums 0.00  
7 Distribution codes IRA/SEP...  8 Other % 0.00 0  
9a Your % of total distribution % 9b Total employee cont. 0.00  
12 State tax withheld 0.00 13 State / Payer's state number 14 State distribution 0.00  
15 Local tax withheld 0.00 16 Name of locality 17 Local distribution 0.00

2017 Form 1099-R

Total distribution

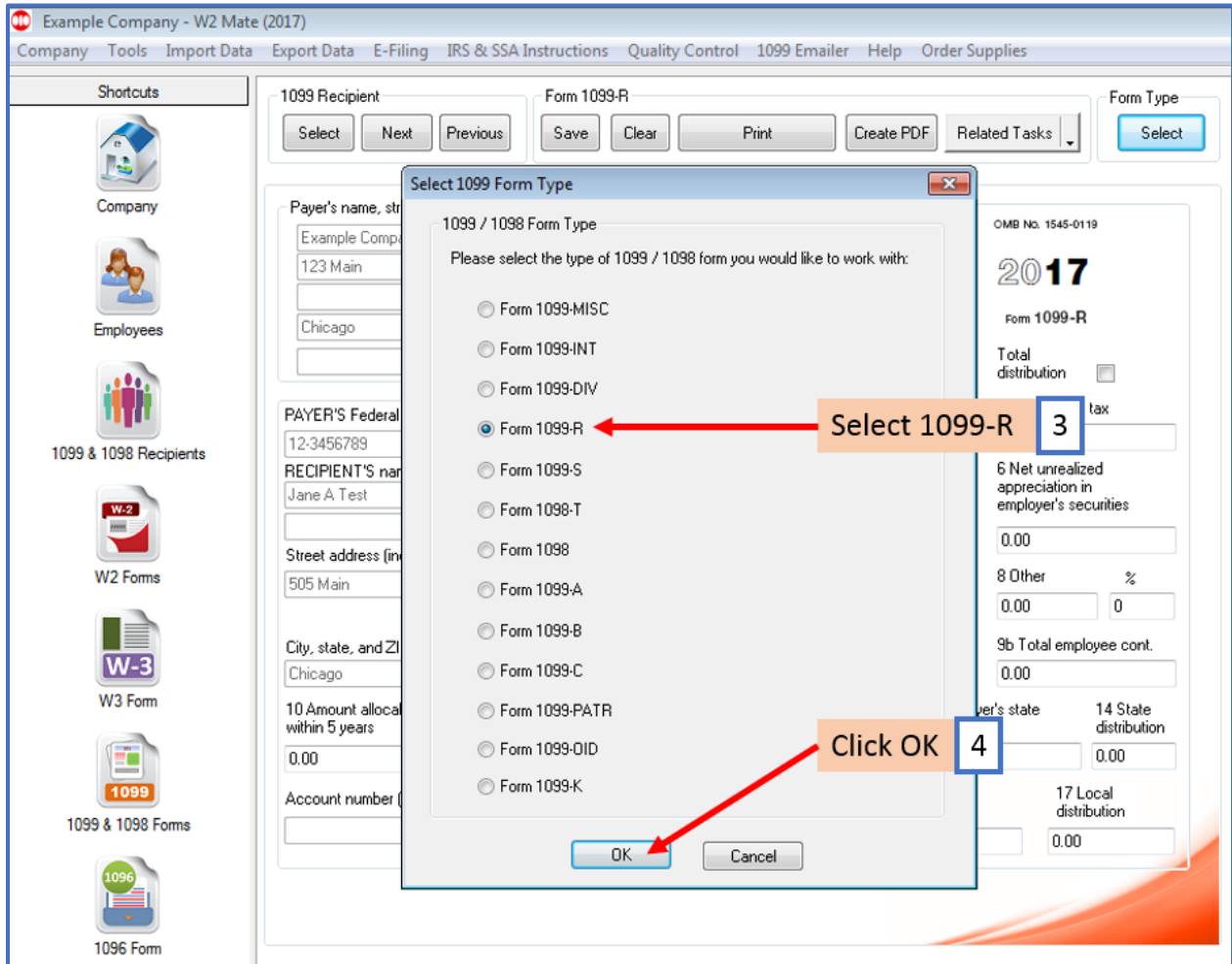
4 Fed income tax 0.00  
6 Net unrealized appreciation in employer's securities 0.00

Click Select 2

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

3. Select Form 1099-R

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 top 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", "W-3 Form", "1099 & 1098 Forms", and "1096 Form".

The main area is titled "1099 Recipient" and "Form 1099-R". 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. A blue box highlights the number "5" in the recipient list.

The recipient information is as follows:

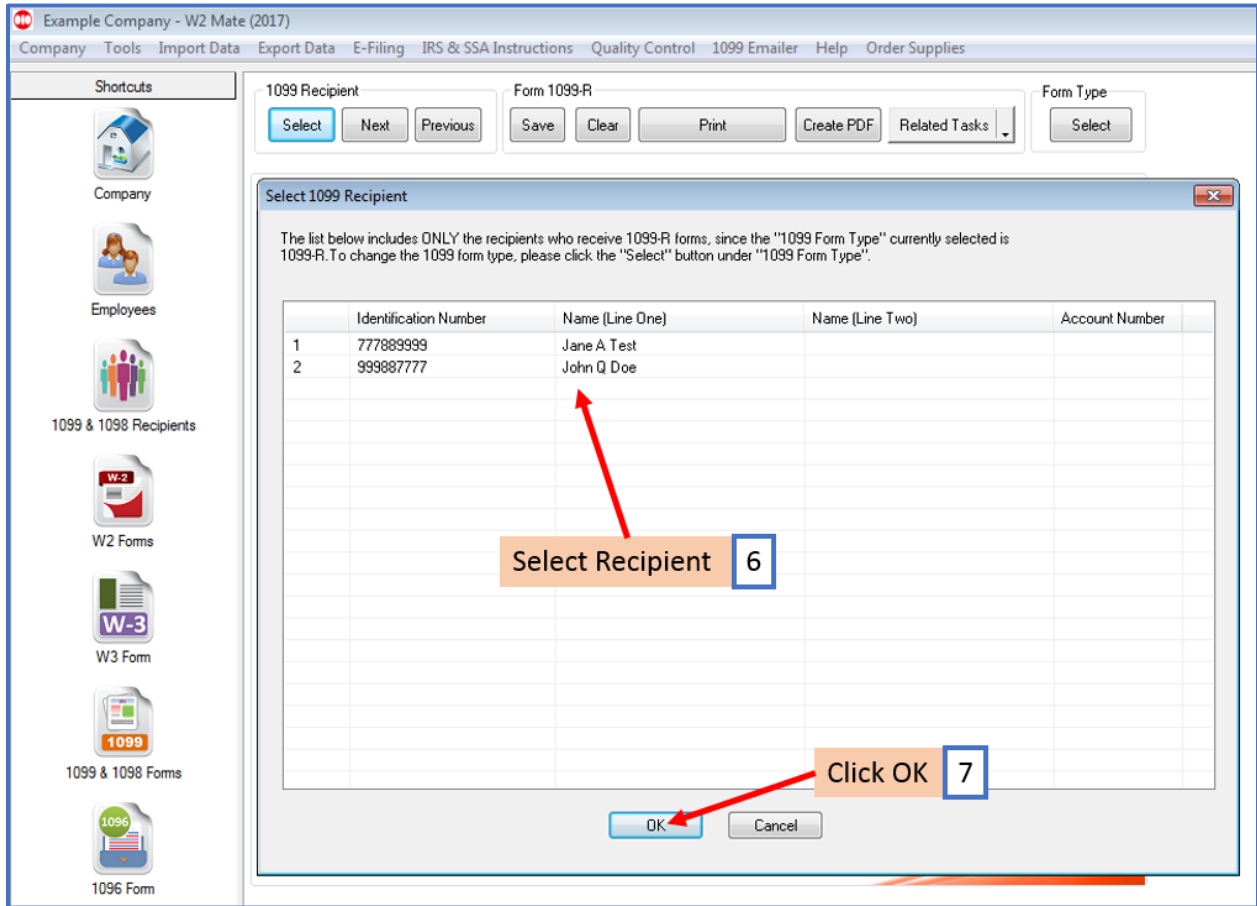
- Address: 123 Main, Chicago, IL 60605
- PAYER'S Federal ID number: 12-3456789
- RECIPIENT'S ID number: 777889999
- RECIPIENT'S name: Jane A Test
- Street address (including apt. no.): 505 Main
- City, state, and ZIP: Chicago, IL 60605
- 10 Amount allocable to IRR within 5 years: 0.00
- 11 1st year of desig. Roth contrib.: [empty]
- Account number (see ins.): [empty]

The right side of the form shows the distribution details for 2017:

- 1 Gross distribution: 0.00
- 2a Taxable amount: 0.00
- 2b Taxable amount not determined: [checkbox]
- 3 Capital gain (incl. in box 2a): 0.00
- 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: 0.00
- 7 Distribution codes: IRA/SEP... [checkbox]
- 8 Other: 0.00, 0
- 9a Your % of total distribution: [empty] %
- 9b Total employee cont.: 0.00
- 12 State tax withheld: 0.00
- 13 State / Payer's state number: [dropdown]
- 14 State distribution: 0.00
- 15 Local tax withheld: 0.00
- 16 Name of locality: [empty]
- 17 Local distribution: 0.00

6. Select Recipient

7. Click OK



The screenshot shows the W2 Mate software interface. On the left is a sidebar with shortcuts for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms, and 1096 Form. The main window title is 'Example Company - W2 Mate (2017)'. Below the title bar are menu items: Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, 1099 Emailer, Help, and Order Supplies. The main area has three tabs: '1099 Recipient', 'Form 1099-R', and 'Form Type'. The '1099 Recipient' tab is active, showing buttons for 'Select', 'Next', and 'Previous'. The 'Form 1099-R' tab shows buttons for 'Save', 'Clear', 'Print', 'Create PDF', and 'Related Tasks'. The 'Form Type' tab shows a 'Select' button. A dialog box titled 'Select 1099 Recipient' is open, displaying a table of recipients. The table has columns for Identification Number, Name (Line One), Name (Line Two), and Account Number. Two recipients are listed: Jane A Test and John Q Doe. A red arrow points from the 'Select Recipient' callout to the first row of the table. Another red arrow points from the 'Click OK' callout to the OK button at the bottom of the dialog.

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

8. Edit 1099-R Data as needed

9. Click Save

The screenshot shows the W2 Mate software interface for editing a 1099-R 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", "Printer", "Help", and "Order Supplies". The sidebar on the left contains shortcuts for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".

The main form area is titled "1099 Recipient" and "Form 1099-R". It contains the following fields:

- 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
- 10 Amount allocable to IRR within 5 years:** 0.00
- 11 1st year of desig. Roth contrib.:** (empty)
- Account number (see ins.):** (empty)

The right side of the form contains the distribution details:

- 1 Gross distribution:** 0.00
- 2a Taxable amount:** 0.00
- 2b Taxable amount not determined:** (checkbox)
- 3 Capital gain (incl. in box 2a):** 0.00
- 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:** 0.00
- 7 Distribution codes:** IRA/SEP... (checkbox)
- 8 Other %:** 0.00, 0
- 9a Your % of total distribution:** (empty) %
- 9b Total employee cont.:** 0.00
- 12 State tax withheld:** 0.00
- 13 State / Payer's state number:** (dropdown)
- 14 State distribution:** 0.00
- 15 Local tax withheld:** 0.00
- 16 Name of locality:** (empty)
- 17 Local distribution:** 0.00

Annotations on the screenshot include a red arrow pointing to the "Save" button with the text "Click Save" and a box around the number "9". Another red arrow points to the "Edit Data" button with the text "Edit Data" and a box around the number "8". The year "2017" is displayed prominently in the center of the form area.

10. Click Yes

The screenshot shows the W2 Mate (2017) software interface. A confirmation dialog box is overlaid on the form, asking "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 labeled "Click Yes 10" to the "Yes" button. The background form is for a 1099-R recipient, with fields for Payer's name (Example Company), address (123 Main, Chicago, IL 60605), Payer's Federal ID (12-3456789), Recipient's name (Jane A Test), and various distribution and tax fields. The form is titled "1099 Recipient" and "Form 1099-R".