

How to Print Form 1096

Note: W2 Mate will print the data on Red Pre-Printed IRS 1096 Form

Make sure you have the correct Company open inside W2 Mate

1. Click 1096 Form from Shortcuts
2. Click Select the type of 1099/1098 form

The screenshot shows the W2 Mate software interface for '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, a 'Shortcuts' sidebar contains icons for 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W3 Form', '1099 & 1098 Forms', and '1096 Form'. A red arrow points from the '1096 Form' icon to the '1096 Form' section of the main interface. The main interface has a 'Print' button and a 'Select type of 1099 form to be filed' button. A red arrow points from this button to a text box that says 'This 1096 form is intended to file form:'. Below this, there are two buttons: 'Click 1096 Form' (labeled with a blue box containing the number 1) and 'Click Select type of 1099 form to be filed' (labeled with a blue box containing the number 2). The form fields include: 'FILER'S name' (Example Company), 'Street address (including room or suite number)', 'City, state, and ZIP code' (Chicago, IL, 60605), 'Name of person to contact', 'Telephone number', 'E-mail address', 'Fax number', '1 Employer identification number' (12-3456789), '2 Social security number', '3 Total number of forms' (4), '4 Federal income tax withheld' (0.00), and '5 Total amount reported with this Form 1096' (0.00). There is a '1096 Box 5 Instructions' button. A note at the bottom states: 'PER IRS INSTRUCTIONS: 1096 Box 5 (Total amount reported with this Form 1096): This box includes the total of the amounts from SPECIFIC 1099 boxes and NOT from all boxes. For example form 1096 box 5 includes the totals for the following boxes ONLY 1099-MISC form: 1, 2, 3, 5, 6, 7, 8, 10, 13, and 14. No entry for 1096 Box 5 is required if you are filing Form 1098-T, 1099-A, or 1099-G. Please click on the "1096 Box 5 Instructions" button to learn more. You can also check form 1096 instructions.'

3. Select type of 1099/1098 form

4. Click OK

The screenshot shows the W2 Mate (2017) software interface. The main window has a menu bar with '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' panel with icons for 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W3 Form', '1099 & 1098 Forms', and '1096 Form'. The main area contains a 'FILER'S name' section with fields for 'Example Company', '123 Main', 'Chicago, IL', and 'E-mail address'. Below this are fields for '1 Employer identification number' (12-3456789) and '2 Social security number'. A note at the bottom states: 'PER IRS INSTRUCTIONS: 1096 Box 5 (Total from SPECIFIC 1099 boxes and NOT from all 1099-MISC form: 1, 2, 3, 5, 6, 7, 8, 10, 13, and 1099-G. Please click on the "1096 Box 5 Instructions" link.' A 'Select type of 1099 form to be filed' button is visible. A modal dialog box titled 'Select 1099 Form Type' is open, showing a list of form types: Form 1099-MISC (selected), Form 1099-INT, 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. A red arrow points to the 'Form 1099-MISC' option, labeled 'Select Form 3'. Another red arrow points to the 'OK' button, labeled 'Click OK 4'.

Example Company - W2 Mate (2017)

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

Print Select type of 1099 form to be filed

Note:
The data inside form 1096 gets automatically generated from the data in all the 1099 forms which you fill under the "1099 Forms" screen.

FILER'S name
Example Company
Street address (including room or suite number)
123 Main
City, state, and ZIP code
Chicago IL
Name of person to contact
E-mail address
1 Employer identification number 2 Social security number
12-3456789
PER IRS INSTRUCTIONS: 1096 Box 5 (Total from SPECIFIC 1099 boxes and NOT from all 1099-MISC form: 1, 2, 3, 5, 6, 7, 8, 10, 13, and 1099-G. Please click on the "1096 Box 5 Instructions" link.)

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

Select 1099 Form Type

1099 / 1098 Form Type
Please select the type of 1099 / 1098 form you would like to work with:

- ☒ Form 1099-MISC
- ☐ Form 1099-INT
- ☐ 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
- ☐ Form 1099-K

OK Cancel

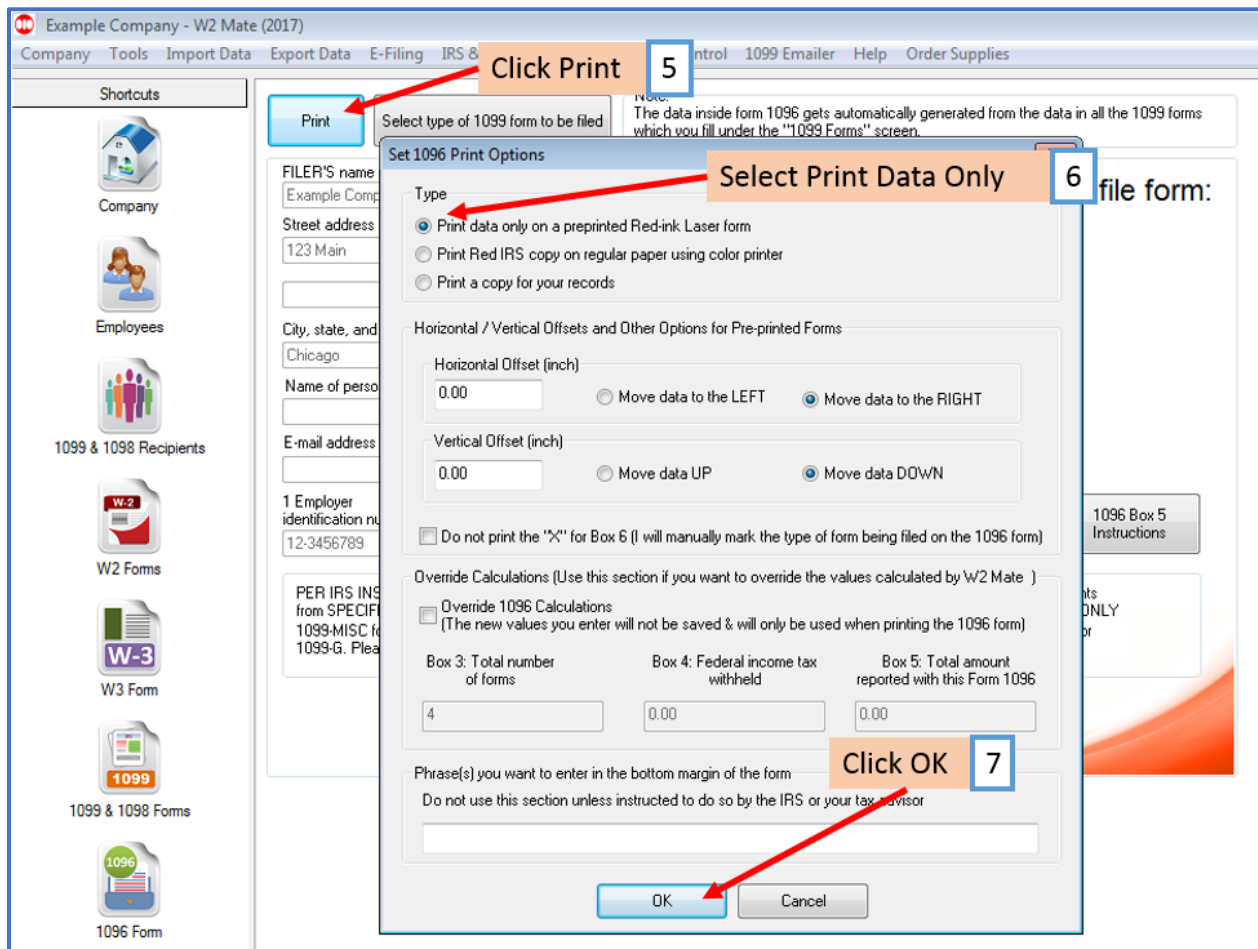
Select Form 3

Click OK 4

5. Click Print

6. Select Print Data Only

7. Click OK



8. Select Printer

9. Click OK

