

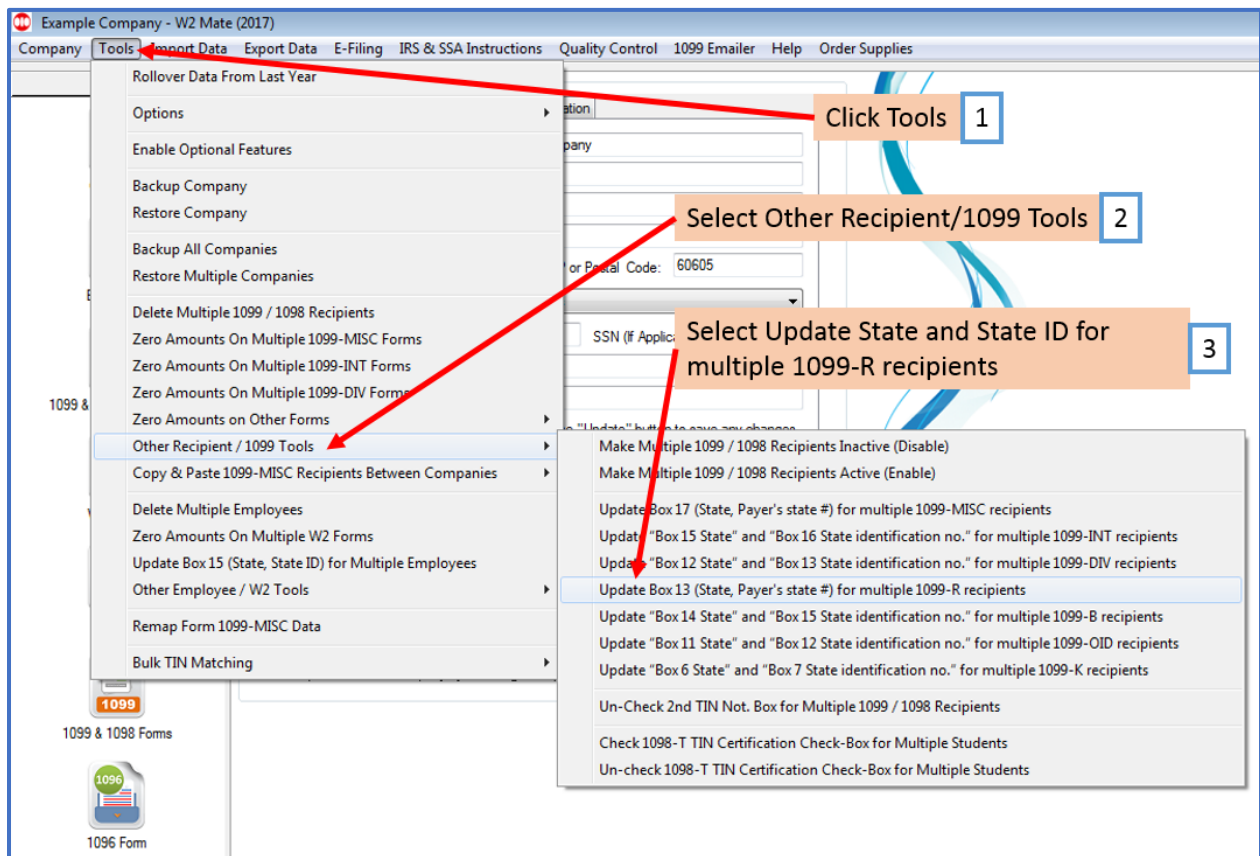
How to Update State and State ID for Multiple 1099-R Recipients

Make sure you have the correct Company open inside W2 Mate

Note: In order to use this feature you must purchase and enable W2 Mate Option #5 for Additional 1099 forms

1. Go to Tools
2. Select Other Recipient/1099 Tools
3. Select Update State and State ID for Multiple 1099-R Recipients

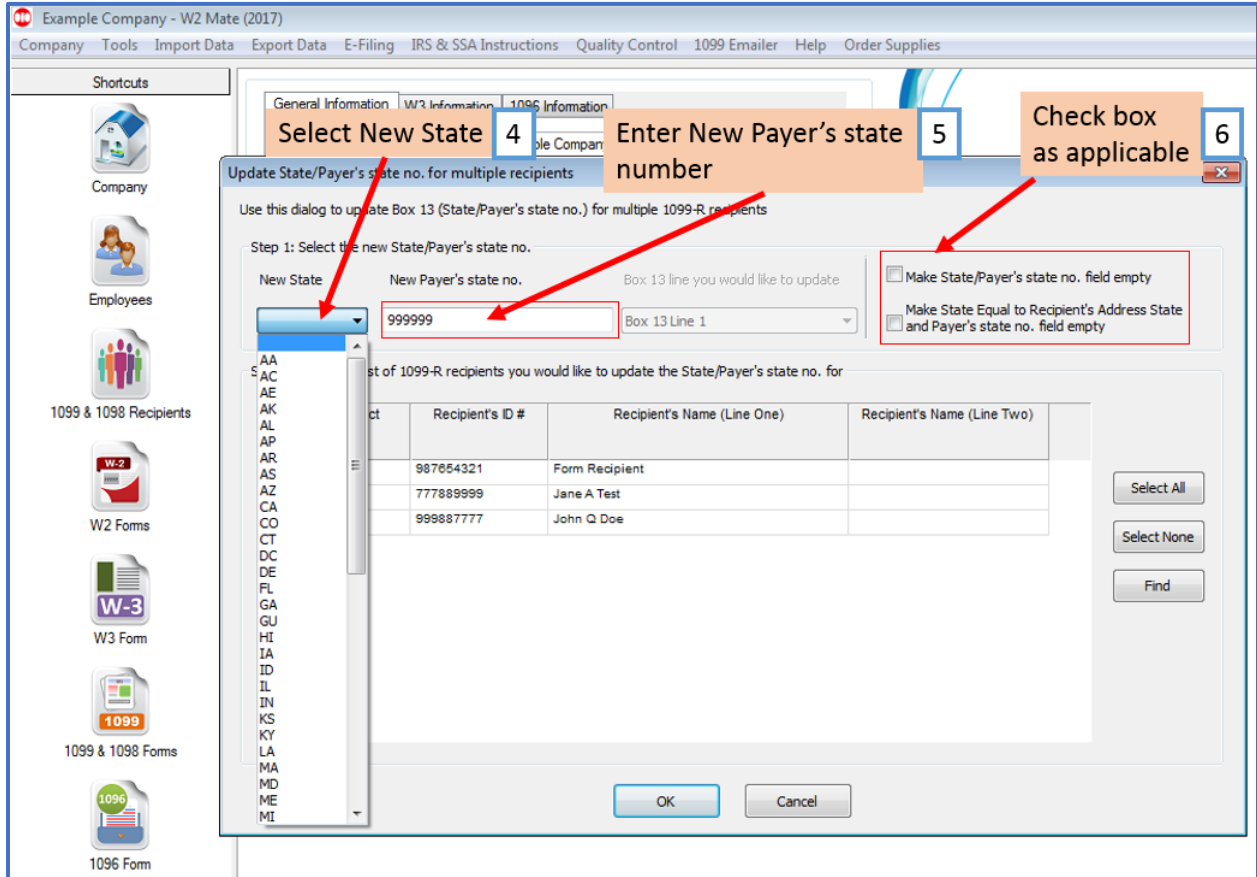
Note: The Box numbers used on the form are subject to change from year to year



4. Select New State from drop down menu

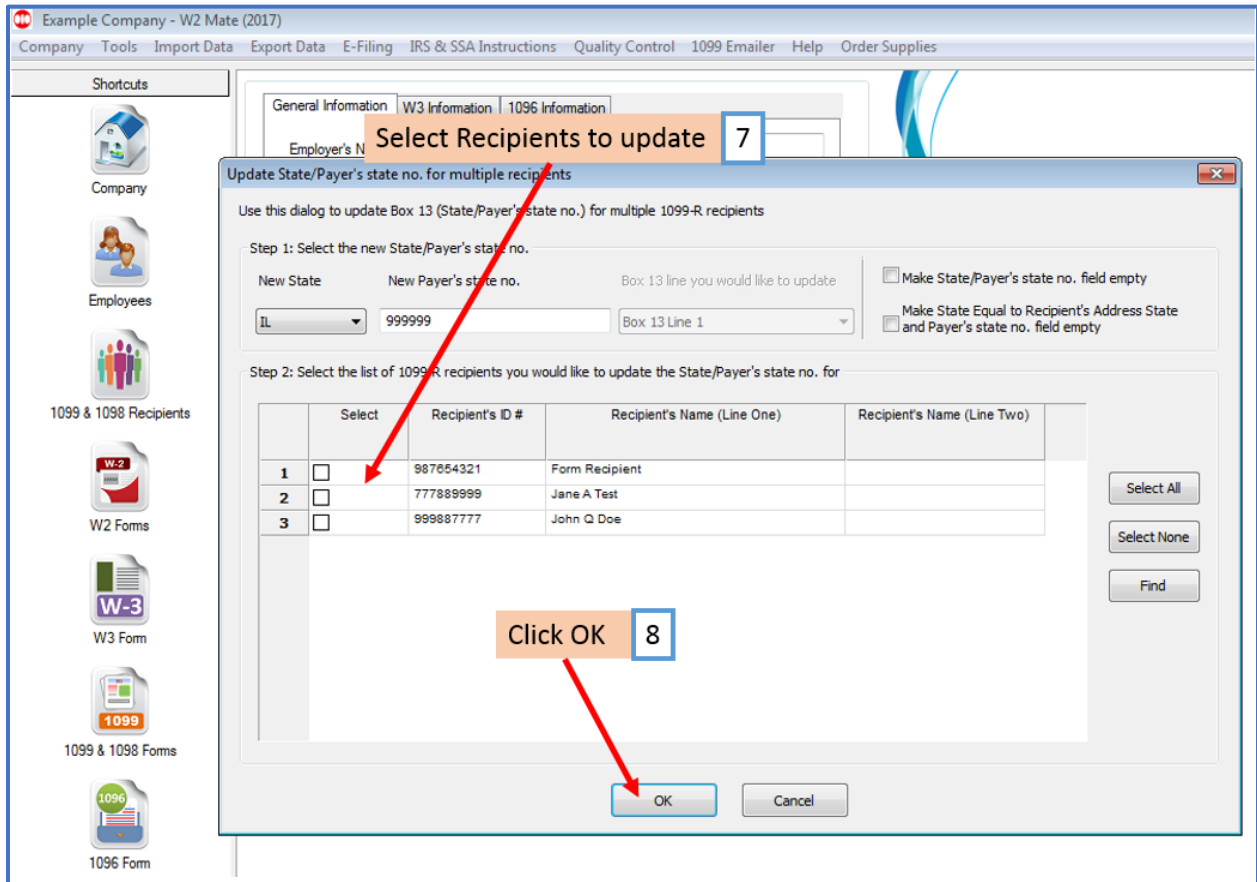
5. Enter New Payer's State Number

6. Check box as applicable



7. Select Recipients to update

8. Click OK



9. Click Yes

The screenshot displays the W2 Mate (2017) software interface. 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. A left sidebar contains "Shortcuts" for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms, and 1096 Form. The main content area has tabs for "General Information", "W3 Information", and "1096 Information". The "General Information" tab is active, showing fields for Employer's Name / Filer's Name (Example Company), Address 1 (123 Main), Address 2, City (Chicago), State (IL), ZIP or Postal Code (60605), and Country (United States). A modal dialog box titled "W2 Mate (2017)" is overlaid, displaying an information icon and the text: "You are about to update State/Payer's state no. for 2 recipients. Are you sure you want to continue?". Below the text are "Yes" and "No" buttons. A red arrow points from a callout box labeled "Click Yes 9" to the "Yes" button. The callout box is a blue-bordered rectangle with the text "Click Yes" in black and the number "9" in white inside a blue square. The "W2 MATE 2017" logo is visible in the bottom right corner of the software window.

10. Click OK

The screenshot displays the W2 Mate 2017 software interface. 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 E-mailer, Help, and Order Supplies. A left-hand sidebar contains "Shortcuts" for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms, and 1096 Form. The main content area is divided into tabs for "General Information", "W3 Information", and "1096 Information". The "General Information" tab is active, showing fields for Employer's Name / Filer's Name (Example Company), Address 1 (123 Main), Address 2, City (Chicago), State (IL), ZIP or Postal Code (60605), and Country (United States). A modal dialog box titled "W2 Mate (2017)" is overlaid on the main window, displaying a yellow warning icon and the message: "The State/Payer's state no. for one or more recipients has been updated successfully." An "OK" button is visible at the bottom right of the dialog box. A red arrow points from a callout box labeled "Click OK" and "10" to the "OK" button. Below the dialog box, the main window displays the text: "Current company name is : Example Company", "You can create a new company by selecting 'Company > New' from the top menu.", and "You can open a different company by selecting 'Company > Open' from the top menu." The "W2 MATE 2017" logo is located in the bottom right corner of the software window.