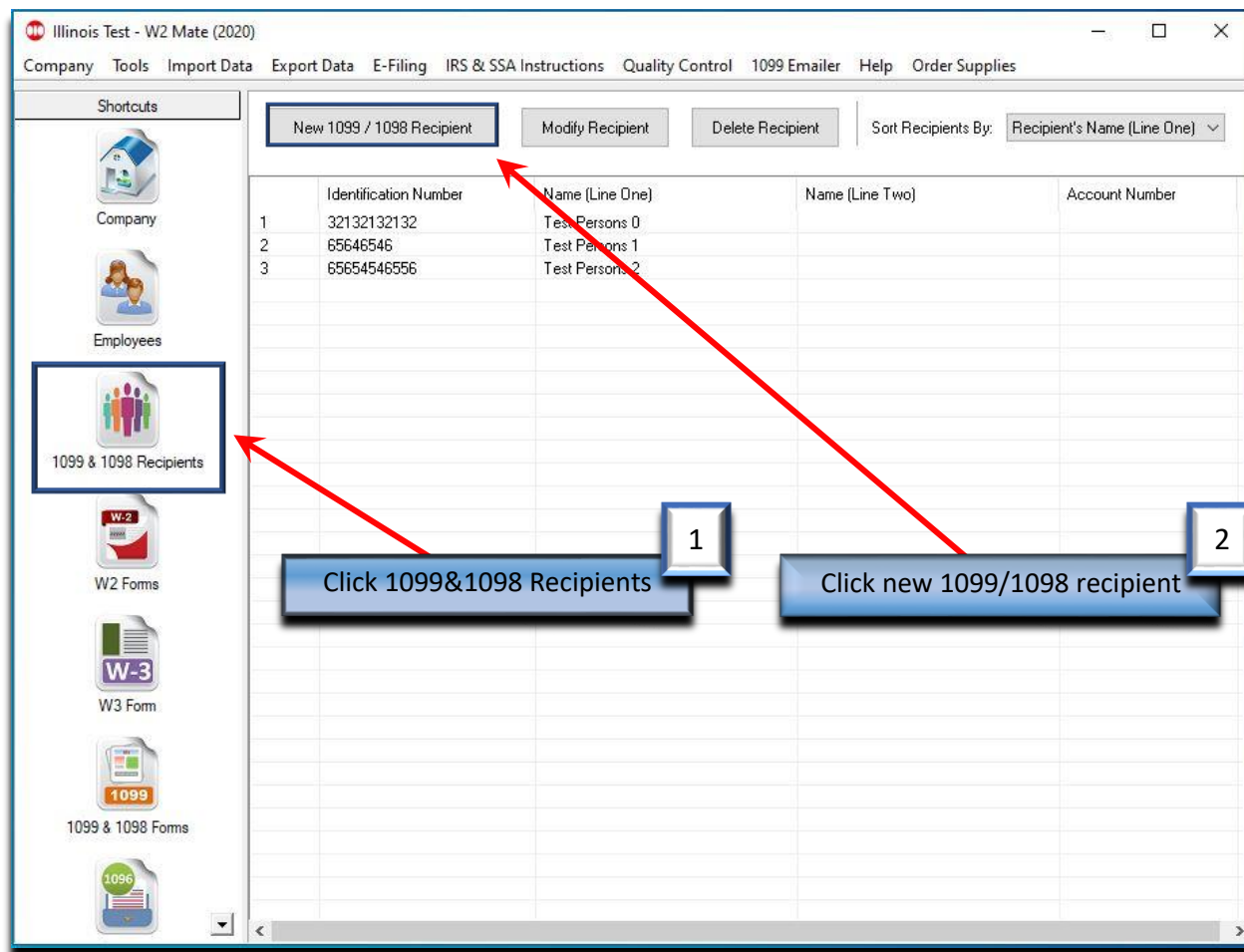


# How to Create, Populate and Print 1099-NEC Forms

Make sure you have the correct Company open inside W2 Mate

1. Click 1099 & 1098 Recipients in shortcut
2. Click New 1099/1098 Recipient



3. Choose Form 1099-NEC and/ or 1099 MISC

4. Select 1099-NEC only

Illinois Test - W2 Mate (2020)

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

New 1099 / 1098 Recipient

General

Recipient's Tax ID (such as SSN / EIN) 14564565

Types of 1099 / 1098 Forms Received

- Form 1099-NEC and / or 1099-MISC
- Form 1099-NEC and / or 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

1099-NEC and / or 1099-MISC

Use 1099-NEC Only

Use 1099-NEC and 1099-MISC

Use 1099-NEC Only

Use 1099-MISC Only

optional, use if you need to

2nd TIN not

Name

Recipient Name Line One (Example: John Doe) Johnny

Address

Address 1 333 fresh drive

Address 2 (only used when "Types of 1099 / 1098 Forms Received" is set to "Form 1099-INT")

City lenox State IL Zip code 60464 Foreign Country  Non-US Address

Common 1099-NEC / 1099-MISC Payments

1099-NEC Box 1 - Nonemployee compensation 0.00

1099-MISC Box 1 - Rents: 0.00

Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]

OK Cancel

3 Select form 1099 NEC form and/or 1099 MISC

4 Choose accordingly

5. Enter New Recipient information

6. Click OK

Enter new recipient information **5**

Illinois Test - W2 Mate (2020)

Company Tools Import Data Export Data E Filing IRS & SSA Instructions Quality Control 1099 Emitter Help Order Supplier

**New 1099 / 1098 Recipient**

General

Recipient's Tax ID (such as SSN / EIN)

Types of 1099 / 1098 Forms Received  Form 1099-NEC and / or 1099-MISC

1099-NEC and / or 1099-MISC Use 1099-NEC and 1099-MISC

2nd TIN not.

Name

Recipient Name Line One (Example: John Doe)

Recipient Name Line Two (optional, use if you need to)

Account # (optional)

Address

Address 1

Address 2 (only used when "Types of 1099 Forms Received" is "Form 1099-MISC")

City  State  Zip code  Foreign Country  Non-US Address

Email Address (Optional)

This field is useful if you want to bulk email 1099s using "1099 Emitter" software.

What is 1099 Emitter?

Common 1099-NEC / 1099-MISC Payments

The boxes below can be used to enter common amounts reported on form 1099-NEC / 1099-MISC. Use the "1099 & 1098 Forms" screen, if you need to report / edit any other amounts on form 1099-NEC, 1099-MISC or any other form such as 1099-INT.

1099-NEC Box 1 - Nonemployee compensation

1099-MISC Box 1 - Rents:

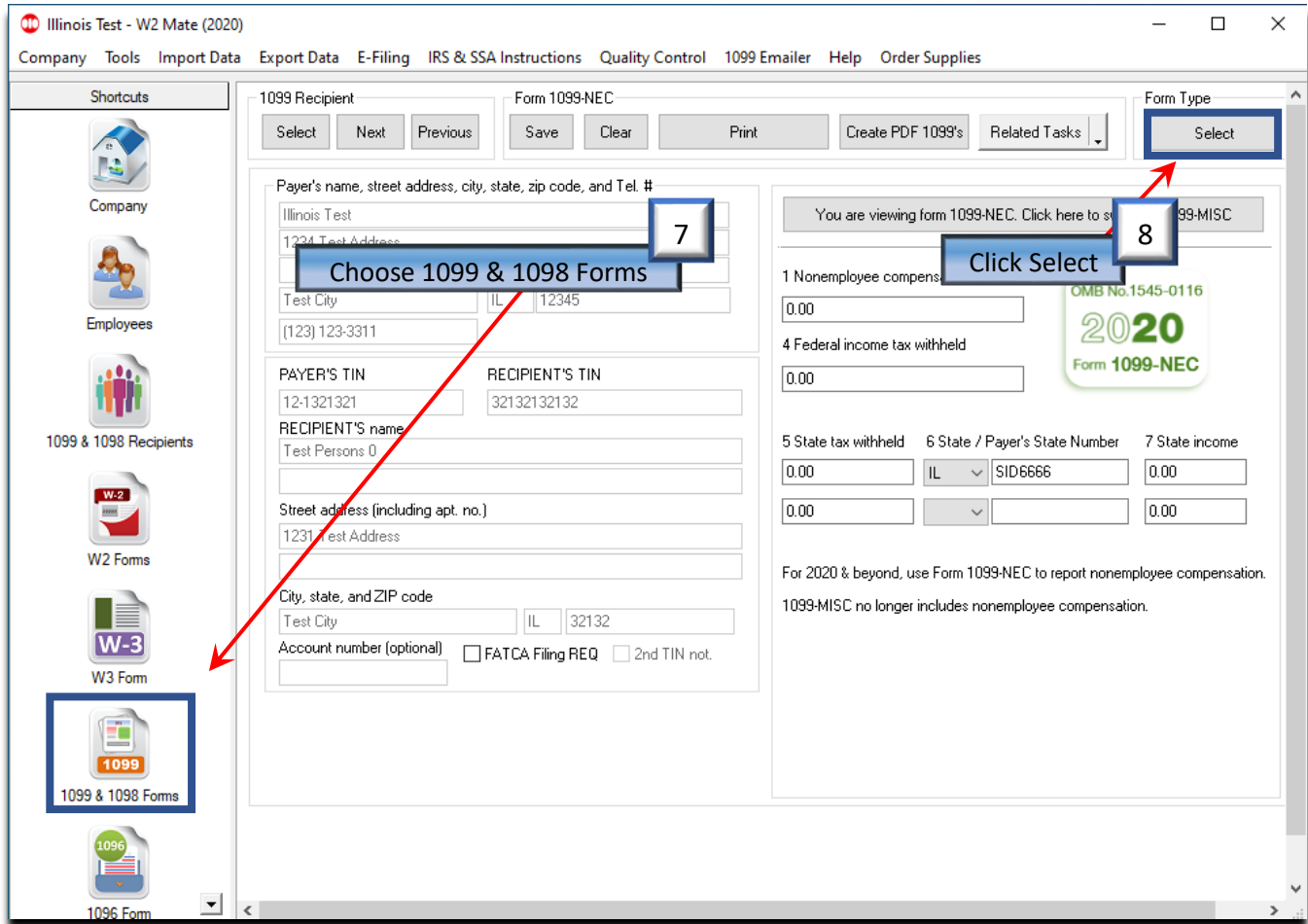
Click OK **6**

Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]

OK Cancel

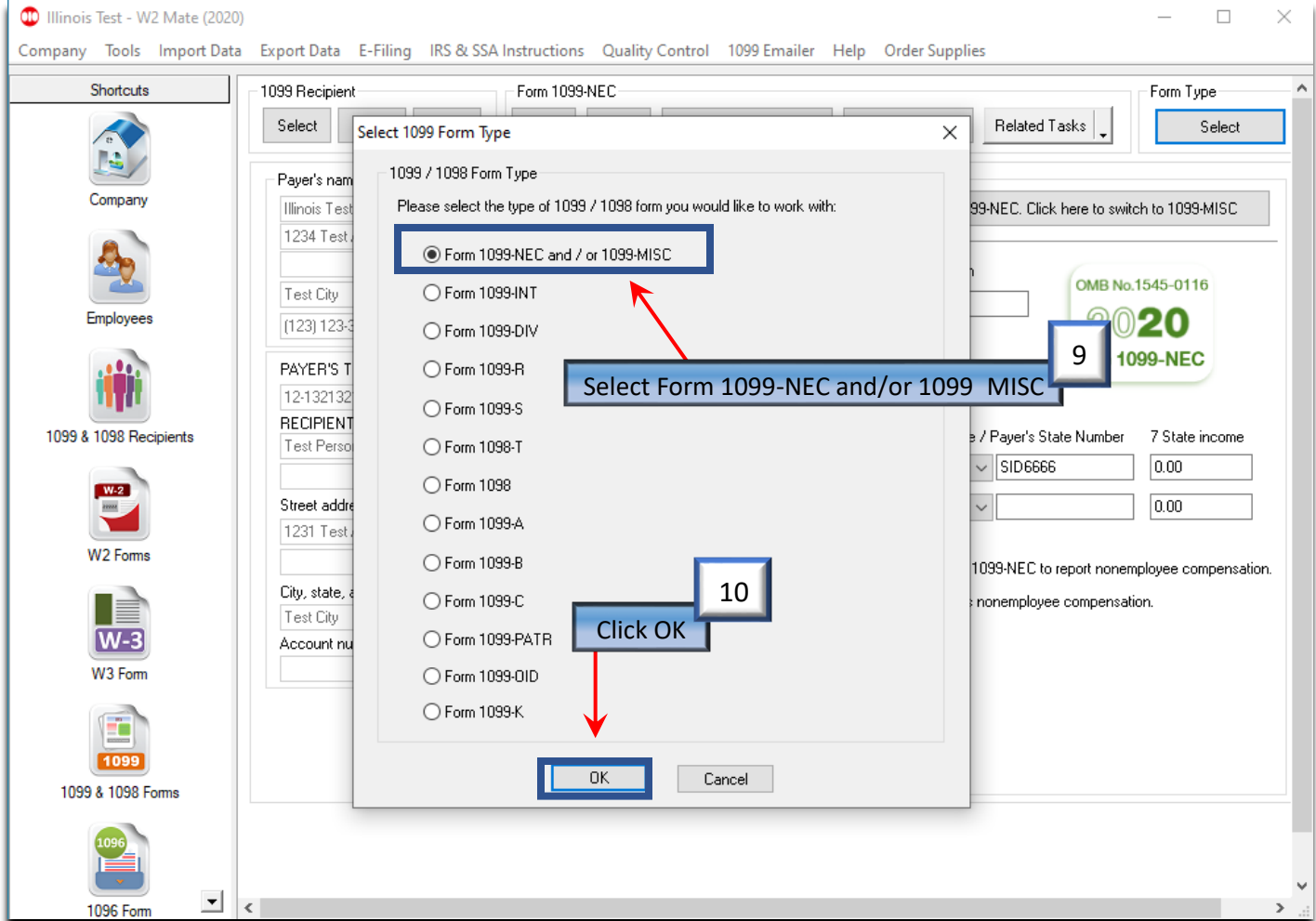
7. Choose 1099 & 1098 Forms in shortcuts

8. Click Select under form type



9. Select Form 1099-NEC and/or 1099 MISC

10. Click OK



11. Click Button to switch between 1099-NEC and 1099-MISC if applicable

The screenshot shows the W2 Mate software interface for the 2020 tax year. The main window is titled "Illinois Test - W2 Mate (2020)". The top menu includes "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", and "1096 Form".

The main area is titled "1099 Recipient" and "Form 1099-NEC". It contains several input fields for recipient information, including name, address, city, state, zip code, and telephone number. There are also fields for Payer's TIN and Recipient's TIN.

On the right side, there are fields for "1 Nonemployee compensation" and "4 Federal income tax withheld", both set to 0.00. Below these are fields for "5 State tax", "6 State / Payer's State Number" (set to IL), and "7 State income" (set to 0.00). A callout box labeled "11" points to the "6 State / Payer's State Number" field.

A blue callout box at the top right of the form area contains the text: "You are viewing form 1099-NEC. Click here to switch to 1099-MISC".

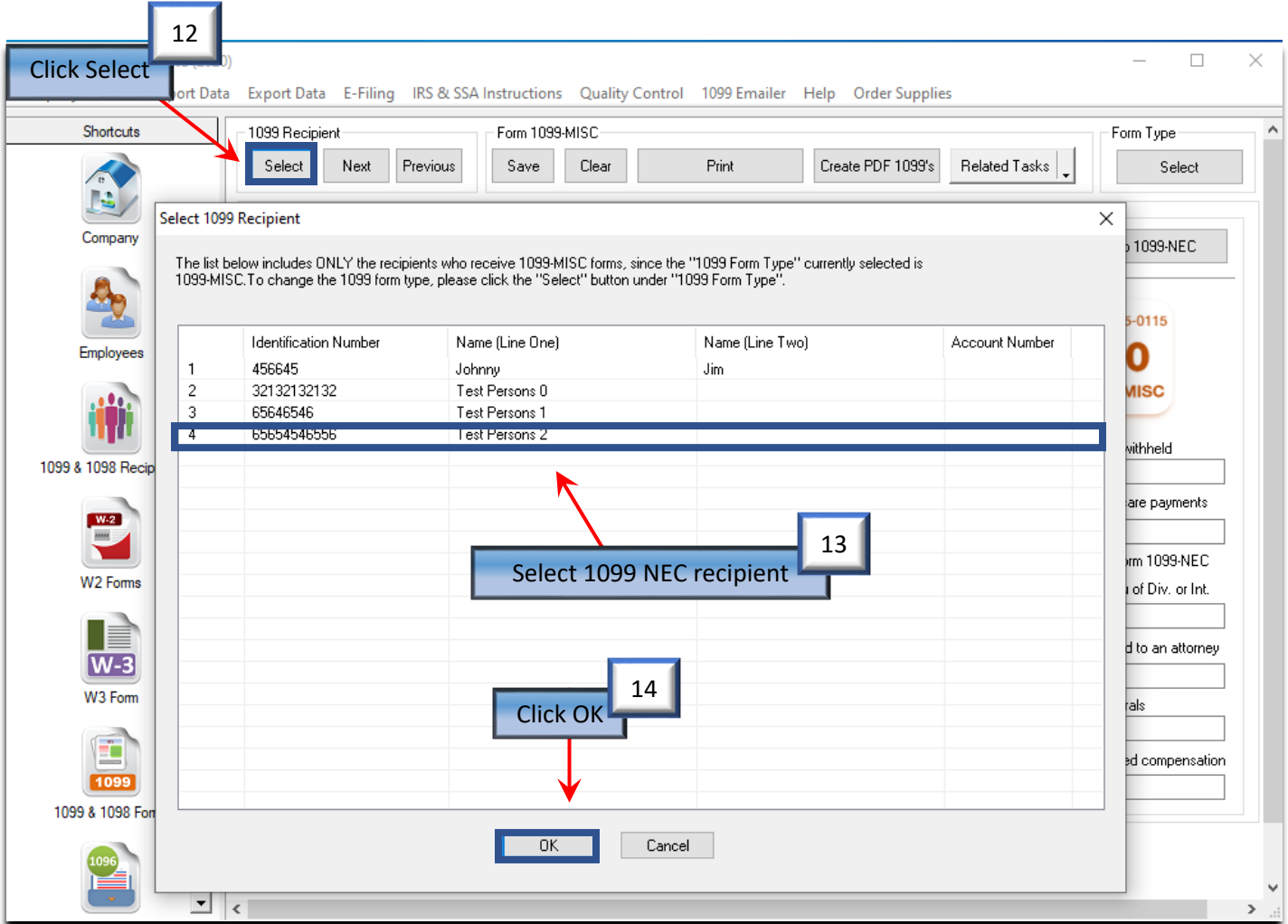
A blue callout box at the bottom of the form area contains the text: "Click to switch between 1099-NEC and 1099-MISC if applicable".

At the bottom right, there is a note: "For 2020 & beyond, use Form 1099-NEC to report nonemployee compensation. 1099-MISC no longer includes nonemployee compensation."

12. Click Select under Recipient

13. Select 1099-NEC Recipient

14. Click OK



15. Fill in recipient(s) amounts

16. Click Save

\*Note: Repeat this step for all other recipients you have added \*

The screenshot shows the W2 Mate software interface for entering a 1099-NEC form. The window title is "Illinois Test - W2 Mate (2020)". The top menu includes "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 Emailer", "Help", and "Order Supplies".

On the left sidebar, there are shortcuts 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-NEC". It contains several input fields and buttons:

- Buttons:** "Select", "Next", "Previous", "Save" (highlighted with a blue box and a callout "16" with the text "Click Save"), "Clear", "Print", "Create PDF 1099's", "Related Tasks" (dropdown), and "Form Type" (dropdown).
- Form Fields:**
  - Payer's name, street address, city, state, zip code, and Tel. #:** "Illinois Test", "1234 Test Address", "Test City", "IL", "12345", "(123) 123-3311".
  - PAYER'S TIN:** "12-1321321"
  - RECIPIENT'S TIN:** "456645"
  - RECIPIENT'S name:** "Johnny"
  - Street address (including apt. no.):** (empty)
  - City, state, and ZIP code:** (empty)
  - Account number (optional):** (empty)
  - Checkboxes:** "FATCA Filing REQ" (unchecked), "2nd TIN not" (unchecked).
- Right Panel (Form 1099-NEC):** A box titled "You are viewing form 1099-NEC. Click here to switch to 1099-MISC" contains the following fields:
  - 1 Nonemployee compensation:** "456.00"
  - 4 Federal income tax withheld:** "456.00"
  - 5 State tax withheld:** "56"
  - 6 State / Payer's State Number:** "IL"
  - 7 State income:** "SID6666", "0.00"

Annotations include a blue box labeled "15" with the text "Fill out information" pointing to the "Related Tasks" dropdown, and a blue box labeled "16" with the text "Click Save" pointing to the "Save" button.



17. Click Print

18. Select Recipients

19. Select Print a recipient/ payer copy and choose a copy from the drop down

Note: To print a Recipient /Payer copy on blank paper choose the copy to print from the drop-down menu To print the data on the preprinted IRS red form chose Print DATA Only

20. Click OK

The screenshot shows the 'Print 1099 Forms' dialog box in the W2 Mate software. The dialog is divided into three steps:

- Step 1:** A table for selecting recipients to print. Callout 17 points to the 'Print' button in the main software window. Callout 18 points to the first row in the table, with a text box saying 'Select recipient'.
- Step 2:** Selection of the form copy type. Callout 19 points to the dropdown menu where 'Print a recipient / payer copy' is selected. A text box says 'Select Print a recipient/ payer copy and choose a copy from the drop down'. Callout 20 points to the 'OK' button.
- Step 3:** Printing options for pre-printed forms, including horizontal/vertical offsets and spacing.

Select	Recipient's ID #	Recipient's Name (Line One)	Recipient's Name (Line Two)
<input checked="" type="checkbox"/>	456645	Johnny	Jim
<input type="checkbox"/>	32132132132	Test Persons 0	
<input type="checkbox"/>	65646546	Test Persons 1	
<input type="checkbox"/>	65654546556	Test Persons 2	

21. Select the correct printer

22. Click OK

