

How to Edit Data on a 1099-NEC Form

Make sure you have the correct Company open inside W2 Mate

1. Click 1099 & 1098 Forms from the Shortcuts menu

Illinois Test - W2 Mate (2020)

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

General Information W3 Information 1096 Information

Employer's Name / Filer's Name: Illinois Test

Address 1: 1234 Test Address

Address 2:

City: Test City

State: IL ZIP or Postal Code: 12345

Country: United States

Employer Identification Number: 12-1321321 SSN (If Applicable):

Employer State ID (If Applicable): SID6666

Notes (Optional Free-form Field):

Please click the "Update" button to save any changes.

Database File Path (read-only) C:\Users\Public\Documents\W2 Mate 2020\Illinois Test.pmt

Update Reset Clear

Current company: Click 1099 & 1098 Forms 1

You can create a new company by selecting "Company > New" from the top menu.

You can open a different company by selecting "Company > Open" from the top menu.

W2 MATE 2020

2. Click Select under Form Type

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1099 Recipient Form 1099-NEC Form Type

Select Next Previous Save Clear Print Create PDF 1099's Related Tasks Select

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.)
City, state, and ZIP code
Account number (optional) FATCA Filing REQ 2nd TIN not.

You are viewing form 1099-NEC. Click here to switch to 1099-MISC

1 Nonemployee compensation 456.00

4 Federal income tax withheld 456.00

5 State tax withheld 56.00 6 State / Payer's State Number IL SID6666 7 State income 0.00

0.00 0.00

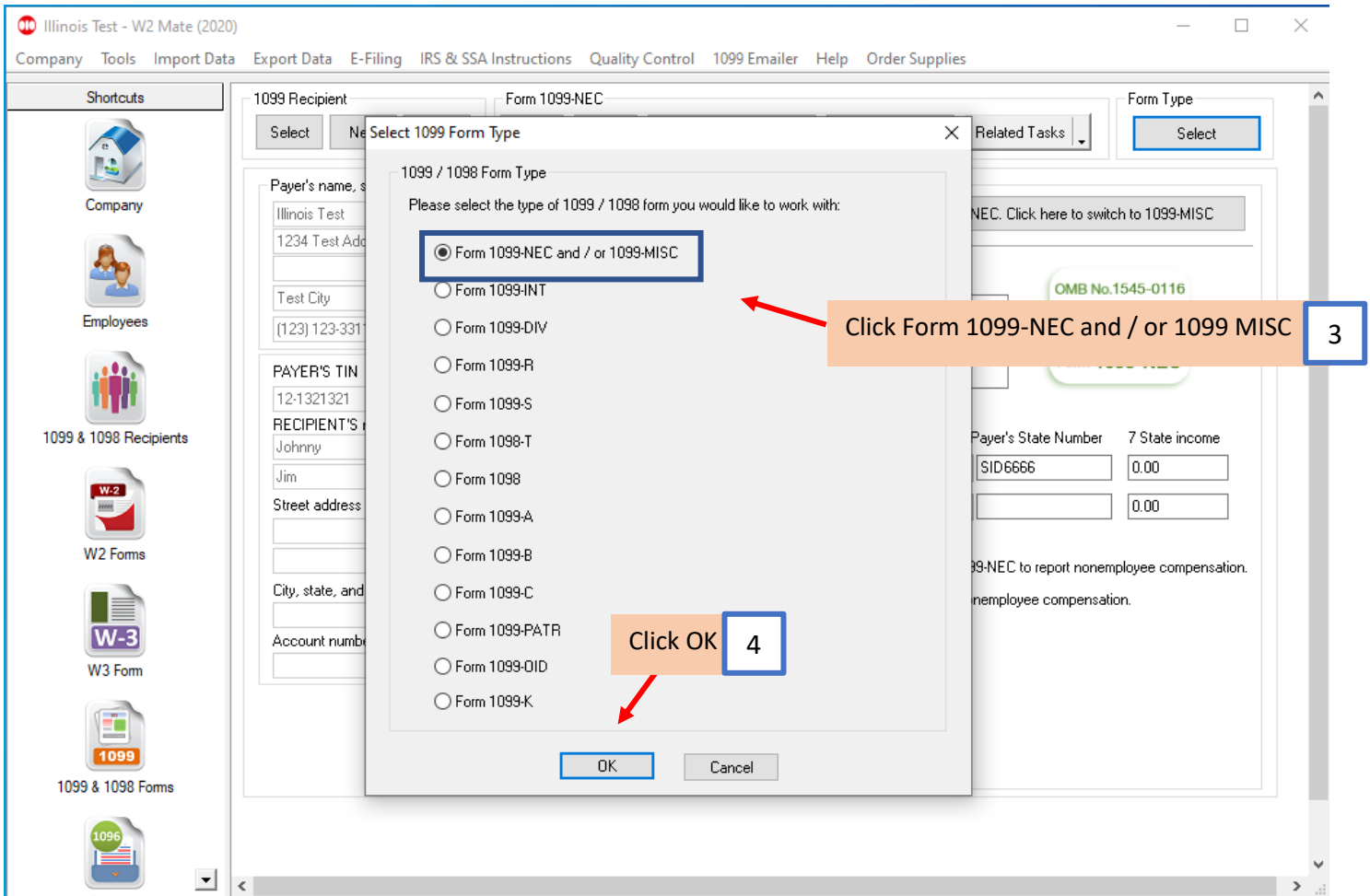
For 2020 & beyond, use Form 1099-NEC to report nonemployee compensation. 1099-MISC no longer includes nonemployee compensation.

OMB No.1545-0116
202 Form 1099

Click Select 2

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

4. Click OK



5. 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 window title is "Illinois Test - W2 Mate (2020)". The main 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 & 1098 Forms", and "1096 Form".

The main content 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.

At the top right of the form area, there is a "Form Type" section with a "Select" button. A blue box highlights a button labeled "5" with the text "Click to switch between 1099-NEC and 1099-MISC if applicable" overlaid on it. A red arrow points from this button to a text box that says "You are viewing form 1099-NEC. Click here to switch to 1099-MISC".

The form displays the following data:

- 1 Nonemployee compensation: 0.00
- 4 Federal income tax withheld: 0.00
- 5 State tax withheld: 0.00
- 6 State / Payer's State Number: IL
- 7 State income: 0.00

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."

6. Click Select under 1099 Recipient

7. Select Recipient

8. Click OK

The screenshot shows the 'Select 1099 Recipient' dialog box in the W2 Mate software. The dialog box contains a table with the following data:

| | Identification Number | Name (Line One) | Name (Line Two) | Account Number |
|---|-----------------------|-----------------|-----------------|----------------|
| 1 | 241-74-7411 | John Doe | | 5455 |
| 2 | 456645 | Johnny | Jim | |

Annotations in the image indicate the following steps:

- 6**: Click the 'Select' button under the '1099 Recipient' section in the main window.
- 7**: Select a recipient from the table in the dialog box.
- 8**: Click the 'OK' button at the bottom of the dialog box.

9. Edit 1099-NEC Data as needed

10. Click Save

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1099 Recipient Form 1099-NEC

Select Next Previous **Save** Clear Print Create PDF 1099's Related Tasks Select

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Payer's name, street address, city, state, zip code, and Tel. #

Illinois Test
1234 Test Address
Test City IL 12345
(123) 123-3311

Click Save 10

PAYER'S TIN 12-1321321 RECIPIENT'S TIN 241-74-7411

RECIPIENT'S name John Doe

Street address (including apt. no.)
65 Roes Rd.
Suite 100

City, state, and ZIP code Julie SC 52121

Account number (optional) 5455 FATCA Filing REQ 2nd TIN not.

You are viewing form 1099-NEC. Click here to switch to 1099-MISC

1 Nonemployee compensation 7421.30

4 Federal income tax withheld 55.40

5 State tax withheld 15.10 6 State / Payer's State Number IL 2851417 7 State income 6422.30

0.00 0.00

OMB No.1545-0116
2020
Form 1099-NEC

For 2020 & beyond, use Form 1099-NEC to report nonemployee compensation. 1099-MISC no longer includes nonemployee compensation.

10. Click Yes

The screenshot shows the W2 Mate (2020) software interface. A confirmation dialog box is open in the center, asking "Are you sure you want to save the current fields?". The dialog box has a yellow warning icon and two buttons: "Yes" and "No". The "Yes" button is highlighted with a blue box. A red arrow points from a blue box containing the number "10" to the "Yes" button. Below the arrow is a text box that says "Click Yes". The background shows the main form for Form 1099-NEC, with fields for Payer's name, address, and recipient information. The software title bar reads "Illinois Test - W2 Mate (2020)".