Printing 1099 Data

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Accessing and Preparing 1099 Module Forms for Printing

Accessing the Print Features:

The **Print Menu** on the main **"Form 1099 - Year"** screen is where users select printing options and print forms. This menu is organized into three columns: **IRS Copies**, **Other Copies**, and **Reports**.

Selecting Payees for Printing

- **Payee Selection:**
  Only Payees selected under **"Select Payees"** in the "Edit Payees" box will be included in the print job.
  - If fewer Payees are selected than the total participant count, not all Payee copies will be printed.

- **Printing and Mailing Forms:**
  If forms will be printed and mailed by the user, access the **Print Menu** on the main **1099-X - Year** screen. Alternatively, users can utilize the ftwilliam.com **Fulfillment Service.** for printing, mailing, and e-filing.

- **Ordering Special Paper:**
  If printing is handled in-house, specialized paper is required for different copies. For paper needs, Nelco Solutions is recommended.

Additional Menu Features

At the top of the **Print Menu**, two links offer further customization:

- **Print Options:**
  - Adjust print margins to ensure alignment with Copy 1096 and Copy A.
  - Test print on blank paper and compare against the special red paper before final printing. Adjust margins as needed within **Print Options**.

- **TIN Masking:**
  - Enable TIN Masking (hides all but the last 4 digits of the Payee's SSN) for **Other Copies** (Copy B, Copy C, and Copy 2).
  - **Note**: Only **Designated Admin Users** can enable global TIN Masking.

Forms/Paper for printing

If users are printing and mailing the forms, then users should do this from the "Print Menu" on the main "1099-X - Year" screen of the website. See below for information on the ftwilliam.com Fulfillment Service. ftwilliam.com can do the printing, mailing and e-filing for users. **Note:** If users are doing the printing, users generally want to order special paper for the different copies; we recommend Nelco Solutions for paper needs.

Printing Form 1096

Users need to print these returns on '1-up' preprinted paper. This is obtainable from Nelco Solutions, a vendor that ftwilliam.com works with. Users should feel free to use other vendors. Before printing copies of Form 1096, it is necessary to check the printer. Every printer is different, and it's important that the printer is aligned correctly before users begin to print multiple forms. First, ftwilliam.com suggests reviewing Aligning Your Printing above.

Then, users should click on the "1096 Single" in the "Print Menu" box. This will produce a blank Form 1096 just containing the payer data. It is a good idea to test print on blank paper and hold it up to the special red paper for the Copy 1096 before actually printing on the special red paper. Users can make adjustments in "Print Options" until the alignment is correct.

Printing Copies of Form 1099

Users can print copies of Form 1099-R for the payee (Copy C), and for filing with state (Copy 2) and federal (Copy B) taxes. Users should print these on '3-up' blank perforated paper. Click on "Copy B/C/2 (Blank)". Put the '3-up' blank perforated paper in the printer and print the copies. Users should also print the Recipient Instructions, either on the back or separately, and mail with the Copy B/C/2.

Note: Copy 1 will not be available unless users have entered a state in box 15 of the draft 1099-R within the "Edit Payees" box. Also, when users click to print a final form, account numbers will automatically be added to the form if they have not already been added by the user.