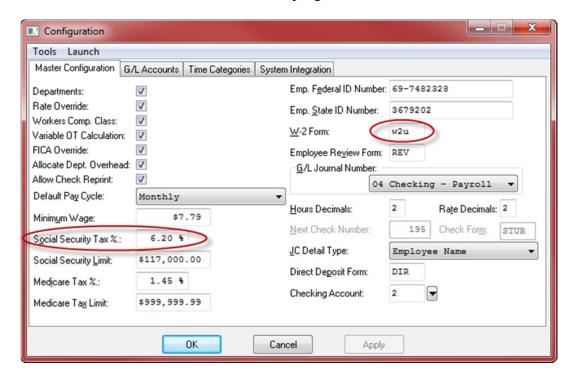


1099 and W2 Tax Form Tips and Instructions for 2013

(Effective January 1, 2014)

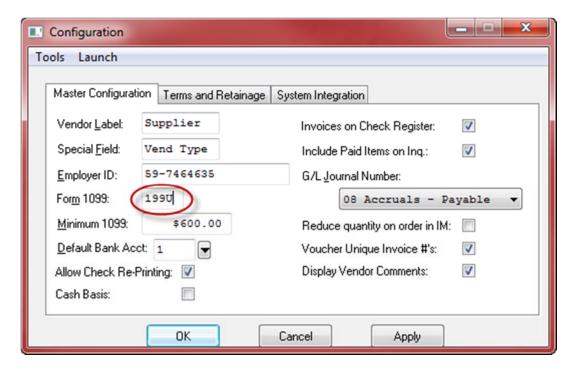
This document outlines the various forms that can be used to print W-2s in the Infinity POWER Payroll module and 1099s in the Accounts Payable module. There are a wide variety of form files that can be used depending on your specific needs. Make sure you have set your Master Configuration properly before attempting to print either set of documents.

To configure the proper form name in the **Payroll** module, go to the Windows Graphical Version (**GUI**) of Payroll by selecting "**Systems**," "**Payroll**," "**Set Up and Maintenance**," and "**Payroll Configuration**" as shown below. Make sure you are in the latest version of the **Infinity POWER** software (**Version 7.4 or Version 7.3**). You will enter the desired "**W-2 Form**" name at the top right of the screen as circled in "**red**."



NOTE: Effective January 1, 2013, the "Social Security Tax %" field as circled in red automatically reverted back to 6.2%. The latest 2014 Payroll software updates are available now by using the "DP/Update" feature to get the latest State and Federal Tax Table updates.

To configure the Accounts Payable module for 1099s, select the options "Systems," "Accounts Payable," "Set Up and Maintenance," "Accounts Payable Configuration." The following screen will be displayed.

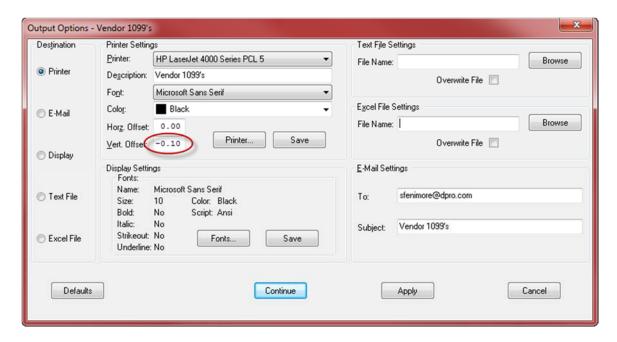


This will be the form file name (circled in red) used when printing 1099s from the system. There are several variations available. The following sections describe the variations of W-2 and 1099 forms available for printing.

It is possible, that depending on your specific printer, some forms may print one space or line off in any given direction. Should this occur, there is a utility within the **Infinity POWER Windows Graphical (GUI)** version of the product that will allow you to adjust the form to conform specifically to your printer locally.

When you select to print either a **W-2** or **1099**, as shown in the following example, you will be prompted to select your Output Option (*i.e. printer*). Once you have selected your printer, look just below the selected printer in the section titled "**Printer Settings**," under the Color section, there are two **Offset** options. These offset options are designed to allow the user to adjust any report or form up or down on their specific printer on a temporary or permanent basis, depending on whether you save the settings or not.

Choosing the **Horizontal Offset** will move the printing functions left or right on the form. Selecting the **Vertical Offset** will move the printing functions up or down on the form. Start by entering a number such as **0.10** for moving the form up or down one tenth of an inch at a time in the **Vertical Offset**. Entering a number such as **-0.10** will move the form the opposite direction.



* * * WARNING * * *

If Data Pro or your Dealer has modified a W-2 or 1099 form for you in previous years to accommodate your specific printer(s) and the form name does not match one of the form names listed in the following sections, then this form has not been adjusted for the current IRS reporting requirements. You have a custom form that needs to either be modified again or you may want to consider using one of the standard forms below.

W2 Form File Descriptions

If you are utilizing Mag Media, you MUST be on Version 7.2 or higher.

The various **W2** form files are described below:

- 1) Form file W2 is the standard, and will function properly in most instances.
- 2) Form file W2U prints one line higher than the standard form. (U = Up, DN = Down)

- 3) Form file **W2DN** prints one line lower than the standard form. It may be necessary to use form **W2DN** with ink jet style printers.
- 4) Form file **W24** is the form for printing four up per employee, per page on a LaserJet printer.

1099 Form File Descriptions (All Versions)

Except where specified, all **1099** form files will print to **HP LaserJet** compatible, **Dot Matrix**, **HP DeskJet** printers. The various **1099** form files are described below:

- 1) 1099 is used to print the Non-Employee Compensation dollar amount in Box 7 on the 1099-MISC form. Variations: 199U and 199DN (U = Up, DN = Down)
- 2) 1099R is used to print the Rents dollar amount in Box 1 on the 1099-MISC form. Variations: 199RU and 199RD
- 3) 1099K is used to print the Royalties dollar amount in Box 2 on the 1099-MISC form. Variations: 199KU and 199KD
- 4) 1099F is used to print the Fishing Boat Proceeds dollar amount in Box 5 on the 1099-MISC form. Variations: 199FU and 199FD
- 5) 1099P is used to print the Prizes and Awards, etc. dollar amount in Box 3 on the 1099-MISC form. Variations: 199PU and 199PD
- 6) 1099I is used to print the Interest Income dollar amount in Box 1 on the 1099-INT form. Variations: 199IU and 199ID
- 7) 1099D is used to print the Ordinary Dividends dollar amount in Box 1 on the 1099-DIV form. Variations: 199DU and 199DD
- 8) 1099G is used to print Capital Gain Distributions dollar amount in Box 1b and 2a on the 1099-DIV form. Variations: 199GU and 199GD
- 9) 1099A is used to print the Gross Proceeds paid to an Attorney dollar amount in Box 14 on the 1099-MISC form. Variations: 199U and 199DN
 (U = Up, DN = Down)
- 10) 1099M is used to print fees paid for Medical and Health Care Payment dollar amounts in Box 6 on the 1099-MISC form. Variations: 199U and 199DN (U = Up, DN = Down)

The Standard Form Files will function properly in most instances. Offset Utility as described earlier to make minor adjustments to specific printers.	Otherwise, use the accommodate your