



1099 and W2 Tax Form Tips and Instructions for 2016

(Effective December 31, 2016)

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 7.5x**). You will enter the desired “**W-2 Form**” name at the top right of the screen as circled in “**red.**”

A screenshot of the 'Configuration' window in the software. The window has a blue title bar and a menu bar with 'Tools' and 'Launch'. Below the menu bar are tabs for 'Master Configuration', 'G/L Accounts', 'Time Categories', and 'System Integration'. The 'Master Configuration' tab is active. On the left side, there are several checkboxes and input fields: 'Departments' (checkbox), 'Rate Override' (checked), 'Workers Comp. Class' (checked), 'Variable OT Calculation' (checkbox), 'FICA Override' (checkbox), 'Allocate Dept. Overhead' (checkbox), 'Allow Check Reprint' (checked), 'Default Pay Cycle' (dropdown menu set to 'Bi-Weekly'), 'Minimum Wage' (input field with '7.25'), 'Social Security Tax %' (input field with '6.20 %'), 'Social Security Limit' (input field with '\$127,200.00'), 'Medicare Tax %' (input field with '1.45 %'), and 'Medicare Tax Limit' (input field with '\$9,999,999.9'). On the right side, there are more input fields: 'Emp. Federal ID Number' (input field with '95-888874'), 'Emp. State ID Number' (input field with '2589635'), 'W-2 Form' (input field with 'W2', circled in red), 'Employee Review Form' (input field with 'REV'), 'G/L Journal Number' (input field with '4'), 'Hours Decimals' (input field with '5'), 'Rate Decimals' (input field with '5'), 'Next Check Number' (input field with '100002'), 'Check Form' (input field with 'STUB'), 'JC Detail Type' (dropdown menu set to 'None'), 'Direct Deposit Form' (input field with '1stub'), and 'Checking Account' (input field with '2'). At the bottom of the window are three buttons: 'OK', 'Cancel', and 'Apply'.

NOTE: The latest 2017 Payroll software updates are available now by using the “DP/Update” feature to get the latest State and Federal Tax Table updates. You must be on Version 7.5x to use the latest “DP/Update” feature.

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.

The screenshot shows a 'Configuration' window with the following fields and values:

Field	Value	Field	Value
Vendor Label	Supplier	Invoices on Check Register	<input checked="" type="checkbox"/>
Special Field	Vend Type	Include Paid Items on Inq.	<input checked="" type="checkbox"/>
Employer ID	59-7464635	G/L Journal Number	08 Accruals - Payable
Form 1099	1099	Reduce quantity on order in IM	<input type="checkbox"/>
Minimum 1099	\$600.00	Voucher Unique Invoice #'s	<input checked="" type="checkbox"/>
Default Bank Acct	1	Display Vendor Comments	<input checked="" type="checkbox"/>
Allow Check Re-Printing	<input checked="" type="checkbox"/>		
Cash Basis	<input type="checkbox"/>		

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 7.5x 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** (*U = Up, D = Down*)
- 3) **1099K** is used to print the **Royalties** dollar amount in **Box 2** on the **1099-MISC** form. **Variations: 199KU and 199KD** (*U = Up, D = Down*)
- 4) **1099F** is used to print the **Fishing Boat Proceeds** dollar amount in **Box 5** on the **1099-MISC** form. **Variations: 199FU and 199FD** (*U = Up, D = Down*)
- 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** (*U = Up, D = Down*)
- 6) **1099I** is used to print the **Interest Income** dollar amount in **Box 1** on the **1099-INT** form. **Variations: 199IU and 199ID** (*U = Up, D = Down*)
- 7) **1099D** is used to print the **Ordinary Dividends** dollar amount in **Box 1** on the **1099-DIV** form. **Variations: 199DU and 199DD** (*U = Up, D = Down*)
- 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**
(*U = Up, D = Down*)
- 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. Otherwise, use the Offset Utility as described earlier to make minor adjustments to accommodate your specific printers.