Accessing and Preparing 1099 Module Forms for Printing

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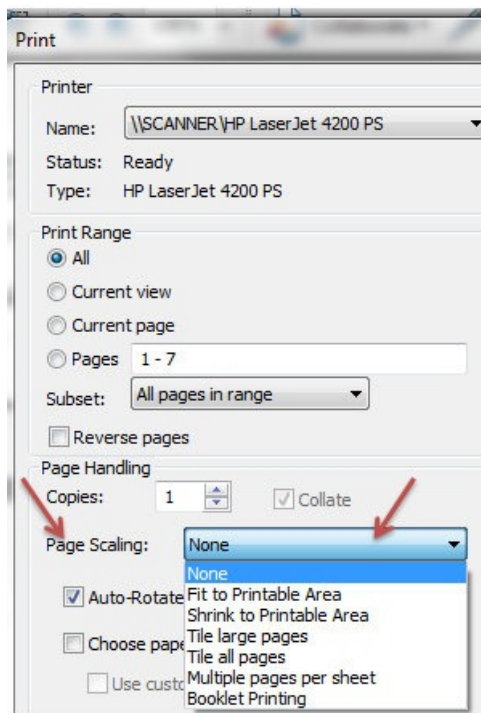
- **Ordering Special Paper:**
  If printing is handled in-house, specialized paper is required for different copies. For paper needs, Nelco Solutions is recommended.
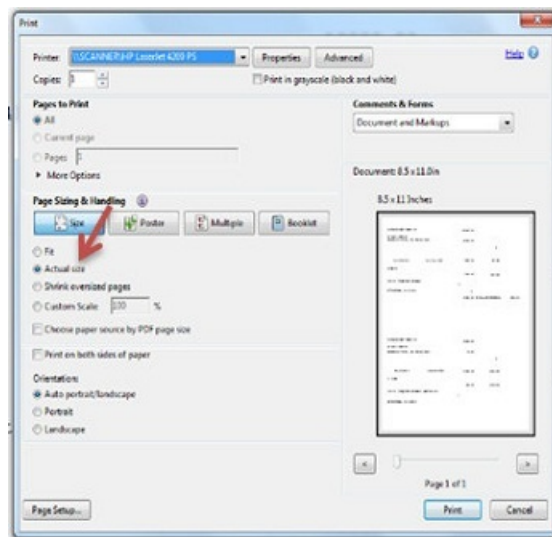
Aligning Print Settings

Before printing **Form 1096** and **Copy A**, ensure proper alignment by setting up Acrobat correctly:
- **Adjust Print Scaling:**
  - Click the printer icon in the Acrobat toolbar (below the main browser toolbar).
  - Under **Page Handling**, set **Page Scaling** to **None** (default is often "Fit to Page," which shrinks the form to 94%).
  - Confirm the zoom in the **Preview** section is at 100%.

- **Alternative Option:**
  - If the **Page Scaling** option outlined above is unavailable, select **Actual Size** and perform a test print on blank paper.
  - Hold the printed test against the red Copy 1096 form to verify alignment.

- **For Firefox Users:**
  - If **Page Scaling** options are not visible, refer to the provided instructional recording for guidance.

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.