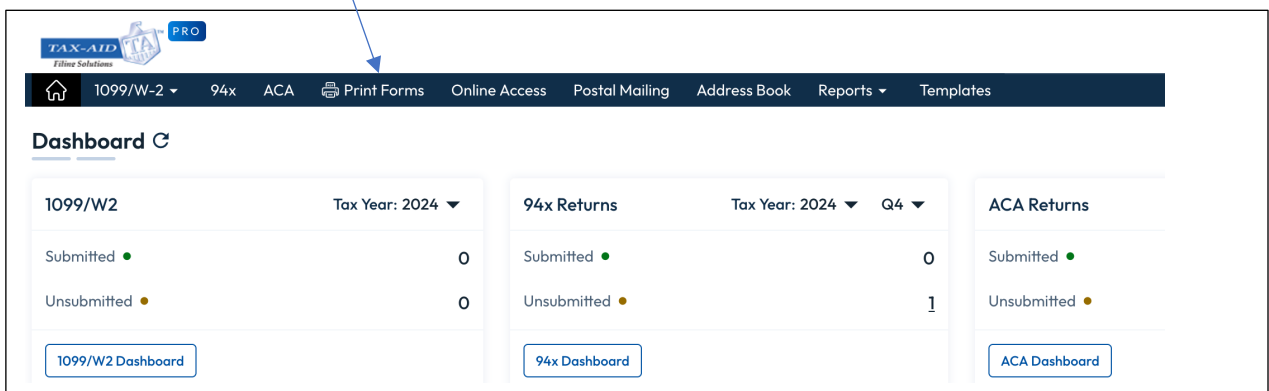


Professional Printing Your Own Forms for distribution

Tax-Aid Filing print options are very diverse. You can print the form and related instructions one at a time or in bulk. You can also print the forms by payer in a format that is ready to mail with the forms pre-positioned for use with standard, tax form specific, windowed envelopes.

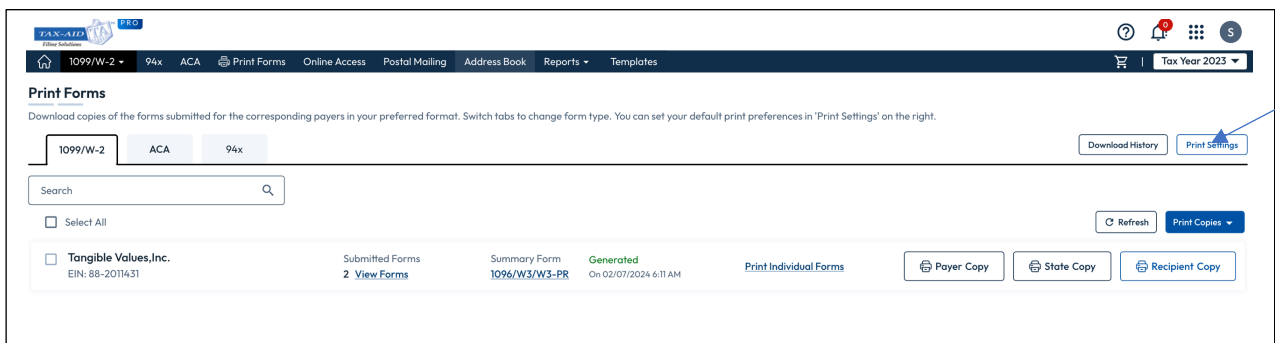
Here are the instructions to print out the forms using standard tax industry blank perforated stock with form instructions preprinted on the back of the form. The perfed forms are designed to fit into standard tax form mailing envelopes. **Tip: Make sure your browser security settings are not blocking pop-up windows.**

Step 1. Select print forms



The screenshot shows the Tax-Aid dashboard. At the top, there is a navigation bar with a home icon, a dropdown menu for '1099/W-2', and other tabs: '94x', 'ACA', 'Print Forms', 'Online Access', 'Postal Mailing', 'Address Book', 'Reports', and 'Templates'. Below the navigation bar is a 'Dashboard' section with three summary cards: '1099/W2', '94x Returns', and 'ACA Returns'. Each card shows 'Submitted' and 'Unsubmitted' counts for 'Tax Year: 2024'. The '1099/W2' card shows 0 submitted and 0 unsubmitted. The '94x Returns' card shows 0 submitted and 1 unsubmitted. The 'ACA Returns' card shows 0 submitted and 0 unsubmitted. There are also buttons for '1099/W2 Dashboard', '94x Dashboard', and 'ACA Dashboard'.

Step 2. Before selecting your payer, click on print settings



The screenshot shows the 'Print Forms' page. At the top, there is a navigation bar with a home icon, a dropdown menu for '1099/W-2', and other tabs: '94x', 'ACA', 'Print Forms', 'Online Access', 'Postal Mailing', 'Address Book', 'Reports', and 'Templates'. Below the navigation bar is a 'Print Forms' section with a search bar and a 'Print Settings' button. The 'Print Settings' button is highlighted with a blue arrow. Below the search bar is a table of payers. The first payer is 'Tangible Values, Inc.' with EIN: 88-2011431. The table shows 'Submitted Forms' (2), 'View Forms', 'Summary Form' (1096/W3/W3-PR), 'Generated' (On 02/07/2024 6:11 AM), 'Print Individual Forms', and buttons for 'Payer Copy', 'State Copy', and 'Recipient Copy'.

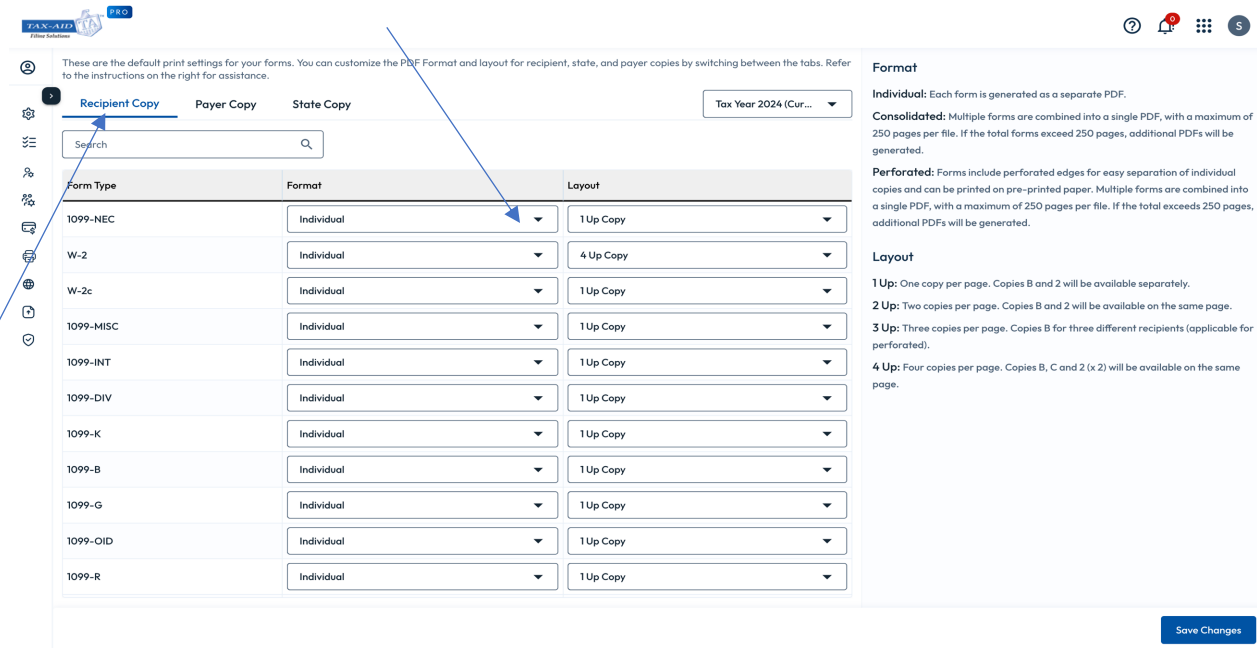
Observations:

You can go a couple of routes here.

- By clicking on print settings you can default to perfed paper. This allows you to print all of a payers forms at one time on paper perfed and positioned to fit in special tax form envelopes.
- OR you could select a payer. Caution here! You still need to set up your print settings! If you do not, the print-out may default to one recipient at a time!

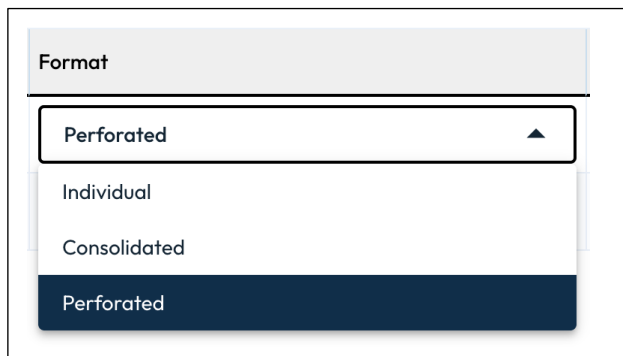
- **IMPORTANT NAVIGATION TIP.** When clicking on “print settings” it opens a new navigation tab in your browser. After finishing your print set ups you need to go back to your filing tab **ON THE TOP OF YOUR BROWSER WINDOW!**

Step 3. IMPORTANT. This is where you can default your settings to print on perforated mailable forms using standard tax forms and mailing envelopes!



Form Type	Format	Layout
1099-NEC	Individual	1 Up Copy
W-2	Individual	4 Up Copy
W-2c	Individual	1 Up Copy
1099-MISC	Individual	1 Up Copy
1099-INT	Individual	1 Up Copy
1099-DIV	Individual	1 Up Copy
1099-K	Individual	1 Up Copy
1099-B	Individual	1 Up Copy
1099-G	Individual	1 Up Copy
1099-OID	Individual	1 Up Copy
1099-R	Individual	1 Up Copy

In this example we are going to print 1099 – NECs for recipients. So select recipients and then click on the form (Individual) button.

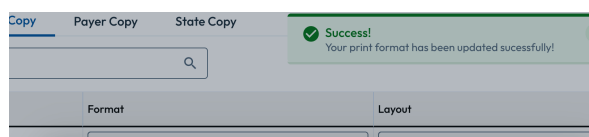


Select perforated

When you do, notice the layout automatically changes to the correct paper format. In the case of a 1099-NEC it is a 3 up form. Go through this process for all other form types you will be submitting (W-2s, 1099-INT etc.).

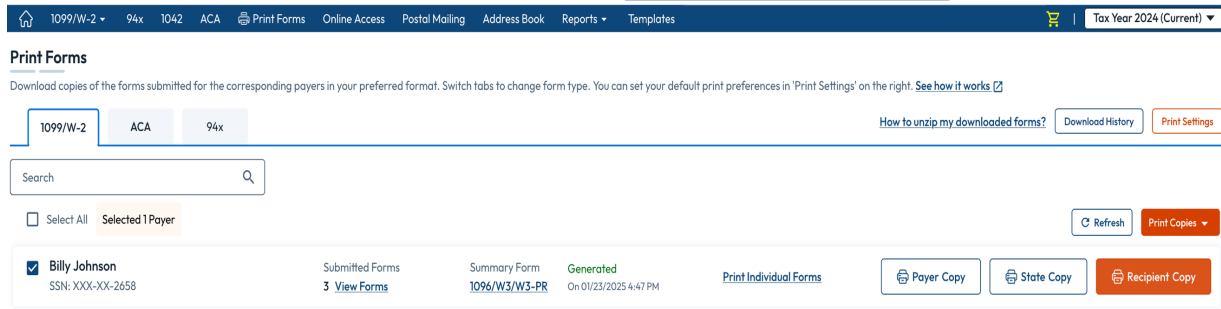
Then click Save Changes

After you click “Save Changes” the following screen will pop up and disappear. To file click on the navigation tab on the top of your browser window.



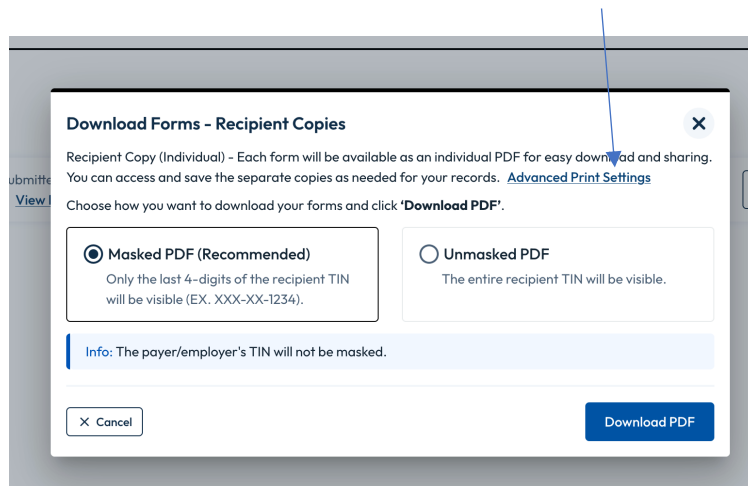
Step 4. Print your Forms

To print the forms, Tax-Aid Filing creates print ready PDFs. Depending on the size of the run, and how busy our servers are, it may take a little time to create these PDFs.



1. Select the tax year (2024 selected)
2. Select the form type tab (1099/W-2 selected)
3. Select the payer check box (Billy Johnson Inc. selected)
4. Select the form to print (recipient copies selected)
5. Click on “Print Copies”

(please note the colors may be different here for you as this example uses a test account with fake data.)

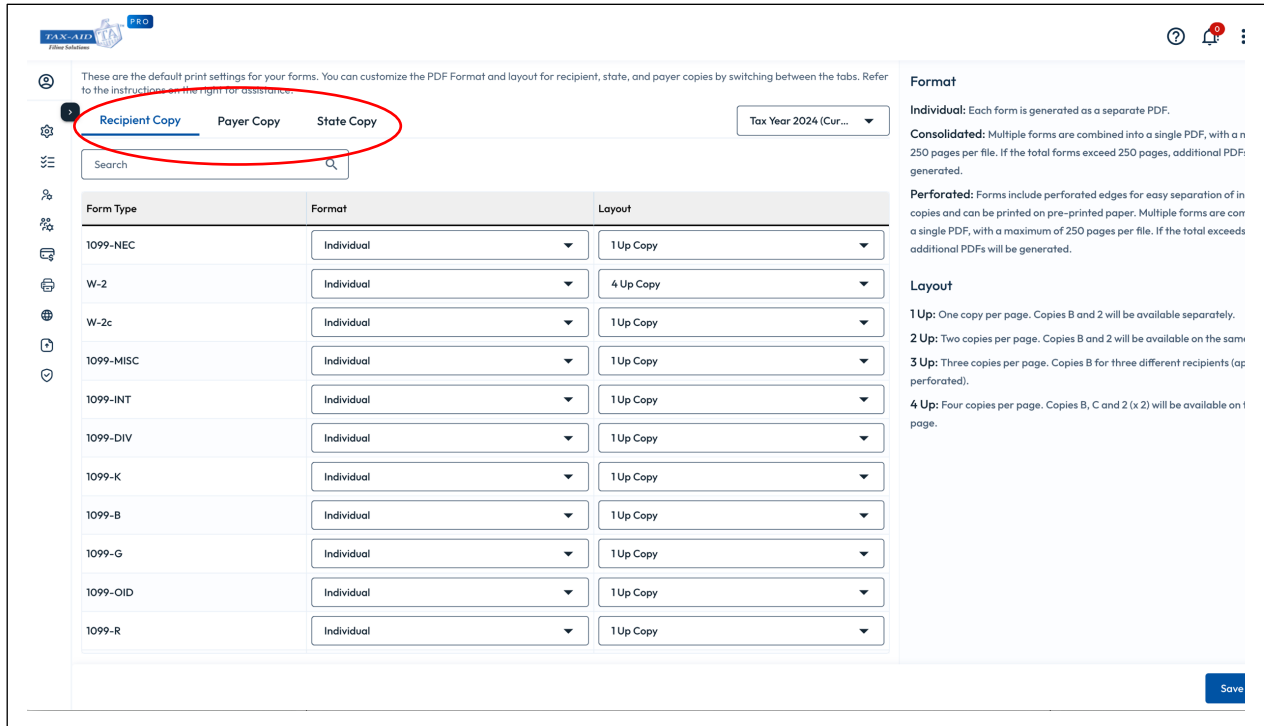


When you click on “Print Copies” this pop-up screen will appear. Things to note:

1. Select whether you wish to mask the TIN. We strongly recommend yes.
2. **IMPORTANT:** If you have NOT set up correct print settings you may be disappointed in your output. You still have a chance to correct this problem by clicking on “[Advanced Print Settings](#)” noted with the arrow.

- When you click on this button it brings you to the same print set up area we reviewed earlier in Step 3. But with ONE MORE IMPORTANT POINT!

Step 5. Print Set Up REVISITED. Set up EACH Copy type.



These are the default print settings for your forms. You can customize the PDF Format and layout for recipient, state, and payer copies by switching between the tabs. Refer to the instructions on the right for assistance.

Recipient Copy Payer Copy State Copy Tax Year 2024 (Cur...)

Search

Form Type	Format	Layout
1099-NEC	Individual	1 Up Copy
W-2	Individual	4 Up Copy
W-2c	Individual	1 Up Copy
1099-MISC	Individual	1 Up Copy
1099-INT	Individual	1 Up Copy
1099-DIV	Individual	1 Up Copy
1099-K	Individual	1 Up Copy
1099-B	Individual	1 Up Copy
1099-G	Individual	1 Up Copy
1099-OID	Individual	1 Up Copy
1099-R	Individual	1 Up Copy

Format

Individual: Each form is generated as a separate PDF.

Consolidated: Multiple forms are combined into a single PDF, with a n 250 pages per file. If the total forms exceed 250 pages, additional PDFs generated.

Perforated: Forms include perforated edges for easy separation of in copies and can be printed on pre-printed paper. Multiple forms are con a single PDF, with a maximum of 250 pages per file. If the total exceeds additional PDFs will be generated.

Layout

1 Up: One copy per page. Copies B and 2 will be available separately.

2 Up: Two copies per page. Copies B and 2 will be available on the sam

3 Up: Three copies per page. Copies B for three different recipients (ap perforated).

4 Up: Four copies per page. Copies B, C and 2 (x 2) will be available on t page.

Save

Follow the instructions in Step 3 to set up your print preference.

IMPORTANT POINT: The important hint here is you need to set up your print preferences FOR EACH Copy type. So do this set up three times! Once for Recipient Copy, once for Payer Copy and once for State copy to ensure each is output the way you would like.

Remember to navigate back to printing your forms. Look at the top of your browser and click on the correct Tab.

Step 6. Download PDF

You are now ready to print out your forms. Simply click on Download PDF. You can then print your forms out on your printer.

To order appropriate perforated forms and envelopes go to:

www.tangiblevalues.com/

Order: 82-5209 W-2 laser 4up blank form with instr on back (Envelope: 89-99992)
89-5059 1099 laser 3-up blank w/ instr on back for NEC and other 3-up 1099s (Env: 89-88882)
89-5144 1099 laser 2-up blank w/ instr on back for MISC and other 2-up 1099s (Env: 89-77772)