



# HELPFUL INFORMATION ABOUT YOUR FORMS

**A LASER OR INK JET PRINTER IS REQUIRED TO PRINT YOUR LASER FORMS.**

## **TAX FORM COUNT UTILITY**

You should be aware of a special program that can be found on your Utilities Menu entitled, "Tax Form Count Utility," that can be helpful to you in determining how many forms to order. This program will count all of the individuals or recipients that have already been paid in the year specified and show what type of form they should receive. To arrive at a total number of forms to order, you should also estimate the number of additional forms that you will need for other employees and recipients that will be paid this year or processed at year-end. (Note, this program ONLY counts forms in the current default data directory.)

## **EXAMPLE W2 ORDERS**

**W2'S** - I need to print 700 W2's. I have state and local withholding. I need 9 total parts: Copy A for the SSA, Copy 1 for the State, Copy 1 for the locality, Copy D for the employer and Copies B,C,2,2 and instructions for the employee. (NOTE: Copy A's no longer have to be on red forms and can be printed on blank paper for W2's and W3's.)

**W2 COPY A** - I could print these as black-scannable forms using blank paper. If I decided to do this I would NOT order pre-printed W2 Copy A's. If I decided to produce W2's on red scannable pre-printed forms, I would order red W2 Copy A forms which are item #25. The Copy A's come in packages of 50 sheets per package with two forms per sheet for a total of 100 forms per package. I need 7 packages. I will order 10 to make sure that I don't run out.

**W2 PERF. PAPER** - I will use the 4Up perforated paper with instructions on the back. Each employee will receive 1 sheet of paper. The paper comes in packages of 50 sheets. I need 700 sheets which would be 14 packages. I will order 18 packages to make sure that I don't run out.

**W2 COPY 1/ COPY D** - The Copy 1 for State and locality and the Copy D for the employer can be run on plain paper.

## **EXAMPLE W3 ORDERS**

**W3'S** - I need to print 27 W3's. I need 2 total parts: Copy A for the SSA and the file copy. I could print W3 Copy A's as black-scannable on blank paper. If I decided to do this, I would NOT order preprinted W3's Copy A's. If I decided to produce W3's on red scannable pre-printed forms, I would order Item #31 red W3 forms. The Copy A's come in packages of 50 forms per package. I will order one package.

**W3 File Copy** - The file copy can be run on plain paper.

## **EXAMPLE 1099 & 1096 ORDERS**

**1099 MISC, INT, DIV, B & R** are 2 recipients per sheet. Remember to order the special blank perf. paper and also the proper envelope for these forms.. The respective form item numbers are ITEMS 40, 28, 27, 26 AND (envelope) 41.

**1099 MISC** - I need to print 400 - 1099 MISC's. I need 3 forms for each recipient: Copy A for the IRS, and Copies B and instructions for the recipient and Copy C which is my file copy. (NOTE: Red Copy A's are still required for 1099's and 1096's.)

**1099 MISC. COPY A** - The copy A's come in packages of 50 sheets per pack and there are 2 forms per sheet for a total of 100 forms per package. I need 4 packages for a total of 400 forms. I will order 6 packs to make sure that I don't run out.

**1099 MISC. BLANK PERFORATED PAPER** - Each recipient will receive the Copy B and instructions. This takes a full sheet of paper. The paper comes in packages of 50 sheets. I need 400 sheets which would be 8 packages. I will order 11 packages to make sure that I don't run out.

**1099 MISC Copy C** - The Copy C for the payer can be printed on plain paper.

**1096's** - I need to print 11 - 1096's. I need 2 total parts: Copy A for the IRS, and the file copy. The 1096 Copy A comes in 50 forms per package. I will order 1 package. The 1096 File Copy can be run on plain paper.

## **EXAMPLE OTHER FORMS**

**1098's** - The 1098 Copy A is a 2-up form. A package of 50 forms will enable you to print copy A's for 100 recipients. The envelopes that are used for the 1099-M, 1099-I, 1099-D, and 1099-B will work for the 1098.

**1099-R** - The 1099-R Copy A is a 2-up form. A package of 50 forms will enable you to print the copy A's for 100 recipients. The same envelopes that are used for the 1099-M, 1099-I, 1099-D, 1098 and 1099-B will also work for the 1099-R.