

How to Import and E-File 1098-T Forms in **W2 Mate**[®]



**Start by Opening
W2 Mate**[®]
Program

www.W2Mate.com

Go to > Company > Open

1

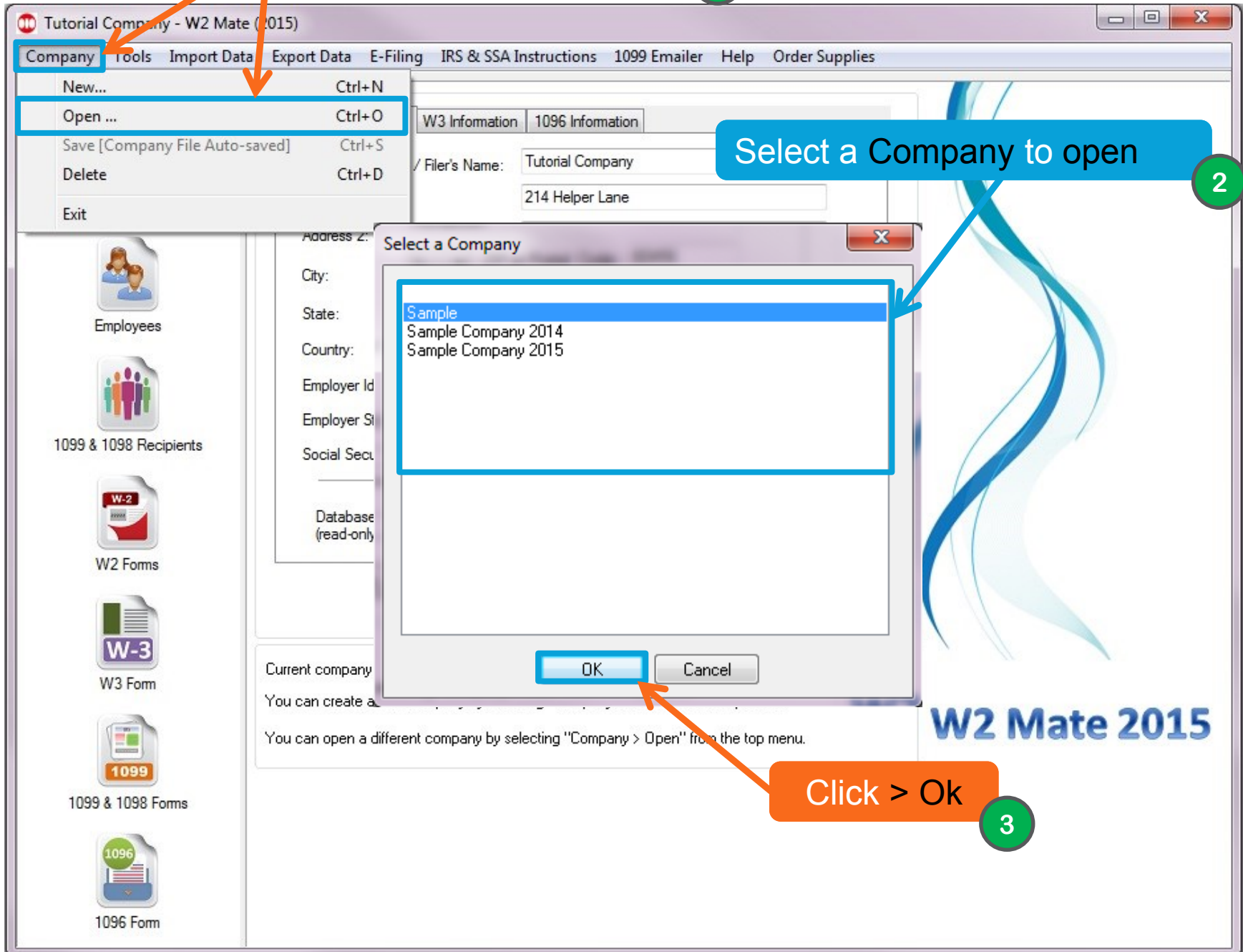
Select a Company to open

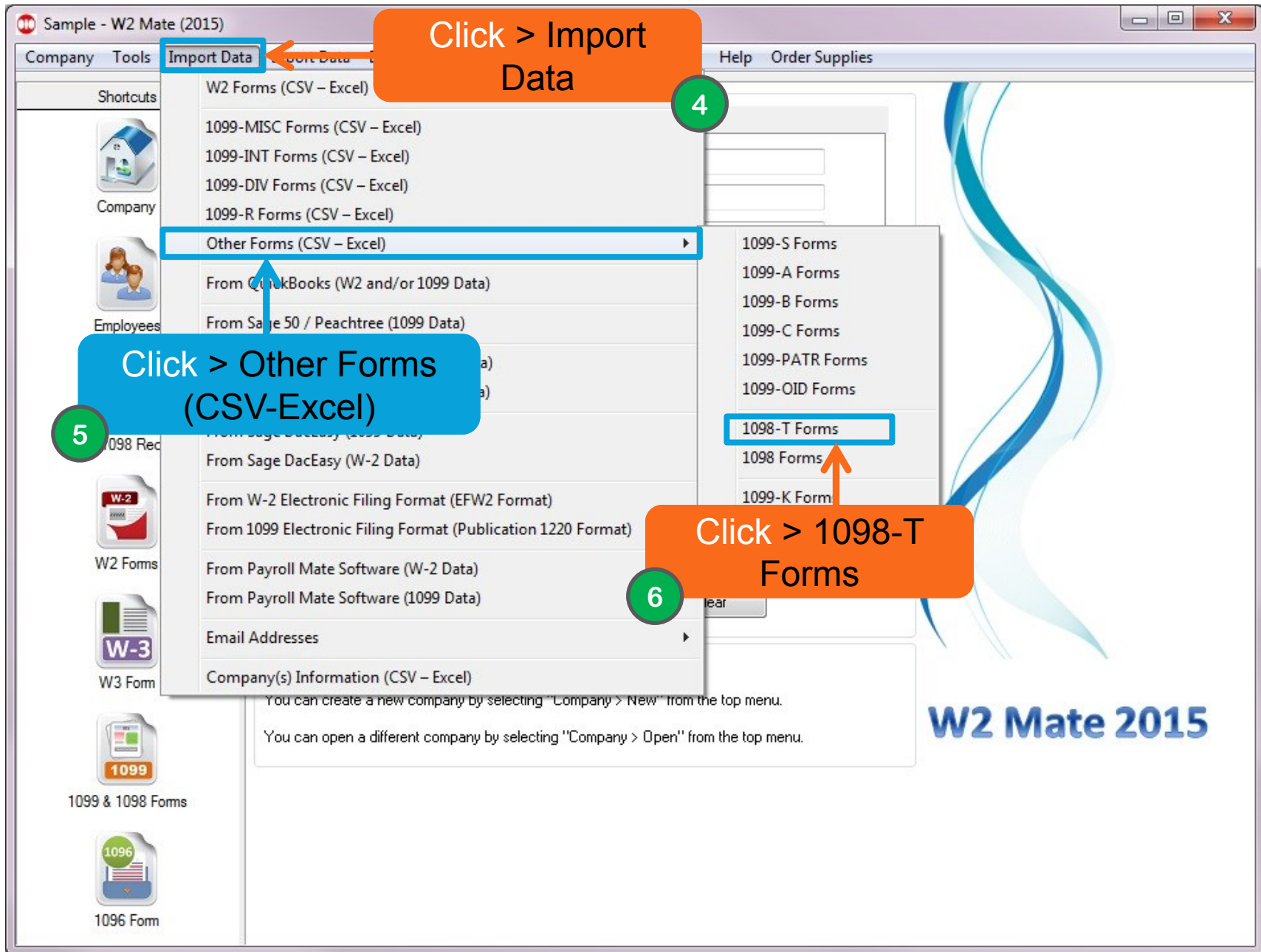
2

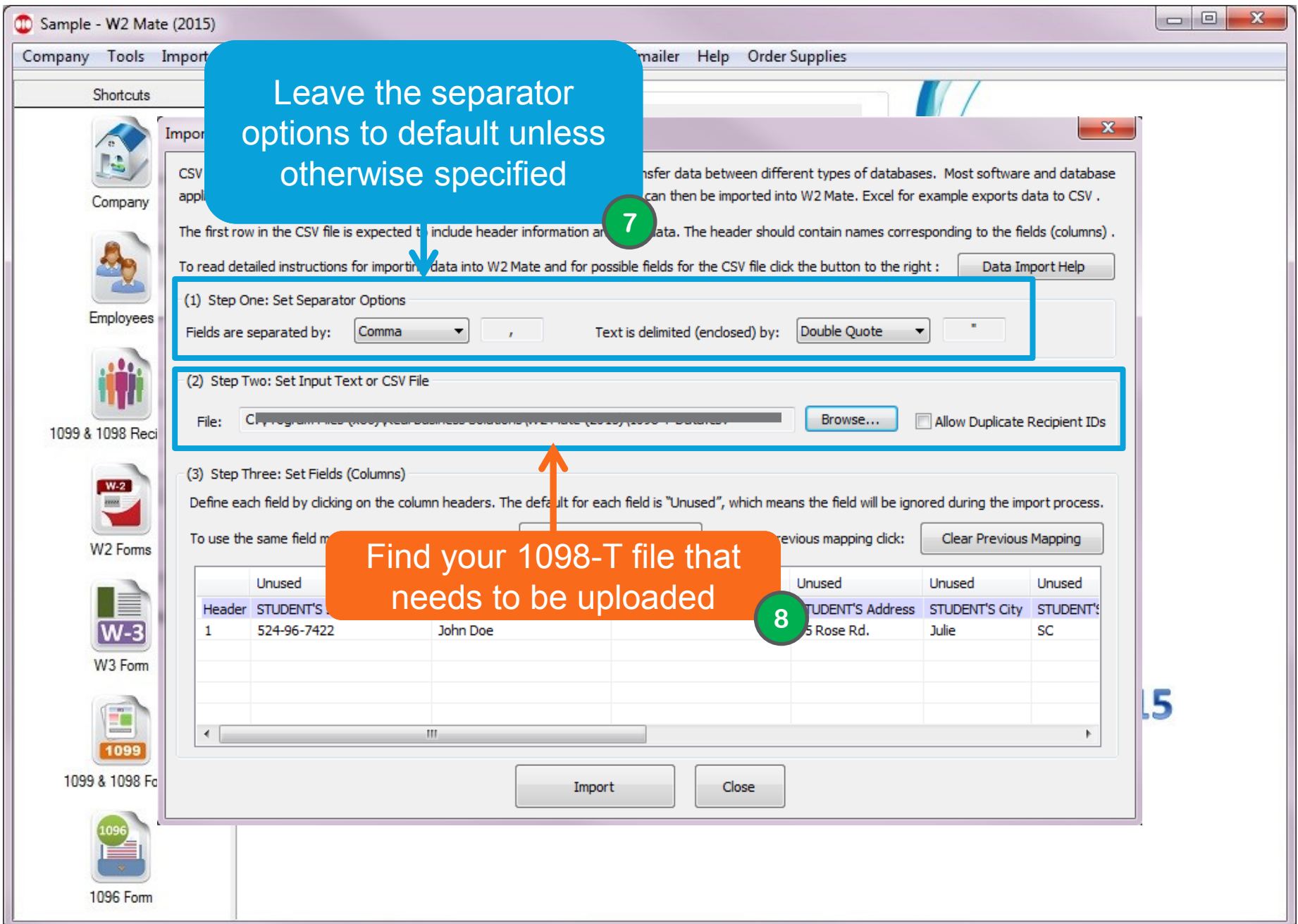
OK

Click > Ok

3







Leave the separator options to default unless otherwise specified

7

Find your 1098-T file that needs to be uploaded

8

15

Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 Emailer Help Order Supplies

Shortcuts

Company

Employees

1099 & 1098 Rec

W2 Forms

W3 Form

1099

1099 & 1098 Fo

1096 Form

Import 1098-T Forms

CSV (comma separated value) is the most common format used in order to transfer data between different types of databases. Most software and database applications will allow you to export W2 and 1099 data into CSV format, which can then be imported into W2 Mate. Excel for example exports data to CSV .

The first row in the CSV file is expected to include header information and NOT data. The header should contain names corresponding to the fields (columns) .

To read detailed instructions for importing data into W2 Mate and for possible fields for the CSV file click the button to the right :

(1) Step One: Set Separator Options

Fields are separated by: , Text is delimited (enclosed) by: "

(2) Step Two: Set Input Text or CSV File

File: Allow Duplicate Recipient IDs

(3) Step Three: Set Fields

Define each field by clicking on the column headers. The default for each field is "Unused", which means the field will be ignored during the import process.

To use the same field mapping you used before click: To clear previous mapping click:

	Unused	Unused	Unused	Unused	Unused	Unused
Header	STUDENT'S social security #	STUDENT'S name (line one)	STUDENT'S name (line two)	STUDENT'S Address	STUDENT'S City	STUDENT'S
1	524-96-7422	John Doe		65 Rose Rd.	Julie	SC

Map your fields correctly

9

5

Sample - W2 Mate (2015)

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Import 1098-T Forms

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The first row in the CSV file is expected to include header information and NOT data. The header should contain names corresponding to the fields (columns) .

To read detailed instructions for importing data into W2 Mate and for possible fields for the CSV file click the button to the right :

(1) Step One: Set Separator Options

Fields are separated by: , Text is delimited (enclosed) by: "

(2) Step Two: Set Input Text (CSV File)

File: Allow Duplicate Recipient IDs

(3) Step Three: Set Field Mapping

Define each field by clicking on the column headers. The default for each field is "Unused". **10** means the field will be ignored during the import process.

To use the same field mapping you used before click: To clear previous mapping click:

	Unused	Unused	Unused	Unused	Unused
Header	STUDENT	STUDENT'S name (line two)	STUDENT'S Address	STUDENT'S City	STUDENT'S
1	524-96-7	65 Rose Rd.	Julie	SC	

Click > Unused
and match the column
with the header column

10

Click > Import

11

The screenshot shows the W2 Mate 2015 software interface. The title bar reads "Sample - W2 Mate (2015)". The menu bar includes "Company", "Tools", "Import Data", "Export Data", and "E-Filing". The "E-Filing" menu is open, displaying a list of form types: "W2 Forms", "1099-MISC Forms", "1099-INT Forms", "1099-DIV Forms", "1099-R Forms", "1099-S Forms", "1098-T Forms", "1098 Forms", "1099-A Forms", "1099-B Forms", "1099-C Forms", "1099-...", "1099-...", and "1099-...". The "1098-T Forms" option is highlighted with a blue box. An orange arrow points from a callout box to this option. The callout box contains the text "Click > 1098-T Forms" and a green circle with the number "13". Another callout box at the top right contains the text "Click > E-Filing" and a green circle with the number "12". The left sidebar shows shortcuts for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form". The main area shows a "General Info" section with fields for "Employer", "Address", "City", "State", and "Country". Below this, there is a text box with instructions: "Current company name is : Sample", "You can create a new company by selecting 'Company > New' from the top menu.", and "You can open a different company by selecting 'Company > Open' from the top menu." The bottom right corner of the interface features the text "W2 Mate 2015" next to a blue wave graphic.

Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 E-mailer Help Order Supplies

Electronic Filing Transmitter Setup

Transmitter Information (Information of the company or person who registered with the IRS in order to file electronically.)

Transmitter Name Line1: TIN (Tax Identification Number):

Transmitter Name Line2: TCC (Transmitter Control Code):

Company Associated With Correspondence Address (Company that the IRS will contact with any issues related to the file)

Company Name Line1: City:

Company Name Line2: State:

Company Address: Zip Code:

Save / Load

When preparing 1099s for multiple companies and you want to be the point of contact for all of them, you can save and load your info here.

Contact Information (Person that the IRS will contact with any issues related to the file)

Name: Phone #: E-mail:

14

15

Enter Contact Information

Fill in all transmitter and company information

Combined Federal/State Filing Program (Only for 1099-MISC, R, B, DIV, INT, OID & K)

Through the Combined Filing Program, the IRS will forward information to the state on your behalf for approved filers. Filers must submit a test file (between NOV 1 & FEB 1) in order to sign up for the program.

Include "Combined Federal/State Filing Program" Information [Do not check if you will send this e-file directly to the state, unless the state participates in the program]

Which States Participate?

Output File (This is the name and path of the file which you need to send to the IRS or state)

File Name and Path:

Test File

Create a TEST file

Corrected Return

Only use when filing corrections

Mark Payee Records as "C"

Mark Payee Records as "G"

Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 E-mailer Help Order Supplies

Short Electronic Filing Transmitter Setup

Transmitter Information (Information of the company or person who registered with the IRS in order to file electronically.)

TIN (Tax Identification Number): 000000000

TCC (Transmitter Control Code): 00000

City: Chicago

State: IL

Zip Code: 11111

Name: sample Phone #: 1234567890 E-mail: sample@mail.com

16

17

Combined Federal/State Filing Program (Available only for 1099-MISC, R, B, DIV, INT, OID & K)

Through the Combined Federal/State Filing Program, the IRS will forward information returns filed electronically to participating states free of charge for approved filers. Filers must submit a test file (between Nov 1 & Feb 15) in order to sign up for the program.

Which States Participate?

Include "Combined Federal/State Filing Program" Information [Do not check if you will send this e-file directly to the state, unless the state participates in the program]

Output File (This is the name and path of the file which you need to send to the IRS or state)

File Name and Path: C:\Users\KBS\Documents\1099-TAX-SAMPLE

Browse...

Test File

Create a TEST file

Corrected Return

Only use when filing corrections

Mark Payee Records as "C"

Mark Payee Records as "G"

OK Cancel

Check the combined Fed/State program filing box if your state participates in the program and you want to include state data in your electronic submission file.

Select Create a TEST file. To create a test file, if needed.

Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 E-mailer Help Order Supplies

Electronic Filing Transmitter Setup

Transmitter Information (Information of the company or person who registered with the IRS in order to file electronically.)

Transmitter Name Line1: TIN (Tax Identification Number):

Transmitter Name Line2: TCC (Transmitter Control Code):

Company Associated With Correspondence Address (Company that the IRS will contact with any issues related to the file)

Company Name Line1: City:

Company Name Line2: State:

Company Address: Zip Code:

Contact Information (Person that the IRS will contact with any issues related to the file)

Name: Phone #: E-mail:

Save / Load

When preparing 1099s for multiple companies and you want to be the point of contact for all of them, you can save and load your info here.

Combined Federal/State Filing Program (Available only for 1099-MISC, P...)

Through the Combined Federal/State Filing Program, the IRS will forward returns filed electronically to participating states free of charge for app... Filers must submit a test file (between Nov 1 & Feb 15) in order to sign...

Include "Combined Federal/State Filing Program" Information
[Do not check if you will send this e-file directly to the state, unless the state participates in the program]

Output File (This is the name and path of the file which you need to send to the IRS or state)

File Name and Path:

18

19

Click browse to select the location for the file to be saved to

Click > OK

Sample - W2 Mate (2015)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions 1099 Emailer Help Order Supplies

Shortcuts

- Company
- Employees
- 1099 & 1098 Recipients
- W2 Forms
- W3 Form
- 1099 & 1098 Forms
- 1096 Form

W2 Mate

Electronic transmittal file was created successfully and saved to:

PLEASE DO NOT FORGET TO UPLOAD THIS FILE TO THE IRS FIRE SYSTEM

<http://fire.irs.gov>

W2 Mate does NOT automatically send the E-File to the IRS. Please remember that Your E-File submission is not complete until you upload the file to the IRS and receive confirmation from them.

Would you like W2 Mate to open the folder where the file was saved?

Click > Yes

20

21. Now go to the IRS FIRE website to upload your 1099 electronic submission file.

Click > IRS & SSA Instructions

22

IRS & SSA Instructions

- Online IRS Instructions
- Online SSA Instructions
- Visit IRS Website
- Visit SSA Website

- Go to IRS FIRE System Website (1099 Electronic Filing)
- Go to SSA Business Services Online Website (W2 Electronic Filing)

Click > Go to IRS FIRE System Website (1099 Electronic Filing)

23

- Company
- Employees
- 1099 & 1098 Recipients
- W-2 Forms
- W-3 Form
- 1099 & 1098 Forms
- 1096 Form

Payer's name, street address, city, state, and ZIP code, account number, and other fields.

PAYER'S Federal ID No. 54-2897451

RECIPIENT'S name Jane Doe

Street address (including apt. no.) 332 Line Drive

City, state, and ZIP code Chicago IL 51478

Account number (optional) FATCA Filing REQ 2nd TIN not.

15a Section 409A deferrals 0.00 15b Section 409A income 0.00

9 Payer made direct sales of \$5,000 or more of consumer products to a buyer for resale

10 Crop insurance proceeds 0.00

11 0.00 12

13 Excess golden parach. 0.00 14 Gross proceeds paid to an attorney 0.00

16 State tax withheld 0.00 17 State / Payer's State Number IL 123456 18 State income 0.00

You will be rerouted to the IRS FIRE Website, where you must log in to submit the file you have created. If you have any questions regarding the IRS FIRE system website call **(866)-455-7438.**

Congratulations. You know how to
import and e-file 1098-T forms!



www.W2Mate.com

1-800-507-1992