

How to Create, Populate and Print 1098-T Forms

Make sure you have the correct Company open inside W2 Mate

Note: In order to use this feature you must purchase and enable W2 Mate Option #5 for Additional 1099 forms

1. Click 1099 & 1098 Recipients in shortcut
2. Click New 1099/1098 Recipient

Example Company - W2 Mate (2017)

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

Shortcuts

New 1099 / 1098 Recipient Modify Recipient Delete Recipient Sort Recipients By: Recipient's Name (Line One)

	Identification Number	Name (Line One)	Name (Line Two)	Account Number
1	777889999	Jane A Test		
2	999887777	John Q Doe		
3	123456789	New	Recipient	

Click 1099 & 1098 Recipients 1

Click New 1099/1098 Recipient 2

3. Choose Form 1098-T

The screenshot shows the W2 Mate software interface. The main window title is "Example Company\$second name - W2 Mate (2017)". The menu bar includes "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 Emitter", "Help", and "Order Supplies".

On the left side, there is a "Shortcuts" panel with icons for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".

The main area displays a "New 1099 / 1098 Recipient" dialog box. At the top, there are buttons for "New 1099 / 1098 Recipient", "Modify Recipient", and "Delete Recipient", along with a "Sort Recipients By:" dropdown set to "Recipient's Name (Line One)".

The dialog box has a "General" tab. It contains fields for "Recipient's Tax Identification #", "Name" (with "Recipient Name Line One" and "Recipient Name Line Two" sub-fields), "Address" (with "Address 1" and "Address 2" sub-fields), "City", "State", "Zip code", and "Foreign Country". There are also checkboxes for "Non-US Address" and "2nd TIN not".

The "Types of 1099 / 1098 Forms Received" dropdown menu is open, showing a list of form types with checkboxes: Form 1098-T (checked), Form 1099-MISC, Form 1099-INT, Form 1099-DIV, Form 1099-R, Form 1099-S, Form 1098, Form 1099-A, Form 1099-B, Form 1099-C, Form 1099-PATR, Form 1099-OID, and Form 1099-K. A red arrow points to the "Form 1098-T" option. To the right of the dropdown, the text "Select Form 1098-T" is displayed next to a blue box containing the number "3".

Below the address fields, there is a section for "Common 1099-MISC Payments" with input fields for "Box 1 - Rents" (0.00) and "Box 7 - Nonemployee compensation" (0.00). There is also a checkbox for "Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]".

At the bottom of the dialog box are "OK" and "Cancel" buttons.

4. Enter New Recipient information

5. Click OK

Example Company\$second name - W2 Mate (2017)

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

Shortcuts

New 1099 / 1098 Recipient Modify Recipient Delete Recipient Sort Recipients By: Recipient's Name (Line One)

Identification Number Name (Line One) Enter New Recipient data 4 Count Number

New 1099 / 1098 Recipient

General

Recipient's Tax Identification # Types of 1099 / 1098 Forms Received Account # (optional) 2nd TIN not.

Form 1098-T

Name

Recipient Name Line One (Example: John Doe) Recipient Name Line Two (optional, use if you need to)

Address

Address 1 Email Address (Optional)

Address2 (only used when "Types of 1099 Forms Received" is "Form 1099-MISC")

This field is useful if you want to bulk email 1099s using "1099 E-mailer" software.

City State Zip code Foreign Country

Non-US Address

Common 1099-MISC Payments

The boxes below can be used to enter common amounts reported on form 1099-MISC. Use the "1099 & 1098 Forms" screen, if you need to report / edit any other amounts on form 1099-MISC or any other form such as 1099-INT.

Box 1 - Rents: Box 7 - Nonemployee compensation

Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic files]

Click OK 5

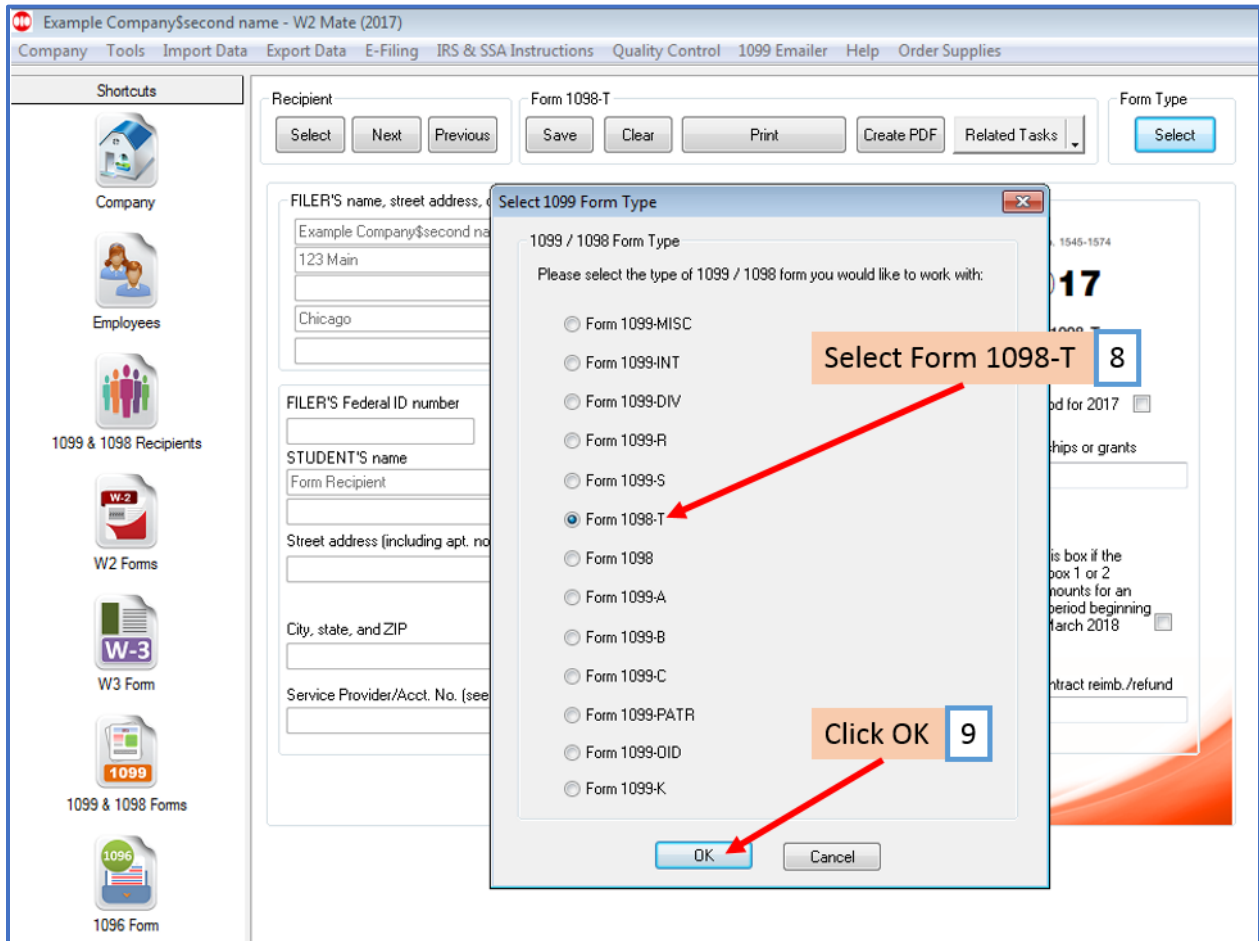
6. Choose 1099 & 1098 Forms in shortcuts

7. Click Select under form type

The screenshot displays the W2 Mate software interface for creating a 1099-MISC form for the year 2017. The interface includes a top menu bar with options like 'Company', 'Tools', 'Import Data', 'Export Data', 'E-Filing', 'IRS & SSA Instructions', 'Quality Control', '1099 Emailer', 'Help', and 'Order Supplies'. On the left, a 'Shortcuts' sidebar contains icons for 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W3 Form', '1099 & 1098 Forms', and '1096 Form'. A red arrow points from the '1099 & 1098 Forms' icon to a 'Click 1099 & 1098 Forms' callout box labeled '6'. The main workspace is titled '1099 Recipient' and 'Form 1099-MISC'. It features a 'Form Type' dropdown menu with a 'Select' button highlighted by a red arrow and a 'Click Select' callout box labeled '7'. The form fields are populated with example data: Payer's name 'Example Company', address '123 Main, Chicago, IL 60605', Payer's Federal ID number '777999999', Recipient's ID number 'Jane A...', and address '505 Main, Chicago, IL 60605'. The form type is set to '2017 Form 1099-MISC'. The right side of the form contains 18 numbered fields for various types of income and withholdings, all currently set to '0.00'. A red arrow also points from the '1099 & 1098 Forms' icon to the '1099' icon in the sidebar.

8. Select Form 1098-T

9. Click OK



10. Click Select under Recipient

11. Select 1098-T Recipient

12. Click OK

Example Company\$second name - W2 Mate (2017)

Company Tools Import Data Export Data **Click Select** 10 Quality Control 1099 Emailer Help Order Supplies

Recipient: **Select** Next Previous Form 1098-T: Save Clear Print Create PDF Related Tasks Form Type: Select

Select 1099 Recipient

The list below includes ONLY the recipients who receive 1098-T forms, since the "1099 Form Type" currently selected is 1098-T. To change the 1099 form type, please click the "Select" button under "1099 Form Type".

	Identification Number	Name (Line One)	Name (Line Two)	Account Number
1	987654321	Form Recipient		
2	777889999	Jane A Test		
3	999887777	John Q Doe		

Select Recipient 11

Click OK 12

OK Cancel

13. Fill in recipient(s) amounts (for example: Payments received for qualified tuition, Amounts billed for qualified tuition, etc.)

14. Click Save

Note: Repeat this step for all other recipients you have added

Example Company\$second name - W2 Mate (2017)

Company Tools Import Data Export Click Save 14 Instructions Complete Information for Recipient 13 Form Type

Recipient Form 1098-T

Select Next Previous Save Clear Print Create PDF Related Tasks Select

Shortcuts

Company

Employees

1099 & 1098 Recipients

W2 Forms

W3 Form

1099

1099 & 1098 Forms

1096 Form

FILER'S name, street address, city, state, zip code, and Tel. #

Example Company\$second name
123 Main
Chicago IL 60605

FILER'S Federal ID number STUDENT'S taxpayer ID no.
987654321

STUDENT'S name
Form Recipient

Street address (including apt. no.)

City, state, and ZIP

Service Provider/Acct. No. (see instr.) 8 Check if at least half-time student

1 Payments received for qualified tuition and related expenses 0.00

2 Amounts billed for qualified tuition and related expenses 0.00

3 Check if you have changed your reporting method for 2017

4 Adjustments made for a prior year 0.00

5 Scholarships or grants 0.00

6 Adjustments to scholarships or grants for a prior year 0.00

7 Check this box if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2018

9 Check if a graduate student

10 Ins. contract reimb./refund 0.00

OMB No. 1545-1574
2017
Form 1098-T

15. Click Print

16. Select Recipients

17. Select copy to print

Note: To print a Recipient /Payer copy to blank paper choose the copy to print from the drop-down menu

To print the data on the preprinted IRS red form chose Print DATA Only

18. Click OK

Example Company\$second name - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions **Click Print 15** Help Order Supplies

Recipient: Select Next Previous Form 1098-T Save Clear **Print** Create PDF Related Tasks Form Type: Select

Print 1099 Forms

Step 1: Please select the recipients you want to print 1099 Forms for

	Select	Recipient's ID #	Recipient's Name (Line One)	Recipient's Name (Line Two)
1	<input type="checkbox"/>	987654321	Form Recipient	
2	<input type="checkbox"/>	777889999	Jane A Test	
3	<input type="checkbox"/>	999887777	John Q. Doe	

Select Recipients 16

Select Current Recipient Only
Select All Recipients
Select None
Select Recipient Range
Find Recipient

Step 2: Please select the type of 1099 Form copy you want to print

Print a recipient / payer copy: Copy B-For Student Mark as CORRECTED
 Print DATA ONLY on a preprinted form (IRS Copy A on red-ink form or any other copy on pre-printed form) Mask Recipient's Tax ID Number on Copy B.

Furnish Copy B of this form to the recipient by January 31, 2018.
File Copy A of this form with the IRS by February 28, 2018. If you file electronically, the due date is April 2, 2018. You can use W2 Mate Option #4 (Electronic Filing) in order to file electronically.

Step 3: If you are printing on a pre-printed form, please specify the horizontal and vertical offsets for printed data

Horizontal (inch)	Vertical (inch)	Vertical space between forms (DO NOT change unless you have to)
0.00 <input type="radio"/> Move data to the LEFT	0.00 <input type="radio"/> Move data UP	Space between first and second form. Default is 1.0 Inch 1.00
<input checked="" type="radio"/> Move data to the RIGHT	<input checked="" type="radio"/> Move data DOWN	Space between second and third form. Default is 1.0 Inch 1.00

Click OK 18

OK Cancel

19. Select the correct printer

20. Click OK

