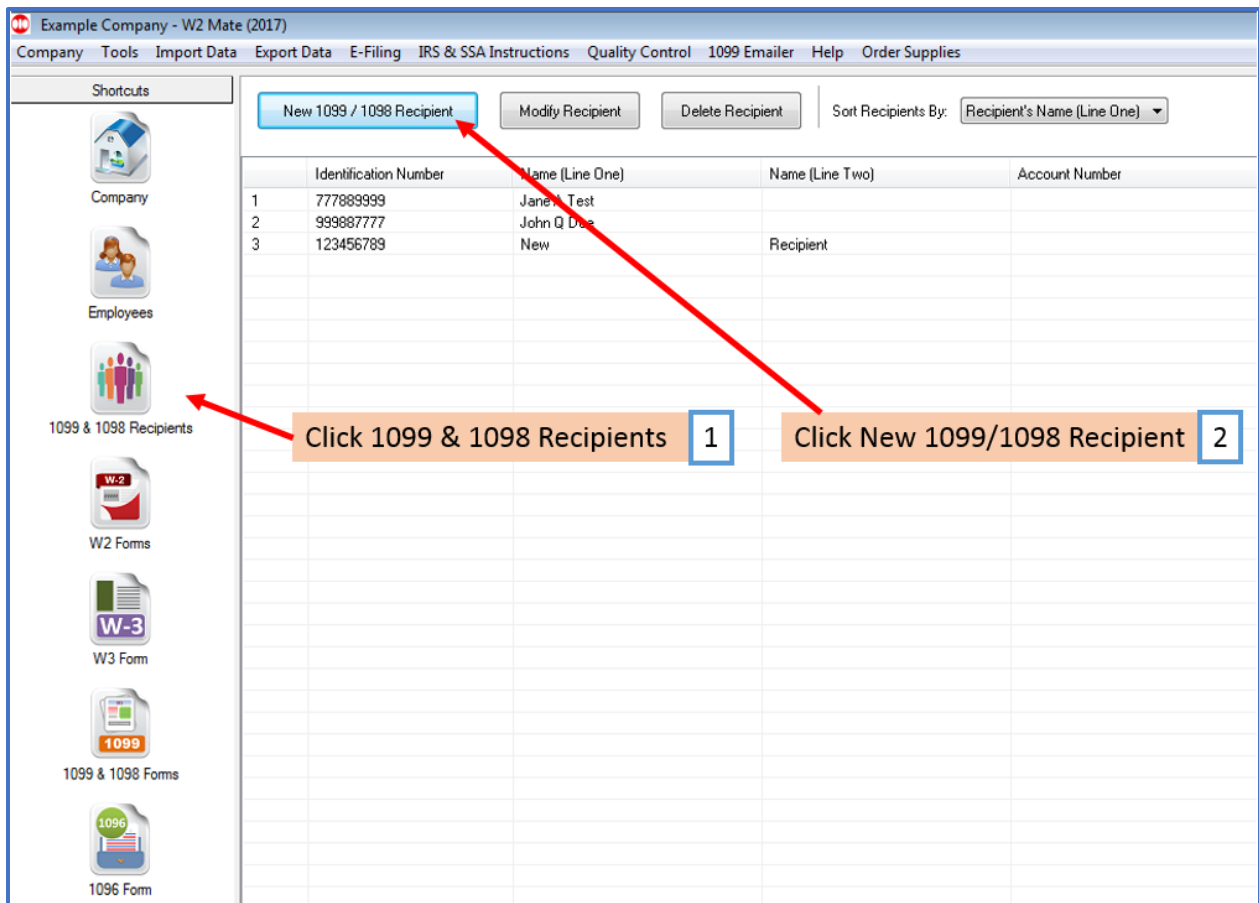


# How to Create, Populate and Print 1098 Forms

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



### 3. Choose Form 1098

The screenshot shows the W2 Mate software interface. The main window is titled "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 Emler", "Help", and "Order Supplies". The left sidebar contains shortcuts for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".

The "New 1099 / 1098 Recipient" dialog box is open, showing the "General" tab. The "Types of 1099 / 1098 Forms Received" dropdown menu is open, displaying a list of form types. The "Form 1098" option is selected, highlighted in blue, and a red arrow points to it. A callout box with the text "Select Form 1098" and a circled "3" is positioned next to the dropdown.

The dialog box contains the following fields and options:

- Recipient's Tax Identification #
- Name: Recipient Name Line One (Example), Recipient Name Line Two (optional, use if you need to)
- Address: Address 1, Address 2 (only used when "Types of 1099 / 1098 Forms Received" is "1099-MISC")
- City, State, Zip code, Foreign Country
- Account # (optional), 2nd TIN not
- Email Address (Optional)
- Common 1099-MISC Payments: Box 1 - Rents, Box 7 - Nonemployee compensation
- Recipient is inactive [exclude from 1099 forms, 1096 form and 1099 electronic filing]

Buttons at the bottom of the dialog box include "OK" and "Cancel".

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 Emler Help Order Supplies

Shortcuts

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

New 1099 / 1098 Recipient

Modify Recipient Delete Recipient Sort Recipients By: Recipient's Name (Line One)

**Enter New Recipient data 4**

**General**

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

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

Address

Address 1

Address 2 (only used when "Types of 1099 Forms Received" is "Form 1099-MISC")

City State Zip code Foreign Country

Email Address (Optional)

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

What is 1099 Emler?

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: 0.00 Box 7 - Nonemployee compensation 0.00

**Click OK 5**

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

OK Cancel

6. Choose 1099 & 1098 Forms in shortcuts

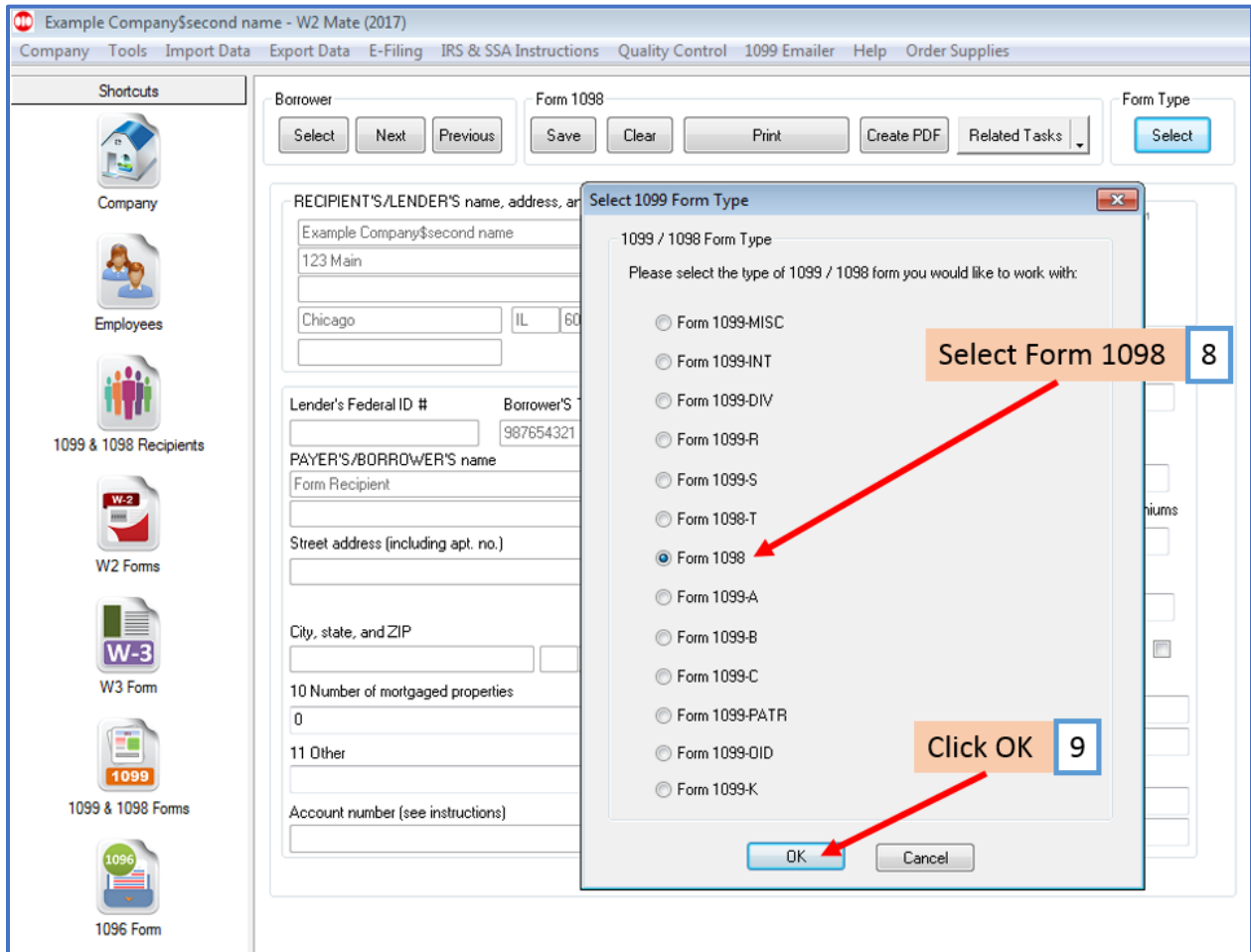
7. Click Select under form type

The screenshot displays the W2 Mate software interface for the year 2017. The main window is titled "Example Company - W2 Mate (2017)". The interface is divided into several sections:

- Shortcuts:** A vertical sidebar on the left 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 the "1099" form type selection box in the main area.
- Form Selection:** The "Form Type" dropdown menu is set to "1099-MISC". A blue box with the number "6" highlights the "1099" form type selection box. A red arrow points from this box to the "1099 & 1098 Forms" icon in the shortcuts sidebar.
- Form Data:** The main area contains a form for "1099 Recipient" and "Form 1099-MISC". The "1099 Recipient" section includes fields for "Payer's name, street address, city, state, zip code, and Tel. #", "PAYER'S Federal ID number", "RECIPIENT'S ID number", "Street address (including apt. no.)", "City, state, and ZIP code", "Account number (optional)", "FATCA Filing REQ", and "2nd TIN not.". The "Form 1099-MISC" section includes fields for "1 Rents", "2 Royalties", "3 Other income", "4 Federal income tax withheld", "5 Fishing boat proceeds", "6 Medical and health care payments", "7 Nonemployee compensation", "8 Substitute payments in lieu of dividends or interest", "9 Payer made direct sales of \$5,000 or more of consumer products to a buyer for resale", "10 Crop insurance proceeds", "11", "12", "13 Excess golden parach.", "14 Gross proceeds paid to an attorney", "16 State tax withheld", "17 State / Payer's State Number", and "18 State income".
- Buttons:** At the top of the form area, there are buttons for "Select", "Next", "Previous", "Save", "Clear", "Print", "Create PDF 1099's", "Related Tasks", and "Form Type". A blue box with the number "7" highlights the "Select" button under the "Form Type" dropdown. A red arrow points from this box to the "Select" button.

8. Select Form 1098

9. Click OK



10. Click Select under Recipient

11. Select 1098 Recipient

12. Click OK

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

Company Tools Import Data Export Data Quality Control 1099 Emailer Help Order Supplies

Shortcuts

Company

Employees

1099 & 1098 Recipients

W2 Forms

W3 Form

1099 & 1098 Forms

1096 Form

Borrower Form 1098 Form Type

Select Next Previous Save Clear Print Create PDF Related Tasks Select

Select 1099 Recipient

The list below includes ONLY the recipients who receive 1098 forms, since the "1099 Form Type" currently selected is 1098. 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      |                 |                |
| 4 | 123456789             | New             | Recipient       |                |

Select Recipient 11

Click OK 12

OK Cancel

13. Fill in recipient(s) amounts (for example: Mortgage interest received, Points paid on purchase, Refund of overpaid interest, 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 Exp Click Save 14 Instr Complete Information for Recipient 13

Shortcuts

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

Borrower Form 1098

Select Next Previous Save Clear Print Create PDF Related Tasks Form Type Select

RECIPIENT'S/LENDER'S name, address, and telephone #

Example Company\$second name  
123 Main  
Chicago IL 60605

OMB No. 1545-0901  
2017  
Form 1098

Lender's Federal ID # Borrower'S Taxpayer ID #  
987654321

PAYER'S/BORROWER'S name  
Form Recipient

Street address (including apt. no.)

City, state, and ZIP

10 Number of mortgaged properties  
0

11 Other

Account number (see instructions)

1 Mortgage interest received from payer(s)/borrower(s)  
0.00

2 Outstanding mortgage principal as of 1/1/2017  
0.00

3 Mortgage origination date (mm/dd/yyyy)

4 Refund of overpaid interest  
0.00

5 Mortgage insurance premiums  
0.00

6 Points paid on purchase of principal residence  
0.00

Is address of property securing mortgage same as PAYER'S/BORROWER'S address

8 Address of property securing mortgage (see instructions)

9 If property has no address, provide description of the property

15. Click Print

16. Select Recipients

17. Select copy to print

Note: To print a Recipient /Payer copy on 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

The screenshot shows the 'Print 1099 Forms' dialog box in the W2 Mate software. The dialog is titled 'Print 1099 Forms' and has three steps:

**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) |
|--------------------------|------------------|-----------------------------|-----------------------------|
| <input type="checkbox"/> | 987054321        | Form Recipient              |                             |
| <input type="checkbox"/> | 777889999        | Jane A Test                 |                             |
| <input type="checkbox"/> | 999887777        | John Q. Doe                 |                             |
| <input type="checkbox"/> | 123456789        | New                         | Recipient                   |

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

Print a recipient / payer copy: Instructions for Copy B

Print DATA ONLY on a preprinted form (IRS Copy A on red-ink form or any other copy on pre-printed form)

Mark as CORRECTED

Mask Recipient's Tax ID Number on Copy B.

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

Horizontal (inch):   Move data to the LEFT  Move data to the RIGHT

Vertical (inch):   Move data UP  Move data DOWN

Vertical space between forms (DO NOT change unless you have to):  Space between first and second form. Default is 1.00 Inch

Buttons: OK, Cancel



19. Select the correct printer

20. Click OK

