

How to E-File 1098-T Forms Using W2 Mate

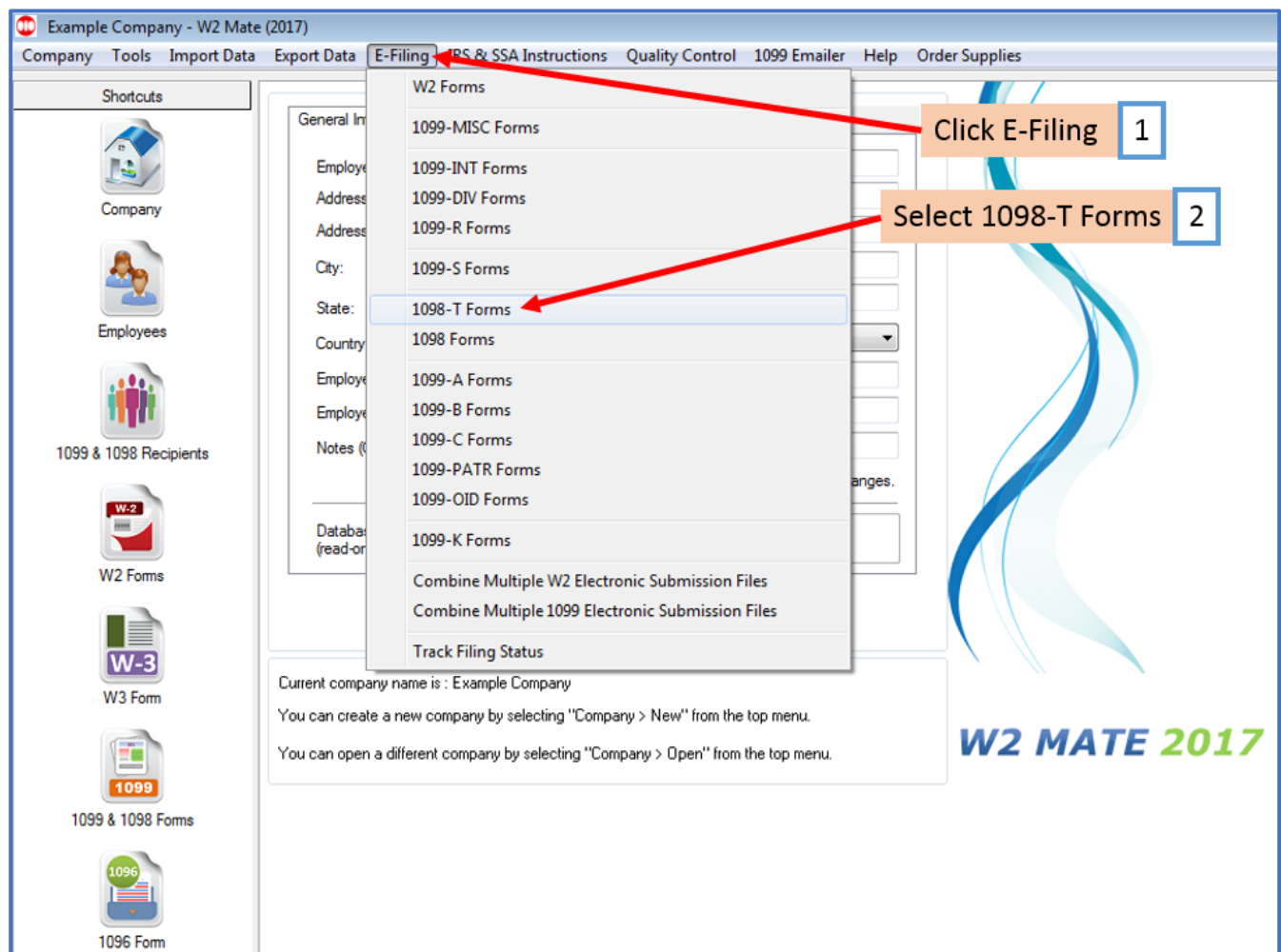
Note: Before you can file electronically with the IRS you need to obtain a TCC code (Transmitter Control Code). If you filed with the IRS electronically before, then you should already have a TCC code.

If this is the first time you are filing electronically then you can easily obtain a TCC code by submitting Form 4419 to the IRS. You will need a TCC code to electronically file regardless whether you use our software or any other software.

Make sure you have the correct Company open inside W2 Mate

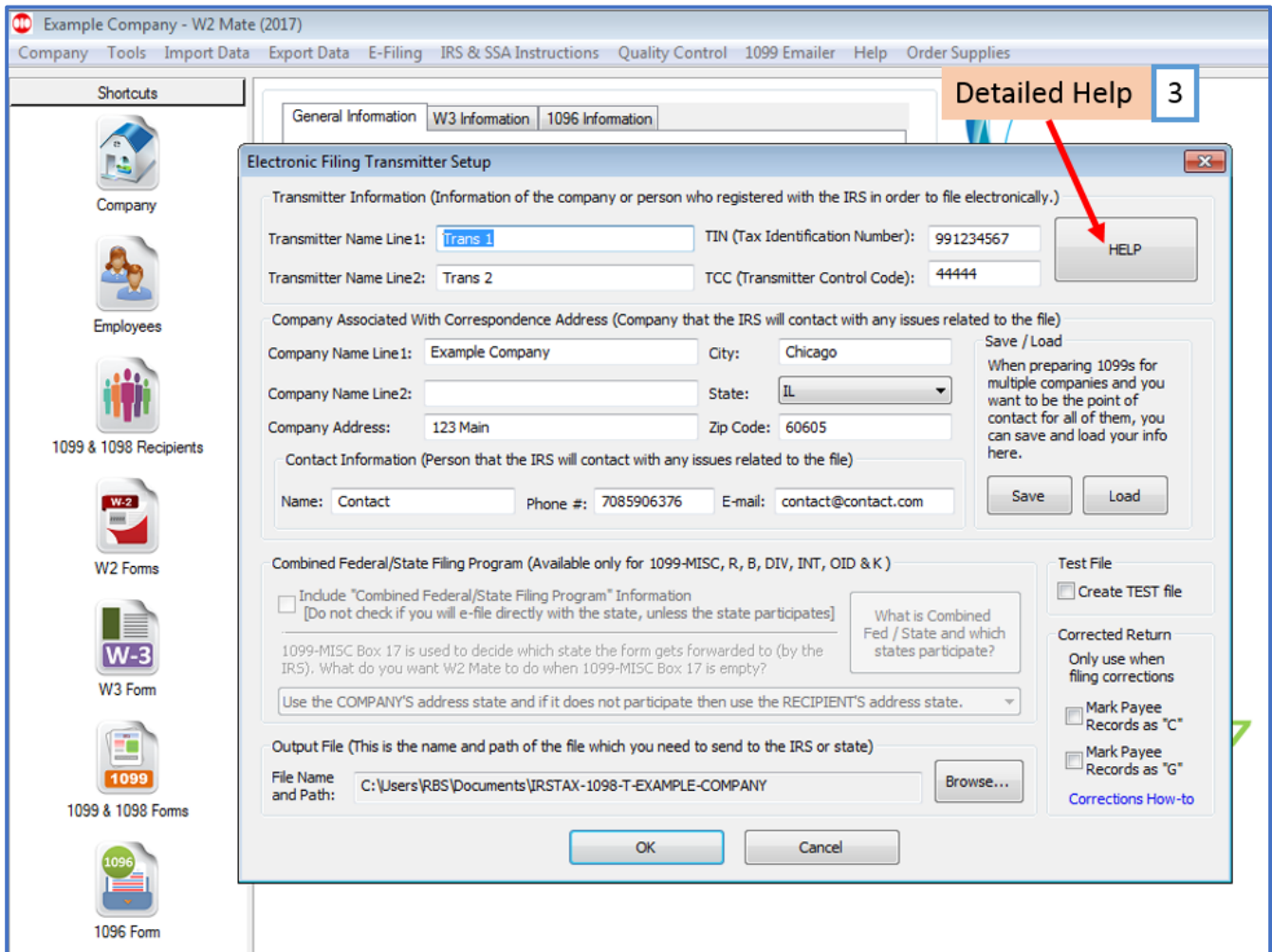
Note: In order to use this feature you must purchase and enable W2 Mate Option #4 to electronically file

1. Click E-Filing
2. Click 1098-T Forms

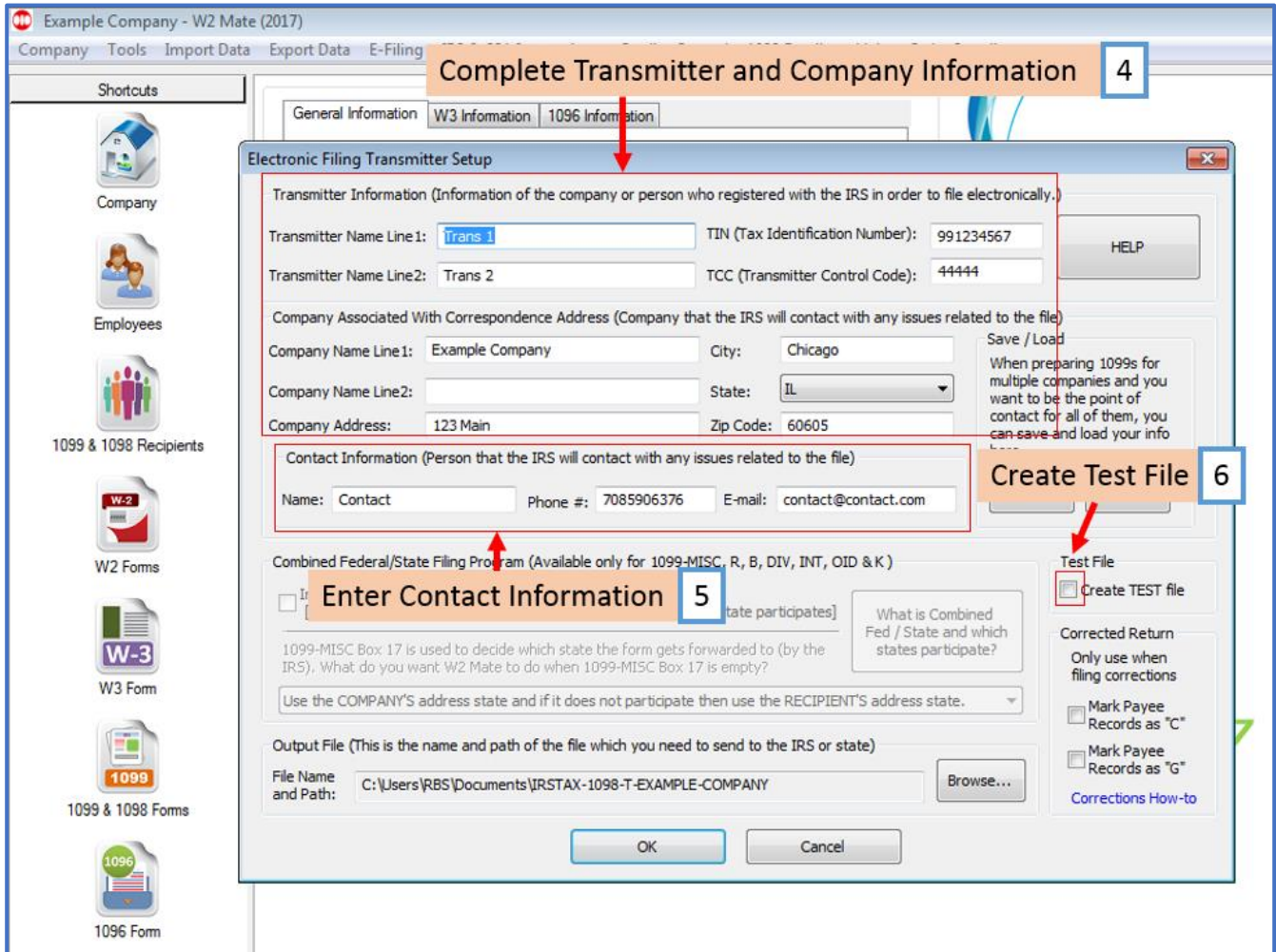


This will open the Electronic Filing Transmitter Setup

3. To see detailed help with the electronic filing process, click on the HELP button



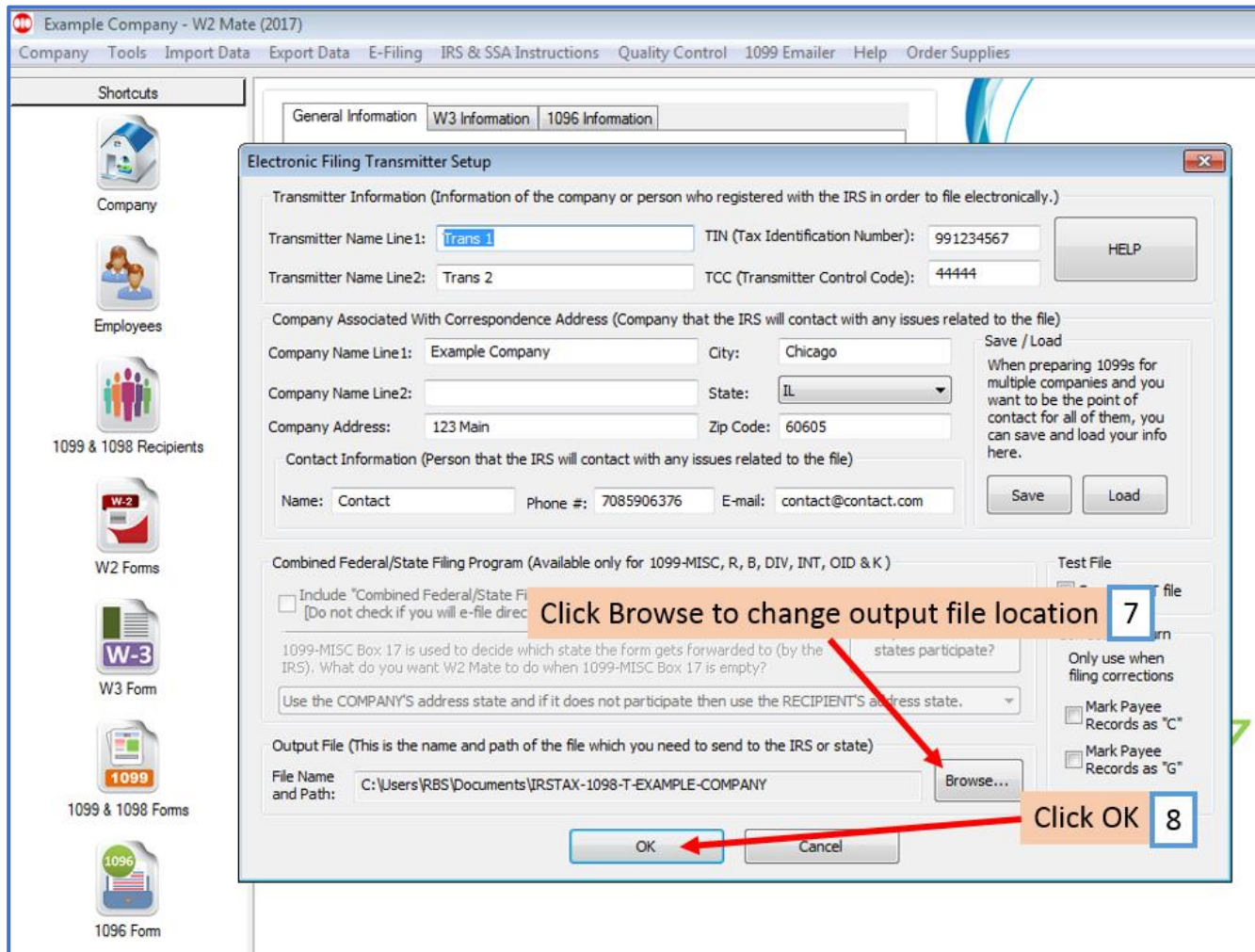
4. Fill in all transmitter and company information
5. Enter Contact Information
6. Select Create a TEST file to create a test file, if needed



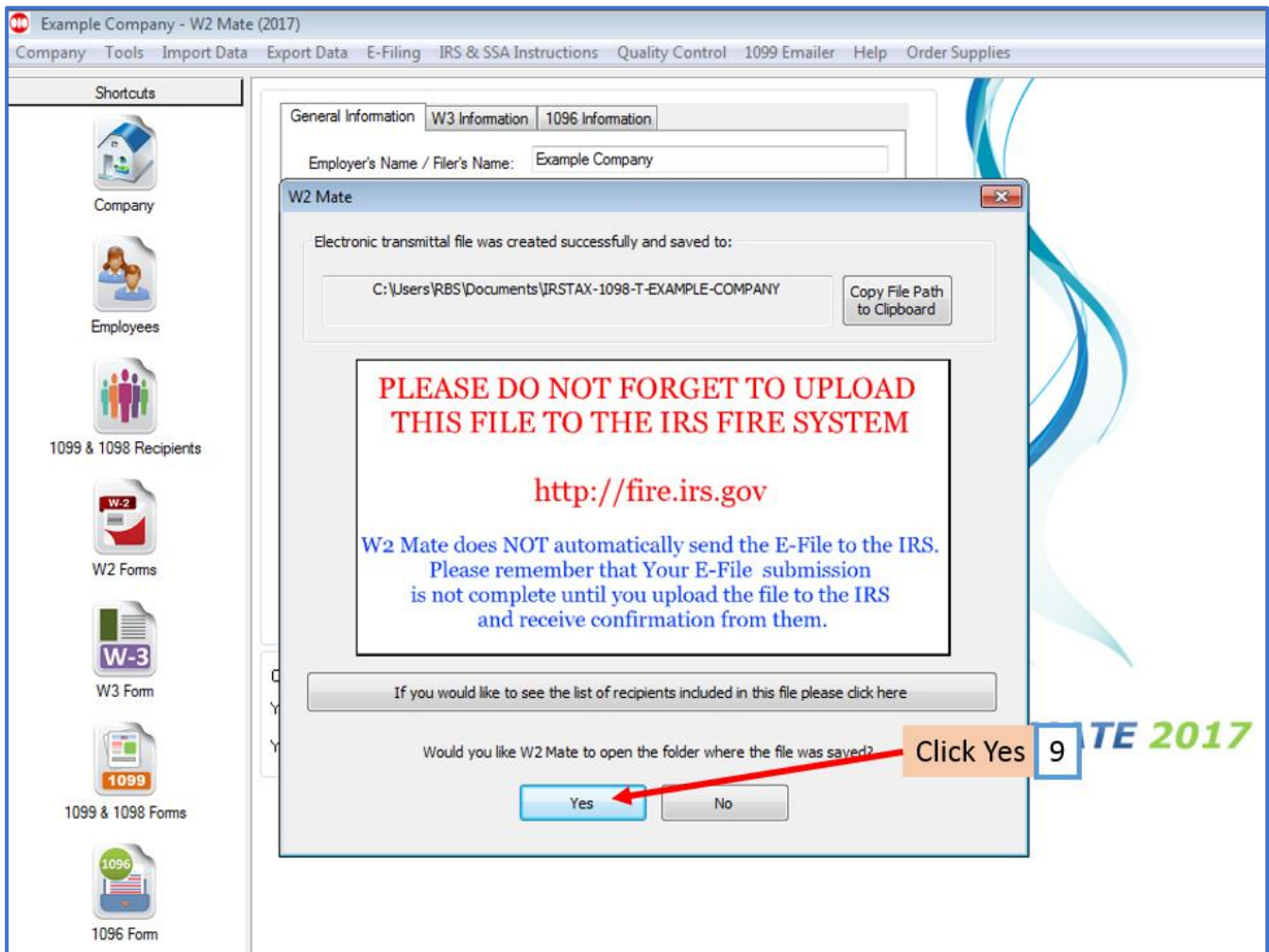
Note: Combined Federal/State Program is not available for form 1098-T

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

8. Click OK



9. To open the folder where the file was saved Click Yes

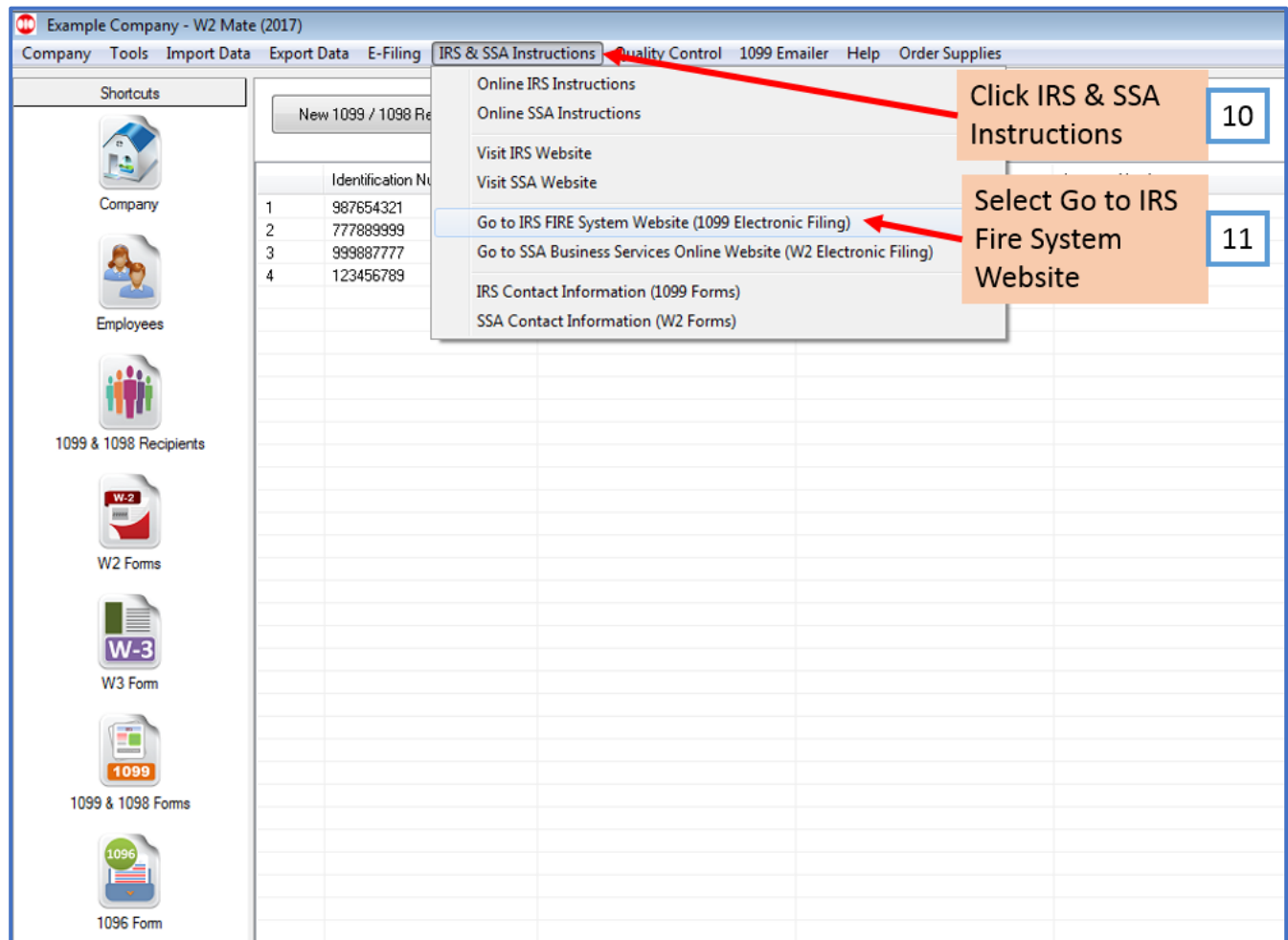


Now go to the IRS FIRE website to upload your 1099/1098 electronic submission file

To access the IRS FIRE website from inside W2 Mate:

10. Click IRS & SSA Instructions

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



You will be rerouted to the IRS FIRE Website (<http://fire.irs.gov>), where you must log in to submit the file you have created.

Note: Log into the IRS FIRE System Website. If you do not have a user name and password click "Create New Account" link and follow the instructions. If you have any questions regarding the IRS FIRE system website call (866)-455-7438.