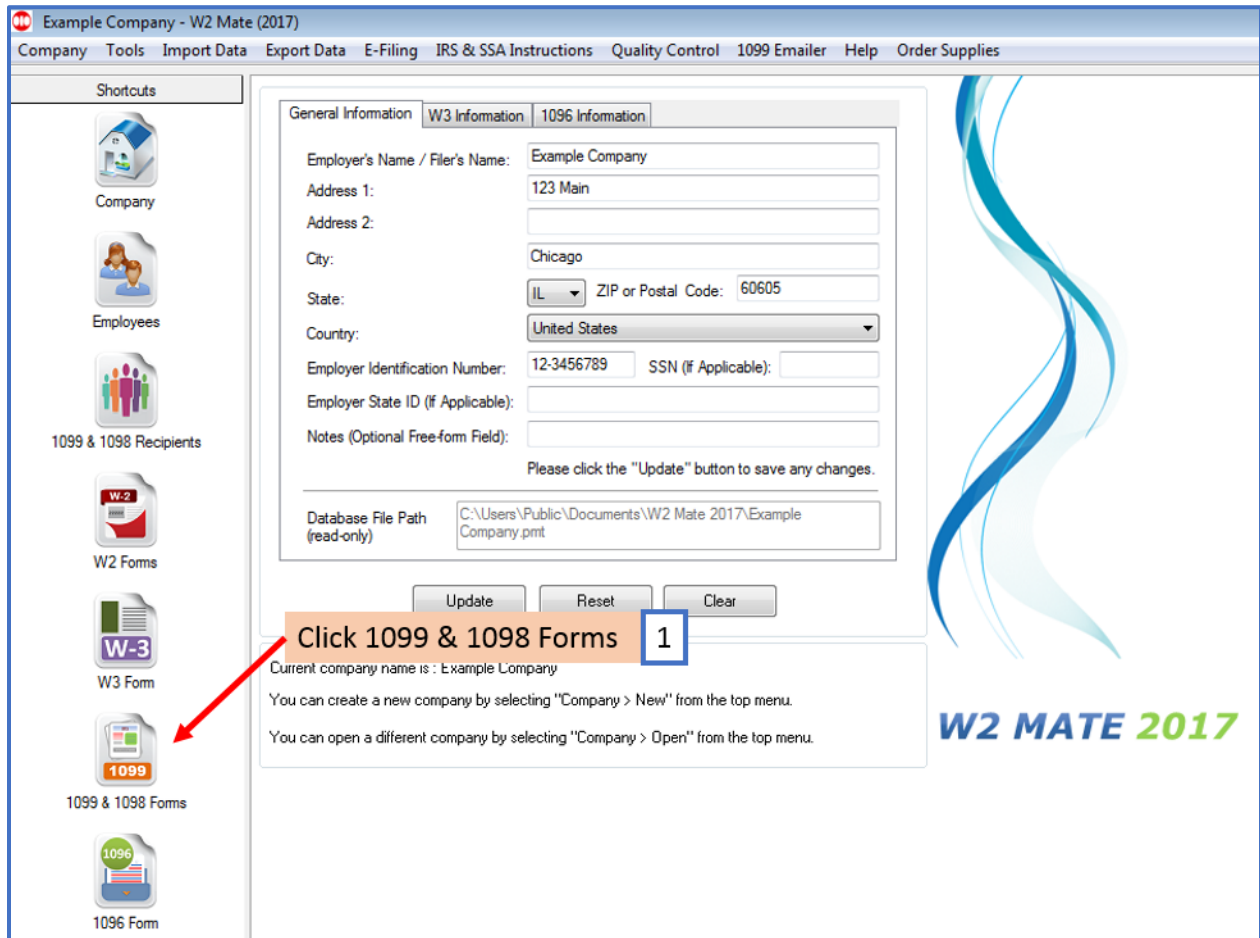


How to Edit Data on a 1098-T Form

Make sure you have the correct Company open inside W2 Mate

1. Click 1099 & 1098 Forms from the Shortcuts menu



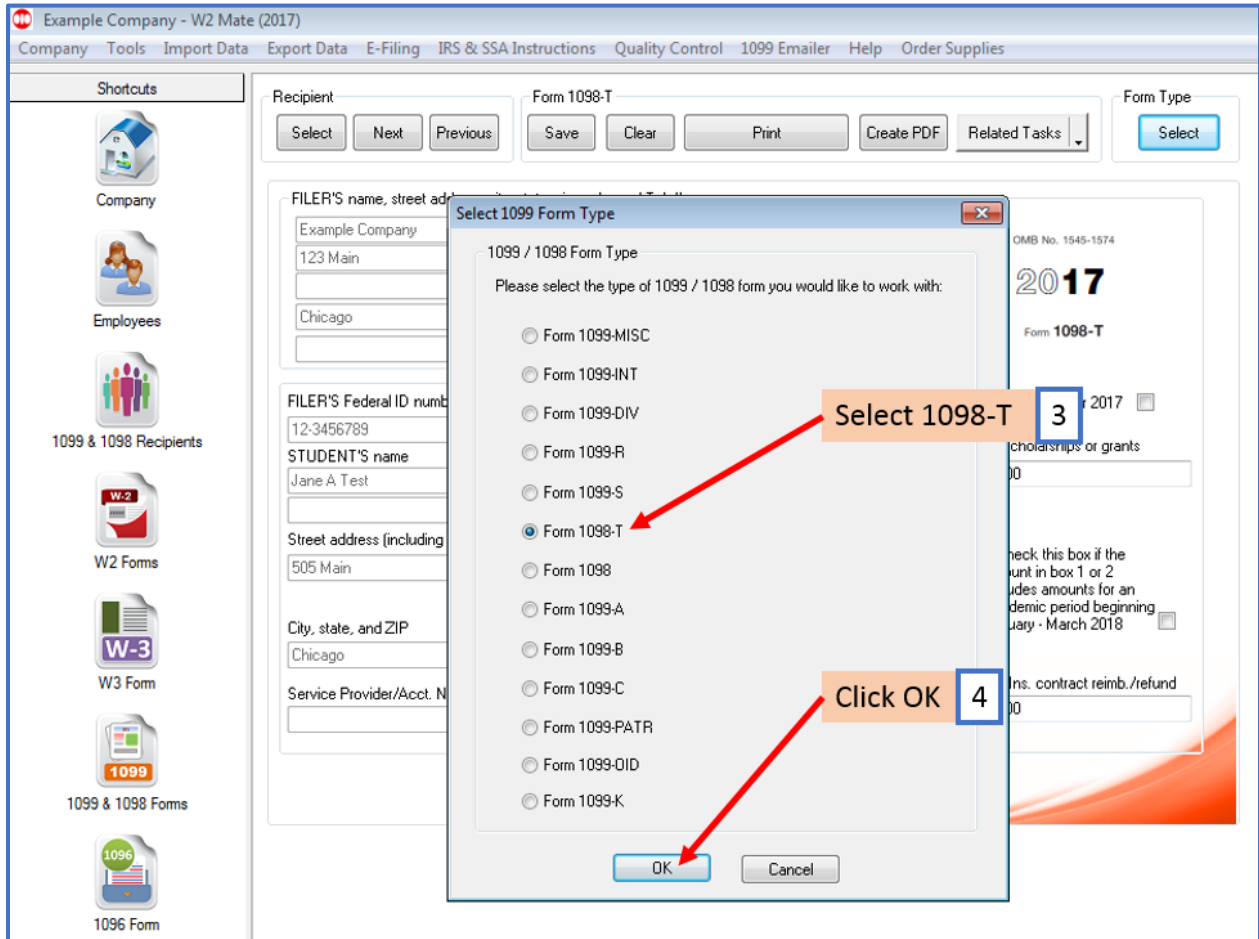
2. Click Select under Form Type

The screenshot shows the W2 Mate software interface for 'Example Company - W2 Mate (2017)'. The top menu bar includes 'Company', 'Tools', 'Import Data', 'Export Data', 'E-Filing', 'IRS & SSA Instructions', 'Quality Control', '1099 E-mailer', 'Help', and 'Order Supplies'. On the left, a 'Shortcuts' sidebar lists 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W3 Form', '1099 & 1098 Forms', and '1096 Form'. The main area is titled 'Form 1098-T' and contains several sections:

- Recipient:** Includes buttons for 'Select', 'Next', 'Previous', 'Save', 'Clear', 'Print', 'Create PDF', 'Related Tasks', and 'Form Type' (with a 'Select' button). A red arrow points to this 'Select' button.
- FILER'S name, street address, city, state, zip code, and Tel. #:** Fields for 'Example Company', '123 Main', 'Chicago', 'IL', and '60605'.
- FILER'S Federal ID number:** '12-3456789'
- STUDENT'S taxpayer ID no.:** '777889999' with a checkbox.
- STUDENT'S name:** 'Jane A Test'
- Street address (including apt. no.):** '505 Main'
- City, state, and ZIP:** 'Chicago', 'IL', '60605'
- Service Provider/Acct. No. (see instr.):** Empty field.
- 8 Check if at least half-time student:** Checkbox.
- Form 1098-T Summary (2017):**
 - 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

3. Select Form 1098-T

4. Click OK



5. Click Select under Recipient

Example Company - W2 Mate (2017)

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

Shortcuts

Company

Employees

1099 & 1098 Recipients

W2 Forms

W3 Form

1099 & 1098 Forms

1096 Form

Recipient

Form 1098-T

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

Click Select 5 address, city, state, zip code, and Tel. #

123 Main

Chicago IL 60605

FILER'S Federal ID number 12-3456789 STUDENT'S taxpayer ID no. 777889999

STUDENT'S name Jane A Test

Street address (including apt. no.) 505 Main

City, state, and ZIP Chicago IL 60605

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

9 Check if a graduate 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

10 Ins. contract reimb./refund 0.00

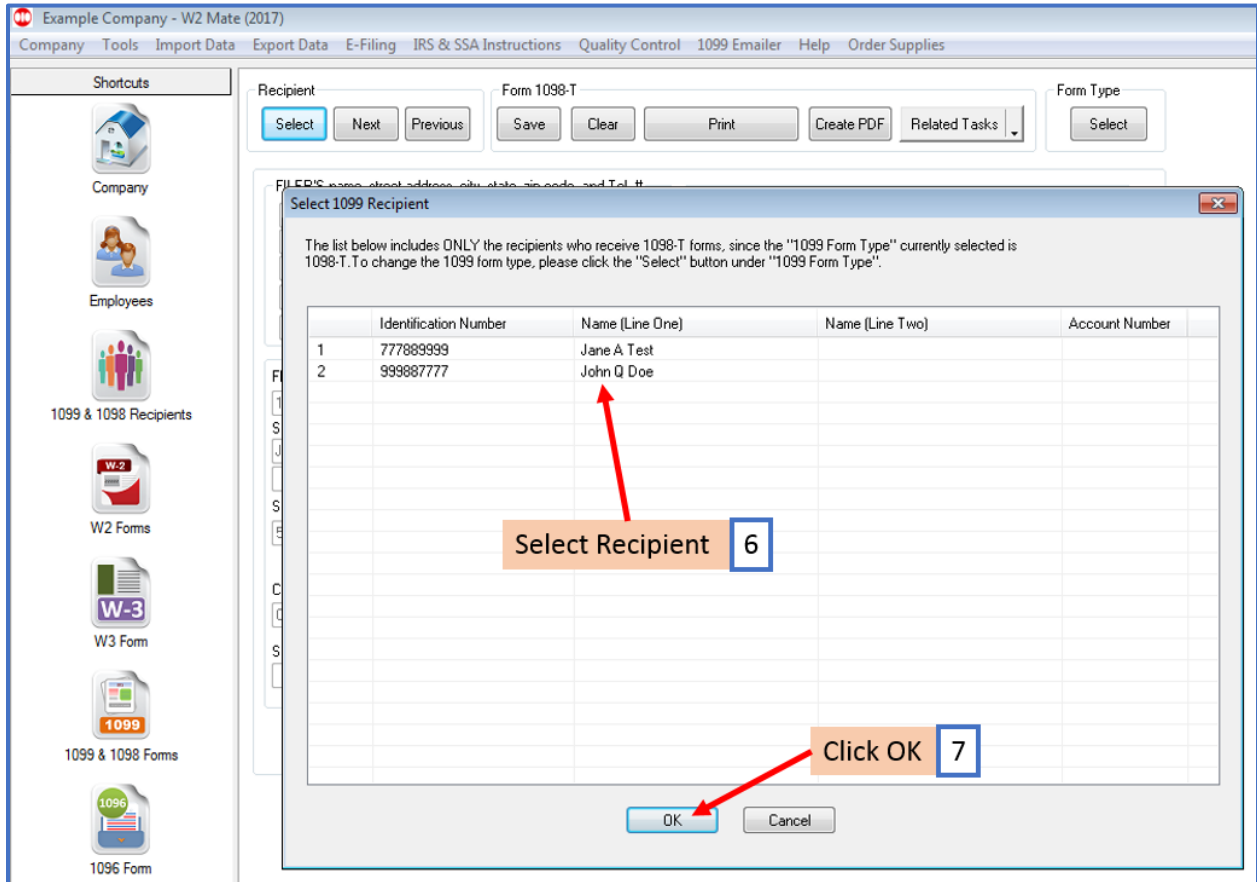
OMB No. 1545-1574

2017

Form 1098-T

6. Select Recipient

7. Click OK



8. Edit 1098-T Data as needed

9. Click Save

Example Company - W2 Mate (2017)

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

Shortcuts

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

Recipient Form 1098

Select Next Previous Save Clear Print Create PDF Related Tasks Select

Click Save 9 **Edit Data 8**

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

Example Company
123 Main
Chicago IL 60605

FILER'S Federal ID number 12-3456789 STUDENT'S taxpayer ID no. 777889999

STUDENT'S name
Jane A Test

Street address (including apt. no.)
505 Main

City, state, and ZIP
Chicago IL 60605

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

10. Click Yes

The screenshot shows the W2 Mate (2017) software interface. A modal dialog box titled "W2 Mate (2017)" is open, displaying a warning icon and the text "Are you sure you want to save the current fields?". The dialog has "Yes" and "No" buttons. A red arrow points from the "Click Yes" text to the "Yes" button. In the background, the main form is visible, showing fields for "FILER'S name, street address, city, state, zip code, and Tel. #", "FILER'S Federal ID n", "STUDENT'S name", "Street address (includ", "City, state, and ZIP", "Service Provider/Acct. No. (see instr.)", "1 Payments received for qualified tuition and related expenses", "2 Amounts billed for qualified tuition and related expenses", "3", "4", "5 Scholarships or grants", "6", "7 Check this box if the amount in box 1 or 2 includes amounts for an academic period beginning January - March 2018", "8 Check if at least half-time student", "9 Check if a graduate student", and "10 Ins. contract reimb./refund". The year "2017" is prominently displayed. The left sidebar contains shortcuts for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms, and 1096 Form.