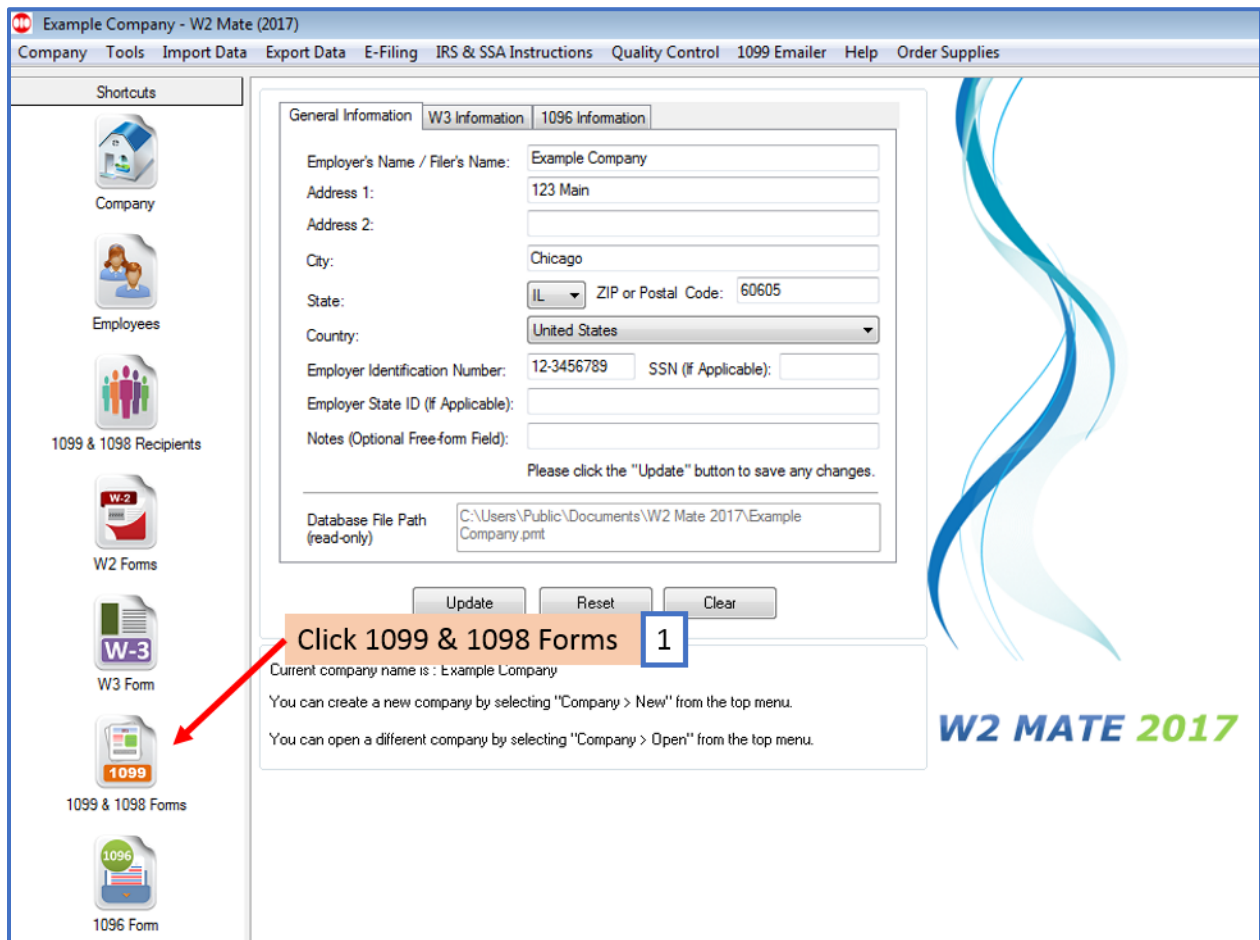


How to Edit Data on a 1098 Form

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

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

Borrower Form 1098 Form Type

Select Next Previous Save Clear Print Create PDF Related Tasks Select

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

Example Company
123 Main
Chicago IL 60605

Lender's Federal ID # 12-3456789 Borrower's Taxpayer ID # 777889999

PAYER'S/BORROWER'S name
Jane A Test

Street address (including apt. no.)
505 Main

City, state, and ZIP
Chicago IL 60605

10 Number of mortgaged properties
0

11 Other

Account number (see instructions)

Form Type: 2017 Form 1098

Click Select

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

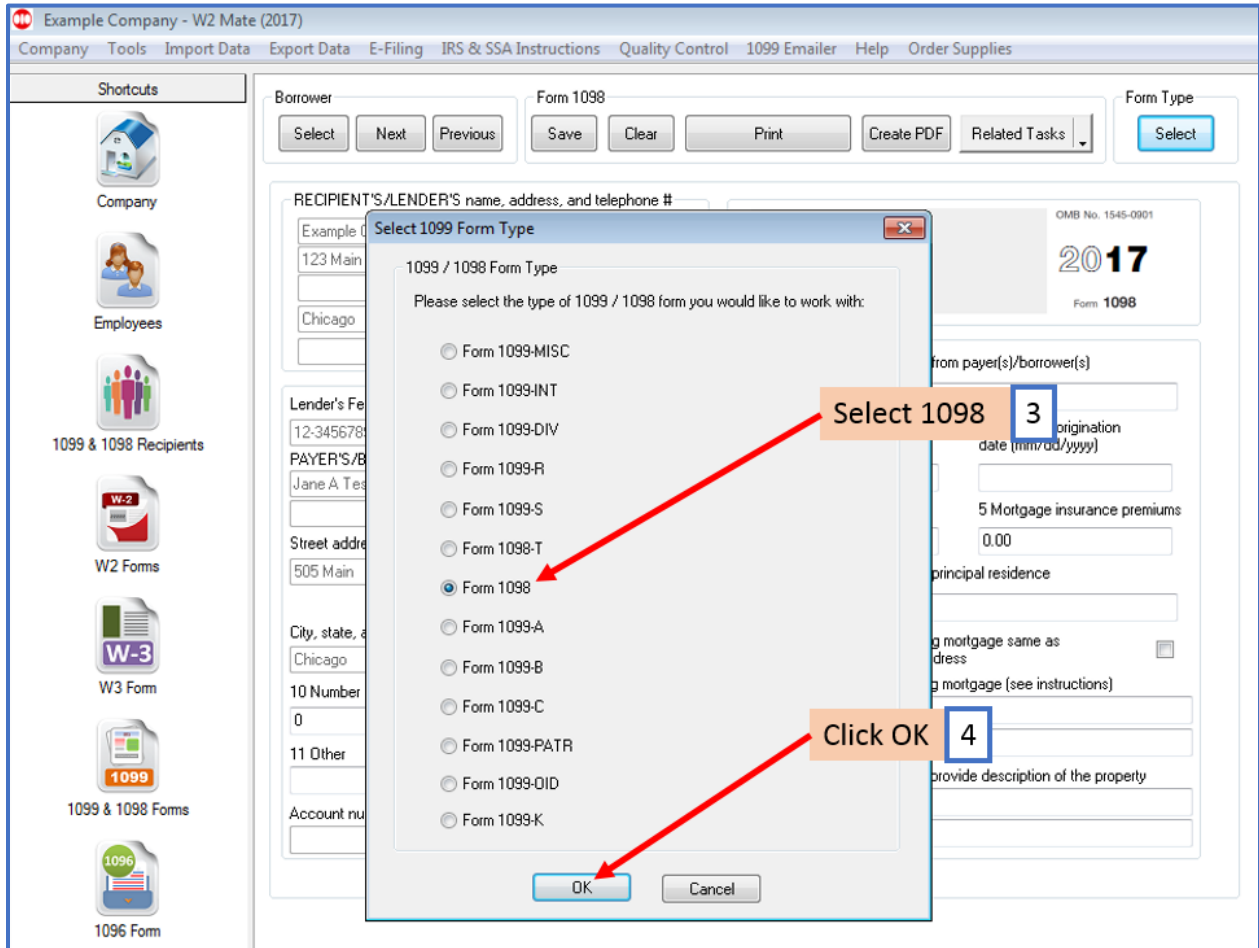
Is address of property securing mortgage same as PAYER'S/BORROWER'S address

8 Address of property securing mortgage (see instructions)

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

3. Select Form 1098

4. Click OK



5. Click Select under Borrower

The screenshot shows the W2 Mate software interface for the year 2017. The top menu bar includes 'Company', 'Tools', 'Import Data', 'Export Data', 'E-Filing', 'IRS & SSA Instructions', 'Quality Control', '1099 Emailer', 'Help', and 'Order Supplies'. On the left, there is a 'Shortcuts' sidebar with icons for 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W3 Form', '1099 & 1098 Forms', and '1096 Form'. The main window is titled 'Borrower' and 'Form 1098'. It contains several input fields and buttons. A red arrow points to the 'Select' button under the 'Borrower' section, with a callout box containing the text 'Click Select' and a blue box with the number '5'. The form fields include: 'Borrower's name, address, and telephone #' (with a value of '123 Main', 'Chicago', 'IL', '60605'), 'Lender's Federal ID #' (12-3456789), 'Borrower's Taxpayer ID #' (777889999), 'PAYER'S/BORROWER'S name' (Jane A Test), 'Street address (including apt. no.)' (505 Main), 'City, state, and ZIP' (Chicago, IL, 60605), '10 Number of mortgaged properties' (0), '11 Other', and 'Account number (see instructions)'. On the right, there is a 'Form Type' dropdown set to '1098' and a '2017' year selector. Below this, there are sections for '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' (checkbox), '8 Address of property securing mortgage (see instructions)', and '9 If property has no address, provide description of the property'.

8. Edit 1098 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

Borrower Form 1098 **Click Save 9** **Edit Data 8** Type

Select Next Previous Save Clear Print Create PDF Related Tasks Select

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

Example Company
123 Main
Chicago IL 60605

OMB No. 1545-0901
2017
Form 1098

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

12-3456789 777889999

PAYER'S/BORROWER'S name

Jane A Test

Street address (including apt. no.)

505 Main

City, state, and ZIP

Chicago IL 60605

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

10. Click Yes

The screenshot shows the W2 Mate (2017) software interface. A confirmation dialog box is displayed in the center, asking "Are you sure you want to save the current fields?". The dialog has a yellow warning icon and two buttons: "Yes" and "No". A red arrow points from the "Yes" button to a blue box containing the number "10". Above this box, the text "Click Yes" is written in orange. The background shows the main form for Form 1098, with fields for Recipient's/Lender's name, address, telephone, Lender's Federal ID #, Borrower's Taxpayer ID #, and mortgage interest received. The interface includes a top menu bar with options like "Company", "Tools", "Import Data", "Export Data", "E-Filing", "IRS & SSA Instructions", "Quality Control", "1099 E-mailer", "Help", and "Order Supplies". A left sidebar contains shortcuts for "Company", "Employees", "1099 & 1098 Recipients", "W2 Forms", "W3 Form", "1099 & 1098 Forms", and "1096 Form".