

How to Enter Data on Other 1099/1098 Forms

W2 Mate has an optional feature to add support for additional 1099/1098 forms

Additional Forms included with the optional feature purchase:

- 1099-INT* Forms: Interest Income
- 1099-DIV* Forms: Dividends and Distributions
- 1099-R* Forms: Distributions From Pensions, Annuities, Retirement, etc.
- 1099-A* Forms: Acquisition or Abandonment of Secured Property
- 1099-B* Forms: Proceeds From Broker and Barter Exchange Transactions
- 1099-C* Forms: Cancellation of Debt
- 1099-PATR* Forms: Taxable Distributions Received From Cooperatives
- 1099-OID* Forms: Original Issue Discount
- 1099-S* Forms: Proceeds From Real Estate Transactions
- 1099-K* Forms: Merchant Card and Third Party Network Payments
- 1098* Forms: Mortgage Interest Statement
- 1098-T* Forms: Tuition Statement

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 1099/1098 forms

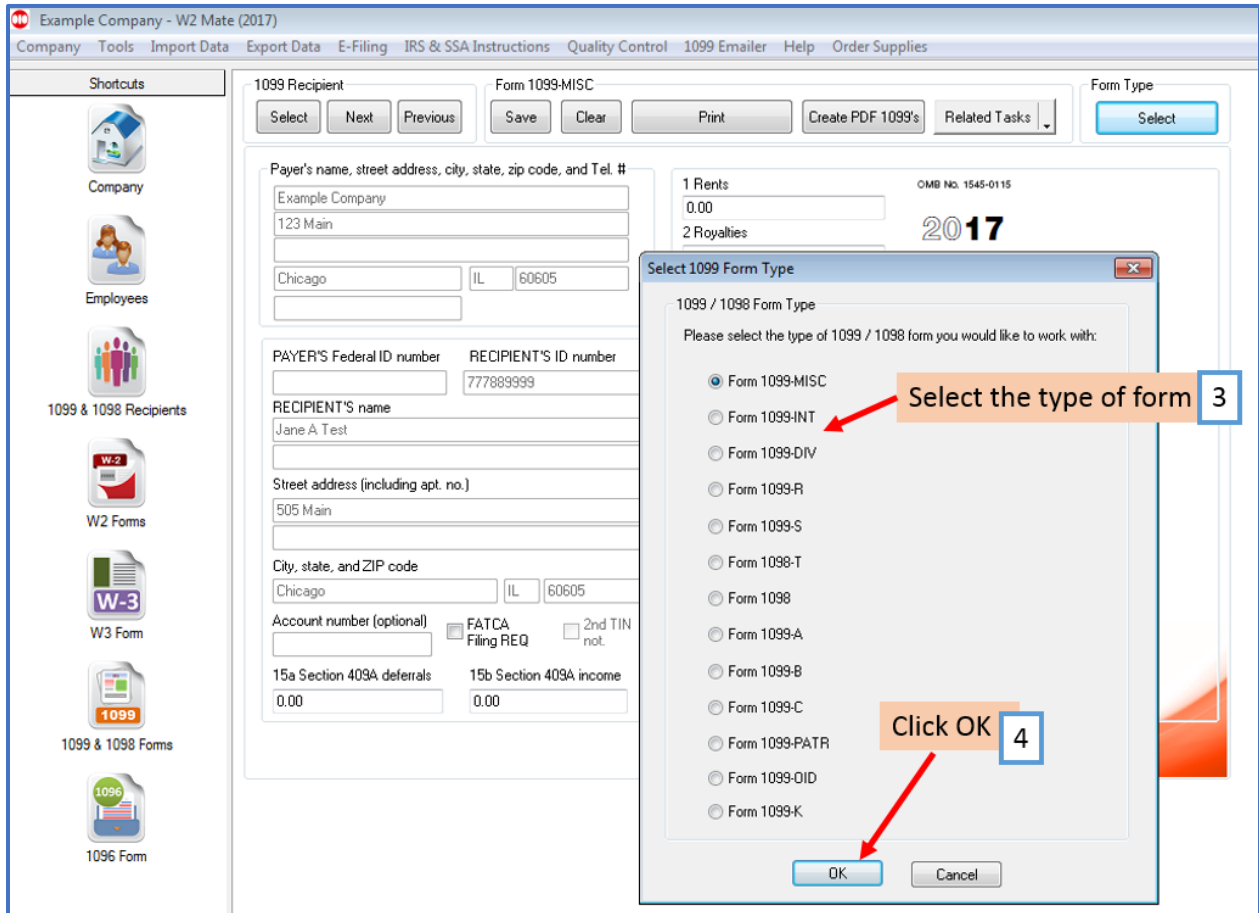
1. Click 1099 & 1098 Forms from Shortcuts
2. In the upper right corner under Form Type Click Select

The screenshot shows the W2 Mate software interface for creating a 1099-MISC form. The interface is titled "Example Company - W2 Mate (2017)". The main window 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 to the "1099 & 1098 Forms" icon, which is labeled with a blue box containing the number "1".
- Form 1099-MISC:** The main area displays the form creation interface. At the top, there are buttons for "Select", "Next", "Previous", "Save", "Clear", "Print", "Create PDF 1099's", and "Related Tasks". A "Form Type" dropdown menu is located in the upper right corner, with a red arrow pointing to the "Select" button, labeled with a blue box containing the number "2".
- Form Fields:** The form includes fields for "Payer's name, street address, city, state, zip code, and Tel. #", "PAYER'S Federal ID number", "RECIPIENT'S ID number", "RECIPIENT'S name", "Street address (including apt. no.)", "City, state, and ZIP code", "Account number (optional)", "FATCA Filing REQ", "2nd TIN not.", "15a Section 409A deferrals", "15b Section 409A income", and various income and withholding categories (1-18).

3. Choose the form you want to work with

4. Click OK



The selected form will open on your screen

Note: When the form opens you can enter the applicable data for this specific form