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:

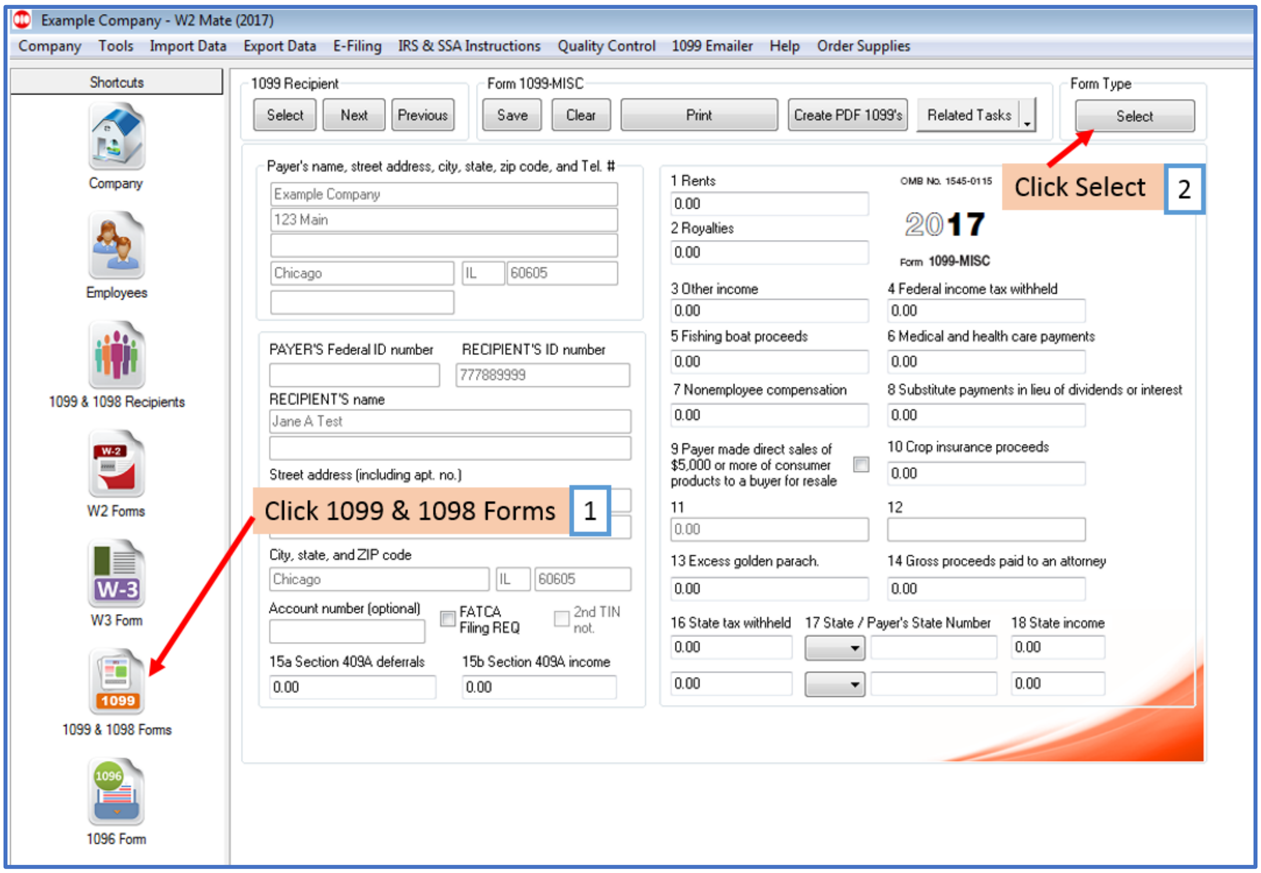
- 1099-INT* Forms: Interest Income
- 1099-DIV* Forms: Dividends and Distributions
- 1099-R* Forms: Distributions From Pensions, Annuities, Retirement, etc.
- 1099-A* Forms: Acquisition or Abandonment of Secured Property
- 1099-B* Forms: Proceeds From Broker and Barter Exchange Transactions
- 1099-C* 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

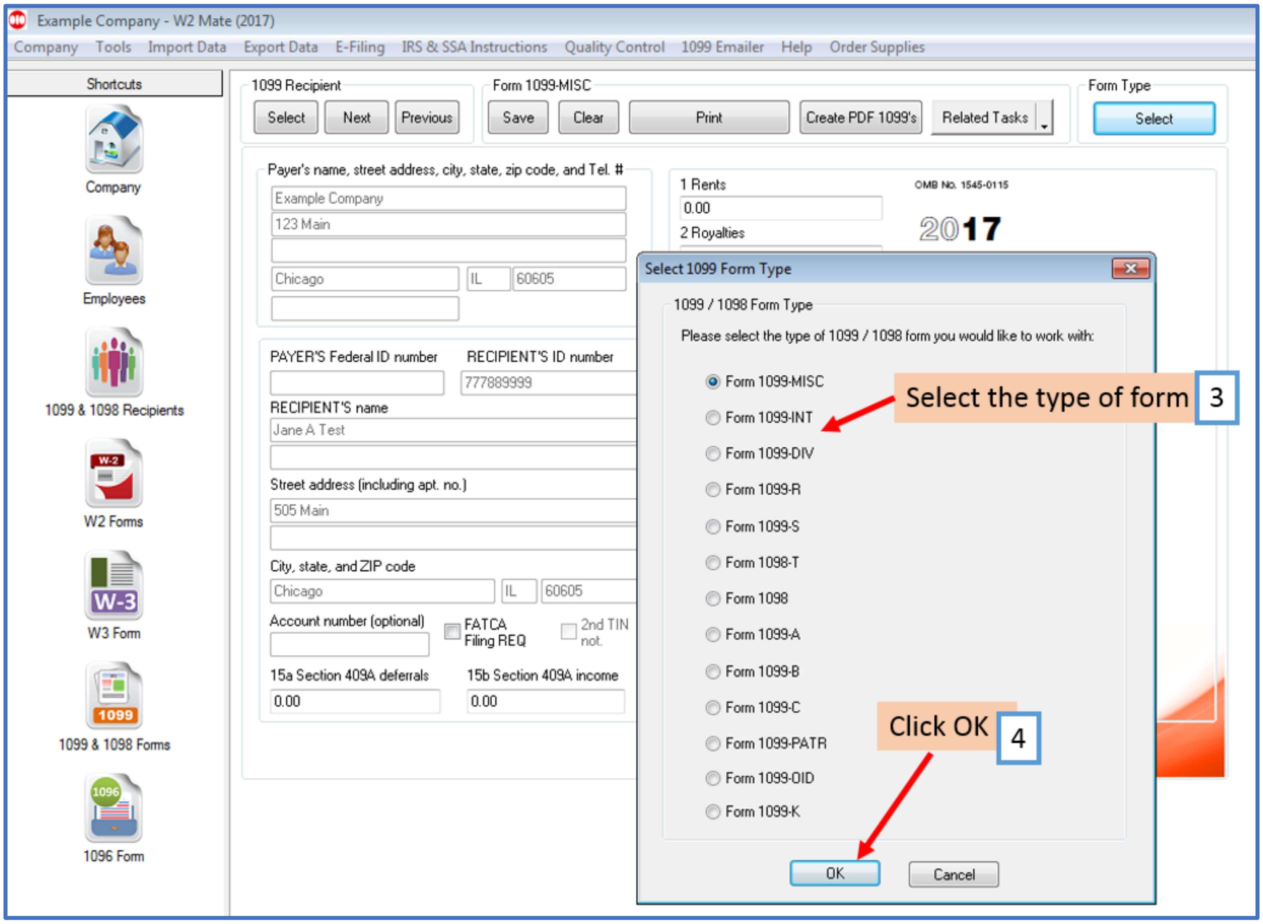
1. Click 1099 & 1098 Forms from Shortcuts

2. In the upper right corner under Form Type Click Select



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