

How to Import 1098-T Data in W2 Mate

Note: In order to use this feature you must purchase and enable W2 Mate Option #3 to import

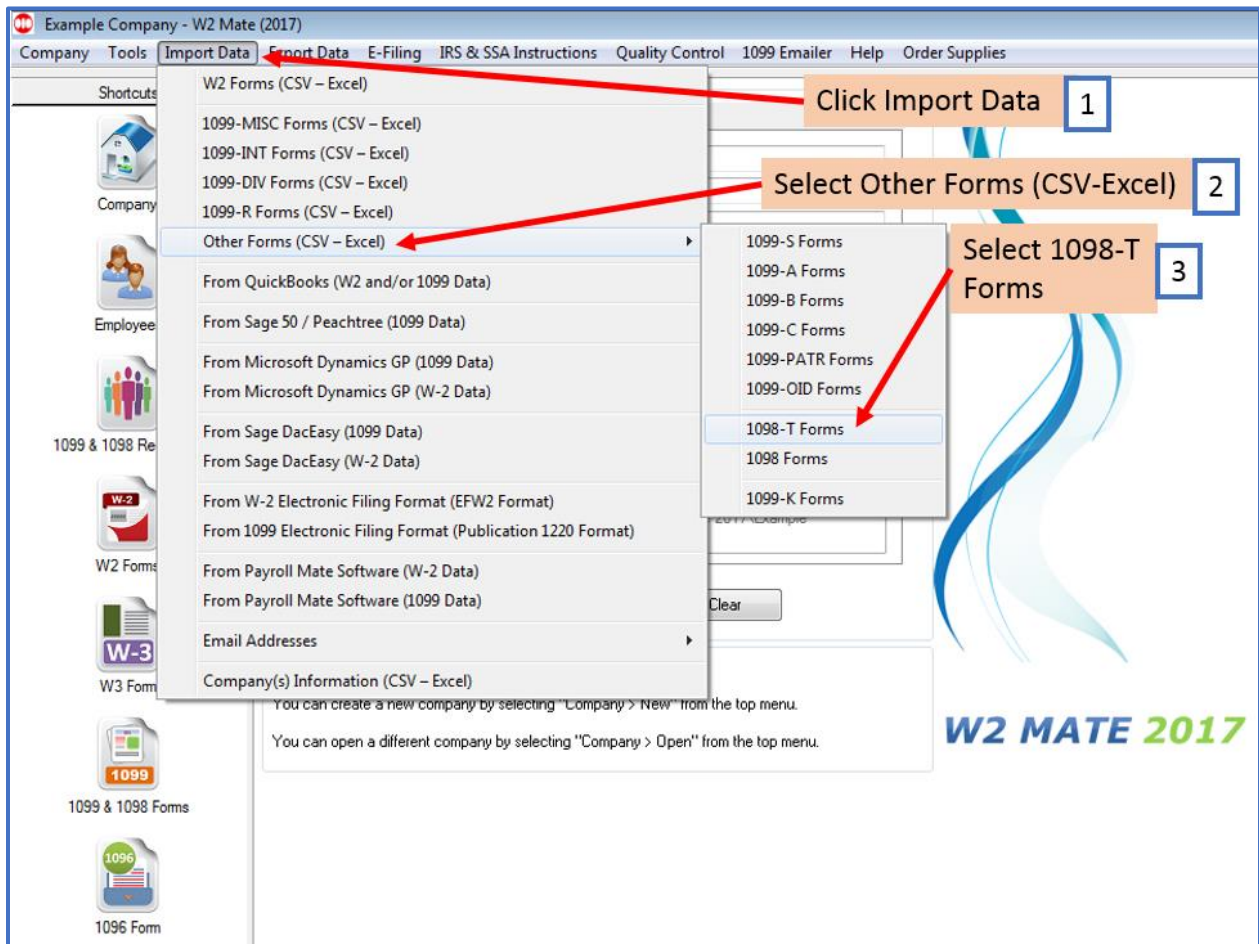
Make sure you have the correct Company open inside W2 Mate

1. Click Import Data

2. Select Other Forms (CSV – Excel)

3. Select 1098-T Forms

If you need help converting your Excel to a CSV please see “Creating a CSV from an Excel Spreadsheet” at the bottom of this tutorial



This will open the Import 1098-T Forms wizard

4. To get detailed help with the import process, click on the Data Import Help button

Note: CSV files typically use a comma separator. Leave the separator options to default unless otherwise specified.

5. Click Browse to select the correct CSV data file to import

a. Once you select the input file you should see a preview for the contents of the file.

Note: The first row is expected to include header information and NOT data. The header should contain names corresponding to the fields (columns) in the file and should contain the same number of fields (columns) as the records in the rest of the CSV file.

The screenshot displays the 'Import 1098-T Forms' wizard in the W2 Mate software. The interface is divided into a sidebar on the left and a main content area. The sidebar contains shortcuts for 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W3 Form', '1099 & 1098 Forms', and '1096 Form'. The main content area shows the 'Import 1098-T Forms' dialog with three steps:

- Step One: Set Separator Options**: Fields are separated by: Comma, Text Delimiter: Double. A 'Data Import Help' button is visible.
- Step Two: Set File**: File: Y:\Angel...csv. A 'Browse...' button is highlighted with a red arrow and labeled '5'. A 'Data Preview' window (5a) is overlaid on this step, showing a preview of the CSV file's content.
- Step Three: Set Fields (Columns)**: Define each field by clicking on the column header. The default for each field is 'Unused'. A table below shows the field mapping.

	Unused	Unused	Unused	Unused
Header	STUDENT'S taxpayer identification no.	Check Box for STUDENT'S taxpayer ID number Certification	STUDENT'S name (line one)	STUDENT
1	524-96-7422	1	John Doe	

At the bottom of the dialog are 'Import' and 'Close' buttons.

6. Map your fields

When mapping your columns, click the word “Unused” for each column and select the correct column description to use for mapping the data

- a. Map data by LEFT clicking the mouse on each column and select the correct column data.

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

General Information W3 Information 1096 Information

Import 1098-T Forms

CSV (comma separated value) is the most common format used in order to transfer data between different types of databases. Most software and database applications will allow you to export W2 and 1099 data into CSV format, which can then be imported into W2 Mate. Excel for example exports data to CSV. The first row in the CSV file is expected to include header information and NOT data. The header should contain names corresponding to the fields (columns).

To read detailed instructions for importing data into W2 Mate and for possible fields for the CSV file click the button to the right :

(1) Step One: Set Separator Options

Fields are separated by: , Text Delimiter: *

Last Row Number to Read from File
Only use if you do not want to read all rows from the input file

(2) Step Two: Set Input Text or CSV File

File: Y:\Angela\W2 MATE\CSV examples\1098-T-Data.csv Allow Duplicate Recipient IDs

(3) Step Three: Set Fields (Columns)

Define each field by clicking on the column headers. The default for each field is "Unused", which means the field will be ignored during the import process.

To use the same field mapping you used before click: To clear previous mapping click:

Unused

Header STUDENT'S taxpayer identification no. Check Box for

1 524-96-1422 1

Recipient Information

Reported Amounts

Unused

STUDENT'S taxpayer identification number

Check Box for STUDENT'S taxpayer ID number Certification

STUDENT'S name (Line One)

STUDENT'S name (Line Two)

STUDENT'S Street address (including apt. no.)

STUDENT'S City

STUDENT'S State

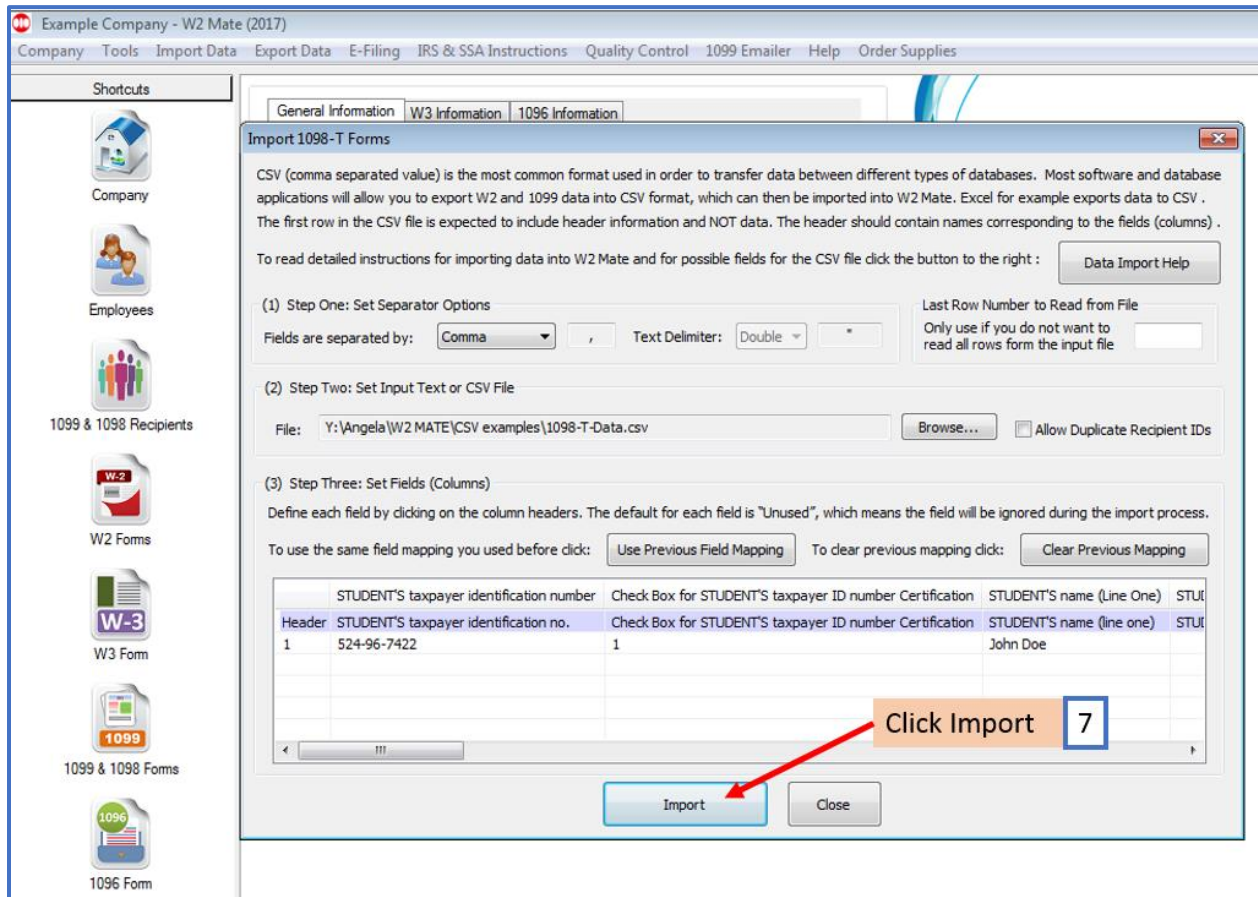
STUDENT'S Zip Code

Account Number

Map each column 6

Left click each "Unused" 6a

7. When you have all the fields mapped, Click Import

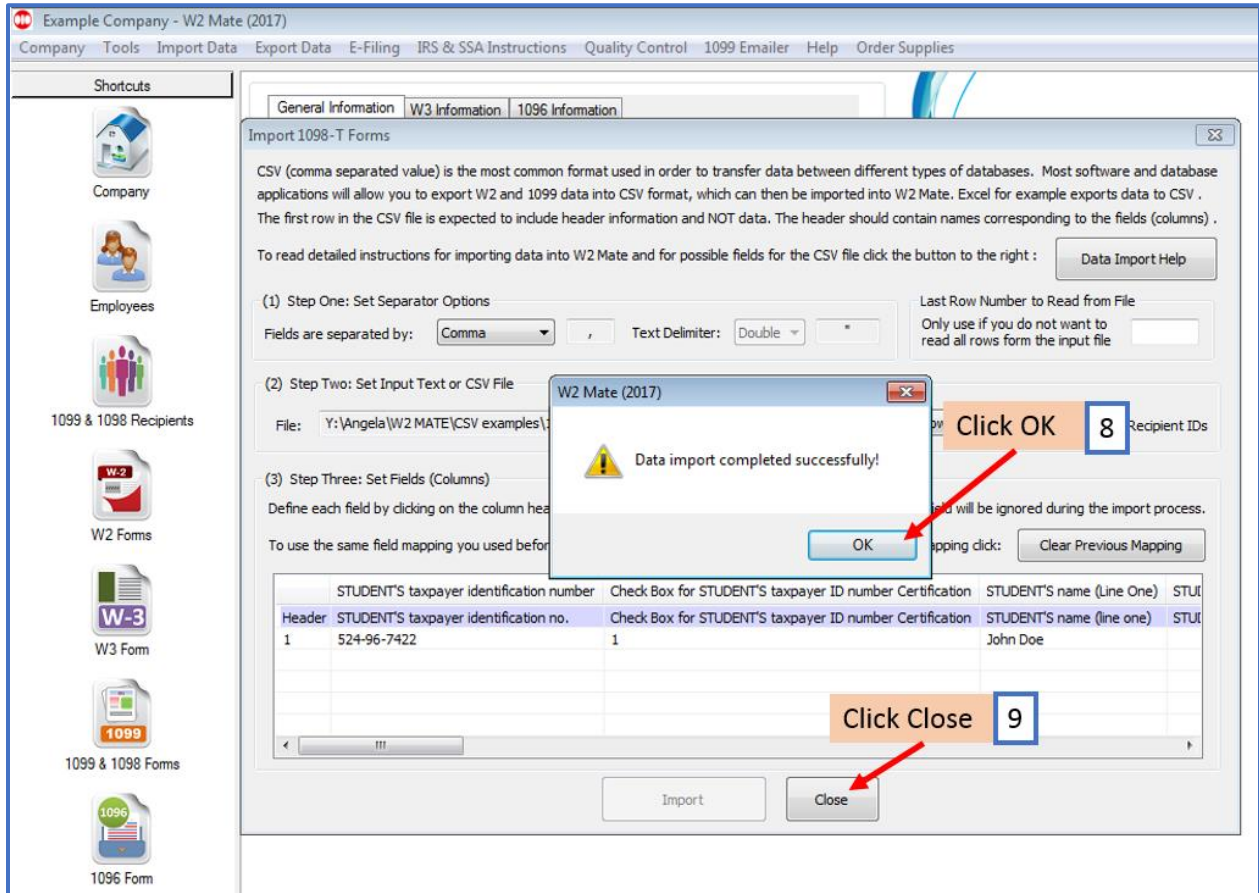


Note: The most common error during import is duplicate or incorrectly formatted 1098-T data. The import engine in W2 Mate uses a highly advanced detection system which can identify and report the most common import data errors BEFORE the data is imported.

If you receive any errors in regards to the data in the CSV file, you will need to open the CSV file, make the needed corrections, resave the CSV file, then import the corrected file into W2 Mate. Corrections cannot be made on the panel above, this is a mapping utility only not an editor.

8. When you receive the Data Import completed successfully Click OK

9. Click Close to exit the 1098-T Import wizard



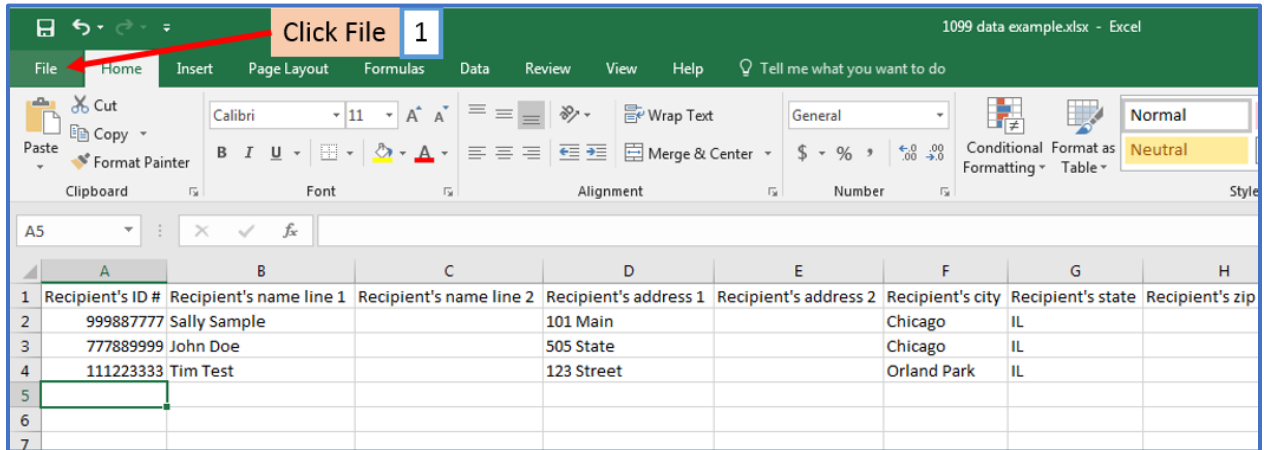
Your new recipients and their 1098-T data are now saved in W2 Mate

Creating a CSV (Comma Separated Value) from an Excel Spreadsheet

Note: In order to import your recipient 1099/1098 data into W2 Mate, the data must be in a CSV format

Open the correct 1099/1098 Data Excel File

1. Click File from the top menu bar

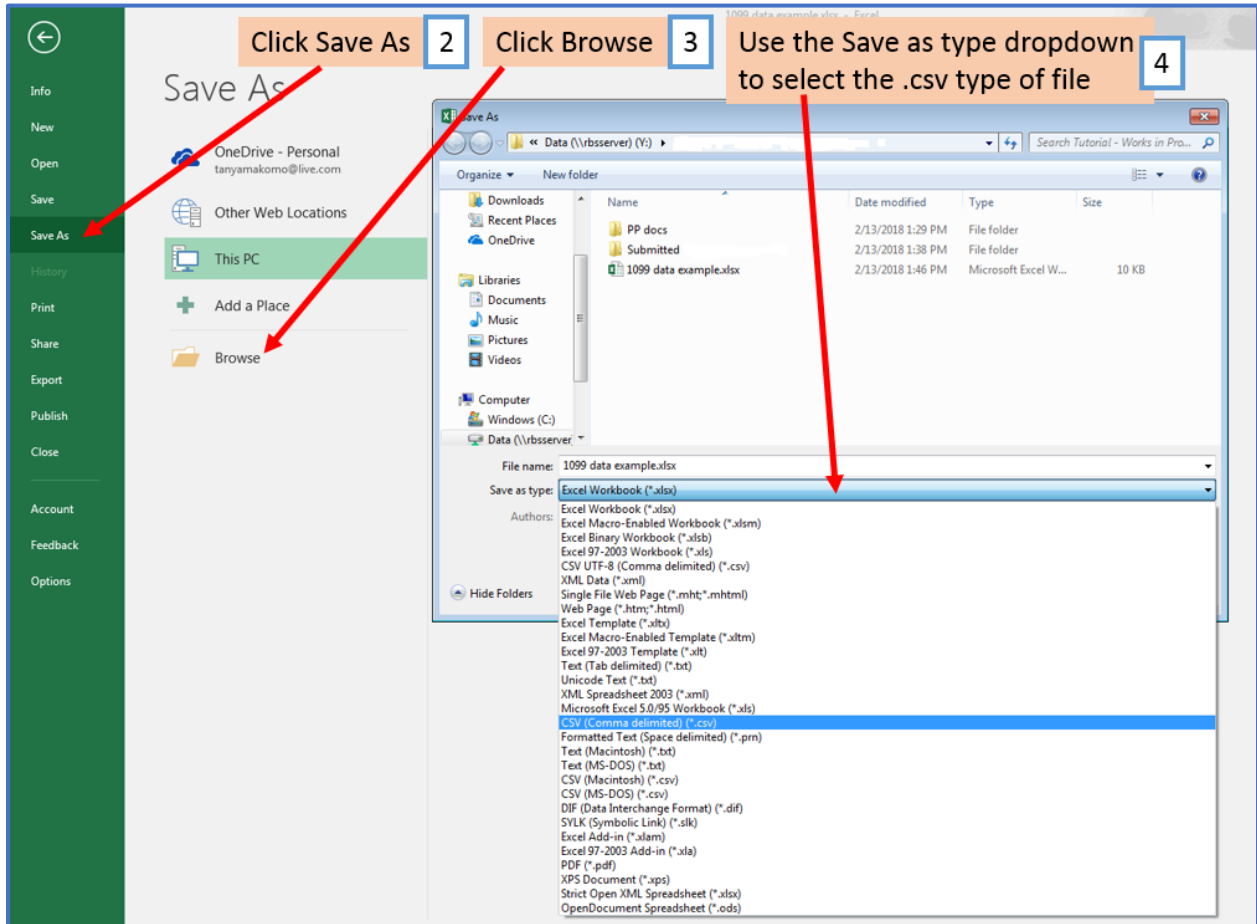


2. Click Save As

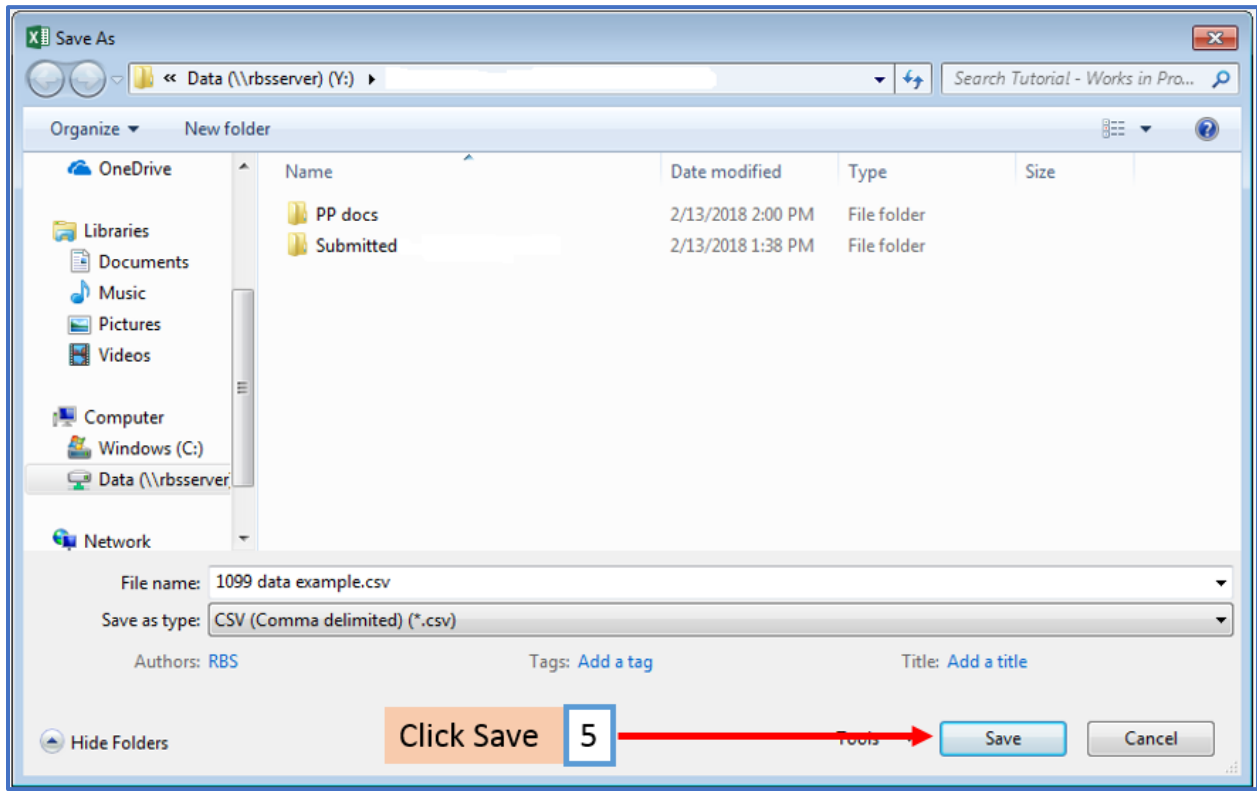
3. Click Browse to select location to save file

4. Use the drop down to select the correct "Save as type" for the file

Note: There may be several different CSV formats to choose from
For W2 Mate, the correct format type is "CSV (Comma delimited) (*.csv)"



5. Click Save



This is the file you will choose when importing your data into W2 Mate