

How to Import and E-File 1099-PATR Forms in **W2 Mate**[®]



Start by Opening
W2 Mate[®]
Program

www.W2Mate.com

Go to > Company > Open

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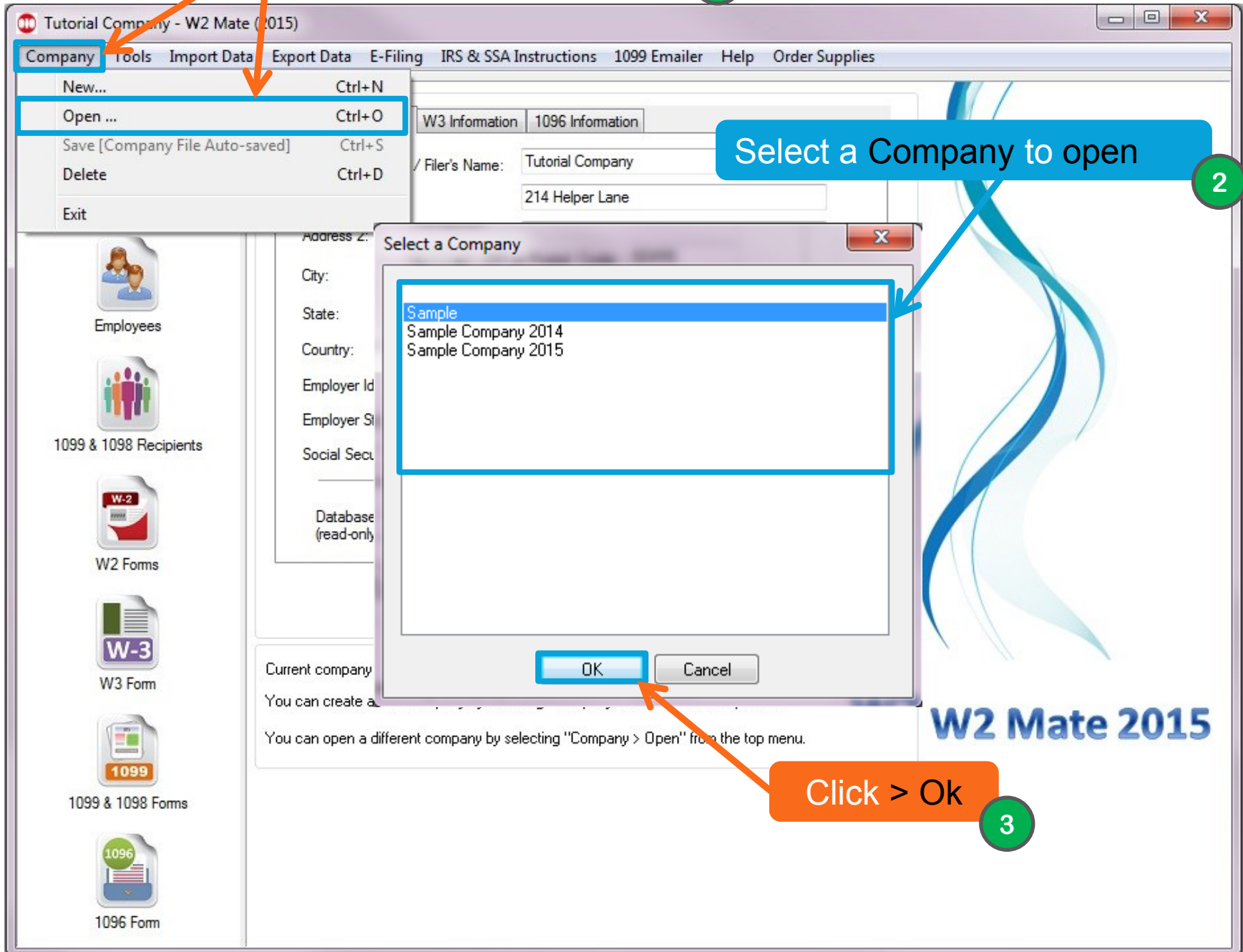
Select a Company to open

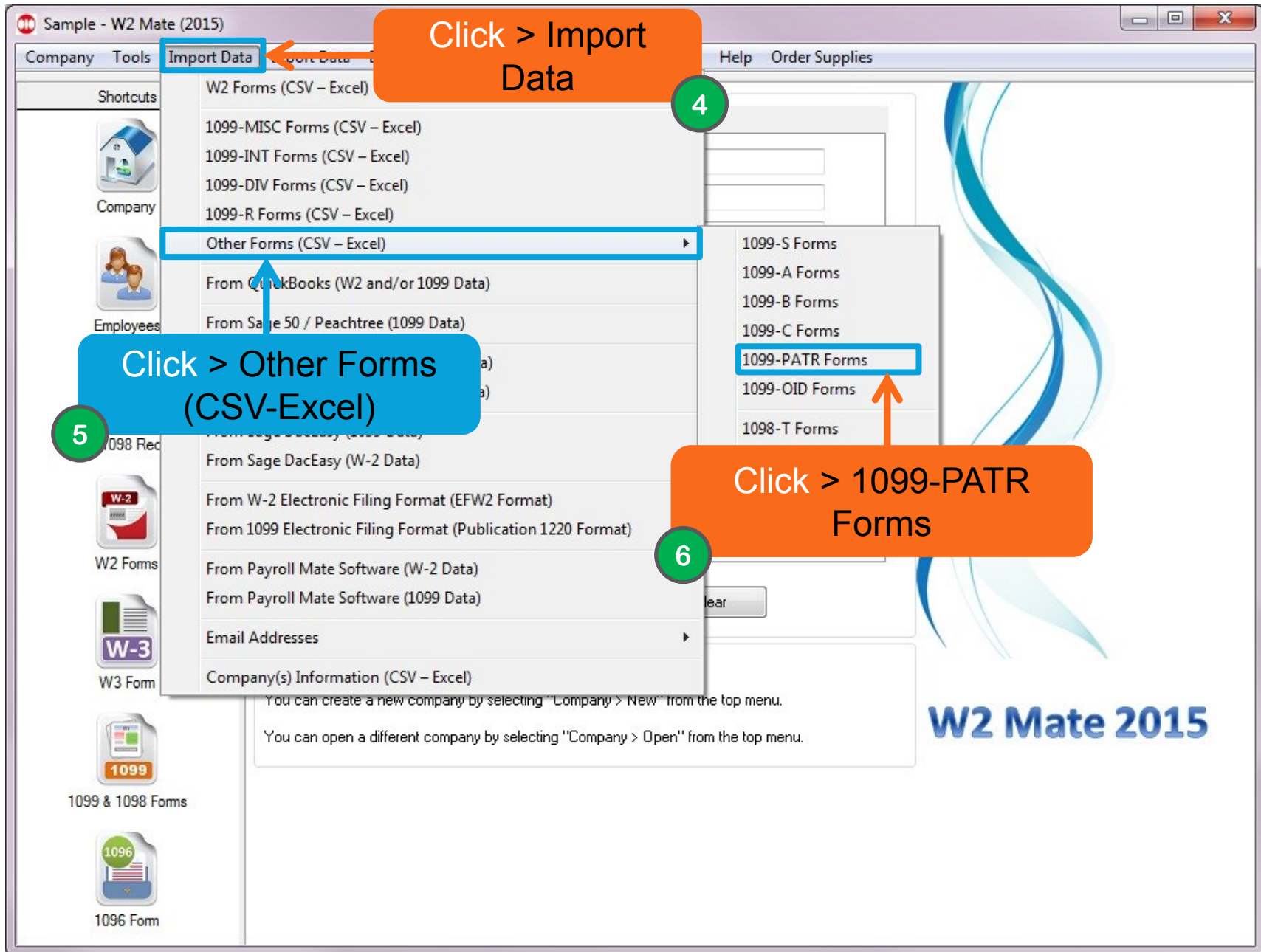
2

OK

Click > Ok

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W2 Mate 2015

Sample - W2 Mate (2015)

Company Tools Import Data Mailer Help Order Supplies

Shortcuts

Company

Employees

1099 & 1098 Recip

W2 Forms

W-3 Form

1099

1099 & 1098 Fon

1096 Form

Leave the separator options to default unless otherwise specified

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CSV files are used to transfer data between different types of databases. Most software and database applications 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 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 : Data Import Help

(1) Step One: Set Separator Options

Fields are separated by: Comma , Text is delimited (enclosed) by: Double Quote "

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

File: Browse... 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 for all files click the button to the right of the previous mapping click: Clear Previous Mapping

	Unused	Unused	Unused
Header	RECIPIENT	RECIPIENT'S Address	RECIPIENT'S City
1	524-96-7422	John Doe	65 Rose Rd. Julie

Import
Close

Find your 1099-PATR file that needs to be uploaded

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Sample - W2 Mate (2015)

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

Shortcuts

General Information W3 Information 1096 Information

Company

Employees

1099 & 1098 Recipient

W2 Forms

W3 Form

1099 & 1098 Forms

1096 Form

Import 1099-PATR 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 is delimited (enclosed) by: "

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

File: Allow Duplicate Recipient IDs

(3) Step Three: Set Field Mapping

Define each field by clicking on the column headers. The default for each field is "Unused" 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	Unused	Unused	Unused	Unused
Header	RECIPIENT'S Tax identification #	RECIPIENT'S name (line one)	RECIPIENT'S name (line two)	RECIPIENT'S Address	RECIPIENT'S City
1	524-96-7422	John Doe		65 Rose Rd.	Julie

Map your fields correctly

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Sample - W2 Mate (2015)

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

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General Information W3 Information 1096 Information

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Import 1099-PATR 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: [Data Import Help](#)

(1) Step One: Set Separator Options

Fields are separated by: Comma , Text is delimited (enclosed) by: Double Quote "

2015\1099-PATR-Data.csv [Browse...](#) Allow Duplicate Recipient IDs

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 used before click: [Use Previous Field Mapping](#) To clear previous mapping click: [Clear Previous Mapping](#)

	Unused	Unused	Unused	Unused	Unused
Header	Recipient Information	RECIPIENT'S name (line one)	RECIPIENT'S name (line two)	RECIPIENT'S Address	RECIPIENT'S City
1	Reported Amounts			65 Rose Rd.	Julie
	Unused				

[Import](#) [Close](#)

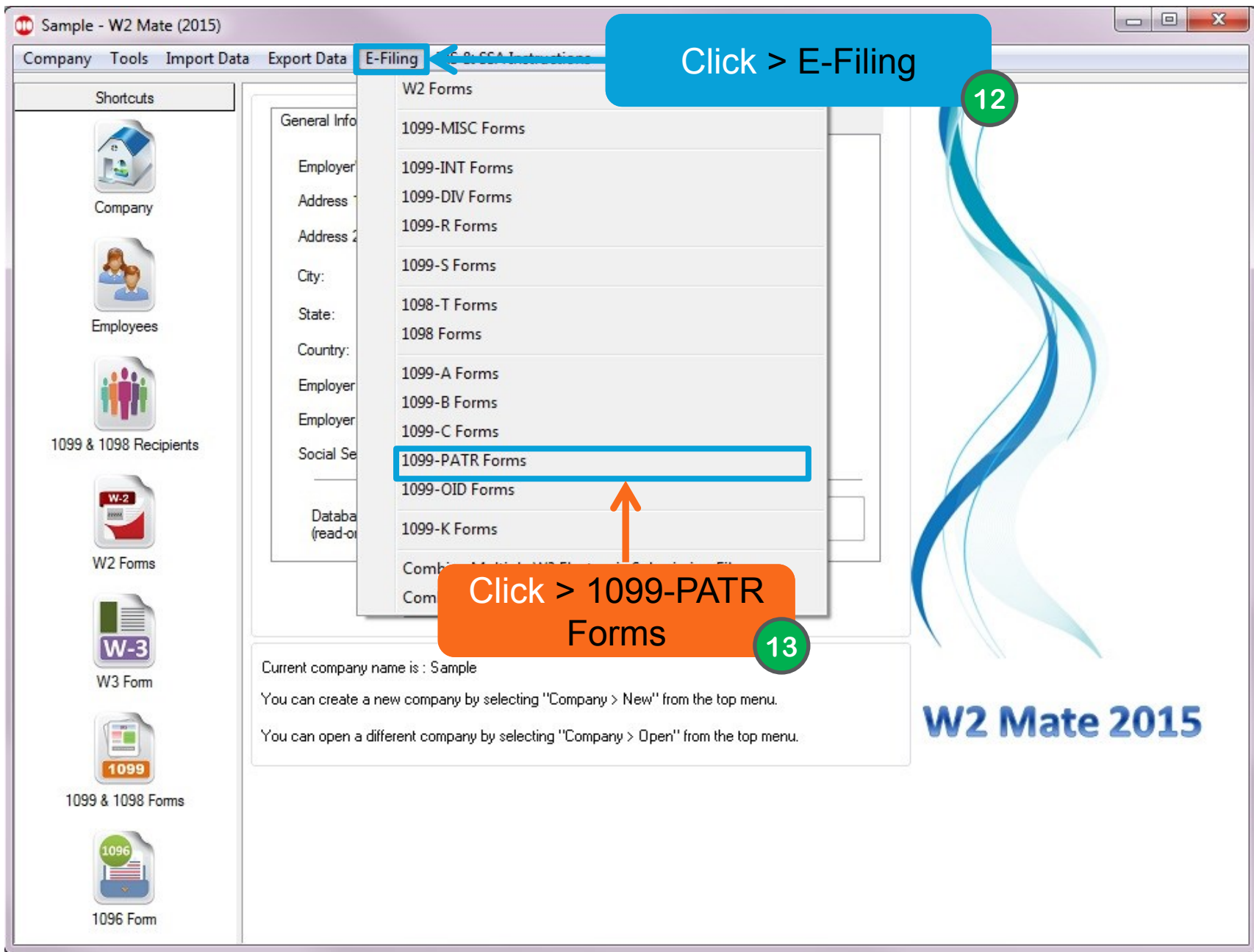
Click > Unused
and match the column
with the header column

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Click > Import

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Sample - W2 Mate (2015)

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

Electronic Filing Transmitter Setup

Transmitter Information (Information of the company or person who registered with the IRS in order to file electronically.)

Transmitter Name Line1: TIN (Tax Identification Number):

Transmitter Name Line2: TCC (Transmitter Control Code):

Company Associated With Correspondence Address (Company that the IRS will contact with any issues related to the file)

Company Name Line1: City:

Company Name Line2: State:

Company Address: Zip Code:

Contact Information (Person that the IRS will contact with any issues related to the file)

Name: Phone #: E-mail:

Combined Federal/State Filing Program (This program is available for 1099-MISC, R, B, DIV, INT, OID & K)

Through this program, the IRS will forward information to the state at no charge for approved filers. Filers must submit a test file (between NOV 1 & FEB 15) in order to sign up for the program.

Include "Combined Federal/State Filing Program" Information
[Do not check if you will send this e-file directly to the state, unless the state participates in the program]

Output File (This is the name and path of the file which you need to send to the IRS or state)

File Name and Path:

Save / Load

When preparing 1099s for multiple companies and you want to be the point of contact for all of them, you can save and load your info here.

Test File

Create a TEST file

Corrected Return

Only use when filing corrections

Mark Payee Records as "C"

Mark Payee Records as "G"

Enter Contact Information

Fill in all transmitter and company information

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Sample - W2 Mate (2015)

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

Short Electronic Filing Transmitter Setup

Transmitter Information (Information of the company or person who registered with the IRS in order to file electronically.)

TIN (Tax Identification Number): 000000000

TCC (Transmitter Control Code): 00000

City: Chicago

State: IL

Zip Code: 11111

Name: sample Phone #: 1234567890 E-mail: sample@mail.com

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Combined Federal/State Filing Program (Available only for 1099-MISC, R, B, DIV, INT, OID & K)

Through the Combined Federal/State Filing Program, the IRS will forward information returns filed electronically to participating states free of charge for approved filers. Filers must submit a test file (between Nov 1 & Feb 15) in order to sign up for the program.

Which States Participate?

Include "Combined Federal/State Filing Program" Information [Do not check if you will send this e-file directly to the state, unless the state participates in the program]

Output File (This is the name and path of the file which you need to send to the IRS or state)

File Name and Path: C:\Users\KBS\Documents\1099-TAX-SAMPLE

Browse...

Test File

Create a TEST file

Corrected Return

Only use when filing corrections

Mark Payee Records as "C"

Mark Payee Records as "G"

OK Cancel

Check the combined Fed/State program filing box if your state participates in the program and you want to include state data in your electronic submission file.

Select Create a TEST file. To create a test file, if needed.

Sample - W2 Mate (2015)

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

Electronic Filing Transmitter Setup

Transmitter Information (Information of the company or person who registered with the IRS in order to file electronically.)

Transmitter Name Line1: TIN (Tax Identification Number):

Transmitter Name Line2: TCC (Transmitter Control Code):

Company Associated With Correspondence Address (Company that the IRS will contact with any issues related to the file)

Company Name Line1: City:

Company Name Line2: State:

Company Address: Zip Code:

Contact Information (Person that the IRS will contact with any issues related to the file)

Name: Phone #: E-mail:

Save / Load

When preparing 1099s for multiple companies and you want to be the point of contact for all of them, you can save and load your info here.

Combined Federal/State Filing Program (Available only for 1099-MISC, P...)

Through the Combined Federal/State Filing Program, the IRS will forward returns filed electronically to participating states free of charge for app... Filers must submit a test file (between Nov 1 & Feb 15) in order to sign...

Include "Combined Federal/State Filing Program" Information
[Do not check if you will send this e-file directly to the state, unless the state participates in the program]

Output File (This is the name and path of the file which you need to send to the IRS or state)

File Name and Path:

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Click browse to select the location for the file to be saved to

Click > OK

Sample - W2 Mate (2015)

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

Shortcuts

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

W2 Mate

Electronic transmittal file was created successfully and saved to:

Copy File Path to Clipboard

PLEASE DO NOT FORGET TO UPLOAD THIS FILE TO THE IRS FIRE SYSTEM

<http://fire.irs.gov>

W2 Mate does NOT automatically send the E-File to the IRS. Please remember that Your E-File submission is not complete until you upload the file to the IRS and receive confirmation from them.

If you would like to see the list of recipients included in this file please click here

Would you like W2 Mate to open the folder where the file was saved?

Click > Yes

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21. Now go to the IRS FIRE website to upload your 1099 electronic submission file.

Click > IRS & SSA Instructions

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IRS & SSA Instructions

- Online IRS Instructions
- Online SSA Instructions
- Visit IRS Website
- Visit SSA Website

Go to IRS FIRE System Website (1099 Electronic Filing)

Go to SSA Business Services Online Website (W2 Electronic Filing)

IRS Contact Information (1099 Forms)

SSA Contact Information (W2 Forms)

Click > Go to IRS FIRE System Website (1099 Electronic Filing)

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Company



Employees



1099 & 1098 Recipients



W2 Forms



W3 Form



1099 & 1098 Forms



1096 Form

Payer's name, street address

Sample

123 Main St

chicago

(521) 487-5974

PAYER'S Federal ID

54-2897451

RECIPIENT'S name

Jane Doe

Street address (including apt. no.)

332 Line Drive

City, state, and ZIP code

Chicago

IL

51478

Account number (optional)

FATCA Filing REQ

2nd TIN not.

15a Section 409A deferrals

0.00

15b Section 409A income

0.00

9 Payer made direct sales of \$5,000 or more of consumer products to a buyer for resale

11
0.00

13 Excess golden parach.

0.00

16 State tax withheld

0.00

17 State / Payer's State Number

0.00

IL

123456

0.00

10 Crop insurance proceeds

0.00

12

14 Gross proceeds paid to an attorney

0.00

18 State income

0.00

0.00

Form Type

Related Tasks

Select

No. 1545-0115

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1099-MISC

1099-MISC tax withheld

health care payments

payments in lieu of dividends or int

You will be rerouted to the IRS FIRE Website, where you must log in to submit the file you have created. If you have any questions regarding the IRS FIRE system website call **(866)-455-7438.**

Congratulations. You know how to import and e-file 1099-PATR forms!



www.W2Mate.com

1-800-507-1992