# How to E-File 1099-INT Forms Using W2 Mate

Note: Before you can file electronically with the IRS you need to obtain a TCC code (Transmitter Control Code). If you filed with the IRS electronically before, then you should already have a TCC code.

If this is the first time you are filing electronically then you can easily obtain a TCC code by submitting Form 4419 to the IRS. You will need a TCC code to electronically file regardless whether you use our software or any other software.

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 #4 to electronically file

- 1. Click E-Filing
- 2. Click 1099-INT Forms

💷 Example Company -	W2 Mate	(2017)		
Company Tools Imp	oort Data	Export Data	E-Filing PS & SSA Instructions Quality Control 1099 Emailer He	lp Order Supplies
Shortcuts			W2 Forms	
2		General In	1099-MISC Forms	Click E-Filing 1
14		Employe	1099-INT Forms	
Company		Address		Select 1099-INT Forms 2
		Address	1099-R Forms	Sciect 1055-INT Forms 2
		City:	1099-S Forms	
		State:	1098-T Forms	
Employees		Country	1098 Forms	
		Employe	1099-A Forms	
		Employe	1099-B Forms	
1099 & 1098 Recipien	nts	Notes (	1099-C Forms	
			1099-PATR Forms ange	s.
W-2			1099-OID Forms	
		Databa: (read-or	1099-K Forms	
W2 Forms			Combine Multiple W2 Electronic Submission Files	
			Combine Multiple 1099 Electronic Submission Files	
			Track Filing Status	
W-3		Current compa	any name is : Example Company	
W3 Form		You can creat	te a new company by selecting "Company > New" from the top menu.	
		You can open	a different company by selecting "Company > Open" from the top menu.	W2 MATE 2017
1099				
1099 & 1098 Forms				
1096 Form				

This will open the Electronic Filing Transmitter Setup

3. To see detailed help with the electronic filing process, click on the HELP button

Shortcuts	Consert Information			De	etailed Help 3		
~	Electronic Filing Transmit						
12/	Transmitter Information	(Information of the company or	person who registered with th	ne IRS in order to file elec	tronically.)		
Company	Transmitter Name Line 1:	Trans 1	TIN (Tax Identificat	TIN (Tax Identification Number): 991234567			
	Transmitter Name Line2:	Trans 2	TCC (Transmitter C	ontrol Code): 44444	14444		
	Company Associated Wi	ith Correspondence Address (Co	ompany that the IRS will contac	t with any issues related	to the file)		
Employees	Company Name Line 1:	Example Company	City: Chicag	0	Save / Load When preparing 1099s for		
	Company Name Line 2:		State: IL		multiple companies and you want to be the point of		
	Company Address:	123 Main	Zip Code: 60605		contact for all of them, you can save and load your info		
199 & 1098 Recipients	Contact Information (	Person that the IRS will contact	with any issues related to the		here.		
	Name: Contact	Phone #: 7085	906376 E-mail: contact	@contact.com	Save Load		
.w.2	1.2						
	a second s	e Filing Program (Available only f		OID &K)	Test File		
W2 Forms		Federal/State Filing Program" Int u will e-file directly with the state					
		1099-INT Box 15 is used to decide which state the form gets forwarded to (by the IRS), What do you want W2 Mate to do when 1099-INT Box 15 is empty?					
W-3		nt W2 Mate to do when 1099-1N ddress state and if it does not p	an a	ThIT'S address stats	Only use when filing corrections		
W3 Form		In the Wayne and Mark	0.0 0.00 0.0000	2011 M	Mark Payee Records as "C"		
		name and path of the file which	you need to send to the IRS or		Mark Payee Records as "G"		
1099	File Name and Path: C:\Users\	RBS\Documents\IRSTAX-1099-IN	NT-EXAMPLE-COMPANY	Browse	Corrections How-to		
1099 & 1098 Forms			OK Can	el			

## 4. Fill in all transmitter and company information

#### 5. Enter Contact Information

## 6. Select Create a TEST file to create a test file, if needed

	General Information	W3 Information 1096 Information	n				
Ma /	-	· · ·					
Company	Transmitter Information	n (Information of the company or p	person who registere	ed with the IRS	S in order to file e	electronically.)	
Company	Transmitter Name Line 1	Trans 1	TIN (Tax I	dentification N	lumber): 9912	34567 HELP	
4	Transmitter Name Line 2:	Trans 2	TCC (Tran	smitter Contro	l Code): 4444	4	
	Company Associated W	ith Correspondence Address (Cor	npany that the IRS v	vill contact with	n any issues rela	ted to the file)	
Employees	Company Name Line 1:	Example Company	City:	Chicago		Save / Load When preparing 1099s for	
	Company Name Line 2:		State:	[IL	•	multiple companies and you want to be the point of	
	Company Address:	123 Main	Zip Code:	60605		contact for all of them, you can save and load your info	
99 & 1098 Recipients	Contact Information (	(Person that the IRS will contact v	vith any issues relate	ed to the file)		Create Test File	e
	Name: Contact	Phone #: 70859	06376 E-mail:	contact@cor	ntact.com		
W-2							
	Combined Federal/State	e Filing Program (Available only fo	r 1099-MISC, R, B, D	DIV, INT, OID	&K)	Test File	
W2 Forms	Enter Co	ntact Information	n 5	rticipates]		Create TEST file	2
					What is Combin Fed / State and	which Corrected Return	
W-3		ed to decide which state the form ant W2 Mate to do when 1099-INI		by the	states participa	only use when filing corrections	
W3 Form	Use the COMPANY'S a	ddress state and if it does not pa	rticipate then use th	e RECIPIENT'S	address state.	Mark Payee	
					2	Records as "C	•
		name and path of the file which y	ou need to send to t	ne IRS or state	e)	Mark Payee Records as "G	-
	File Name and Path: C:\Users\	RBS\Documents\IRSTAX-1099-IN	T-EXAMPLE-COMPAN	IY	Bro	wse Corrections How-	-to
1099							
			ОК	Cancel			
1099 & 1098 Forms							

7. Click What is Combined Fed/State and which states participate? for additional information and to see if your state participates

8. 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

Note: Combined Federal/State Program available for forms 1099-MISC, DIV, INT, OID, R, B & K

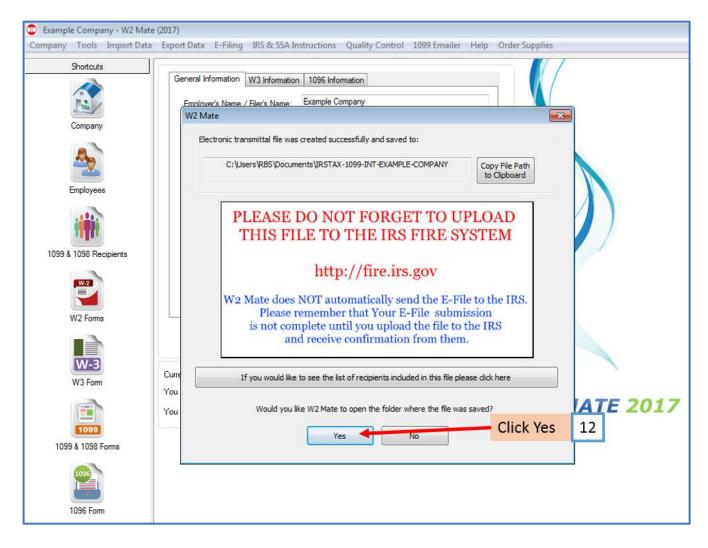
9. Select correct response to direct IRS on what to do if State/State ID box is empty

Shortcuts	General Information W3 Information 1096 Informat	00					
	Electronic Filing Transmitter Setup						
	Transmitter Information (Information of the compan	y or person who registered with the IR	S in order to file electronic	ally.)			
Company	Transmitter Name Line 1: Trans 1	TIN (Tax Identification	Number): 991234567	HELP			
2	Transmitter Name Line 2: Trans 2	TCC (Transmitter Contr	ol Code): 44444				
	Company Associated With Correspondence Address	(Company that the IRS will contact wi	th any issues related to the	e file)			
Employees	heck combined Fed/State 8	City: Chicago		preparing 1099s for			
	Company Name Line2:	State Click to	see which sta	int of			
<b>THE</b>	Company Address: 123 Main	Zip Cc	ate in Combi				
	Name: condect Phone #: /			beol			
W2 Forms	ombined Federal/State Filing Provram (Available on	ly for 1099-MISC, R, B, DIV, INT, OID	te program	Load Test File			
W2 Forms		ly for 1099-MISC, R, B, DIV, INT, OID	&K) What is Combined	Test File			
W2 Forms	Iombined Federal/State Filing Program (Available on	ly for 1099-MISC, R, B, DIV, INT, OID Information tate, unless the state participates] form gets forwarded to (by the	&K)	Test File Create TEST file Corrected Return Only use when			
	ombined Federal/State Filing Pro ram (Available on ✓ Include "Combined Federal/St. te Filing Program" [Do not check if you will e-file directly with the s 1099-INT Box 15 is used to decide which state the	ly for 1099-MISC, R, B, DIV, INT, OID 'Information tate, unless the state participates] form gets forwarded to (by the 9-INT Box 15 is empty?	&K) What is Combined Fed / State and which states participate?	Test File Create TEST file Corrected Return Only use when filing corrections Mark Payee			
W-3	ombined Federal/State Filing Pro ram (Available on ☑ Include "Combined Federal/St te Filing Program ☑ [Do not check if you will e-file directly with the s 1099-INT Box 15 is used to decide which state the IRS). What do you want W2 Mat, to do when 1099	iv for 1099-MISC, R, B, DIV, INT, OID Information tate, unless the state participates] form gets forwarded to (by the 9-INT Box 15 is empty? In participate then use the RECIPIENT of participate then use the RECIPIENT of participate do not include combined to participate do not include combined	&K) What is Combined Fed / State and which states participate? S address state. S address state. S address state. / fed state info. / fed state info.	Test File Create TEST file Corrected Return Only use when filing corrections			
W3 Form	ombined Federal/State Filing Pro ram (Available on Include "Combined Federal/State Filing Program" [Do not check if you will e-file directly with the state 1099-INT Box 15 is used to decide which state the IRS). What do you want W2 Mate to do when 1099 Use the COMPANY'S address state and if it does no Use the RECIPIENT'S address state and if it does no Use the RECIPIENT'S address state and if it does no Use the RECIPIENT'S address state and if it does no Use the RECIPIENT'S address state and if it does no Use the RECIPIENT'S address state and if it does no Use the RECIPIENT'S address state and if it does no Note the RECIPI	iv for 1099-MISC, R, B, DIV, INT, OID Information tate, unless the state participates] form gets forwarded to (by the 9-INT Box 15 is empty? In participate then use the RECIPIENT of participate then use the RECIPIENT of participate do not include combined to participate do not include combined	&K) What is Combined Fed / State and which states participate? S address state. S address state. S address state. / fed state info. / fed state info.	Test File Corrected Return Only use when filing corrections Mark Payee Records as "C" Mark Payee Records as "G"			

## 10. Click browse to select the location for the file to be saved

### 11. Click OK

Shortcuts						
	General Information W3 Information 1096 Information					
	Electronic Filing Transmit	ter Setup				
10/	Transmitter Information	(Information of the company or p	erson who registere	ed with the IRS in order	to file electronically	(.)
Company	Transmitter Name Line 1:	Trans 1	TIN (Tax I	dentification Number):	991234567	
					44444	HELP
200	Transmitter Name Line2:	Trans 2	TCC (Tran	smitter Control Code):	44444	L
	Company Associated Wi	th Correspondence Address (Com	pany that the IRS v	vill contact with any issu		
Employees	Company Name Line 1:	Example Company	City:	Chicago	Save / Lo	ad eparing 1099s for
	Company Name Line2:		State:	[IL	multiple o	ompanies and you
	Company Address:	123 Main	Zip Code:	60605	contact f	oe the point of for all of them, you
			Participation of		can save here.	and load your info
99 & 1098 Recipients	Contact Information (	Person that the IRS will contact w	ith any issues relate	d to the file)		
	Name: Contact	Phone #: 70859	06376 E-mail:	contact@contact.com	n Save	Load
W-2						
	Combined Federal/State	Filing Program (Available only for	1099-MISC. R. B. C	IV. INT. OID & K)		Test File
W2 Forms		ederal/State Filing Program" Info				Create TEST file
-	[Do not check if you	unill a fila disas		ange eutru		tion 10
	1099-INT Box 15 is use	ed to decide what are an a second		ange outpu	it me ioca	
W-3	IRS). What do you wa	nt W2 Mate to do when 1099-INT	Box 15 is empty?			Only use when filing corrections
W3 Form	Use the COMPANY'S a	ddress state and if it does not par	ticipate then use th	e RECIPIENT'S address	state. 👻	Mark Payee
-	Output File (This is the r	ame and path of the file which yo	u need to send to t	he IPS or state)		Records as "C"
	File Name	and paul of the file which yo	a need to send to t	ine and or state)		Mark Payee Records as "G"
1099	and Path: C:\Users\	RBS\Documents\IRSTAX-1099-INT	-EXAMPLE-COMPAN	IY	Browse	Corrections How-to
1099 & 1098 Forms					Click	OK 11
(1995)		C	ж 🕇 🗖	Cancel	CIICK	OK 11
1096						



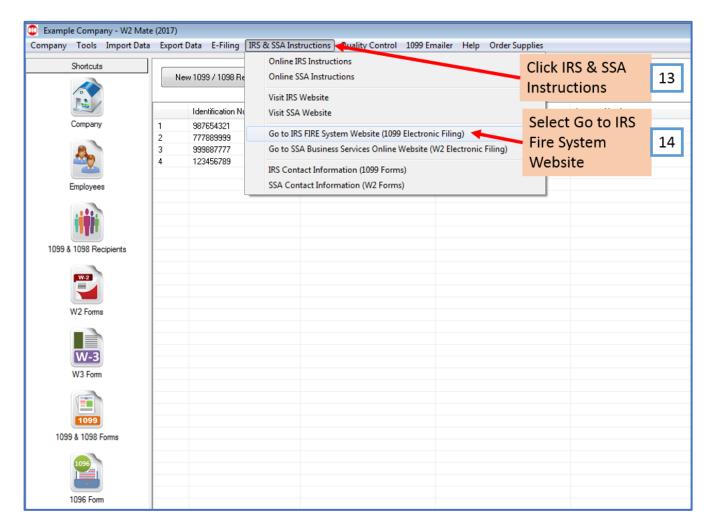
12. To open the folder where the file was saved Click Yes

## Now go to the IRS FIRE website to upload your 1099/1098 electronic submission file

To access the IRS FIRE website from inside W2 Mate:

#### 13. Click IRS & SSA Instructions

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



You will be rerouted to the IRS FIRE Website (<u>http://fire.irs.gov</u>), where you must log in to submit the file you have created.

Note: Log into the IRS FIRE System Website. If you do not have a user name and password click "Create New Account" link and follow the instructions. If you have any questions regarding the IRS FIRE system website call (866)-455-7438.