

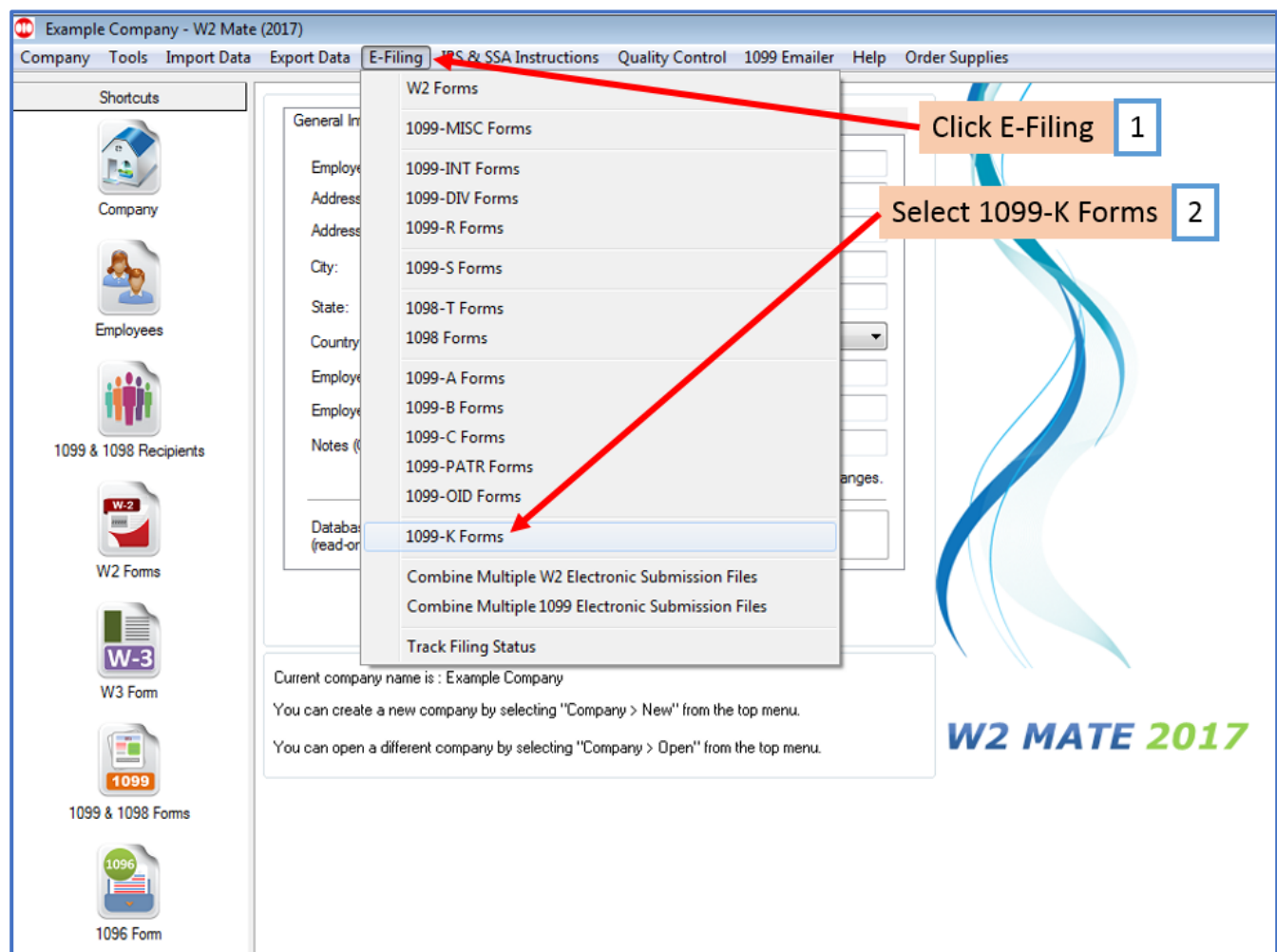
How to E-File 1099-K Forms Using W2 Mate

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-K Forms



This will open the Electronic Filing Transmitter Setup

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

The screenshot shows the W2 Mate (2017) software interface. The main window has a menu bar with options: Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, 1099 Emailer, Help, and Order Supplies. On the left is a 'Shortcuts' panel with icons for Company, Employees, 1099 & 1098 Recipients, W-2 Forms, W-3 Form, 1099 & 1098 Forms, and 1096 Form. The 'Electronic Filing Transmitter Setup' dialog box is open, displaying the following fields and options:

- Transmitter Information** (Information of the company or person who registered with the IRS in order to file electronically.)
 - Transmitter Name Line 1: TIN (Tax Identification Number):
 - Transmitter Name Line 2: TCC (Transmitter Control Code):
- Company Associated With Correspondence Address** (Company that the IRS will contact with any issues related to the file)
 - Company Name Line 1: City:
 - Company Name Line 2: 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** (Available only for 1099-MISC, R, B, DIV, INT, OID & K)
 - ☐ Include "Combined Federal/State Filing Program" Information [Do not check if you will e-file directly with the state, unless the state participates]
 - 1099-K Box 6 is used to decide which state the form gets forwarded to (by the IRS). What do you want W2 Mate to do when 1099-K Box 6 is empty?
- 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:
- Test File**
 - ☐ Create TEST file
- Corrected Return** (Only use when filing corrections)
 - ☐ Mark Payee Records as "C"
 - ☐ Mark Payee Records as "G"
 - [Corrections How-to](#)

The dialog box has 'OK' and 'Cancel' buttons at the bottom. A red arrow points to the 'HELP' button in the top right corner of the dialog box, which is labeled 'Detailed Help' and '3'.

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

Example Company - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing

Complete Transmitter and Company Information 4

General Information W3 Information 1096 Information

Electronic Filing Transmitter Setup

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

Transmitter Name Line 1: Trans 1 TIN (Tax Identification Number): 991234567

Transmitter Name Line 2: Trans 2 TCC (Transmitter Control Code): 44444

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

Company Name Line 1: Example Company City: Chicago

Company Name Line 2: State: IL

Company Address: 123 Main Zip Code: 60605

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

Name: Contact Phone #: 7085906376 E-mail: contact@contact.com

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

Enter Contact Information 5

1099-K Box 6 is used to decide which state the form gets forwarded to (by the IRS). What do you want W2 Mate to do when 1099-K Box 6 is empty?

Use the COMPANY'S address state and if it does not participate then use the RECIPIENT'S address state.

What is Combined Fed / State and which states participate?

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\RBS\Documents\IRSTAX-1099-K-EXAMPLE-COMPANY

Test File

☒ Create TEST file

Corrected Return

Only use when filing corrections

☐ Mark Payee Records as "C"

☐ Mark Payee Records as "G"

Corrections How-to

OK Cancel

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

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

The screenshot displays the W2 Mate 2017 software interface. The main window has a sidebar on the left with icons for 'Company', 'Employees', '1099 & 1098 Recipients', 'W2 Forms', 'W3 Form', '1099', and '1096 Form'. The top menu bar includes 'Company', 'Tools', 'Import Data', 'Export Data', 'E-Filing', 'IRS & SSA Instructions', 'Quality Control', '1099 Emailer', 'Help', and 'Order Supplies'. The 'Electronic Filing Transmitter Setup' dialog box is open, showing fields for 'Transmitter Information' (Name Line 1, Name Line 2, TIN, TCC), 'Company Information' (Name Line 1, Name Line 2, Address, City, State, Zip Code), and 'Contact Information' (Name, Phone #, Email). A red arrow points to the 'Include Combined Federal/State Filing Program' checkbox, which is checked. Another red arrow points to the 'What is Combined Fed / State and which states participate?' button. A third red arrow points to the dropdown menu for '1099-K Box 6'.

8 Check combined Fed/State

9 Select correct response

7 Click to see which states participate in Combined Fed/State program

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

Transmitter Name Line1: Trans 1 TIN (Tax Identification Number): 991234567

Transmitter Name Line2: Trans 2 TCC (Transmitter Control Code): 44444

Company Name Line1: Example Company City: Chicago

Company Name Line2: State:

Company Address: 123 Main Zip Code:

Contact Information

Name: Contact Phone #: 703350370 Email:

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

☒ Include "Combined Federal/State Filing Program" Information
[Do not check if you will e-file directly with the state, unless the state participates]

1099-K Box 6 is used to decide which state the form gets forwarded to (by the IRS).
What do you want W2 Mate to do when 1099-K Box 6 is empty?

Use the COMPANY'S address state and if it does not participate then use the RECIPIENT'S address state.

Use the RECIPIENT'S address state and if it does not participate then use the COMPANY'S address state.

Use the RECIPIENT'S address state and if it does not participate do not include combined / fed state info.

Use the COMPANY'S address state and if it does not participate do not include combined / fed state info.

Do not do anything. In this case the file will not include combined / fed state info for this recipient.

What is Combined Fed / State and which states participate?

Test File

☐ Create TEST file

Corrected Return

Only use when filing corrections

☐ Mark Payee Records as "C"

☐ Mark Payee Records as "G"

Corrections How-to

OK Cancel

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

11. Click OK

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
- W-2 Forms
- W-3 Form
- 1099 & 1098 Forms
- 1096 Form

General Information W3 Information 1096 Information

Electronic Filing Transmitter Setup

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

Transmitter Name Line 1: Trans 1 TIN (Tax Identification Number): 991234567
Transmitter Name Line 2: Trans 2 TCC (Transmitter Control Code): 44444

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

Company Name Line 1: Example Company City: Chicago
Company Name Line 2: State: IL
Company Address: 123 Main Zip Code: 60605

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

Name: Contact Phone #: 7085906376 E-mail: contact@contact.com

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.

Save Load

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

☐ Include "Combined Federal/State Filing Program" (Do not check if you will e-file directly)

1099-K Box 6 is used to decide which state the form gets forwarded to (by the IRS). What do you want W2 Mate to do when 1099-K Box 6 is empty?

Use the COMPANY'S address state and if it does not participate then use the RECIPIENT'S address state.

states participate?

Test File

Only use when filing corrections

- ☐ Mark Payee Records as "C"
- ☐ Mark Payee Records as "G"

Connections How-to

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\RBS\Documents\IRSTAX-1099-K-EXAMPLE-COMPANY

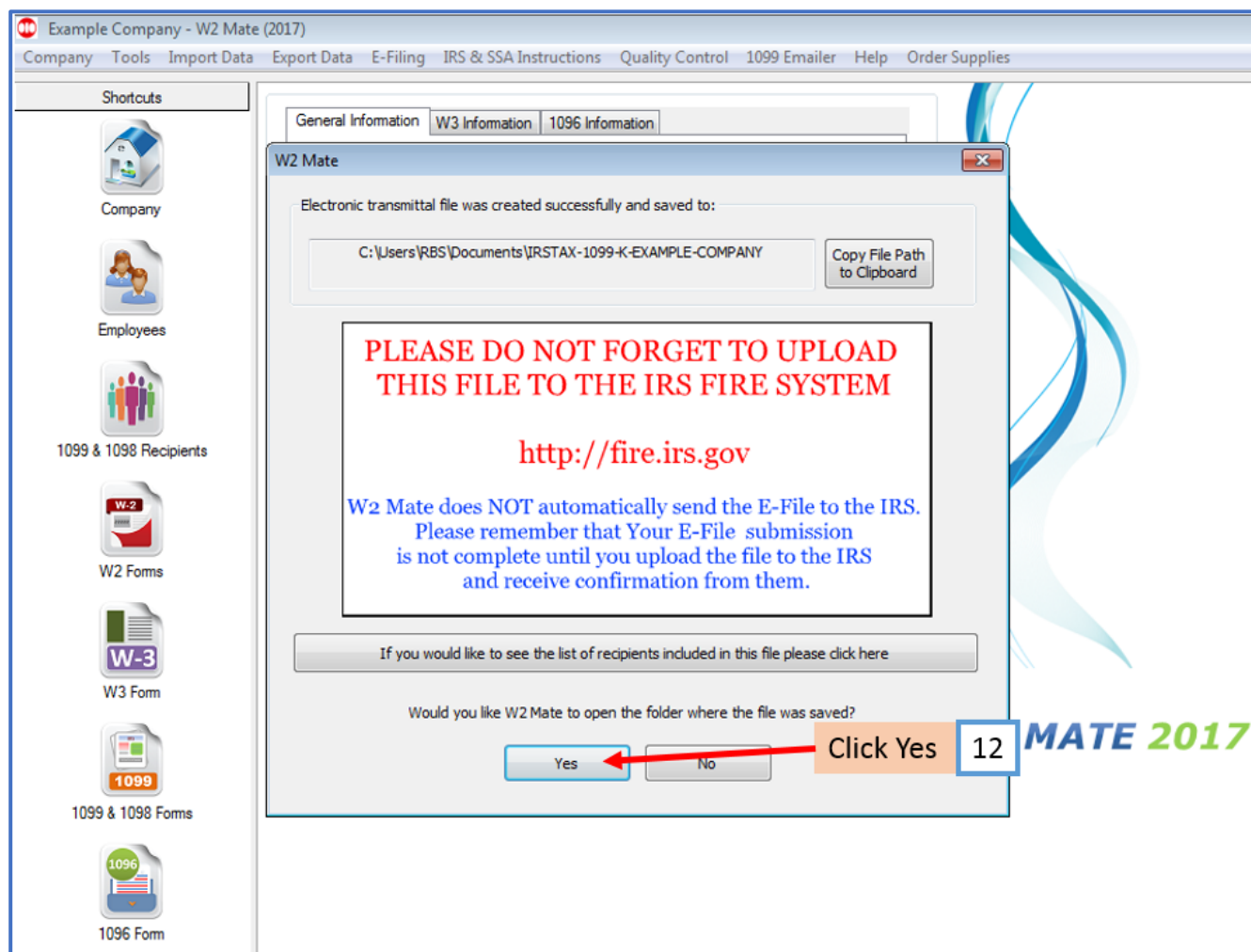
Browse...

Click Browse to change output file location 10

Click OK 11

OK Cancel

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

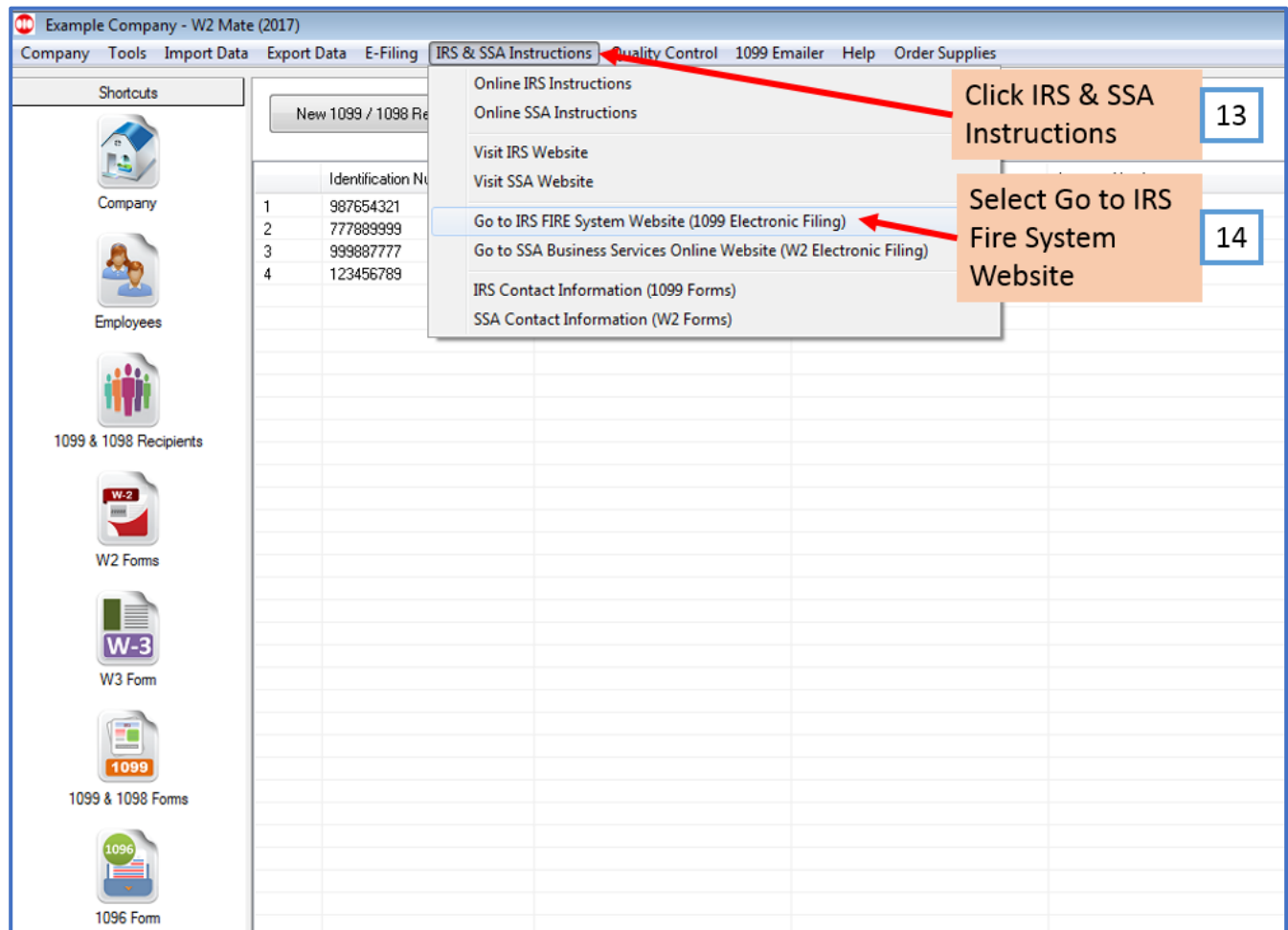


Now go to the IRS FIRE website to upload your 1099/1098 electronic submission file

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 (<http://fire.irs.gov>), 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.