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

Example Comp	any - W2 Mate	(2017)						
Company Tools	Import Data	Export Data	E-Filing 195 & SSA Instructions	Quality Control	1099 Emailer	Help Orde	r Supplies	
Shortcut	s		W2 Forms					_
e		General In	1099-MISC Forms				Click E-Filin	g 1
	/	Employe	1099-INT Forms					
Company	y	Address	1099-DIV Forms			Sele	ect 1099-K	Forms 2
		Address	1099-R Forms			Jere	.et 1055 K	
		City:	1099-S Forms					
		State:	1098-T Forms					
Employee	es	Country	1098 Forms			•		
		Employe	1099-A Forms					
1 11		Employe	1099-B Forms					
1099 & 1098 Re	eciniente	Notes (1099-C Forms					P
1055 0 1050 10	colpicinte		1099-PATR Forms		a	nges.		
W-2			1099-OID Forms					
		Databa: (read-or	1099-K Forms					
W2 Form	15		Combine Multiple W2 Electro	onic Submission Fi	les			
			Combine Multiple 1099 Electr	ronic Submission (Files			
			Track Filing Status					
W-3	9	Current compa	any name is : Example Company				. //	
W3 Form	n	You can creat	e a new company by selecting "Compa	ny > New'' from the	top menu.			
		You can open	a different company by selecting "Com	nanv > Open'' from t	he top menu.		W2 MA	TE 2017
1099								
1099 & 1098	Forms							
1096 For	m							

This will open the Electronic Filing Transmitter Setup

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

Shortcuts					Detail	ed Help 3
	General Information	W3 Information 1096 Informatio	n			
12/	Electronic Filing Transmit	ter Setup				
Company	Transmitter Information	(Information of the company or	person who registered	d with the IRS in order	r to file electronic	ally.)
	Transmitter Name Line 1:	Trans 1	TIN (Tax Id	entification Number):	991234567	
4	Transmitter Name Line2:	Trans 2	TCC (Trans	mitter Control Code):	44444	HELP
	Company Associated Wi	th Correspondence Address (Co	moany that the IRS wi	I contact with any iss	ues related to the	e file)
Employees	Company Name Line 1:		City:	Chicago	Save /	
				-		preparing 1099s for e companies and you
	Company Name Line 2:			IL	want	to be the point of ct for all of them, you
	Company Address:	123 Main	Zip Code:	60605		ive and load your info
99 & 1098 Recipients	Contact Information (Person that the IRS will contact v	with any issues related	to the file)	here.	
						ve Load
W-2	Name: Contact	Phone #: 7085	906376 E-mail:	contact@contact.com	n Ja	Load
W2 Forms	Combined Federal/State	Filing Program (Available only fo	r 1099-MISC, R, B, DI	V, INT, OID & K)		Test File
	Include "Combined F	Federal/State Filing Program [®] Info	ormation			Create TEST file
	Do not check if you	u will e-file directly with the state	, unless the state part		s Combined	
	1099-K Box 6 is used to decide which state the form gets forwarded to (by the IRS). states participate?					Corrected Return
W-3		Mate to do when 1099-K Box 6 i		Juica	paracipate:	Only use when filing corrections
W3 Form	Lise the COMPANY'S a	ddress state and if it does not pa	rticinate then use the	DECIDIENT'S address	etata v	
	Lose the contract of	da cas state and interacts not pe	a dopute a lett ase a le	Recar lett o duales.	5 30000	Mark Payee Records as "C"
	Output File (This is the r	name and path of the file which y	ou need to send to the	e IRS or state)		Mark Payee
	File Name			•	- []	Records as "G"
1099	and Path: C:\Users\	RBS\Documents\IRSTAX-1099-K-	EXAMPLE-COMPANY		Browse	Corrections How-to
1099 & 1098 Forms						concetono non to
			ок	Cancel		
				Contract		

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

Shortcuts			_			
	General Information	W3 Information 1096 Information	on			
Tak /	Electronic Filing Transmit	tter Setup 🚽				
Company	Transmitter Information	(Information of the company or	person who registere	d with the IRS in orde	er to file electronical	у.)
	Transmitter Name Line 1:	Trans 1	TIN (Tax I	dentification Number):	991234567	HELP
20	Transmitter Name Line2:	Trans 2	TCC (Trans	smitter Control Code):	44444	
Employees	Company Associated W	ith Correspondence Address (Co	ompany that the IRS w	ill contact with any iss	sues related to the f	île)
Linpioyees	Company Name Line 1:	Example Company	City:	Chicago	Save / L	pad reparing 1099s for
	Company Name Line2:		State:	[IL	multiple	companies and you be the point of
	Company Address:	123 Main	Zip Code:	60605	contact	for all of them, you e and load your info
W2 Forms		e Filing Pogram (Available only fi		IV, INT, OID &K)		Test File
	🖻 Enter Cor	ntact Informatio	n 5 _{state par}		is Combined	Create TEST file
W-3	1099-K Box 6 is used t What do you want W2	o decide which state the form ge Mate to do when 1099-K Box 6	ets forwarded to (by t is empty?		tate and which s participate?	Corrected Return Only use when filing corrections
W3 Form	Use the COMPANY'S a	ddress state and if it does not p	articipate then use the	e RECIPIENT'S addres	s state. 👻	Mark Payee
	Output File (This is the r	name and path of the file which	you need to send to th	ne IRS or state)		Records as "C"
1099	File Name C:\Users\	RBS\Documents\IRSTAX-1099-K	-EXAMPLE-COMPANY		Browse	Records as "G"
1099 & 1098 Forms	and Path: C. Osersy					Corrections How-to
			ок	Cancel		
			UK	wante w		

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

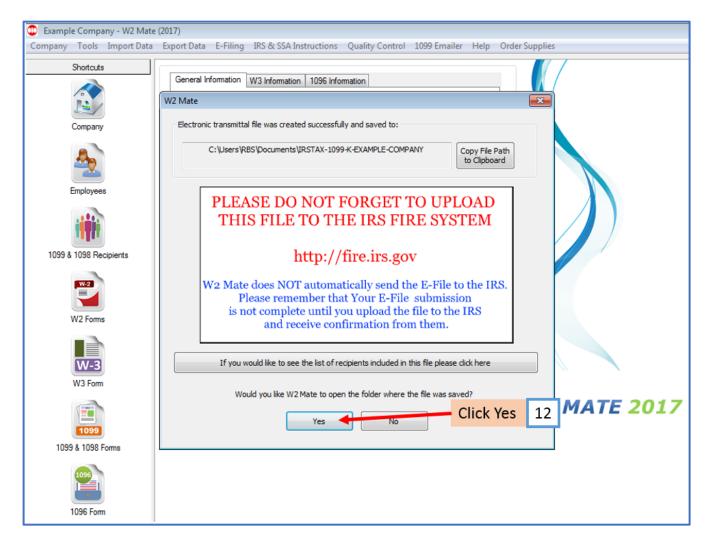
9. Select correct response to direct IRS on what to do if State/State ID box is empty

Shortcuts			
	General Information W3 Information	1096 Information	
Ta /	Electronic Filing Transmitter Setup		
Company	Transmitter Information (Information of the o	company or person who registered with the IRS in order to file	electronically.)
Company	Transmitter Name Line 1: Trans 1	TIN (Tax Identification Number): 9912	234567
2	Terrer March 1997 Terrer 2	TCC (Transmitter Control Code): 4444	HELP
	Transmitter Name Line2: Trans 2		
Employees	Check combined Fed/S	tate 8 that the IRS will contact with any issues rela	sted to the file) Save / Load
	Company Name Line 1: Example Company	City: Chicago	When preparing 1099s for
	Conpany Name Line 2:	State: Click to see w	high states
I T UI	Company Address: 123 Main	Zin Code:	
& 1098 Recipients	Contact Inf	participate in	Combined 7
	Select correct	response 9 Fed/State pro	
W-2	ame: Contact Hnone	e #: //0009/0000/0	
W2 Forms	Combined Federal/State Filing Program (Avail	lable only for 1099-MISC, R, B, DIV, INT, OID & K)	Test File
	Include "Combined Federal/State Filing Pr		Create TEST file
		th the state, unless the state participates] What is Comb Fed / State and	
W-3	[Do not check if you will e-file directly will 1099-K Box 6 is used to decide which s ate What do you want W2 Mate to do when 10	the form gets forwarded to (by the IRS). states particip	Only use when
W3 Form	1099-K Box 6 is used to decide which s ate What do you want W2 Mate to do when 10	the form gets forwarded to (by the IRS). 99-K Box 6 is empty?	Only use when filing corrections
	1099-K Box 6 is used to decide which s ate What do you want W2 Mate to do whe 10' Use the COMPANY'S address state and if it Use the COMPANY'S address state and if it	the form gets forwarded to (by the IRS). 99-K Box 6 is empty? does not participate then use the RECIPIENT'S address state. does not participate then use the RECIPIENT'S address state.	Anate? Only use when filing corrections
	1099-K Box 6 is used to decide which s ate What do you want W2 Mate to do whe 100 Use the COMPANY'S address state and if it Use the COMPANY'S address state and if it CUse the RECIPIENT'S address state and if it	the form gets forwarded to (by the IRS). 99-K Box 6 is empty? does not participate then use the RECIPIENT'S address state. does not participate then use the RECIPIENT'S address state. t does not participate then use the COMPANY'S address state.	only use when filing corrections
	1099-K Box 6 is used to decide which s ate What do you want W2 Mate to do whe 10 Use the COMPANY'S address state and if it Use the RECIPIENT'S address state and if it Use the RECIPIENT'S address state and if it F Use the COMPANY'S address state and if it	the form gets forwarded to (by the IRS). 99-K Box 6 is empty? does not participate then use the RECIPIENT'S address state. does not participate then use the RECIPIENT'S address state. t does not participate then use the COMPANY'S address state. t does not participate do not include combined / fed state info. does not participate do not include combined / fed state info.	Aate? Only use when filing corrections Mark Payee Records as "C" Mark Payee Records as "G"
W3 Form	1099-K Box 6 is used to decide which s ate What do you want W2 Mate to do whe 10 Use the COMPANY'S address state and if it Use the RECIPIENT'S address state and if it Use the RECIPIENT'S address state and if it F Use the COMPANY'S address state and if it	the form gets forwarded to (by the IRS). 99-K Box 6 is empty? does not participate then use the RECIPIENT'S address state. does not participate then use the RECIPIENT'S address state. t does not participate then use the COMPANY'S address state. t does not participate do not include combined / fed state info.	only use when filing corrections
W3 Form	1099-K Box 6 is used to decide which s ate What do you want W2 Mate to do whe 10 Use the COMPANY'S address state and if it Use the RECIPIENT'S address state and if it Use the RECIPIENT'S address state and if it F Use the COMPANY'S address state and if it	the form gets forwarded to (by the IRS). 99-K Box 6 is empty? does not participate then use the RECIPIENT'S address state. does not participate then use the RECIPIENT'S address state. t does not participate then use the COMPANY'S address state. t does not participate do not include combined / fed state info. does not participate do not include combined / fed state info.	Aate? 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				
TS/	Electronic Filing Transmit	ter Setup				
Company	Transmitter Information	(Information of the company or pers	on who registere	ed with the IRS in order	to file electronically.)
	Transmitter Name Line 1:	Trans 1	TIN (Tax I	dentification Number):	991234567	HELP
200	Transmitter Name Line2:	Trans 2	TCC (Tran	smitter Control Code):	44444	
Employees	Company Associated Wi	th Correspondence Address (Compar	y that the IRS w	vill contact with any issu	es related to the file)
Linbiolices	Company Name Line 1:	Example Company	City:	Chicago	Save / Loa	d Daring 1099s for
	Company Name Line2:		State:	IL	multiple co	mpanies and you the point of
. Mu	Company Address:	123 Main	Zip Code:	60605	contact for	r all of them, you and load your info
1099 & 1098 Recipients	Contact Information (F	Person that the IRS will contact with a	any issues relate	d to the file)	here.	
W22	Name: Contact	Phone #: 70859063	76 E-mail:	contact@contact.com	Save	Load
arrow .			1			
W2 Forms	Combined Federal/State	Filing Program (Available only for 10	99-MISC, R, B, D	DIV, INT, OID &K)		Test File
-	Include "Combined F		iso to ch		t file locat	ion 10
		a will e-file direc Click Brow				
W-3		Mate to do when 1099-K Box 6 is em		states p	a apater	Only use when filing corrections
W3 Form	Use the COMPANY'S ac	ddress state and if it does not particip	pate then use th	e RECIPIENT'S address	state. 💌	Mark Payee
	Output File (This is the n	ame and path of the file which you n	eed to send to t	he IRS or state)		Records as "C"
1099	File Name C:\Users\F	BS\Documents\IRSTAX-1099-K-EXAN	PLE-COMPANY		Browse	Records as "G"
1099 & 1098 Forms	and Path: C. Josef S P				Click O	11
		ОК		Cancel	CIICK OF	



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)

mpany	Tools	Import Data	Export [Data E-Filing	IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies	
5	Shortcuts				Online IRS Instructions Click IRS &	SSA
(Nev	w 1099 / 1098 Re	Online SSA Instructions	12
-	e				Visit IRS Website	15
				Identification Nu	Visit SSA Website	
C	Company		1	987654321	Select Go	to IRS
			2	777889999	Go to SSA Business Services Online Website (W2 Electronic Filing)	<mark>n</mark> 14
	4		3	999887777 123456789	of to sol busiless services on the trebsite (the electronic runny)	
	~		4	123436763	IRS Contact Information (1099 Forms) Website	
E	mployees				SSA Contact Information (W2 Forms)	
1000.0		-it-				
1055 &	1056 Neci	pierits				
(Wa					
	-					
V	V2 Forms					
í.						
	W-3					
Ň	W3 Form					
	1099					
1000	& 1098 Fo					
1039	a 1036 F0	mis				
	1096					

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.