

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

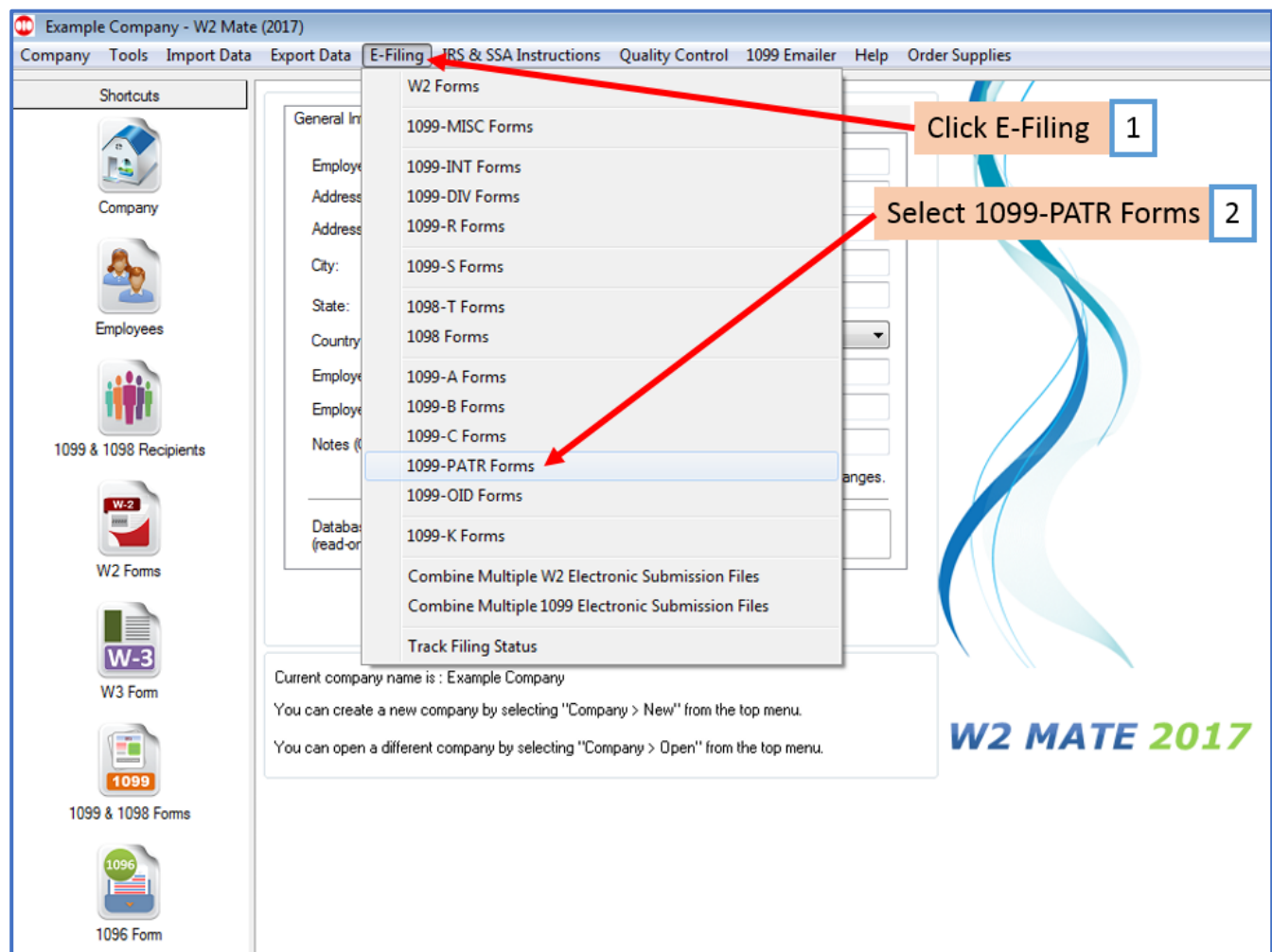
Note: Before you can file electronically with the IRS you need to obtain a TCC code (Transmitter Control Code). If you filed with the IRS electronically before, then you should already have a TCC code.

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-PATR Forms



This will open the Electronic Filing Transmitter Setup

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

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

**Detailed Help 3**

**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:  TIN (Tax Identification Number): 991234567

Transmitter Name Line 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:  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:

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" Information  
[Do not check if you will e-file directly with the state, unless the state participates]

1099-MISC Box 17 is used to decide which state the form gets forwarded to (by the IRS). What do you want W2 Mate to do when 1099-MISC Box 17 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?

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

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:  Browse...

OK Cancel

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:  TIN (Tax Identification Number): 991234567

Transmitter Name Line 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:  City:

Company Name Line 2:  State:

Company Address:  Zip Code:

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.

**Create Test File** 6

☐ Create TEST file

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

Name:  Phone #:  E-mail:

**Enter Contact Information** 5

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

☐ Include "Combined Federal/State Filing Program" Information [state participates]

What is Combined Fed / State and which states participate?

1099-MISC, R, B, DIV, INT, OID & K (by the IRS), What do you want W2 Mate to do when 1099-MISC Box 17 is empty?

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

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:  Browse...

OK Cancel

1099 & 1098 Recipients

W2 Forms

W-3 Form

1099 & 1098 Forms

1096 Form

Note: Combined Federal/State Program is not available for form 1099-PATR

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

8. Click OK

Example Company - W2 Mate (2017)

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W3 Form

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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-MISC Box 17 is used to decide which state the form gets forwarded to (by the IRS). What do you want W2 Mate to do when 1099-MISC Box 17 is empty?

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

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-PATR-EXAMPLE-COMPANY

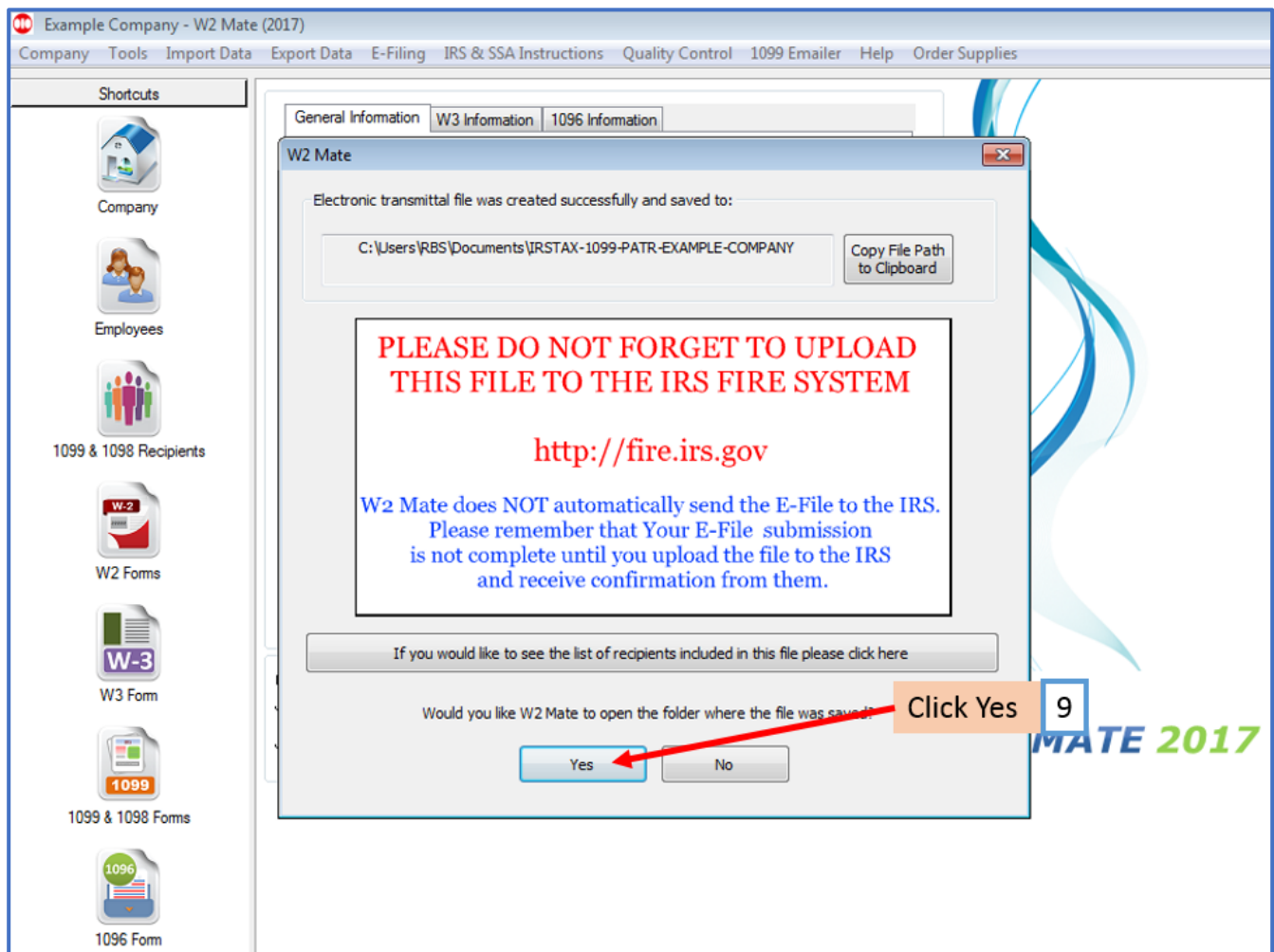
Browse...

OK Cancel

Click Browse to change output file location 7

Click OK 8

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



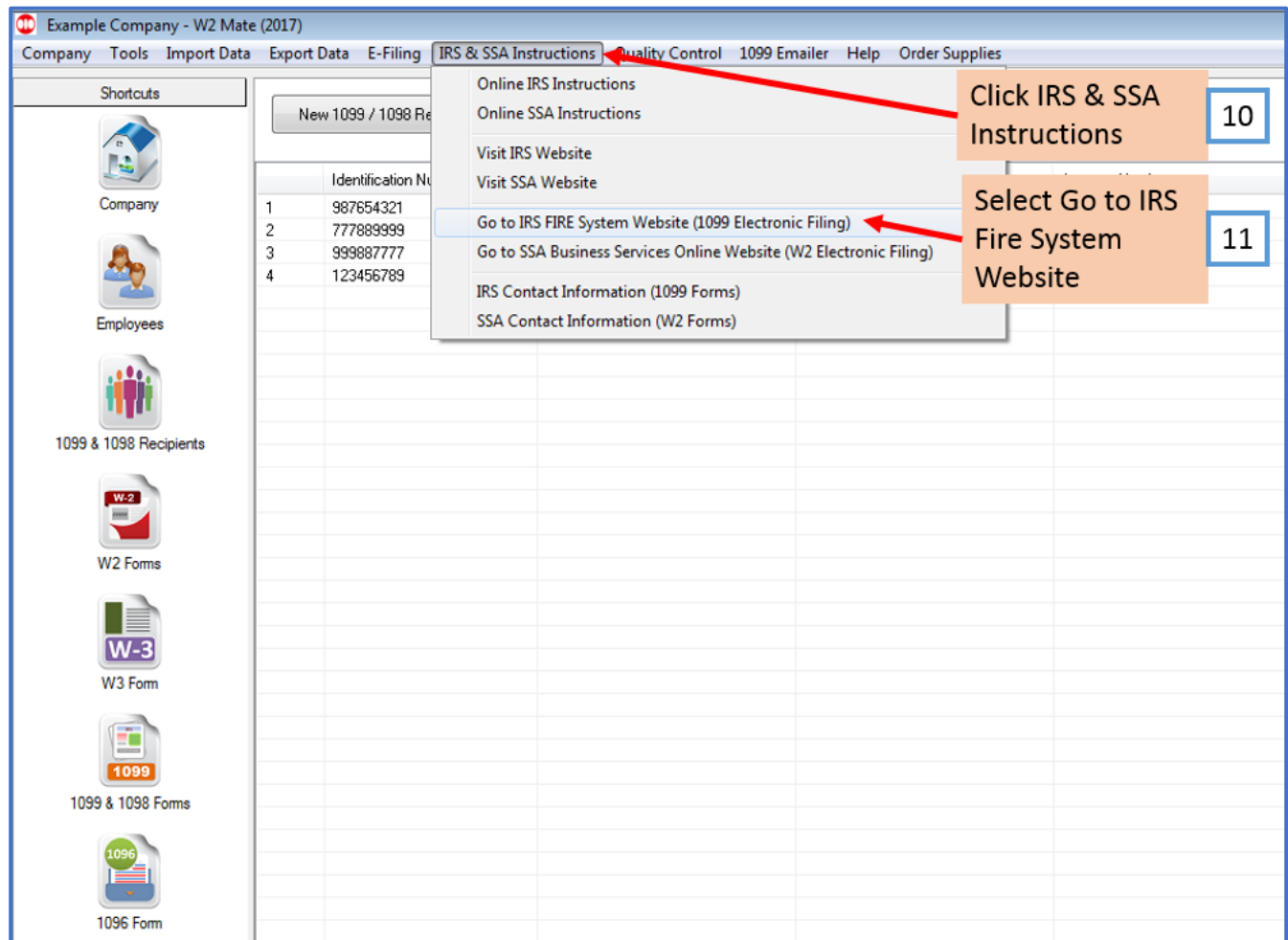


Now go to the IRS FIRE website to upload your 1099/1098 electronic submission file

To access the IRS FIRE website from inside W2 Mate:

10. Click IRS & SSA Instructions

11. 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.