How to E-File 1099-S 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-S Forms

Example Company - W2 Mate	e (2017)		
Company Tools Import Data	Export Data	E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help O	Order Supplies
Shortcuts		W2 Forms	
	General In	1099-MISC Forms	Click E-Filing 1
	Employe	1099-INT Forms	
Company	Address	1099-DIV Forms	last 1000 S Forms
company	Address	1099-R Forms	elect 1099-3 Politis 2
A	City:	1099-S Forms	
	State:	1098-T Forms	
Employees	Country	1098 Forms	
	Employe	1099-A Forms	
	Employe	1099-B Forms	
1099 & 1098 Recipients	Notes (0	1099-C Forms	
		1099-PATR Forms anges.	
W-2	Databar		
	(read-or	1099-K Forms	
W2 Forms		Combine Multiple W2 Electronic Submission Files	
		Combine Multiple 1099 Electronic Submission Files	
W-3		Track Filing Status	
W3 Form	Current compar	ny name is : Example Company	
	You can create	a new company by selecting "Company > New" from the top menu.	14/2 MATE 2017
	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							etailer	Help 3
	General Information V	V3 Information	1096 Information					
	Electronic Filing Transmit	ter Setup						
Common and	Transmitter Information	(Information o	of the company or person w	ho registere	d with the If	RS in order to file	electronicall	(.)
Company	Transmitter Name Line 1:	Trans 1		TIN (Tax Io	lentification	Number): 9912	34567	
A.	Transmitter Name Line 2	Trans 2		TCC (Trees	witter Cont		14	HELP
	Transmitter Name Line2:			TCC (Trans	mitter Cont	roi code):		
Employees	Company Associated Wit	th Correspond	lence Address (Company th	at the IRS w	ill contact w	ith any issues rela	sted to the fi	le) ad
	Company Name Line 1:	Example Com	pany	City:	Chicago		When pr	eparing 1099s for
	Company Name Line2:			State:	IL.	•	want to	tompanies and you be the point of
	Company Address:	123 Main		Zip Code:	60605		can save	and load your info
1099 & 1098 Recipients	Contact Information (F	Person that th	e IRS will contact with any	ssues relate	d to the file))	here.	
W-2	Name: Contact		Phone #: 7085906376	E-mail:	contact@c	ontact.com	Save	Load
and a second sec								
W2 Forms	Combined Federal/State	Filing Program	n (Available only for 1099-N	ISC, R, B, D	IV, INT, OII	0&K)		Test File
	Include "Combined F	ederal/State F will e-file dire	Filing Program" Information	he state par	ticipates]	What is Combi	ined	Create TEST file
	1099-MISC Box 17 is u	sed to decide	which state the form gets f	privarded to	(by the	Fed / State and	which	Corrected Return
W-3	IRS). What do you war	nt W2 Mate to	do when 1099-MISC Box 1	7 is empty?	(b) the			Only use when filing corrections
W3 Form	Use the COMPANY'S ac	ddress state a	nd if it does not participate	then use the	RECIPIENT	ſ'S address state.	_	Mark Payee
	Output File (This is the n	ame and path	of the file which you need	to send to th	e IRS or sta	ate)		Mark Payee
1099	File Name C:\Users\R	RBS\Document	s\IRSTAX-1099-S-EXAMPLE	-COMPANY		Bro	wse	Records as "G"
1099 & 1098 Forms	and Path:							Corrections How-to
			ОК		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

	General Information	/3 Information 1096 Informat	ion			
2				1		
12/	Electronic Filing Transmitt	ter Setup				- <u>t</u>
Company	Transmitter Information	(Information of the company	or person who registere	ed with the IRS in order	to file electronical	ly.)
	Transmitter Name Line 1:	Trans 1	TIN (Tax I	dentification Number):	991234567	HELP
	Transmitter Name Line2:	Trans 2	TCC (Tran	smitter Control Code):	44444	
Employees	Company Associated Wit	th Correspondence Address (Company that the IRS v	will contact with any issu	es related to the	file)
	Company Name Line 1:	Example Company	City:	Chicago	Save / L When n	oad reparing 1099s for
	Company Name Line2:	-	State:	[IL	multiple want to	companies and you be the point of
	Company Address:	123 Main	Zip Code:	60605	contact	for all of them, you
W2 Forms	Combined Federal/State	Filing rogram (Available only	for 1099-MISC, R, B, D	DIV, INT, OID & K)		Test File
	Enter Cont	tact Informatio	n 5			Create TEST file
			e state pa	Fed / Stat	combined e and which	Corrected Return
W-3	INS). What do you war	sed to decide which state the ht W2 Mate to do when 1099-	rorm gets forwarded to MISC Box 17 is empty?	to (by the states p	articipate?	Only use when filing corrections
W3 Form	Use the COMPANY'S ac	ddress state and if it does not	participate then use th	e RECIPIENT'S address	state. 💌	Mark Payee
	Output File (This is the n	ame and path of the file which	n you need to send to t	he IRS or state)		Records as "C" Mark Payee
1099	File Name C:\Users\R	BS\Documents\IRSTAX-1099-	S-EXAMPLE-COMPANY		Browse	Records as "G"
1099 & 1098 Forms	and Path:					Corrections How-to
]		

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

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

8. Click OK

Shortcuts								
	General Information	W3 Information 1	096 Information					
	Electronic Filing Transmi	tter Setup					.	
Company	Transmitter Information	n (Information of th	e company or person w	ho registere	d with the IRS in order	to file electronicall	y.)	
	Transmitter Name Line 1	Trans 1		TIN (Tax Io	dentification Number):	991234567	HEID	
	Transmitter Name Line2	: Trans 2	Trans 2		TCC (Transmitter Control Code):		14444	
Employeee	Company Associated W	ith Correspondence	e Address (Company th	at the IRS w	ill contact with any issu	es related to the f	le)	
Employees	Company Name Line 1:	Example Compan	y	City:	Chicago	Save / Lo	ad	
	Company Name Line2:			State:	n.	 multiple want to 	multiple companies and you want to be the point of	
. Tu	Company Address:		123 Main		e: 60605 conta		for all of them, you	
1099 & 1098 Recipients	Contact Information	(Person that the IF	S will contact with any i	ssues relate	d to the file)	here.		
W-2	Name: Contact	Ph	one #: 7085906376	E-mail:	contact@contact.com	Save	Load	
W2 Forms	Combined Federal/State	e Filing Program (A	vailable only for 1099-M	ISC, R, B, D	IV, INT, OID & K)		Test File	
	Do not check if yo	Federal/State	lick Browse	to cha	ange output	file locat	ion 7	
W-3	1099-MISC Box 17 is (IPS) What do you wa	used to decide whi	h state the form gets for when 1099-MISC Box 1	orwarded to	(by the states p	articipate?	Only use when	
W3 Form	Use the COMPANY'S a	address state and i	f it does not participate	then use the	RECIPIENT'S address	state. 🔻	filing corrections	
							Records as "C"	
	Output File (This is the	name and path of	the file which you need	to send to th	ne IRS or state)		Mark Payee Records as "G"	
1099 1099	and Path: C:\Users\	RBS\Documents\IF	STAX-1099-S-EXAMPLE	-COMPANY		Browse	Corrections How-to	
the second			01		Canada	Click (DK 8	
1055 & 1056 Folinis								
1096			UK		Cancer			



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)

Example Company - W2 Mate	e (2017)		line line
Company Tools Import Data Shortcuts Company	Export Data E-Filing New 1099 / 1098 Re Identification Nu 1 987654321 2 777889999 3 999887777	IRS & SSA Instructions Quality Control 1099 Emailer Help Order State Online IRS Instructions Online SSA Instructions Visit IRS Website Visit IRS Website Visit SSA Website Go to IRS FIRE System Website (1099 Electronic Filing) Image: Control of the state Go to SSA Business Services Online Website (W2 Electronic Filing) Image: Control of the state Image: Control of the state	Opplies10Click IRS & SSA Instructions10Select Go to IRS Fire System11
Employees 1099 & 1098 Recipients	4 123456789	IRS Contact Information (1099 Forms) SSA Contact Information (W2 Forms)	Website
W2 Forms W3 Form			
1099 & 1098 Forms			

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.