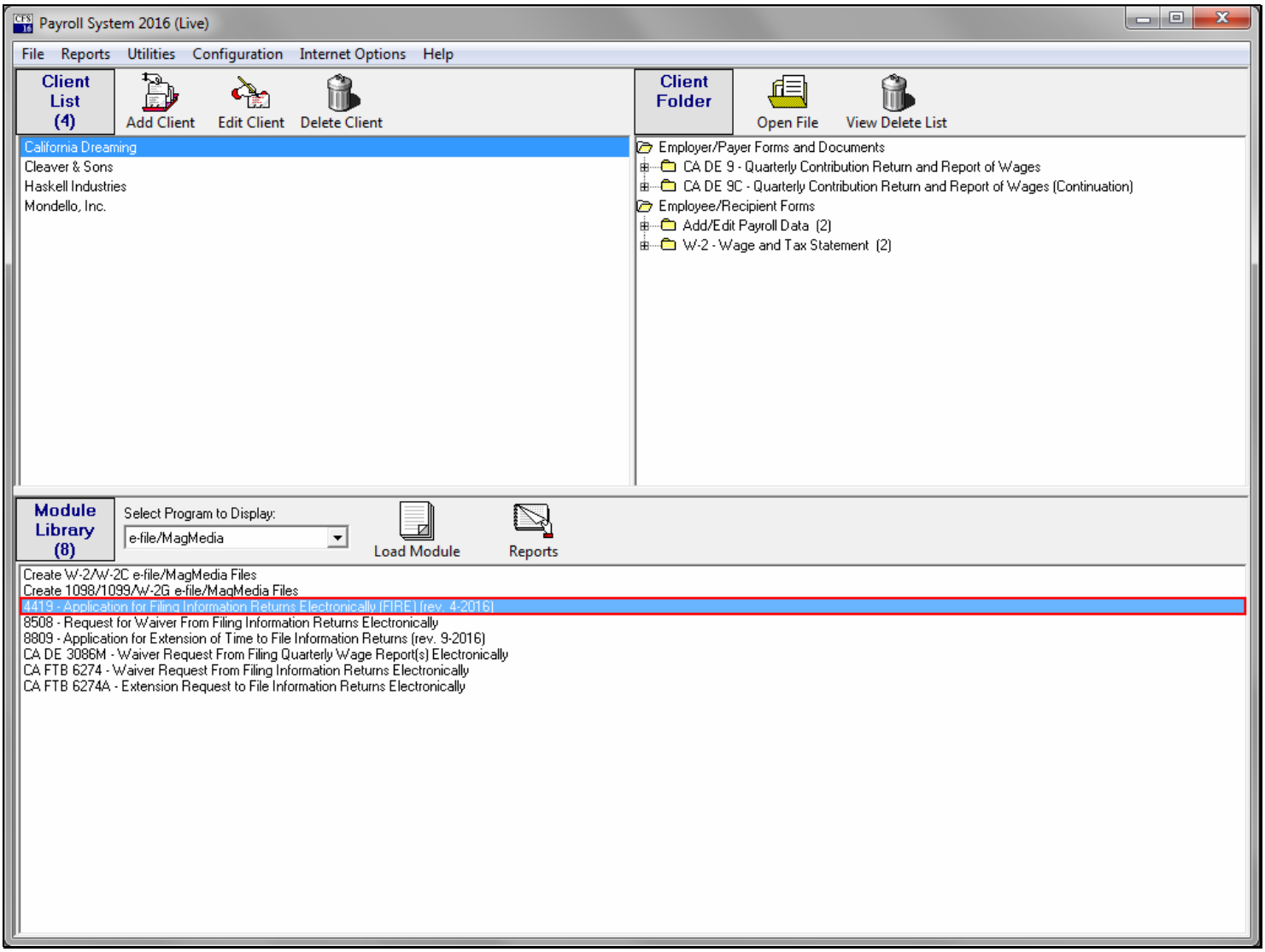
How to e-file 1099s with W2/1099 and e-file add-on

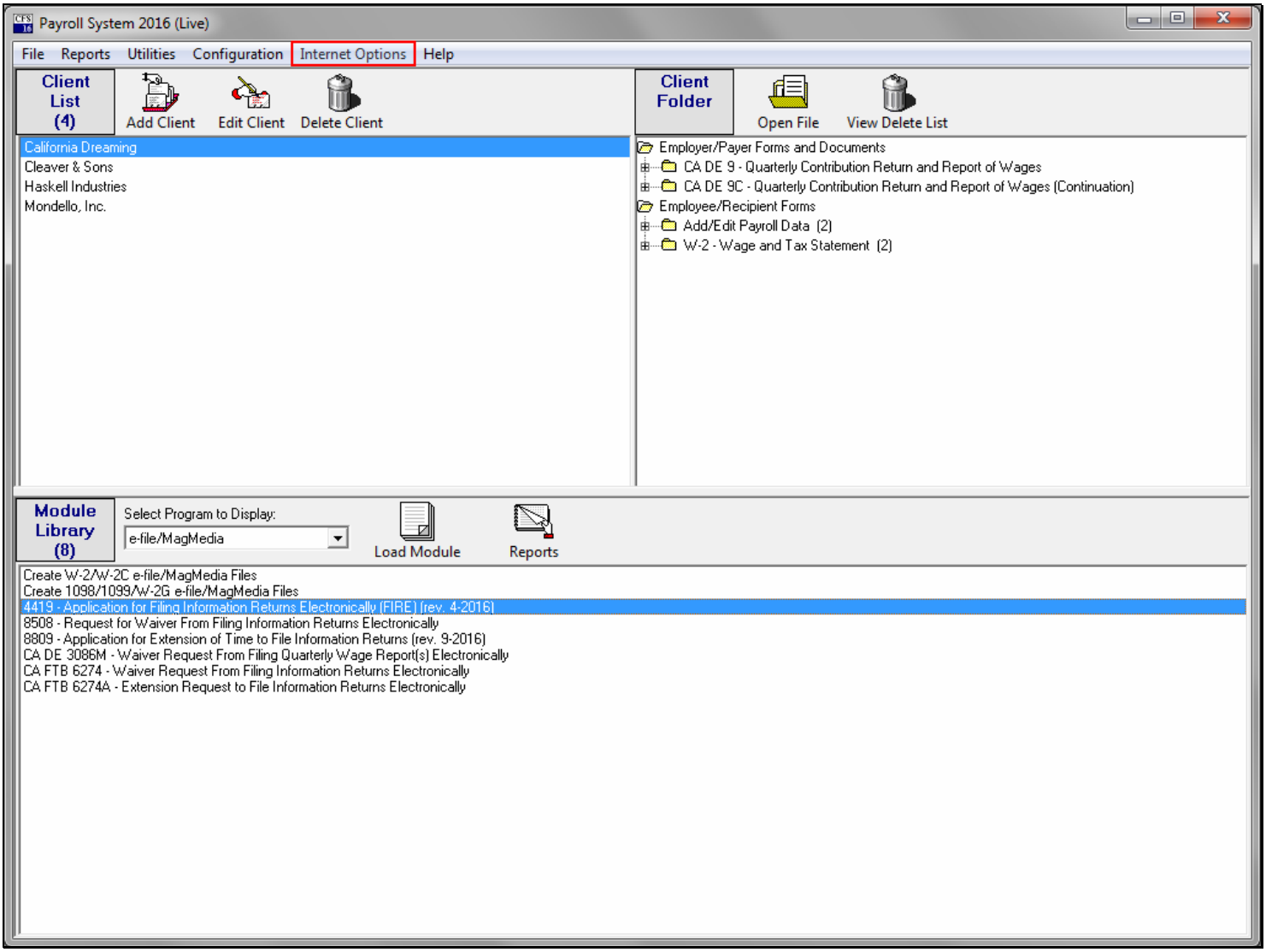
Part A: Preparing to Electronically File 1099s



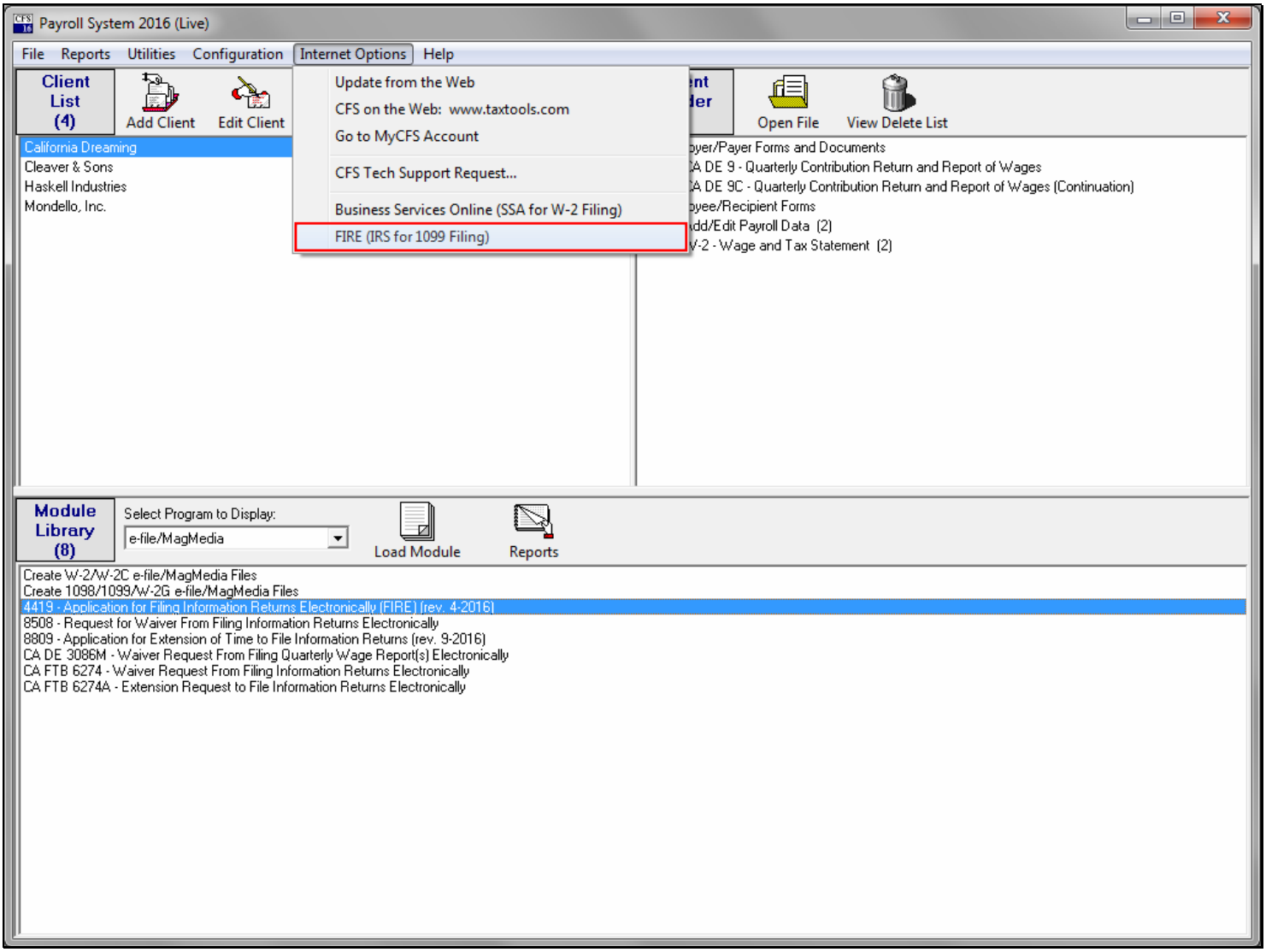
The **W2/1099 e-file add-on** can be used to electronically file information returns after first generating the forms in the W2/1099 program.

Before e-filing Forms 1098, 1099, or W-2G, you must have an **IRS FIRE System** account and a **Transmitter Control Code (TCC)**, which is obtained by filing **Form 4419**.

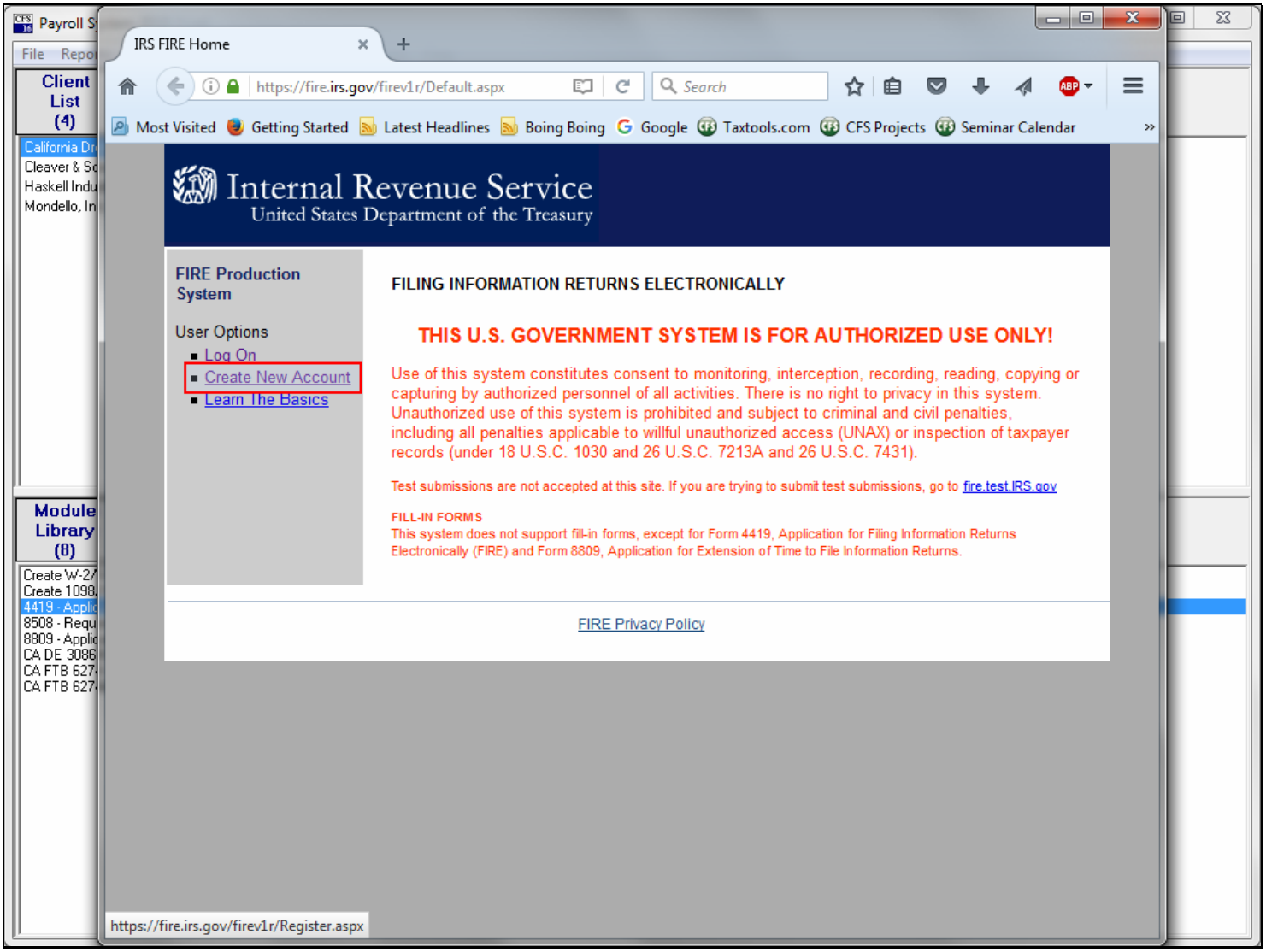
The paper form included in Payroll System can only be used to revise TCC information or request an additional TCC. **To request an original TCC, you must file Form 4419 online via the FIRE System.**



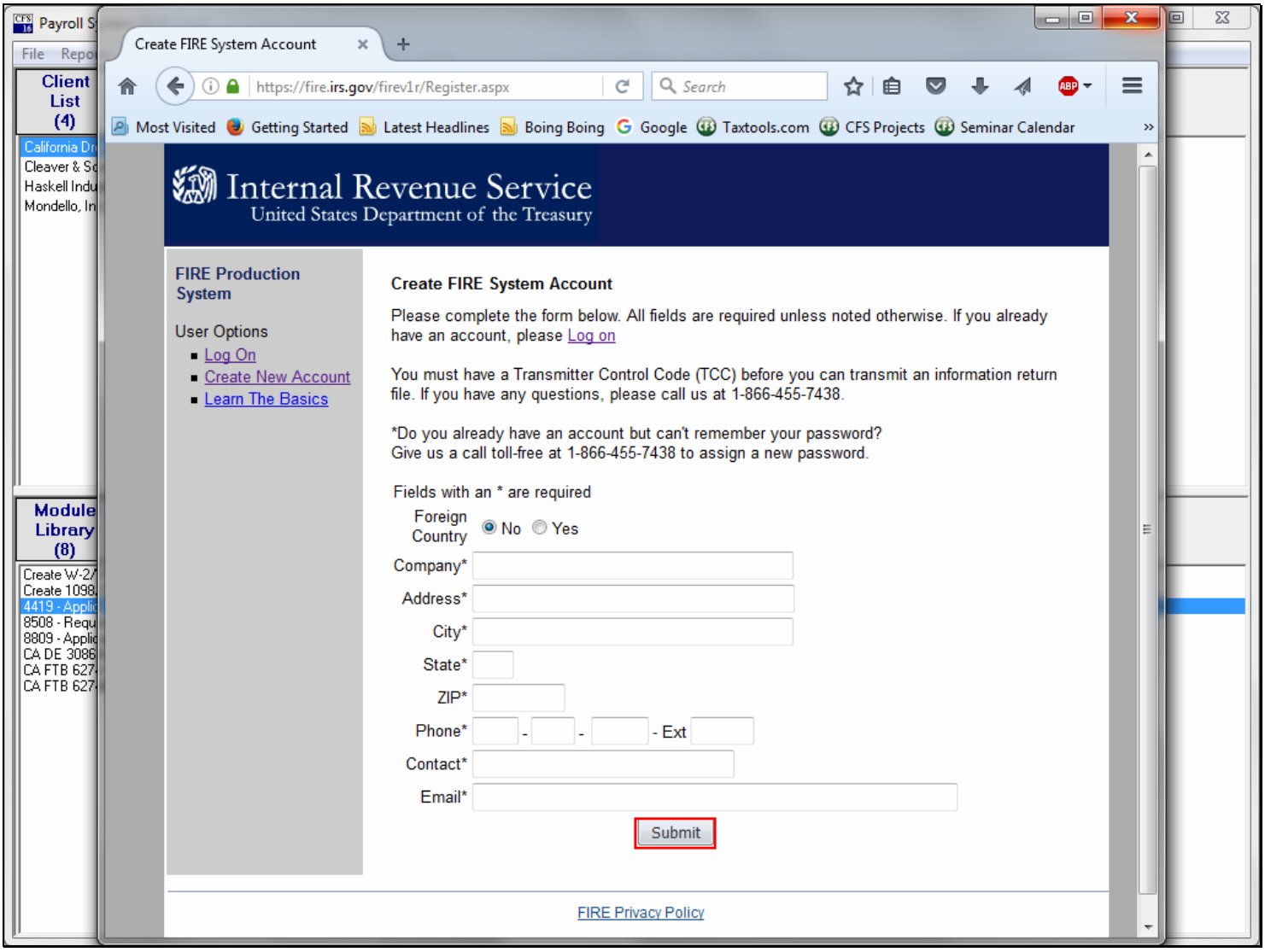
Use the **Internet Options** menu to open your browser to the IRS FIRE System home page.



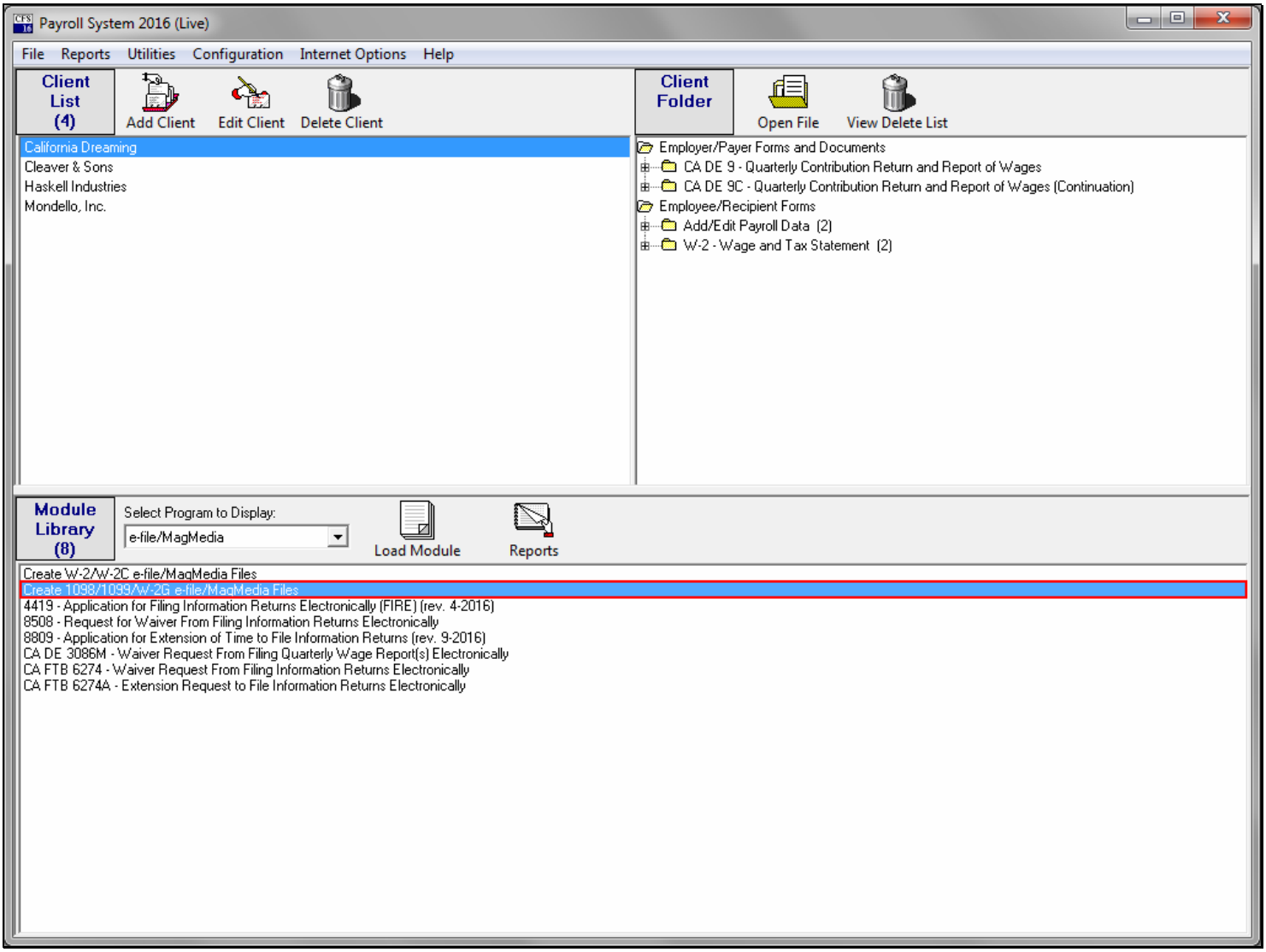
Select **FIRE (IRS for 1099 Filing).**



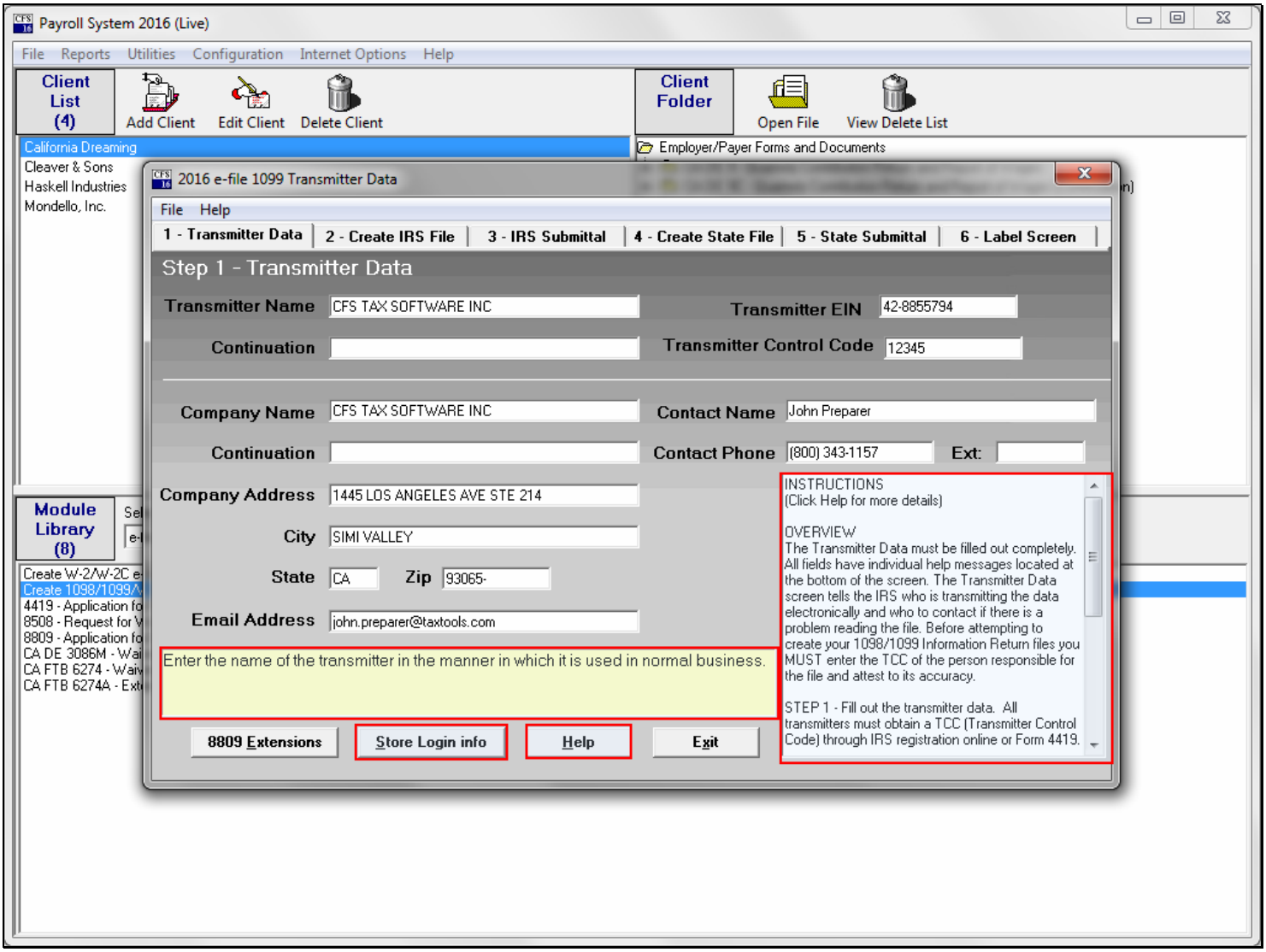
Click **Create New Account** to create a FIRE System account. If you already have an account, you must change your password at least every 90 days to keep it from expiring.



Fill in all fields, then click **Submit** to create an account. Then, complete **Form 4419** online to apply for your TCC.



If you have a TCC and a FIRE account, and you have generated the forms in the W2/1099 program, you are ready to e-file. Open the **Create 1098/1099/W-2G e-file/MagMedia Files** module.

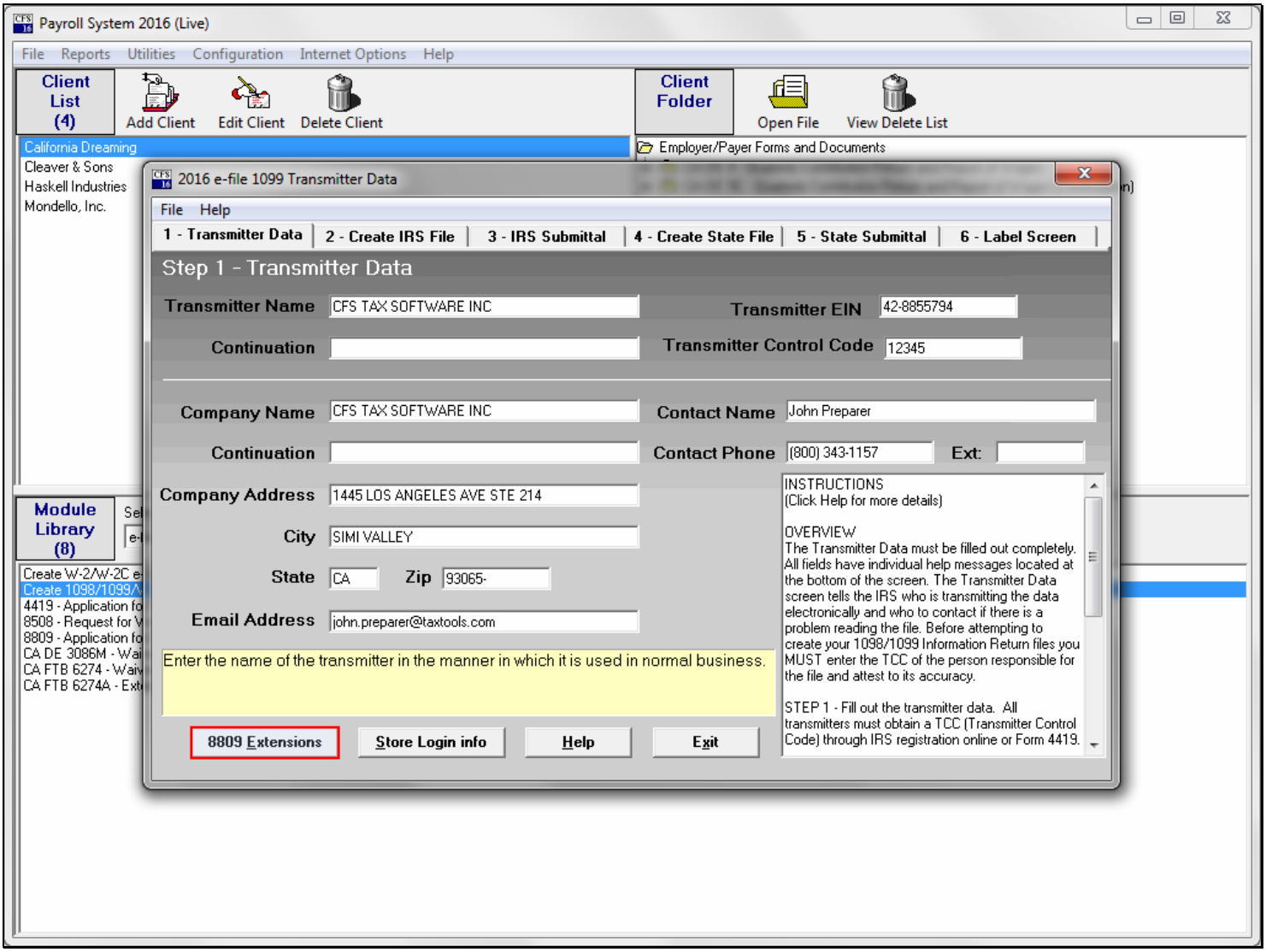


Make sure all of the required Transmitter Data fields are correctly filled in. If you used the e-file add-on last year, this data will be imported.

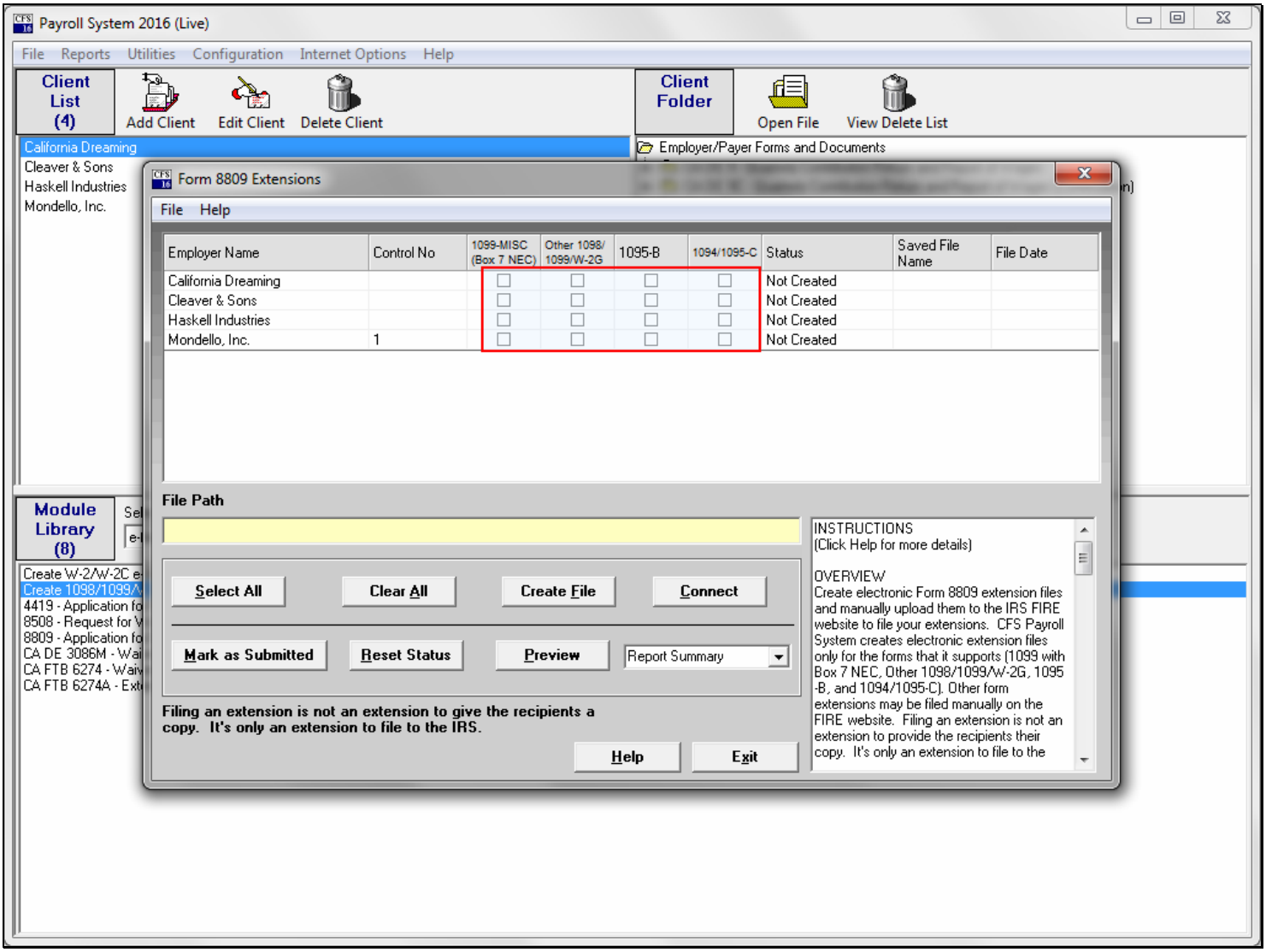
Note the **Instructions** and **Field Help**. Additional help is available by clicking the **Help** button or pressing **F1**.

The **Store Login info** button can be used to store login information for the FIRE System and state sites.

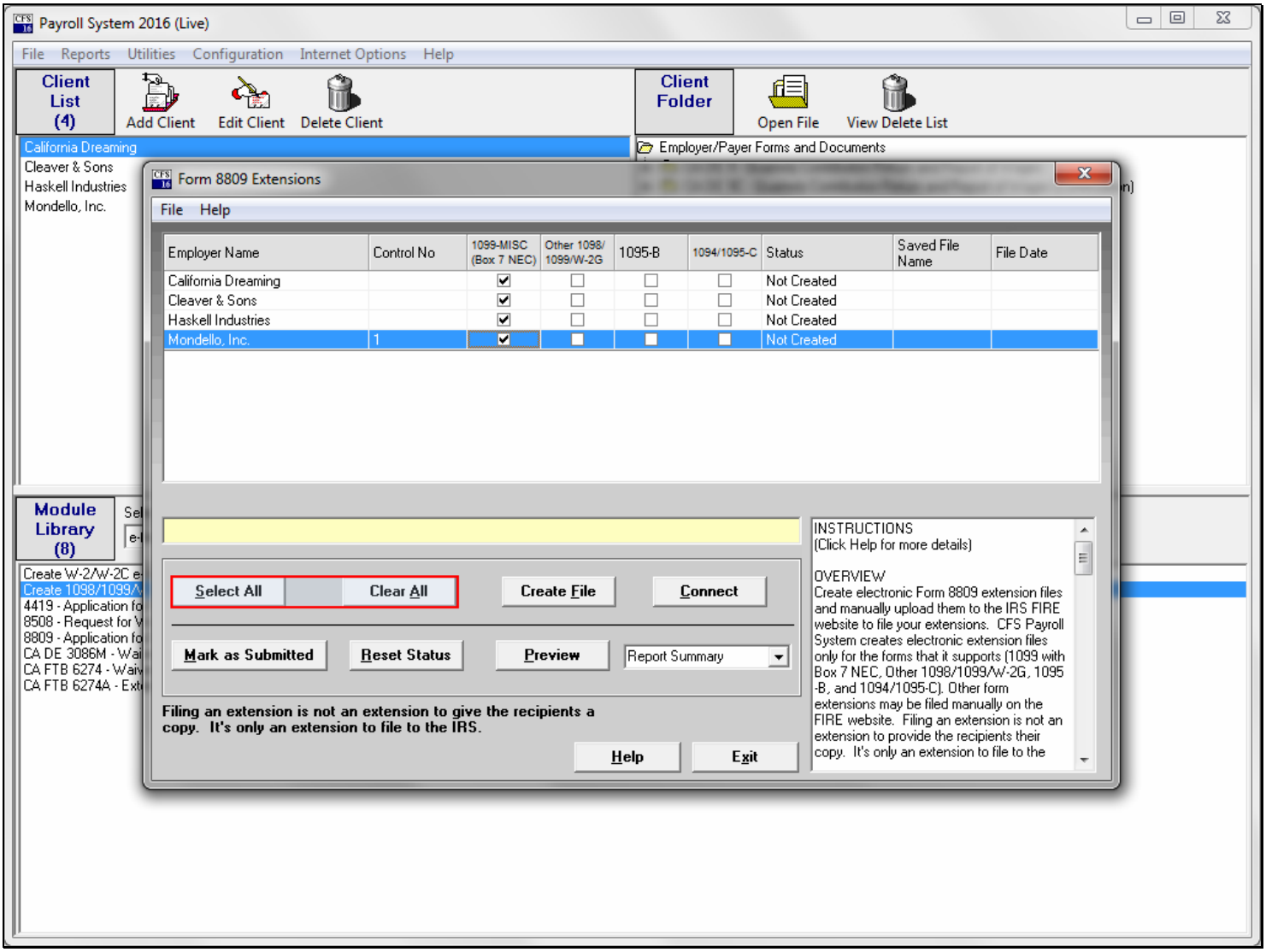
Part B: Electronically Filing an 8809 Extension



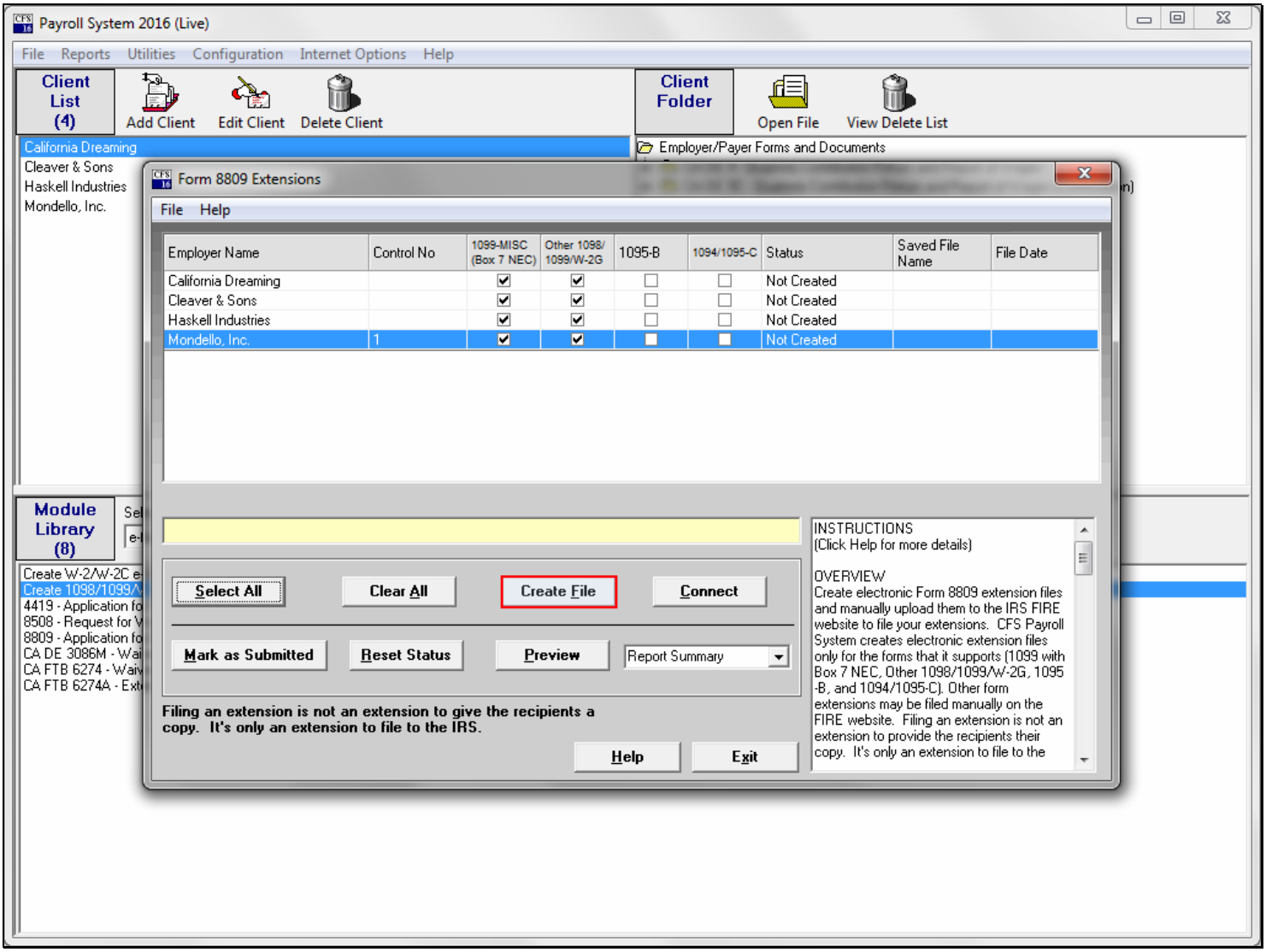
If you wish to e-file an extension for any or all of your clients, click the **8809 Extensions** button.



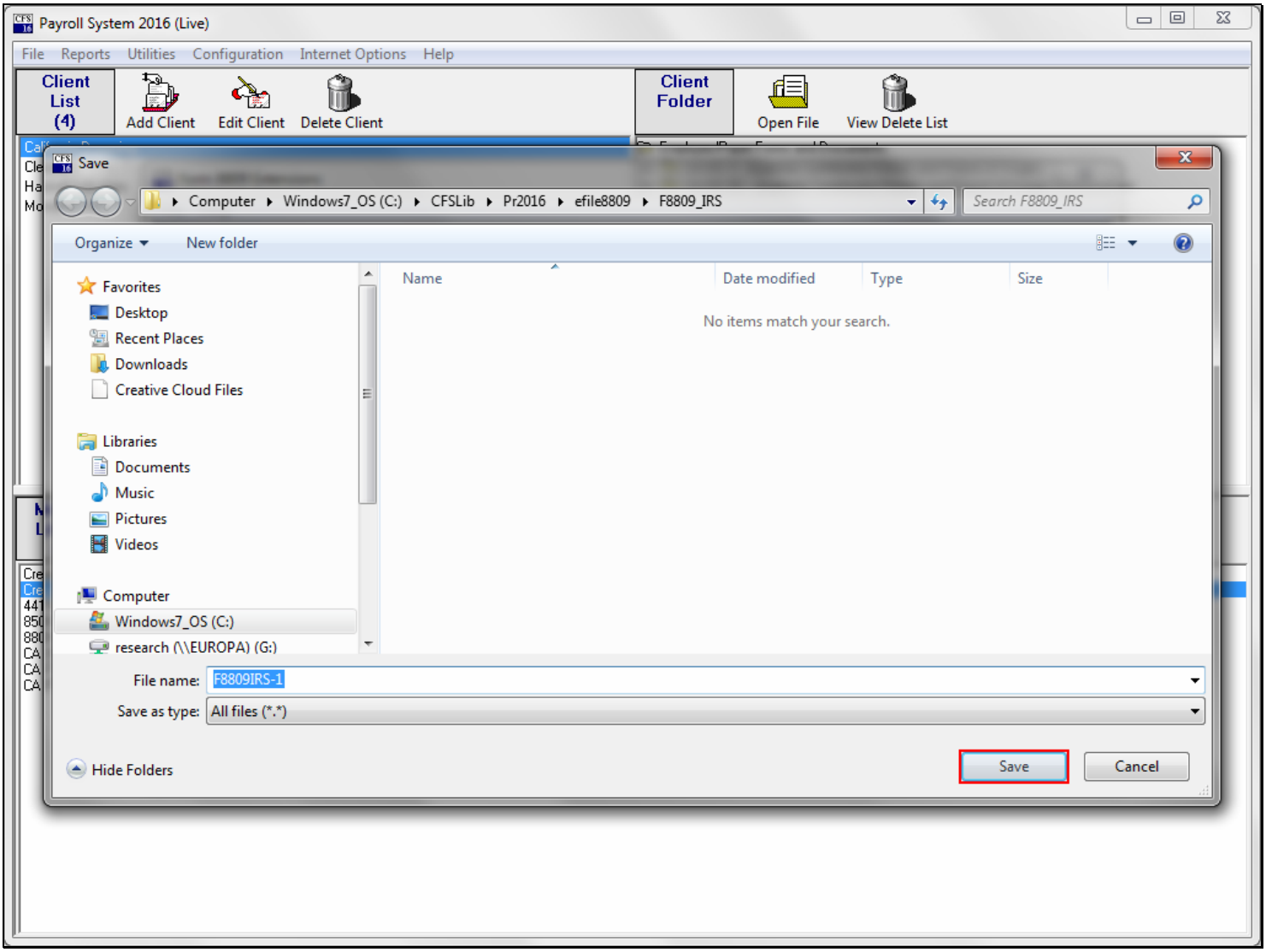
You can use the checkboxes to select which type of extension(s) you wish to apply for,...



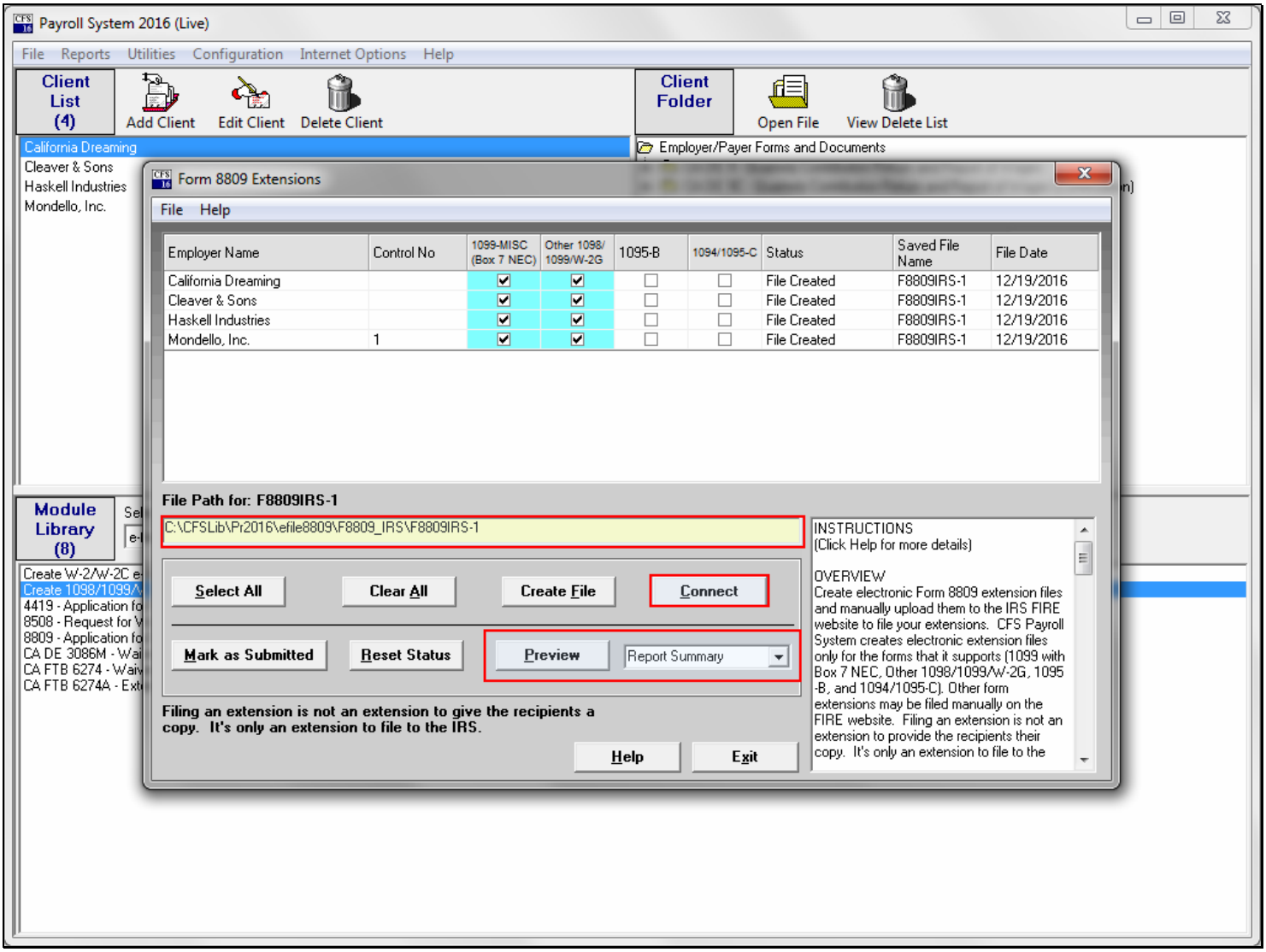
...or you can use the **Select All** / **Clear All** buttons.



When you have finished making your selections, click **Create File**.



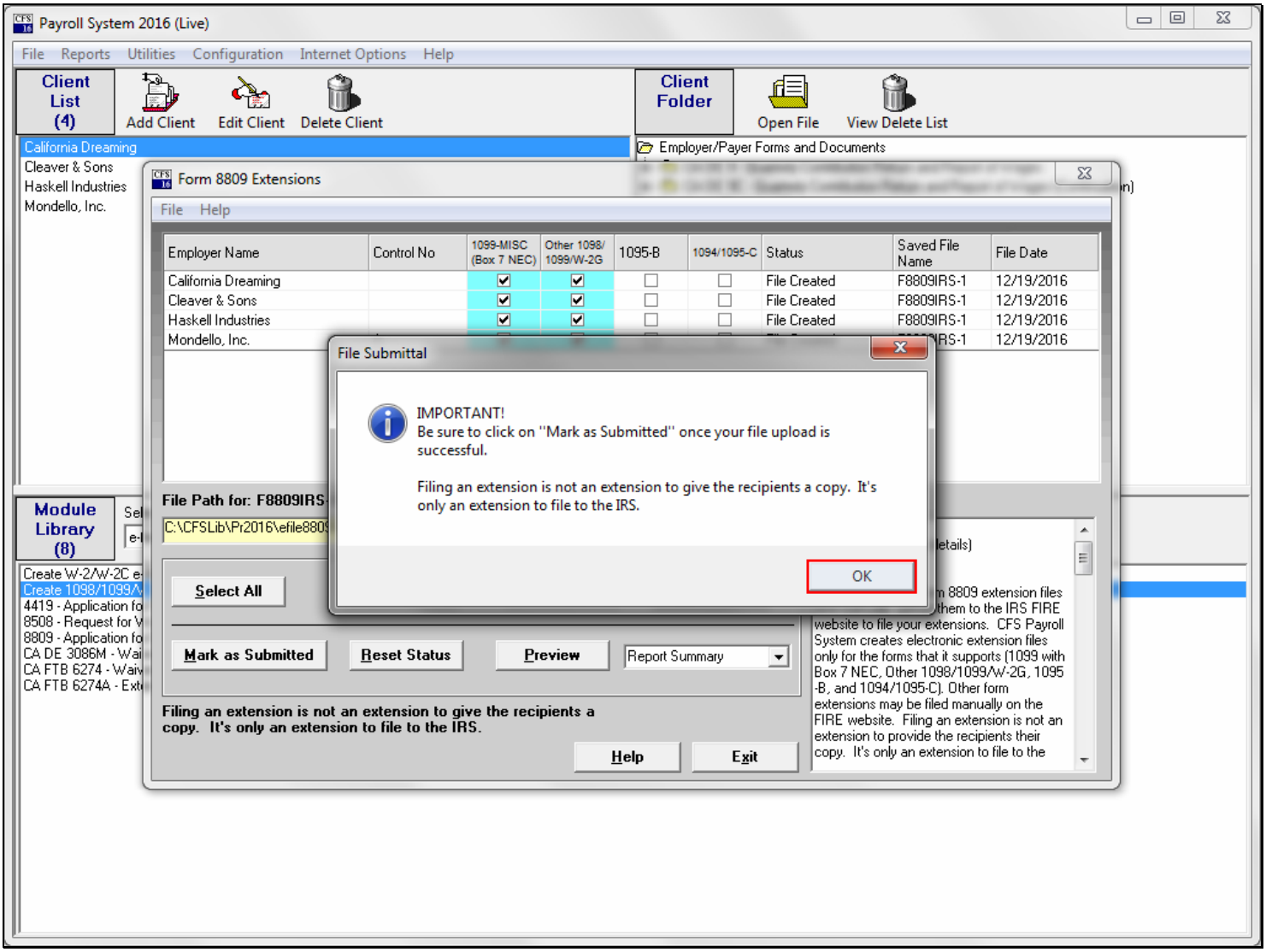
Save the file, using the default filename and location.



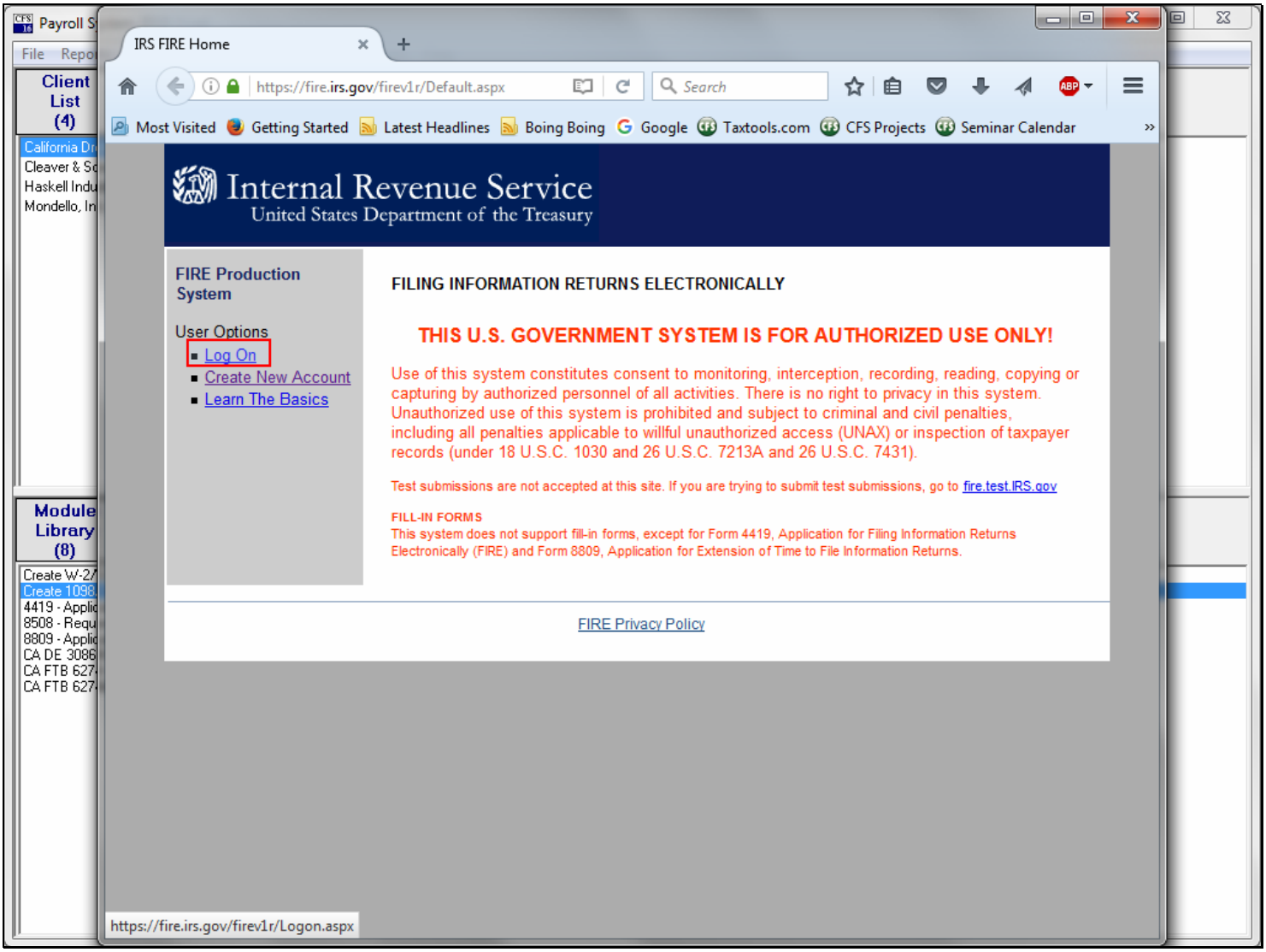
The yellow field displays the path to the file. The path and file name are also copied to the clipboard, so that you can paste them into the appropriate field on the FIRE System website.

If you wish to view a report of the data contained in the file before submitting, select the desired report from the dropdown menu and click the **Preview** button.

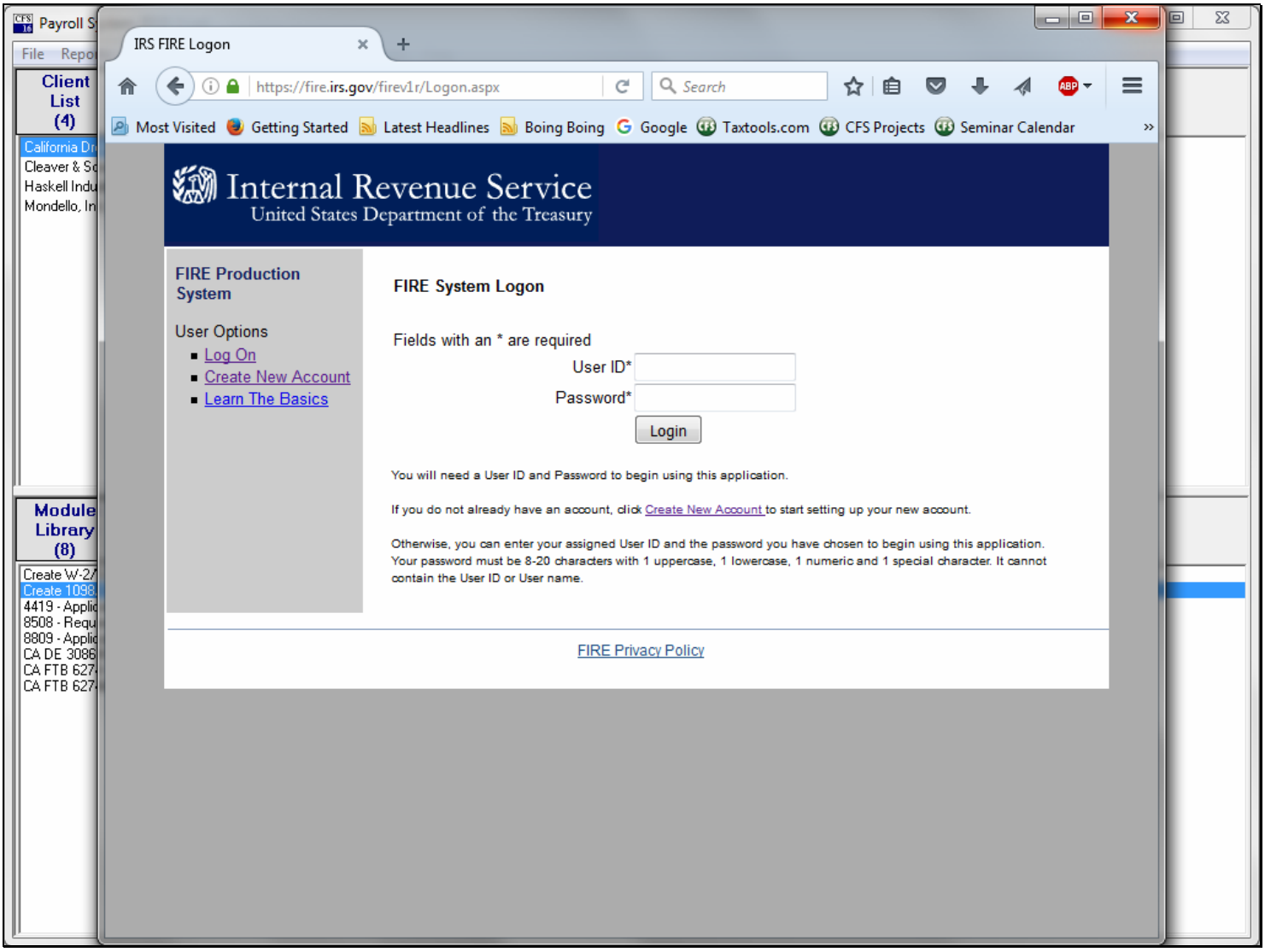
Click the **Connect** button to open your browser to the Fire System site.



Note the message.

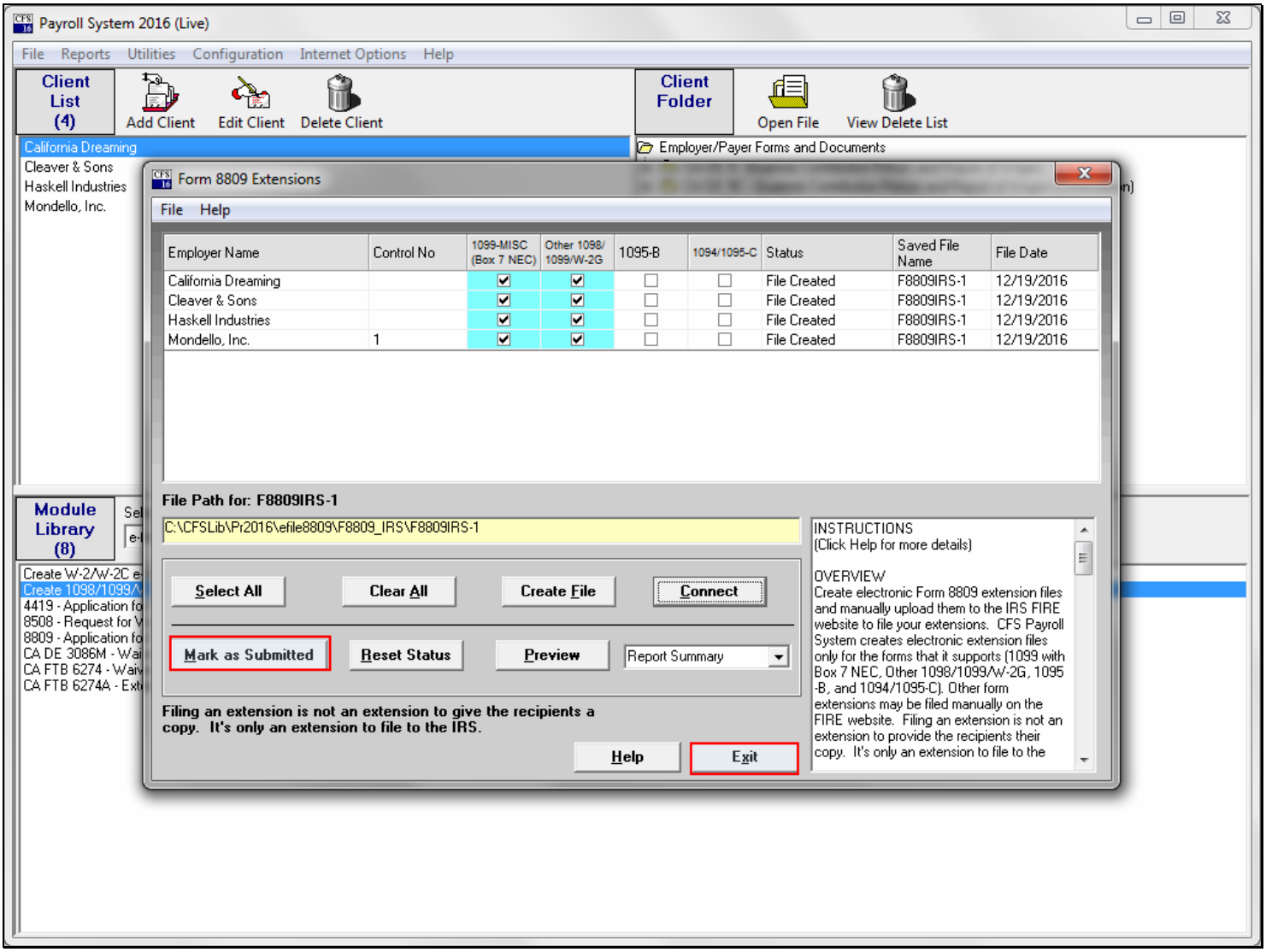


Your browser will open to the FIRE System home page. Click **Log On**.



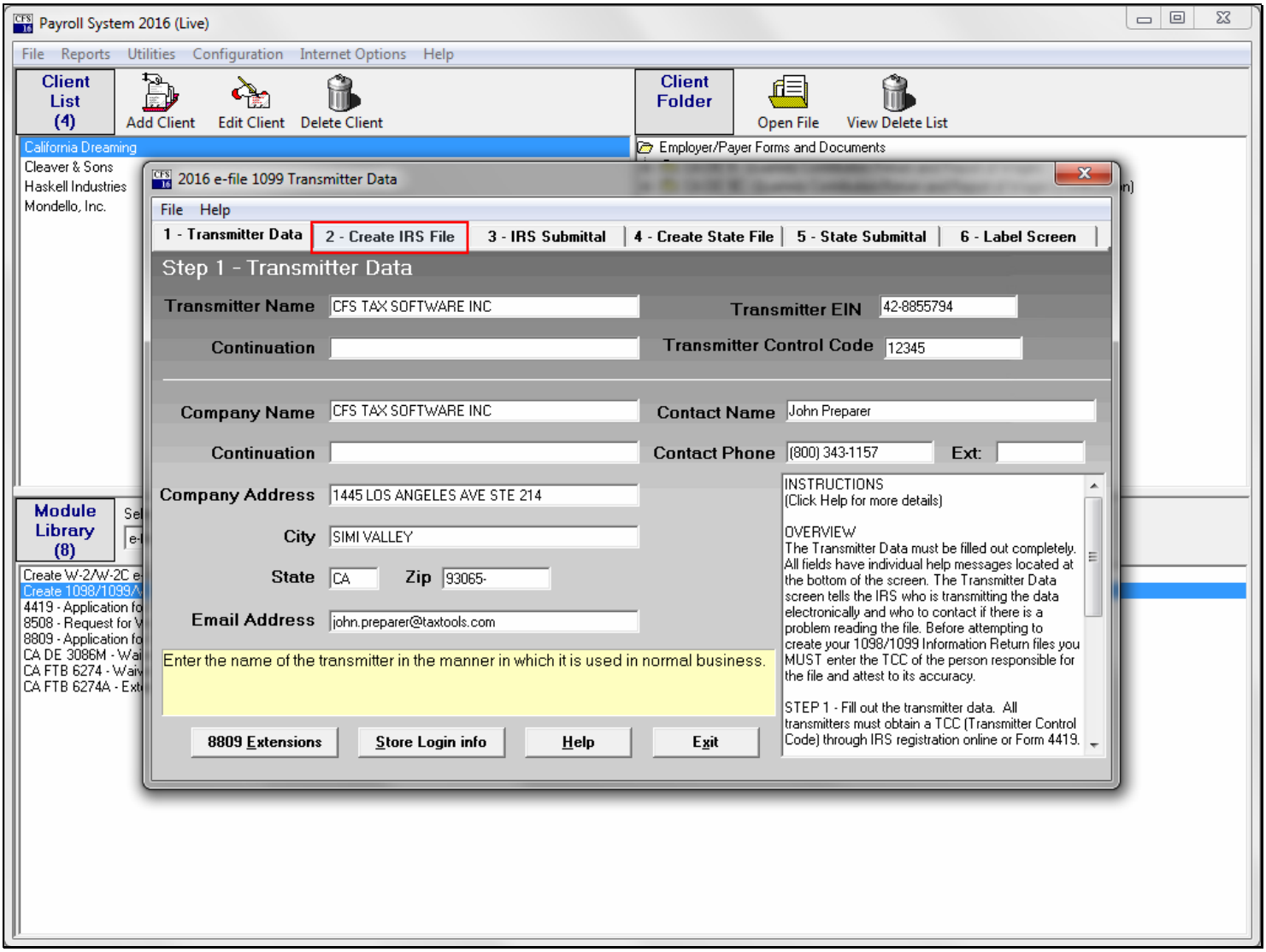
Enter your User ID and Password and click the **Login** button. Follow the instructions to upload your file.

For more information on the FIRE System, see IRS Pub 3609.

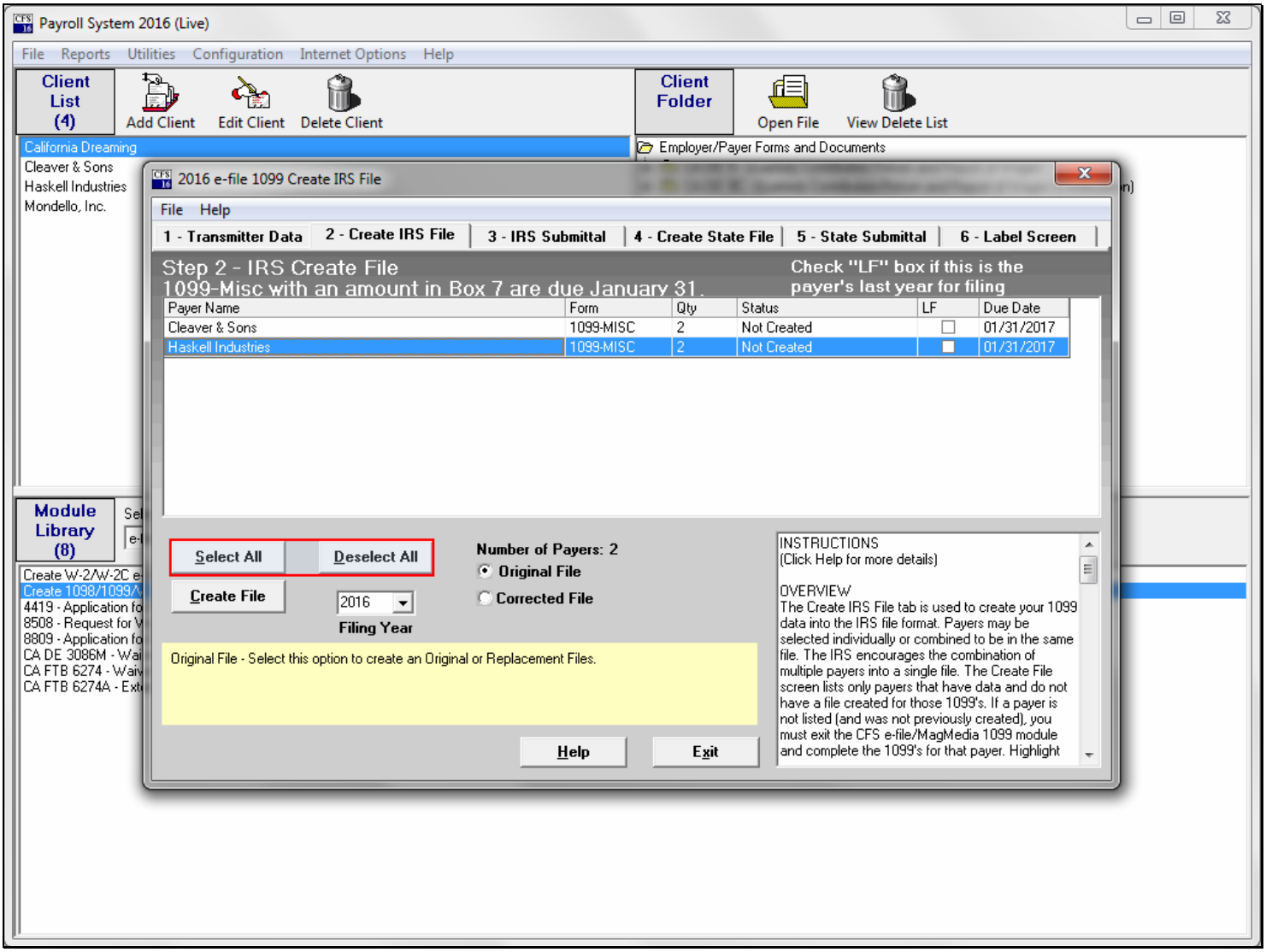


After submitting the file, click the **Mark as Submitted** button to add a reminder that you have submitted the file.

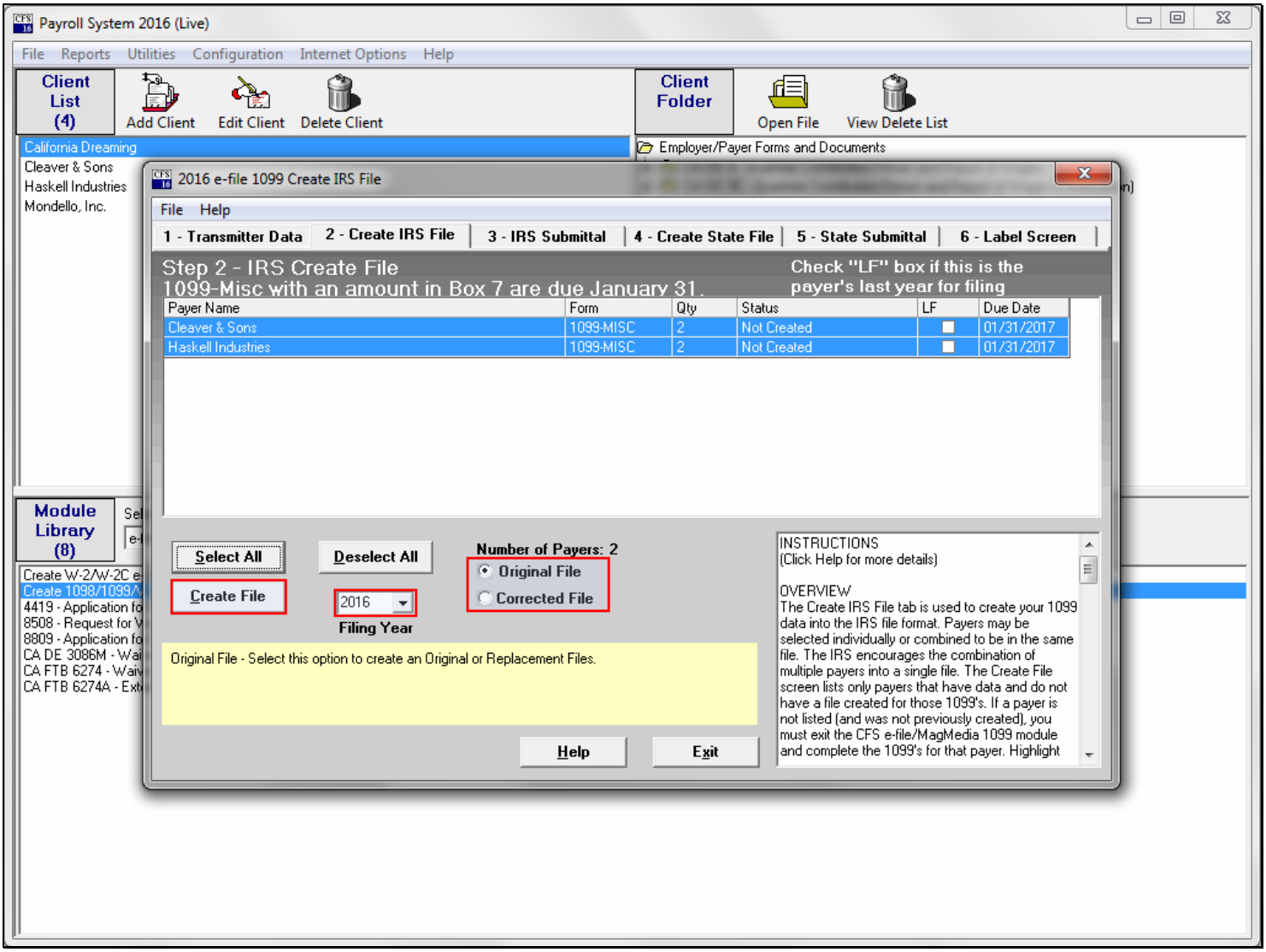
Part C: Electronically Filing Returns



When you are ready to file your information returns, click tab **2 - Create IRS File**.



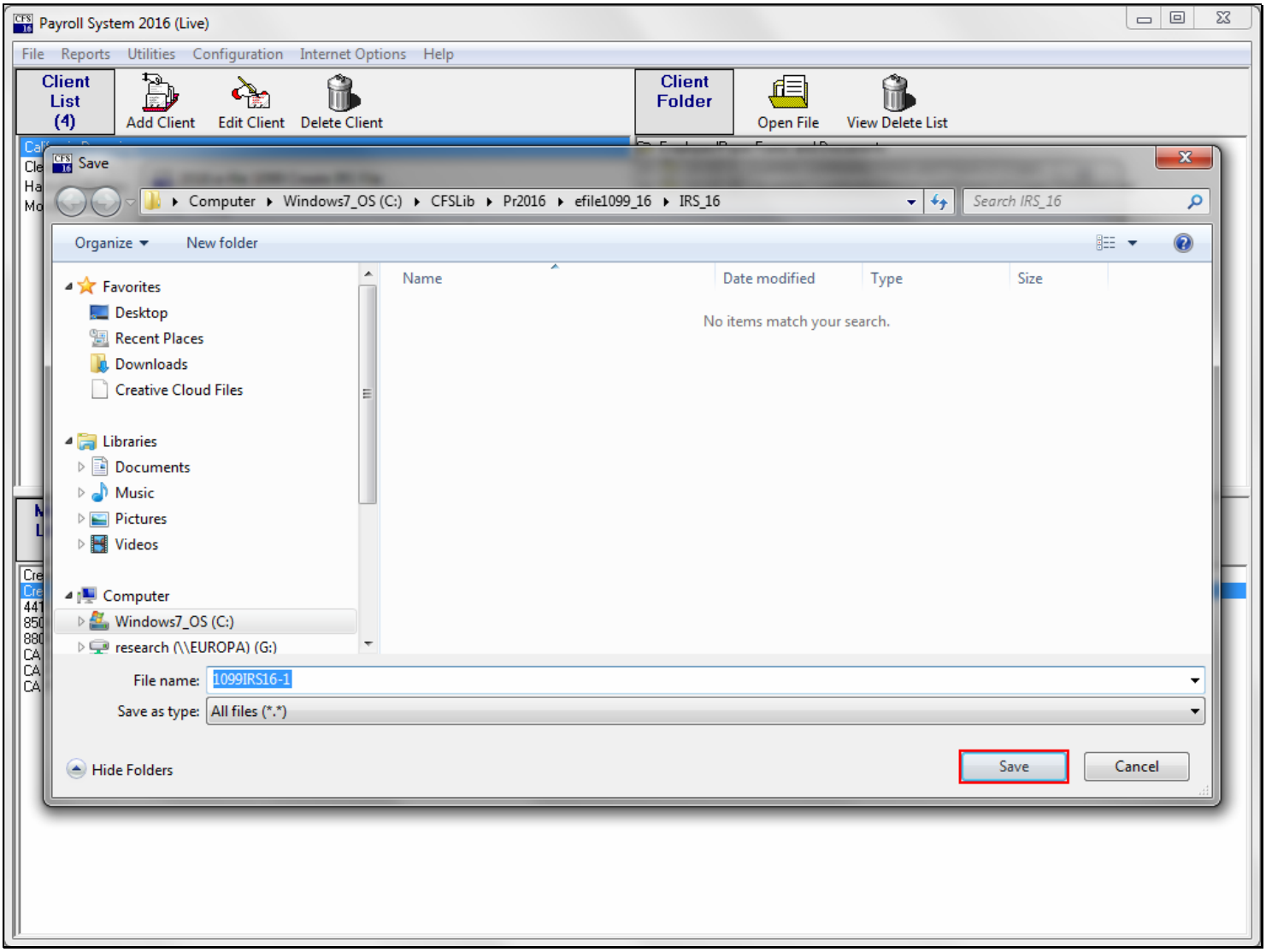
You can select individual payers or use the **Select All** and **Deselect All** buttons.



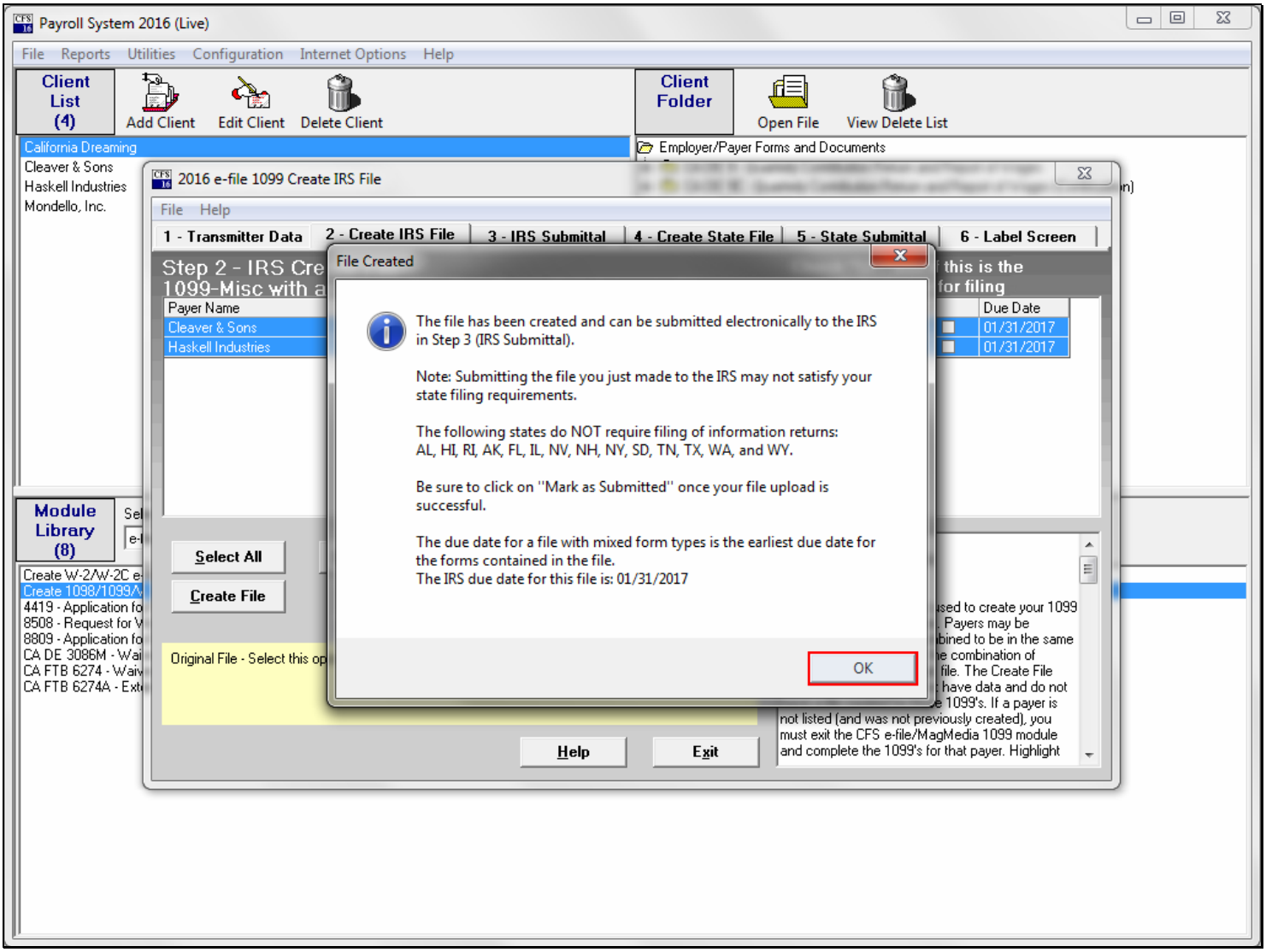
Make sure the **Filing Year** is correct.

If this is a correction, select **Corrected File**.

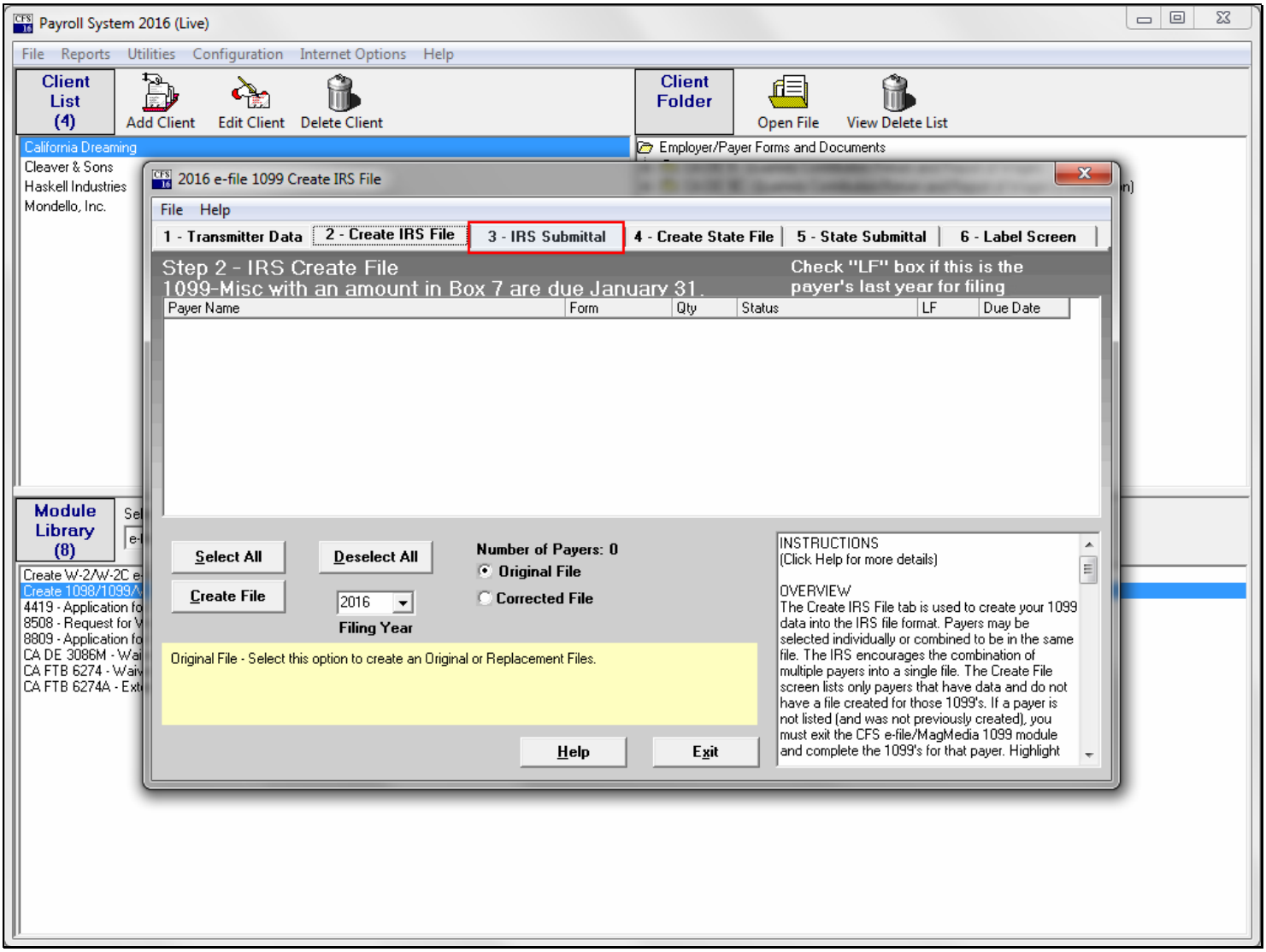
When you are ready to create the file, click the **Create File** button.



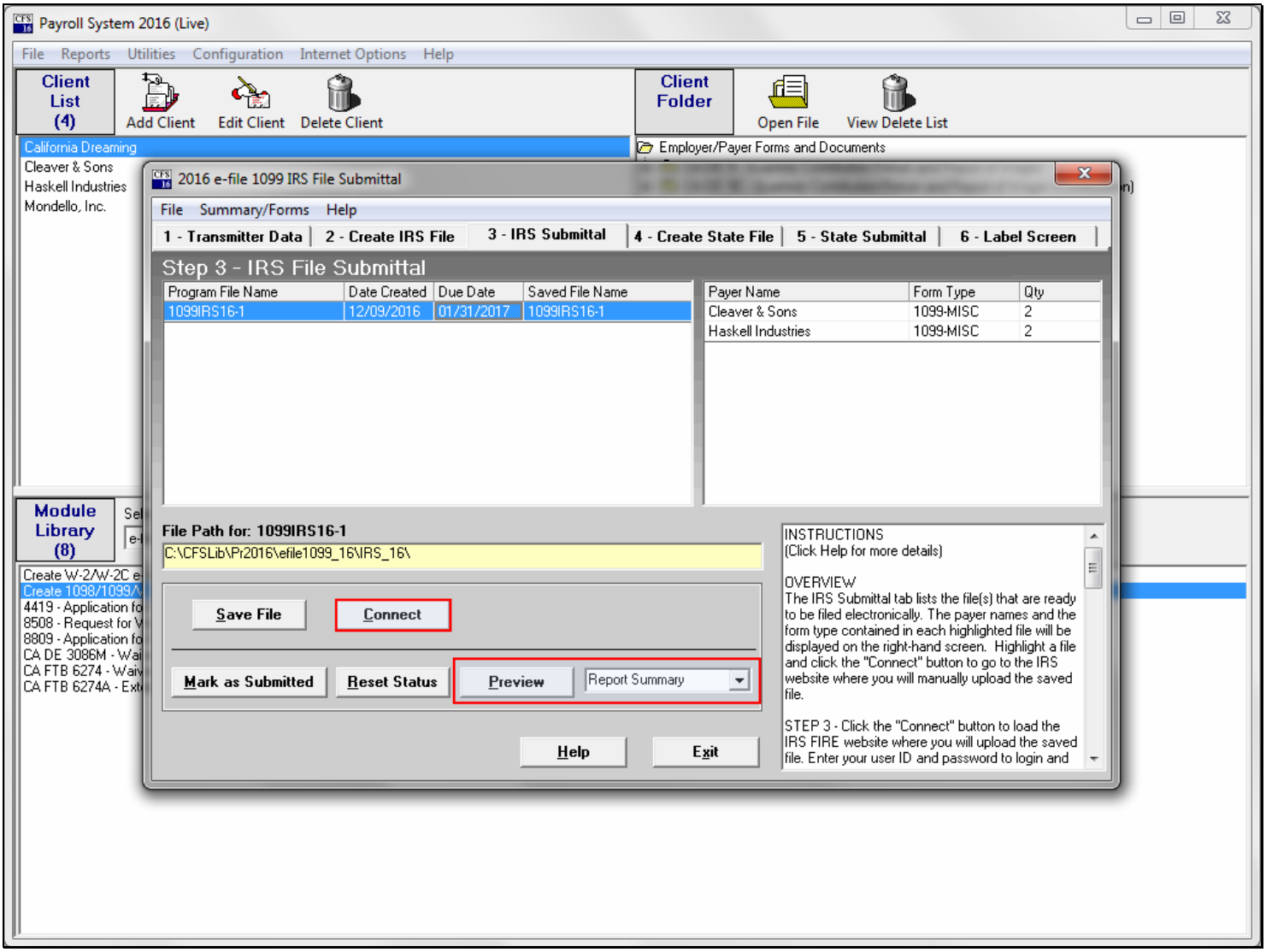
Save the file, using the default filename and location.



Note the message regarding state filing and due date.



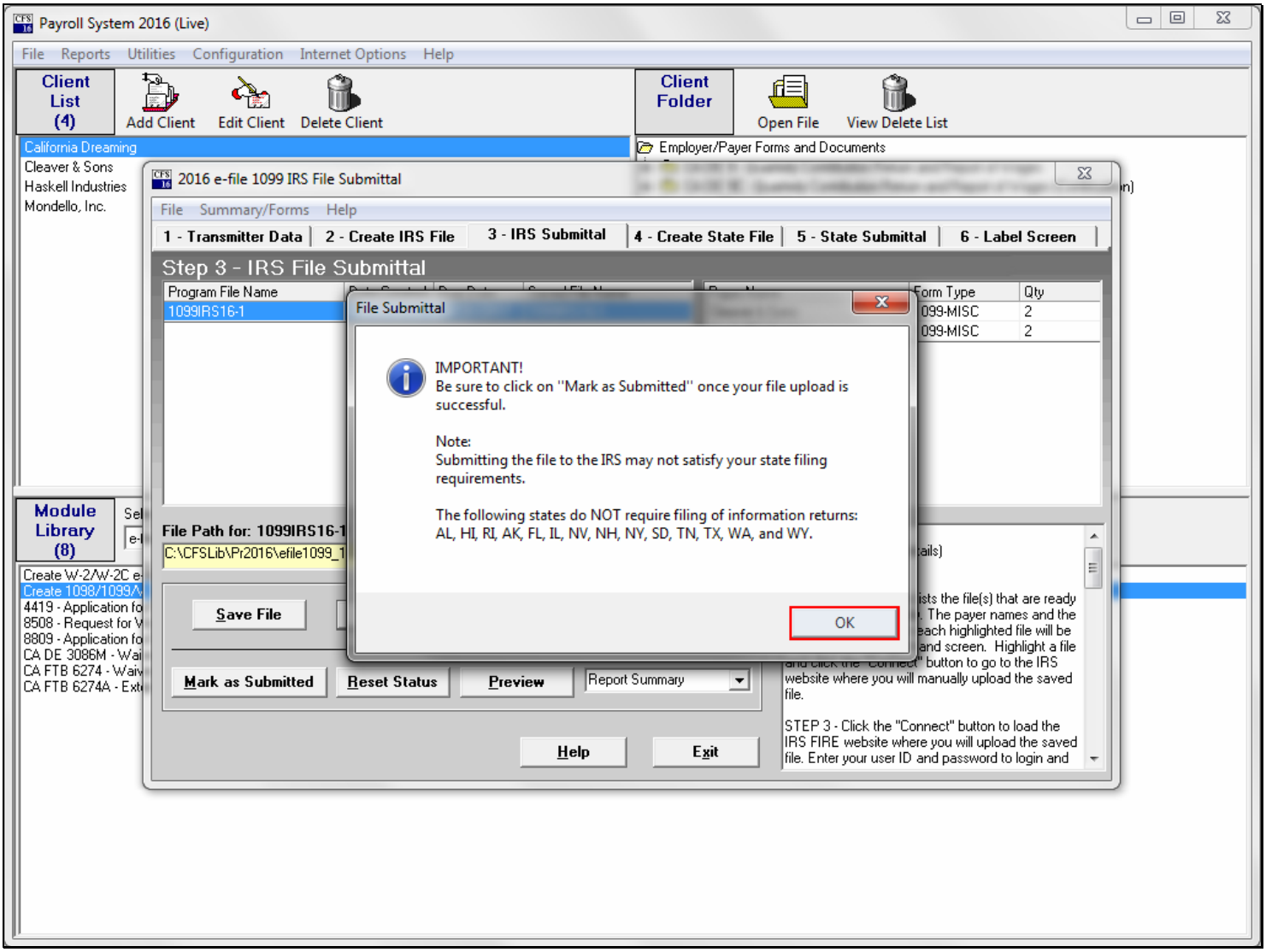
The file is now ready to be submitted to the IRS. Click tab **3 - IRS Submittal**.



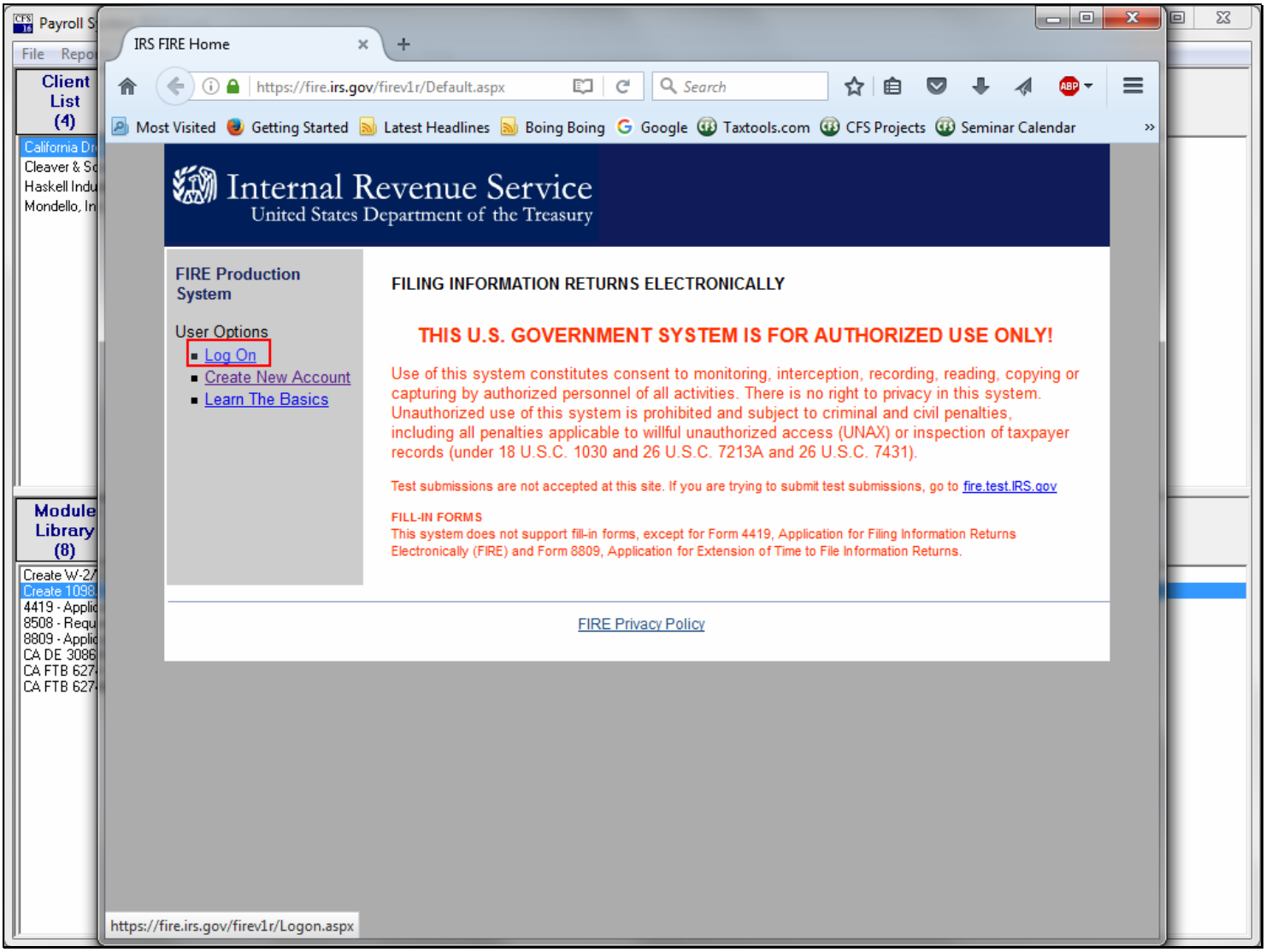
Select the file you wish to submit. The yellow field displays the path to the file. The path and file name are also copied to the clipboard, so that you can paste them into the appropriate field on the FIRE System website.

If you wish to view a report of the data contained in the file before submitting, select the desired report from the dropdown menu and click the **Preview** button.

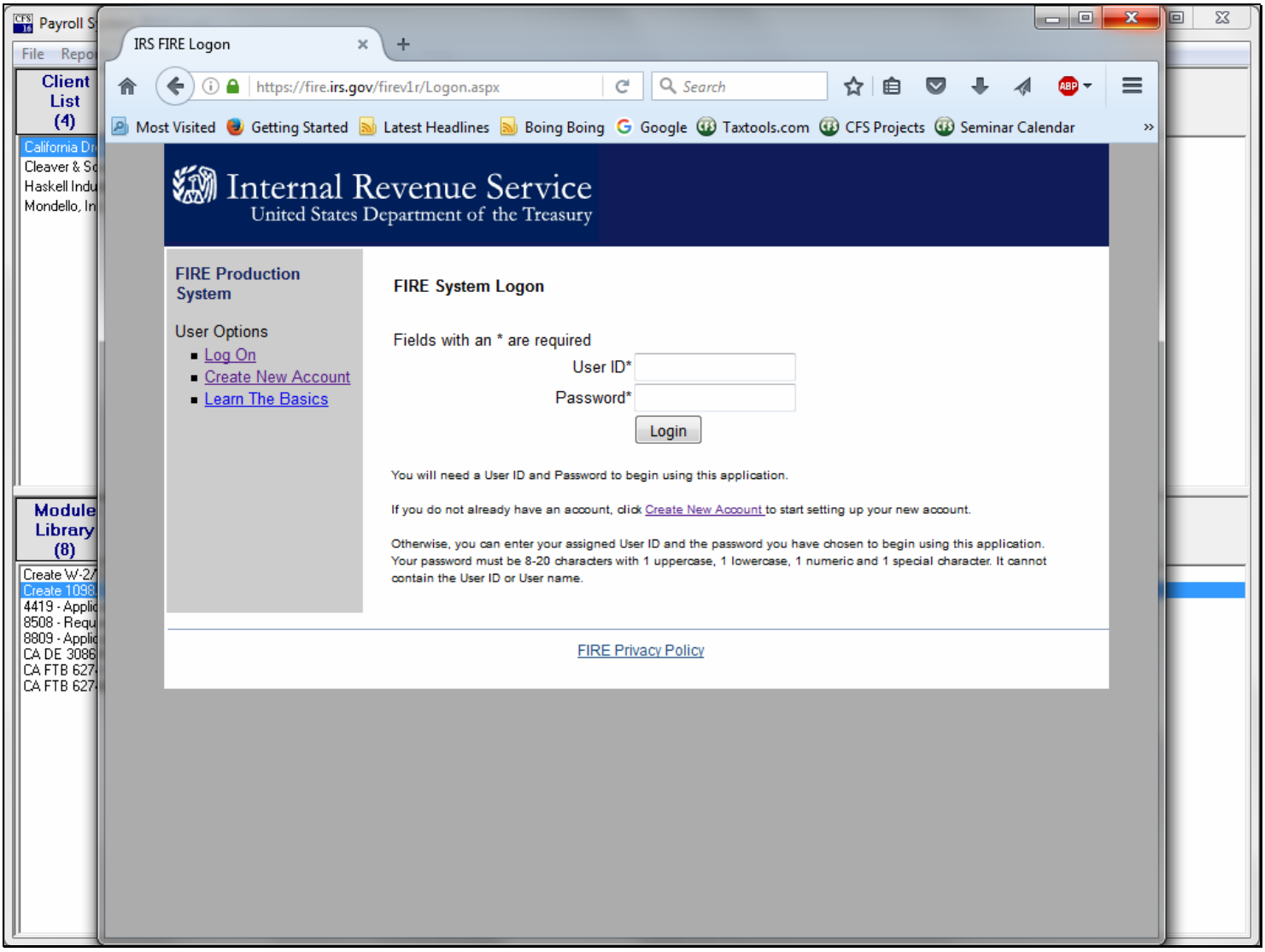
When you are ready to submit the file, click the **Connect** button.



Note the message.

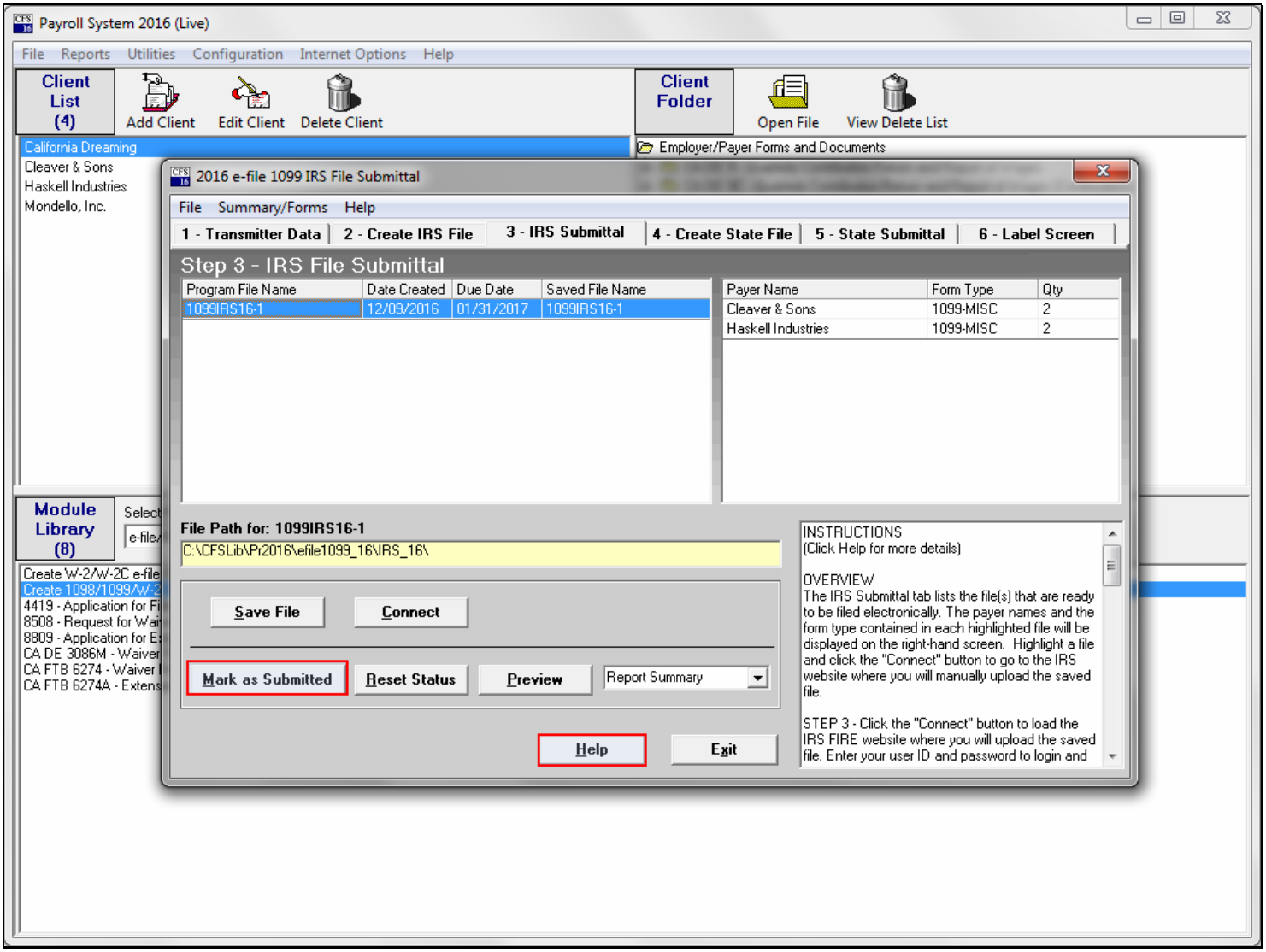


Your browser will open to the FIRE System home page. Click **Log On**.



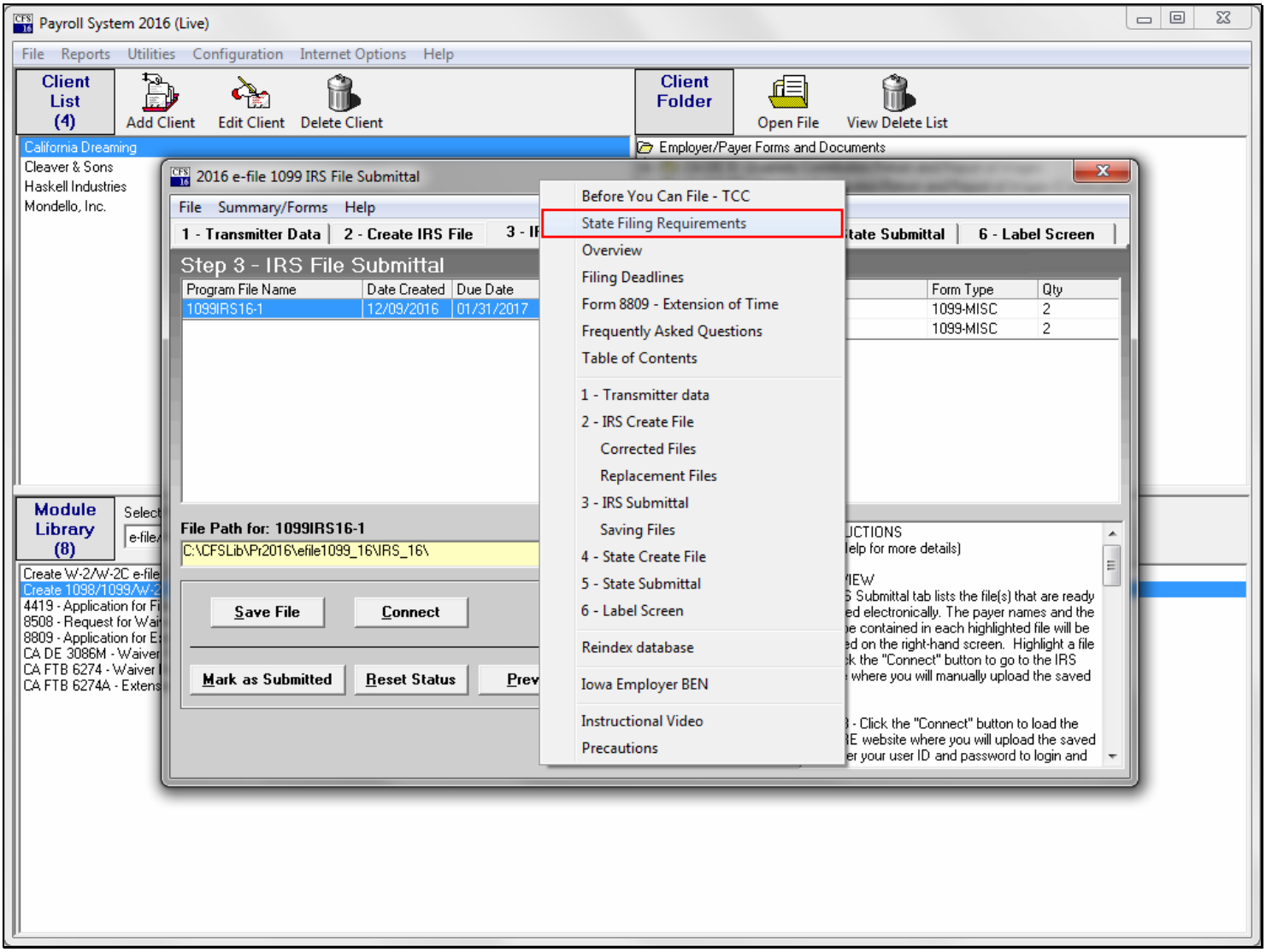
Enter your User ID and Password and click the **Login** button. Follow the instructions to upload your file.

For more information on the FIRE System, see IRS Pub 3609.

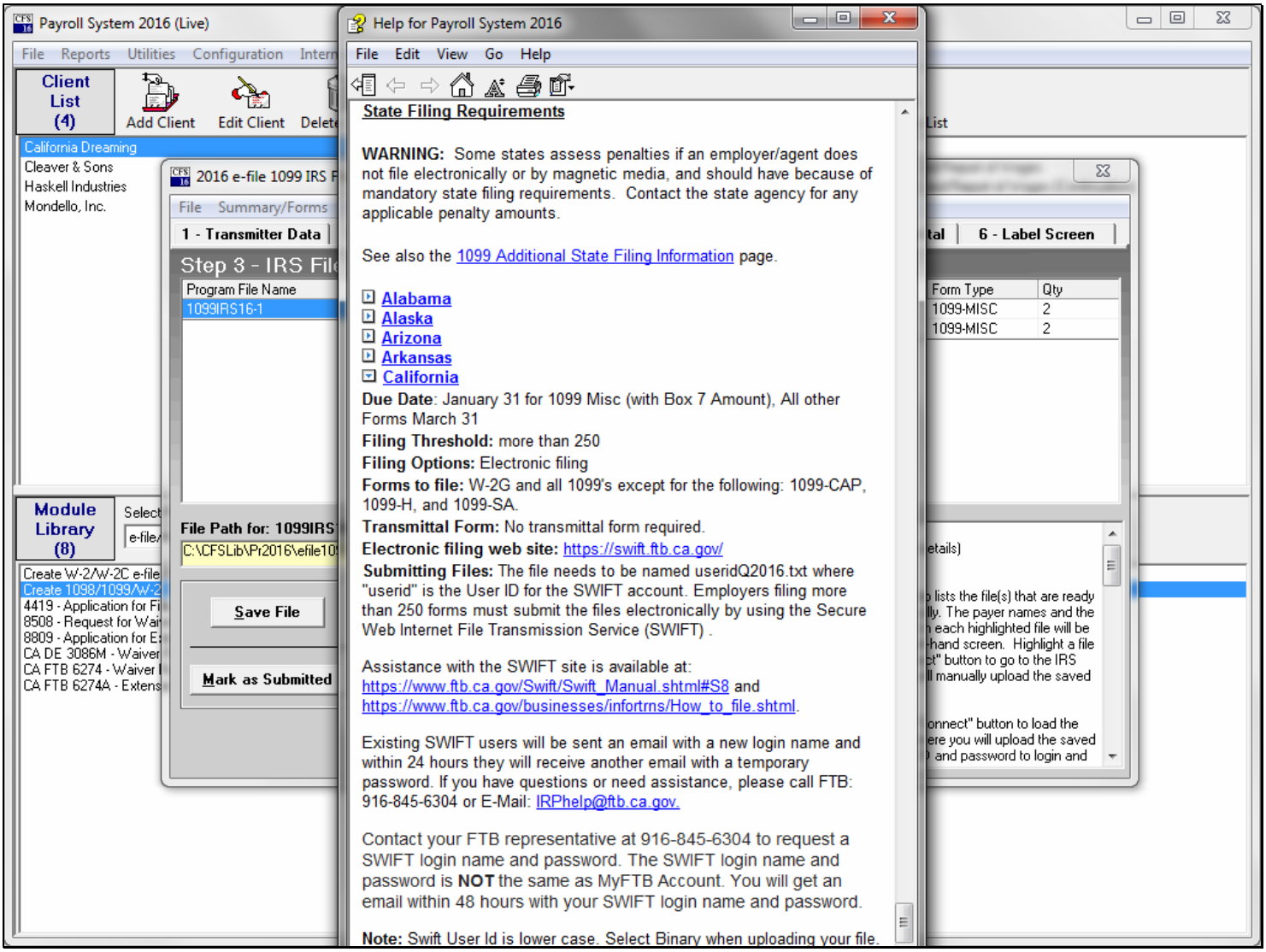


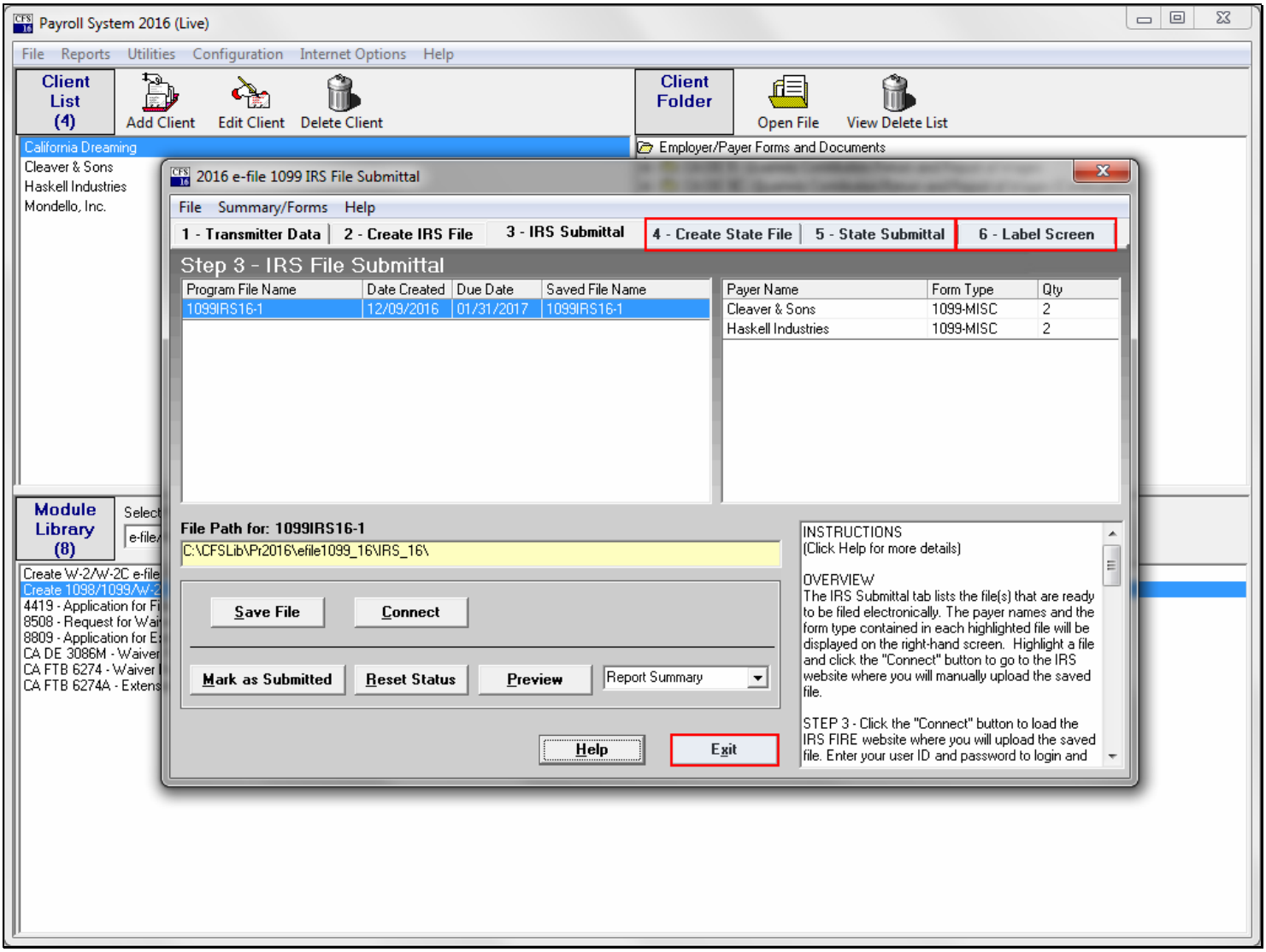
After submitting the file, click the **Mark as Submitted** button to add a reminder that you have submitted the file.

Part D: State Filing Requirements



Submitting files to the FIRE System may not fulfill your state's filing requirements. The help file contains information about state filing requirements.


Payroll System 2016 (Live)
File Reports Utilities Configuration
Client List (4)
Add Client
Edit Client
California Dreaming
Cleaver & Sons
Haskell Industries
Mondello, Inc.
2016 e-file 1099 IRS
File Summary/Forms
1 - Transmitter Data
Step 3 - IRS Fil
Program File Name
1099IRS16-1
File Path for: 1099IRS
C:\CFSLib\Pr2016\efile10
Save File
Mark as Submitted
Module Library (8)
Create W-2/W-2C e-file
Create 1098/1099/W-2
4419 - Application for Fi
8508 - Request for Wai
8809 - Application for E
CA DE 3086M - Waiver
CA FTB 6274 - Waiver
CA FTB 6274A - Extens
Help for Payroll System 2016
File Edit View Go Help
State Filing Requirements
WARNING: Some states assess penalties if an employer/agent does not file electronically or by magnetic media, and should have because of mandatory state filing requirements. Contact the state agency for any applicable penalty amounts.
See also the 1099 Additional State Filing Information page.
Alabama
Alaska
Arizona
Arkansas
California
Due Date: January 31 for 1099 Misc (with Box 7 Amount), All other Forms March 31
Filing Threshold: more than 250
Filing Options: Electronic filing
Forms to file: W-2G and all 1099's except for the following: 1099-CAP, 1099-H, and 1099-SA.
Transmittal Form: No transmittal form required.
Electronic filing web site: https://swift.ftb.ca.gov/
Submitting Files: The file needs to be named useridQ2016.txt where "userid" is the User ID for the SWIFT account. Employers filing more than 250 forms must submit the files electronically by using the Secure Web Internet File Transmission Service (SWIFT) .
Assistance with the SWIFT site is available at: https://www.ftb.ca.gov/Swift/Swift_Manual.shtml#S8 and https://www.ftb.ca.gov/businesses/infortrns/How_to_file.shtml.
Existing SWIFT users will be sent an email with a new login name and within 24 hours they will receive another email with a temporary password. If you have questions or need assistance, please call FTB: 916-845-6304 or E-Mail: IRPhelp@ftb.ca.gov.
Contact your FTB representative at 916-845-6304 to request a SWIFT login name and password. The SWIFT login name and password is NOT the same as MyFTB Account. You will get an email within 48 hours with your SWIFT login name and password.
Note: Swift User Id is lower case. Select Binary when uploading your file.
6 - Label Screen
Form Type Qty
1099-MISC 2
1099-MISC 2



If your state requires a separate file submission, these tabs **4** and **5** allow you to create and submit a state file, using the same procedure you used for the IRS.

If your state requires the file to be submitted on CD, tab **6** allows you to print shipping labels.