Client Write-Up — Preparing to e-file Forms 1099

Use Client Write-Up to create, print, and e-file Forms 1099 and 1096.

Note: Prepare TY2013 Forms 1099 and 1096 using Client Write-Up 2013.

Preparing to e-file Forms 1099 and 1096

Before uploading 1099 and 1096 information to the IRS, you must:

1) Get a Transmitter Control Code (TCC), and
2) Register on the IRS's FIRE web site.

GETTING A TRANSMITTER CONTROL CODE

1) Go to *http://www.irs.gov/pub/irs-pdf/f4419.pdf* and complete Form 4419.

Note: Only select the first box below line 7 unless the others are absolutely necessary.

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2) Fax the completed form to 877-477-0572.
3) Check on the status of the 4419 application (and receive the 5-character TCC over the phone, call toll free: 866-455-7438 (option 4). You will also receive a letter from the IRS with your TCC.
4) In CWU2013, go to **Firm > Firm Info./Global Settings** and enter the TCC.
5) Click **Save**.

REGISTER TO USE THE IRS'S "FIRE" WEBSITE

1) Go to *https://fire.irs.gov/firev1r/default.aspx*.
2) Click **Create New Account** on the left side of the screen.
3) Complete and submit the application.
4) Create a **User ID** and **Password**.
5) Create a 10-digit Personal Identification Number (PIN).

Uploading Forms 1099/1096 to the IRS's FIRE Web Site

These instructions assume you have set up an account with the IRS and have a PIN. This is a different PIN than the one used to e-file tax returns. It is important to note the name and location of the upload file displayed at the bottom of the **E-Filing > 1099/1098 E-Filing > Create File** screen in CWU.

1) In CWU2013, go to **E-Filing > 1099/1098 E-Filing > Transmit File/View Results**. With *http://fire.irs.gov* displayed, click **Open Web Site**.
2) On the left side of the page, click **Log On**.
3) Enter you **User ID** and **Password**.
4) Click **Click here to continue** at the top of the screen.

5) Click **Send Information Returns** on the left side of the screen.
6) Enter your **TCC** and **TIN** and click **Submit**.
7) Verify the filing information and click **Accept**.
8) Click **Original File** on the left side of the screen.
9) Enter your PIN and click **Submit**.
10) Click **Browse** to specify the file in CWU to upload to the IRS.
11) Once the file displays in the **File Name** field, click **Upload**.

Payroll Filings "On the Fly"

This feature enables you to create, process, print, and even e-file payroll forms for clients who keep their own books with very little setup required. Produce the following forms "on the fly" using CWU:

W-2	1099-MISC	941
W-3	1099-DIV	941-SS
	1099-INT	941-X
	1099-R	943
	1099-PATR	943-X
	1099-S	944
	1099-A	944-X
	1099-B	940
	1099-C	
	1098-MORT	
	W-2G	
	1096	

"On the Fly" Overview

Generating "on the fly" payroll forms is easy and quick. Use this feature to generate income for your business with minimal time and effort.

FORMS W-2 AND 1099 "ON THE FLY"

Producing Forms W-2 and 1099 "on the fly" is a three step process:

1) Open or create the appropriate client. You can also bring forward an "on the fly" client entered in CWU2012.

> **Note**: To create a new client, you only need to complete the **Contact Information**, **Business Information**, and **W2/W3-1099/1098 Setup** tabs under **Setup > Client Information**.

2) Input basic demographic and pay information about each employee.
3) Process (and print) the forms.

94X SERIES TAX RETURNS "ON THE FLY"

Producing 94X series tax returns "on the fly" is also a three step process:

1) Open or create the appropriate client. You can also bring forward an "on the fly" client entered in CWU2012.
2) Input the information directly on to the form.
3) Print the form.

Quick Reference for CWU e-filing

W-2 Information

SSA website (register and upload W-2/W-3s): *http://www.socialsecurity.gov/bso/bsowelcome.htm*

Download AccuWage: *http://www.ssa.gov/employer/accuwage/*

SSA website User ID: _____

SSA website Password: _____

1099 Information

Download Form 4419 to apply for a Transmitter Control Code (TCC):
http://www.irs.gov/pub/irs-pdf/f4419.pdf

Fax completed 4419 to: 877-477-0572
Check status of 4419: 866-455-7438 (option 3)

TCC: _____

IRS FIRE website (register and upload): *http://fire.irs.gov*

Website User ID: _____

Website Password: _____

94X Information

To update 8633: 866-255-0654 (option 1, 3)

Name Control Verification: 800-829-4933

Your business's taxpayer PIN: __ __ __ __ __ __ __ __ __ __

Your Reporting Agent PIN: __ __ __ __ __

Alternate way to check 94X IRS Acks:
1) From CWU, go to **Help > Drake Support Web Site**
2) Go to **My Account > EF Database**
3) Go to **Tools > 94x Report**
4) Select the appropriate **Return Type** and **Date Range**
5) Select the **Status** to display or select "All" to include all statuses
6) Click **Run Report**