

TaxTime USA, Inc.



QuickStart for 2019 W-2/1099 Express

The 2019 W-2/1099 program is being delivered as an update to our 2019 941/MI Unemployment Express. It also includes the 2019 Form 940. Please follow the download instructions in the e-mail sent to you.

Forms:

W-2 and 1099 forms can be purchased on our website: <http://www.taxtimeusa.com> or by calling us at: 248.642.7070.

E-filing W-2's and 1099's

See section below regarding submitting W-2 and/or 1099 files to the Social Security Administration (SSA) and Internal Revenue Service (IRS).

The State of Michigan participates in the combined federal/state 1099 filing program which means that State Employer copies of 1099-MISC will not have to be separately submitted to the State as the IRS will automatically forward the information to them. However, the IRS requires that each submitter send a test file and be approved prior to submitting actual files. Please follow the instructions later in this Quickstart for creating and submitting 1099 files: **1099's: Creating 1099 submittable files**

S Corp Insurance:

If you have any S-Corp Health Insurance to report (perhaps in the fourth quarter) and checked the box in the General Information screen a new field in the Wage Detail Entry screen became available. If you use this feature the S Corp Ins amount for each employee will be added to Form 941, line 2 and will also be included in W-2, box 1 and will automatically flow to the W-2, box 14 (to print in box 14 you will need to go to: Setup, Configuration and then click on the Defaults Tab – at the bottom of the screen is an input field for S Corp Insurance description for W-2 box 14; there is a limitation of 6 characters).

To prepare W-2's:

1. For new client files – create a new file by clicking on File and then New Client File. The General Information screen opens. Enter all necessary information. Skip to step 6 below.
2. If you have been using the 2019 941/MI Unemployment Express program to prepare 941 and/or MI Unemployment returns you can export the wage and withholding data into the W-2 screens: from within a client file click on the Select Screen down arrow and select: W-2 entry. To import: from within the W-2 entry screen click on the button: Import From Wage Detail
 - If you used the program last year and this was a proforma'd file a message may come up that "the record exists". To import the wage and withholding information into the existing record(s) click: Update or Update All. If necessary, make any address changes and then go to step 3 below. Delete any Employees that proforma's from last year and do not have any 2019 wages to report. The Delete option can be done either before you import or after. The Delete can be done for one Employee at a time.

- For new users or new client files: Name and social security information will import in to the Details screen for each employee. Complete the screen by filling in the address. Be sure to click on SAVE when address input is complete for that employee. (All employee names appear to the left of the screen).
3. Click on the W-2 tab and fill out any additional information needed for that employee's W-2. Be sure to Click on SAVE when done.
 4. Continue process for each employee.
 5. Skip to the next section on printing W-2's or review the steps for new client files starting with step 6.
 6. If this is a new client file or you did not use the 2019 941/MI Unemployment Express program – after entering new client information using step 1 above click on the Select Screen down arrow and select: W-2 entry
 7. Begin by entering the name, social security number and address information for the first employee and then click on SAVE.
 8. A W-2 tab will appear. Click on it to enter the W-2 information. Click on SAVE when done.
 9. To enter another employee click on NEW at the bottom left of the W-2 entry screen.

NOTE: All employee names appear to the left of the screen. To view or edit an employee's information click on that employee's name.

NOTE: It is important to fill out the General Information screen completely before entering W-2 information. W-2's will be auto filled for box 15 (State) based on the employer's state address and for the Employer state ID number (which has a separate input in the General Information screen). The W-2 will default to the federal ID number if the Employer state ID field is left blank. Both these inputs can be changed from within the W-2 screens. The Kind of Employer for the W-3 will default to: None Apply but can be changed in the General Information screen.

To print W-2's:

1. From within the W-2 entry screen click on the Print Preview icon or click on File and then click on Print Preview.
2. All the W-2's will automatically be selected. The default W-2 Payer type is 941 and form type is Copy A – Social Security Administration (SSA). Copy A is an approved SSA substitute form and should be printed on 20 lb. blank white paper. Our program does not use red copy W-2 (or W-3). You can use the right scroll bar to view each Copy A or use your up/down keys or page up/page down keys. All other W-2 copies will print on blank white paper (Employer and State Copies) and/or Employee 2-up or 4-up perforated paper.
3. To print Copy A – click on either printer icon or click on File and then click on Print Pages. A print setup screen comes up with one as the default number of copies. Click on **Print**.
4. To view/print the Employer Copy D – click on the Form type down arrow and select Copy D and follow step 3 above to print.
5. To view/view/print employee copies using the 4 up form click on the Form type down arrow and select 4-up. These will need 4-up perforated forms. Follow step 3 above to print.
6. To print employee copies B,C, 1 and 2 on blank paper instead of 4-up click on the Form type drop down and select one copy at a time and then follow step 3 above to print.
7. Click on the red X when done.

To print W-3:

1. To first print the W-3 approved SSA substitute make sure the Form Type at the top of the screen shows Copy A.
2. Change the Select down arrow from W-2 to W-3. The W-3 will appear on the screen.
3. Follow step 3 above to print.
4. Click on the red X when done.

W-2C and W-3C:

W-2C and W-3C can be prepared with our software. From within the W-2 screen make sure you have Employee Name, address, etc. detail entered. Once entered a Tab will be available; select the W-2C tab and then enter the tax year. Enter the necessary information and follow the same instructions for printing W-2's/W-3's.

NOTE - W-2c and W-3c cannot be e-filed with our software.

To prepare 1099's:

1. The 2019 program includes 1099-MISC, 1099-INT, 1099-DIV, 1099-R, 1099-B, 1099-K, 1099-C, 1099-S and 1098.
2. For new clients and/or for new client files – create a new file by clicking on File and then New Client File or click on the New File icon. The General Information screen opens. Enter all necessary information; then click on the Select Screen down arrow and select **1099 entry** and follow step 4 below.
3. For users of 2019 941/MI Unemployment Express and/or for existing client files – open a client file and click on the Select Screen down arrow and select: **1099 entry**. The client list of Names will appear on the left hand side of the screen if you used program last year.
4. New client files should begin by entering the name, identification number and address and then click on **SAVE**.
5. A **Form** tab will appear. Click on it and then click on the down arrow to select the 1099 form to prepare for that Name. Click on **SAVE** when data entry is done. If you have multiple 1099 types for that Name click on the down arrow to select another form type and enter data. Be sure to click on **SAVE** when done with each form type.
6. To enter a new Name click on **NEW** at the bottom left of the 1099 entry screen. A new Details screen will open. Follow step 4 and 5 above. To enter data for an existing Name, select that Name from the list and click on the Form tab to enter the data.

NOTE - All names appear to the left of the screen. To view or edit a person's information click on that name. To delete a name, highlight that name and then hit the Delete button.

To print 1099's:

1. From within the 1099 entry screen click on the **Print Preview icon** or click on File and then click on Print Preview.
2. All the Names should be automatically selected. The 1099 type being processed will be viewed and it will show Copy A – Social Security Administration (SSA). Our program uses the red Copy A for all 1099's and blank white paper and/or perforated blank paper for all other copies. You can use the right scroll bar to view each Copy A.

3. To print Copy A – click on either printer icon or click on File and then click on Print Pages. A Print Setup screen comes up with one as the default number of copies. Click on **Print**.
4. To print copies B, C and/or Instructions click on the form type drop down and select one copy at a time and then follow step 3 above to print.
5. If you have more than one 1099 type go back into the Form tab and select the requested Form type and follow step 2 and 3 above.

NOTE - Due to slight differences in printer settings we recommend printing a sample Copy A on white paper to see if any margin adjustments are needed. If so, those adjustments can be made in Configuration Setup and then clicking on the 1099 & W-2 tab.

To print 1096:

1. From within the Print Preview screen for the 1099 change the Select down arrow from 1099 to 1096. The red Copy A 1096 will appear on the screen.
2. To print Copy A – click on either printer icon or click on File and then click on Print Pages. A print setup screen comes up with one as the default number of copies. Click on **Print**.
3. To print an Employer/File Copy change the Form type at the top of the screen from Copy A to File Copy and follow step 2 above.
4. Click on the red X when done.

E-FILING YEAR-END W-2'S AND 1099'S:

Users who want to submit W-2's and/or 1099's must be approved by the SSA and IRS, respectively. If you have not previously done so here are the respective websites:

To register with the IRS:

Go to the following link: <https://fire.irs.gov/>

Click on the "Create New Account" to create a FIRE System Account to acquire a Transmitter Control Code (TCC)

To register with the SSA:

Go to the following link: <https://www.ssa.gov/bsowelcome.htm>

Click on the "Register" button in the Business Services Online area.

Both sites will ask you to create a User Name and Password. If you plan on submitting your W-2's/1099's please register with the SSA/IRS as soon as possible as it could take up to 45 days to be approved.

With this update we have added new **required** Configuration options related to W-2/1099 e-filing:

- Click on the Configuration icon or click on Setup and then click on Configuration
- Click on the Firm Address tab. The new items are: Preparer Code, SSA Business online User ID and IRS Fire System TCC
 - Preparer Code – the drop down provides the available codes (most users will select: Accounting Firm)
 - SSA Business online User ID – this is your ID # as provided by the SSA after you have registered with them
 - IRS Fire System TCC - this is your ID # as provided by the IRS after you have registered with them
- Users will also have to select a Preparer for each submittable file. To set up Preparers: from the menu bar select Setup, then select Code Setup and then Preparer. An email address is required to file electronically.

NOTE – Our submittable files for W-2's and 1099's are in SSA and IRS compliant formats. W-2's and 1099's are only being transmitted to the SSA and IRS and not to any

States. Our W-2 and 1099 submittable files are Michigan compliant but we cannot be certain that the files will be compliant with any other States because other States may have additional formatting requirements. MI State copies have to be separately submitted either on CD –ROM or on paper or you can submit W-2's through our MI Sales Tax Express program.

W-2's:

STEP 1: Creating W-2 submittable files:

After you have created and reviewed a client's W-2's you are ready to create a submittable W-2 file.

1. From within a Company file go to the W-2 Entry screen.
2. Click on the Print Preview icon or click on File and then Print Preview.
3. At top left of screen is an "Add to Efile que" button – click on this button.
4. A Submission que name screen will appear. Enter in a que name that will be used to store this Company's W-2 file.
 - You can only have one W-2 que name open at a time.
 - i. Therefore if you are working on a network only one user/station should be designated to add companies to the E-File que.

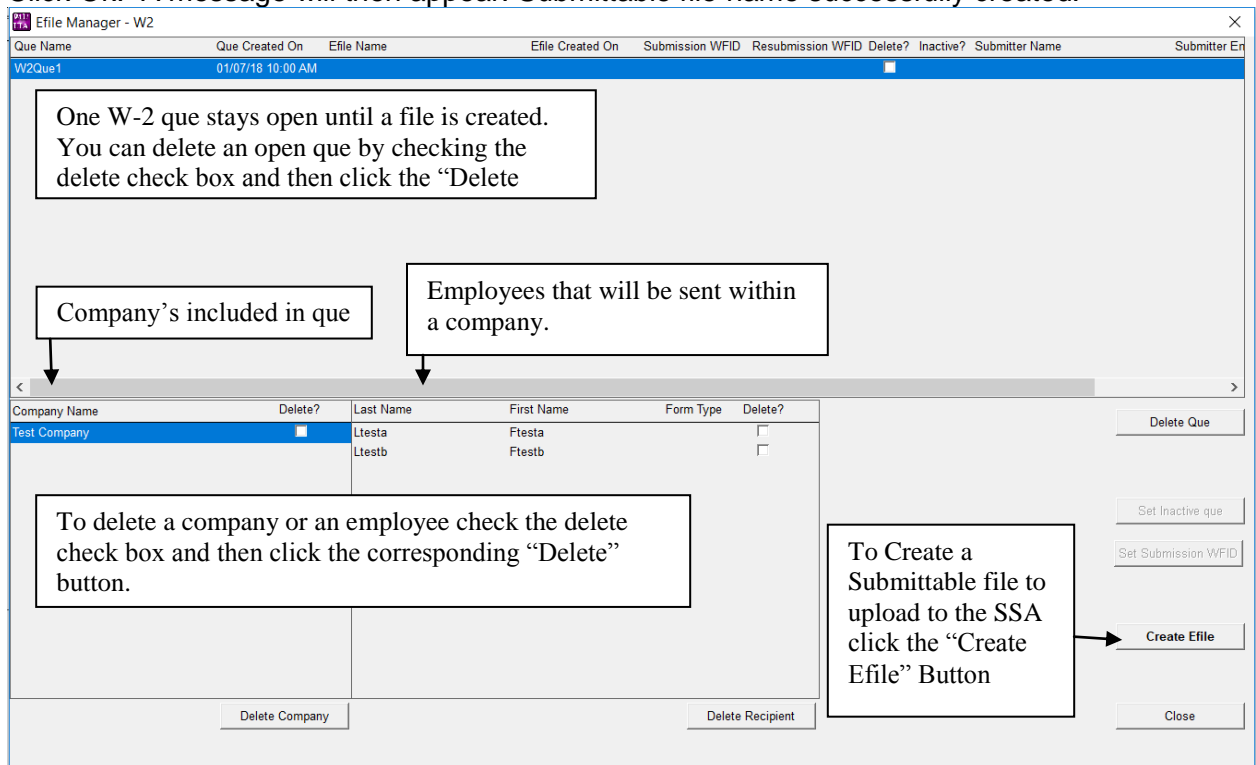
NOTE: If you are using our MI Sales Tax Express and want to electronically submit State of MI W-2's with the Annual Return and you created one file that contained multiple company's W2 data we have added an option ("Export W2 E-File" button) to the bottom left of the W2 Print Preview window that will allow you to create a submittable file with only that companies W2's that are in the print preview window. You can then submit this file with the Annual Return. The submittable file will be saved in the "efile-st" folder under the folder where you installed the software. If you used separate ques and files for each company then you can use the file that was created that pertains to that company and submit that file with the Annual Return. If you will be sending your W2's to the State via CD Rom then you can send one file that contains all of your companies W2 data just like you did for the SSA.

5. A message should then come up: Previewed forms successfully added to (que name). Click OK.
 - To submit multiple companies in one submittable file to the SSA: Go into each company and print preview the W2's and then click the "Add to Efile que" button. (If you will be using the same que for all your files you will not be asked to enter a new que name after step 3 above) This will add those W2's to the open Efile que and then the submittable file created will contain all of the W2's from each of the companies added to the que.
 - To submit a company in its own submittable file to the SSA: Go to into each company and print preview the W2's and then click the "Add to Efile que" button. Then go to the Efile Manager–W2 and select the Que at the top of the window and then click the "Create EFile" Button on the right side of the screen. The system will create the submittable file and place it in the "efile" folder under the program folder where you have the software installed.

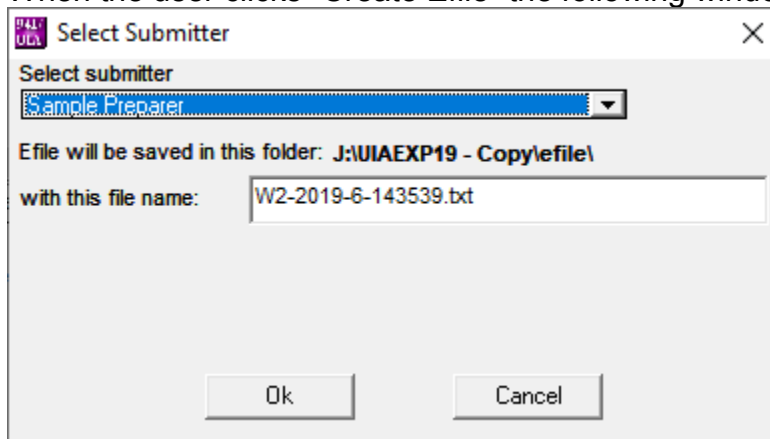
STEP 2: Creating W-2 Efiles to submit to SSA:

1. From the top menu bar click on "File" and then "Efile Manager-W2"
2. The Efile Manager W2 screen will then open and display the active Que Name (and previous que names that have been created for submission, if any). That active que will display the Company Name(s) included in that que in the second section on the screen. The third section of the screen displays the W-2's included for each Company. (see the image below)
3. After you have reviewed this screen and are ready to create a submittable file, click on the Create Efile button at the bottom right of the screen.

4. A Select Submitter screen will then open – click on the Select submitter down arrow and select a preparer name. If this area is blank you must go into Setup, Code Setup and then Preparer and create your list of Preparer Names.
5. The folder this file will be saved in is displayed and a default file name will also be displayed. Users can change the file name but ***MUST*** keep the extension of .txt The file will be saved in the ‘EFILE” folder under the folder where the program was installed. Example “C:\UIAEXP19\EFILE”
6. Click Ok. A message will then appear: Submittable file name successfully created.



When the user clicks “Create Efile” the following window will open:



Use the Dropdown to select the Submitter change the file name if necessary and then click “Ok”. The system will then create a submittable file. It will create both .txt and .zip file either file can be uploaded to the SSA system.

STEP 3: Submitting W-2 files to the SSA:

1. Go to the SSA website: www.ssa.gov/bsa
2. In the Business Services Online area click on the Log In button and then enter your User ID and password.
3. ***We strongly recommend testing your file before submitting it, especially if you are submitting multiple companies together.***
4. To test a file – after logging in the Electronic Wage Reporting screen opens; click on the AccuWage tab and then click on AccuWage Online, click on the W2 button and then click on Start Testing. Find your file and then double click on it or single click on

it and then click on Open. Any errors found will be shown on your screen. Please review the errors, go back into that company file and make necessary changes. **If no errors then you can go back and submit it to the SSA Production system.**

Making corrections

After a file has been created the window will display the file name, create date and submitter information.

Once the file has been created you can no longer delete the que. However if you will never send the file that was created and you want to create a new que with some or all of the information again you can “Inactivate the Que” by clicking on the “Set Inactive que” bottom. Once a que has been Inactivated you CANNOT reactivate it.

After you have submitted a file to SSA the SSA will provide an WFID number that Identifies your submission. You can record this information by clicking on the Que name in the above window and the click the “Set Submission WFID” button. This information is needed if for some reason the file or a company within the file is rejected. This WFID number is sent with the file that fixes the Issue.

Company Name	Delete?	Last Name	First Name	Form Type	Delete?
Test Company	<input type="checkbox"/>	Ltesta	Ftesta		<input type="checkbox"/>
		Ltestb	Ftestb		<input type="checkbox"/>

Buttons: Delete Company, Delete Recipient, Delete Que, Set Inactive que, Set Submission WFID, Create Efile, Close

Resubmissions (for a file or a company within a file that was not accepted):

Conflicts occurred. Resolve

Recipients in other que which has not been submitted. Go to W2-Efile Manager to submit/assign Submission ID/Set Inactive. Then come back and do this action.

Que Name: <new>

Name	Que Name	Que Created On	Efile Name	Efile Created On	Submission WFID
Fnamec Lnamec	W2Que1				
Ftesta Ltesta	W2Que1	01/07/18 10:00 AM	W2-2017-3-114715.zip	01/07/18 11:47 AM	
Ftestb Ltestb	W2Que1	01/07/18 10:00 AM	W2-2017-3-114715.zip	01/07/18 11:47 AM	

If the Re-Submission Id dropdown is not displayed like the example in this window it means that you have not assigned any WFID's from the SSA to the que/file submitted in the W2 EFile Manager

Buttons: Create Submission que with new record(s), Create Resubmission que without new record(s), Create Resubmission que with new record(s), Close

If you try to add employee(s) from a company to a que that have already been included on a prior que this warning screen will open.

Employee's in **Green** have not been included in any que where a submission file was created.

Employee's in **Red** have been included in a que and a file was created that may have been sent to the SSA

A) If you don't want to send add any of the employees to any que click "Close"

- B) If you want to create a que with just the “New” employees click the “Create Submission que with new Records” This will create a new que and only add the records that are highlighted in Green.
- C) If you need to resubmit the employees because the SSA rejected them for some reason First select the Resubmission Id from the dropdown at the top of the window. Then Click the “Create Resubmission without new records” button then the system will create a ReSubmission que with just those employees highlighted in **Red**. If you haven’t entered the WFID’s you will need to do that before you can create a ReSubmsisson file.

Conflicts occurred. Resolve

Conflicts occurred. Select Resubmission by selecting Submission ID or selecting new

Que Name: <new> Resubmission ID: 11222333

Name	Que Name	Que Created On	Efile Name	Efile Created On	Submission WFID
Fnamec Lnamec					
Ftesta Ltesta	W2Que1	01/07/18 10:00 AM	W2-2017-3-114715.zip	01/07/18 11:47 AM	11222333
Ftestb Ltestb	W2Que1	01/07/18 10:00 AM	W2-2017-3-114715.zip	01/07/18 11:47 AM	11222333

Create Submission que with new record(s)
 Create Resubmission que without new record(s)
 Create Resubmission que with new record(s)
 Close

- D) If you need to resubmit the employees because the SSA rejected them for some reason and the original file was missing some employees. First select the Re-Submission Id and then click “Create Resubmission with new record(s)”. This will allow you to create a resubmission que and will add both the records highlighted in **Red** and **Green** into the que for re-submission to the SSA.

Note: Only companies/employee that were submitted on the same file can be included together in a resubmission file. If you submitted two separate files to the SSA and they were rejected you would need to create two separate re-submission files.

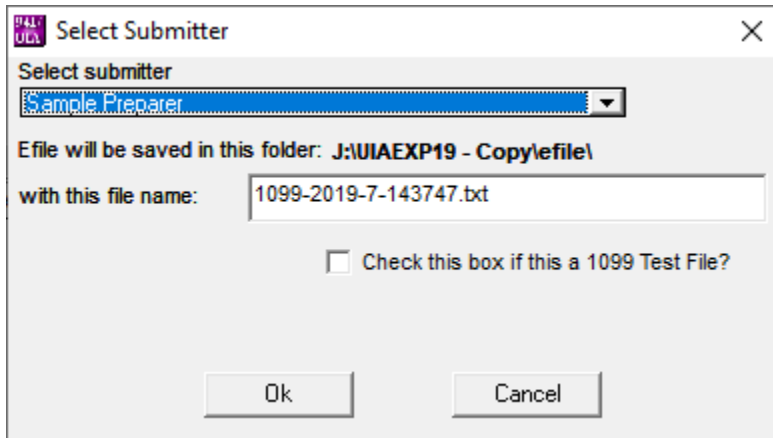
Note: This process should only be used if the SSA does not process a file to completion for some reason. If a file was processed to completion and you find that there was a problem with the accuracy of the W2 data and you need to make a change, you must submit those on a W2C via paper filing. This W2/1099 Express does not support E filing of the W2C or W3C forms at this time.

1099’s:

Creating 1099 submittable files:

The State of Michigan participates in the combined federal/state 1099 filing program which means that State Employer copies of 1099-MISC will not have to be separately submitted to the State as the IRS will automatically forward the information to them. However, the IRS requires that each submitter send a test file and be approved prior to submitting actual files. Follow the steps below to create an actual file – when you get to step 11 below make sure to check the: “Check this box if this is a test file” Then follow the **Submitting 1099 files to the IRS Fire system** below.

NOTE: if your test file was an actual file you can re-create the file by clicking the “Create e-file” button.



After you have created and reviewed a client’s 1099’s you are ready to create a submittable 1099 file.

1. From within a Company file go to the 1099 Entry screen.
2. Click on the Print Preview icon or click on File and then Print Preview.
3. At top left of screen is an “Add to Efile que” button – click on this button.
4. A Submission que name screen will appear. Enter in a que name that will be used to store this Company’s 1099 file.
 - You can only have one 1099 que name open at a time.
 - i. Therefore if you are working on a network only one user/station should be designated to add companies to the E-File que.

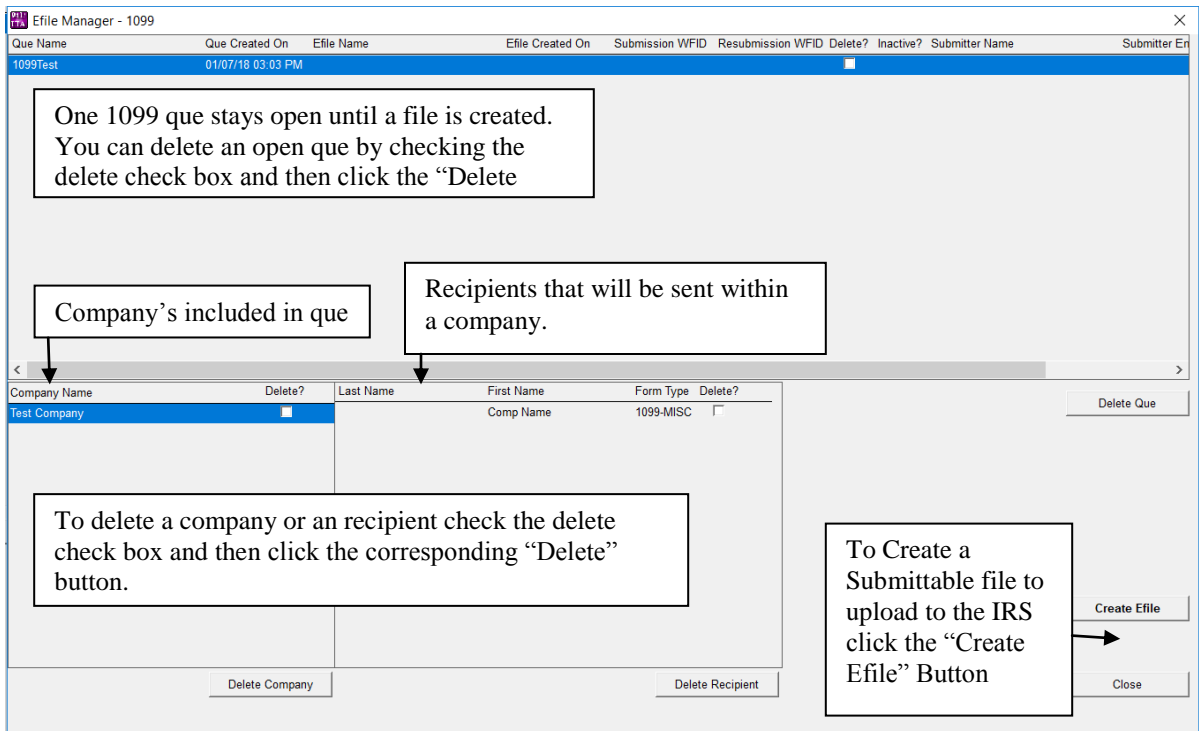
NOTE: The State of Michigan only allows 1099’s to be submitted via paper copy or on CD-Rom in the IRS 1220 specification format. The State does not allow the 1099 MISC to be attached to the efiled Annual Return. If you will be sending your 1099’s to the State via CD Rom then you can send one file that contains all of your companies 1099 data just like you did for the IRS.

5. A message should then come up: Previewed forms successfully added to (que name). Click OK.
 - To submit multiple companies in one submittable file to the SSA: Go into each company and print preview the 1099’s and then click the “Add to Efile que” button. (If you will be using the same que for all your files you will not be asked to enter a new que name after step 3 above) This will add those 1099’s to the open Efile que and then the submittable file created will contain all of the 1099’s from each of the companies added to the que.
 - To submit a company in its own submittable file to the SSA: Go to into each company and print preview the 1099’s and then click the “Add to Efile que” button. Then go to the Efile Manager–1099 and select the Que at the top of the window and then click the “Create EFile” Button on the right side of the screen. The system will create the submittable file and place it in the “efile” folder under the program folder where you have the software installed

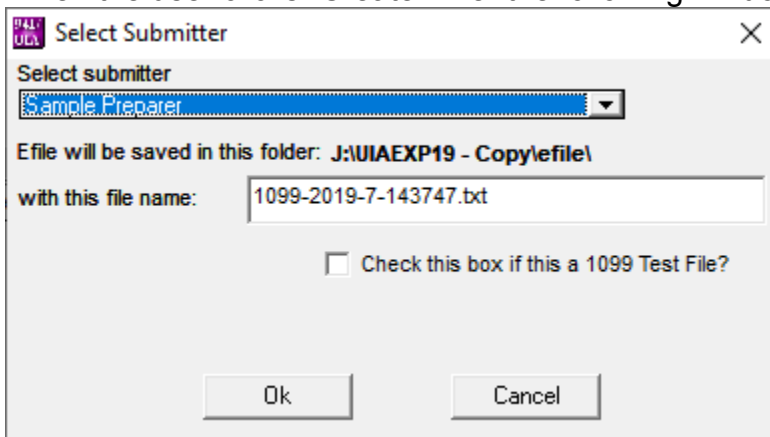
To Create 1099 Efiles to submit to IRS:

6. From the top menu bar click on “File” and then “Efile Manager-1099”

7. The Efile Manager 1099 screen will then open and display the active Que Name (and previous que names that have been created for submission, if any). That active que will display the Company Name(s) included in that que in the second section on the screen. The third section of the screen displays the 1099's included for each Company. See the image below
8. After you have reviewed this screen and are ready to create a submittable file, click on the Create Efile button at the bottom right of the screen.
9. A Select Submitter screen will then open – click on the Select submitter down arrow and select preparer name. If this area is blank you must go into Setup, Code Setup and then Preparer and create your list of Preparer Names.
10. The folder this file will be saved in is displayed and a default file name will also be displayed. Users can change the file name but ***MUST*** keep the extension of .txt The file will be saved in the 'EFILE" folder under the folder where the program was installed. Example "C:\UIAEXP19\EFILE"
11. Click Ok. A message will then appear: Submittable file name successfully created.



When the user clicks "Create Efile" the following window will open:

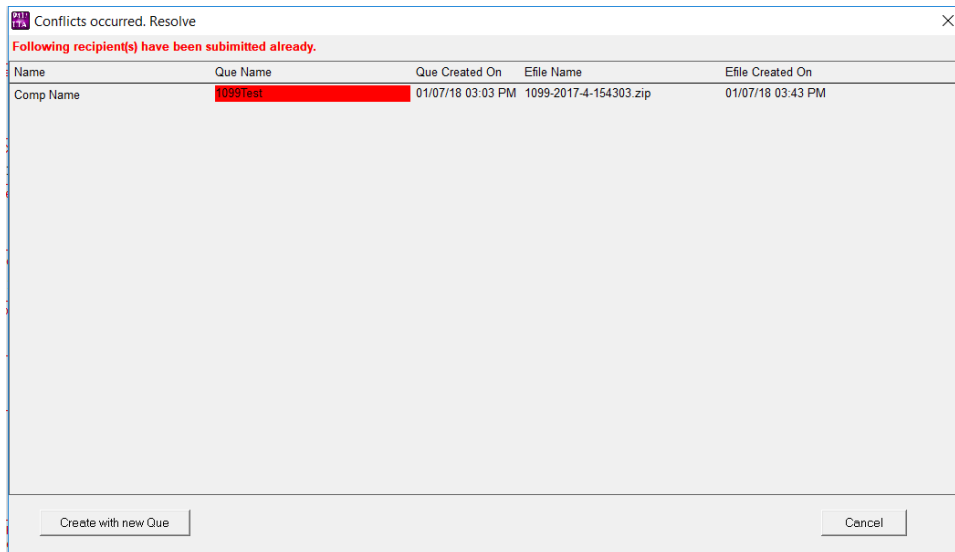


Use the Dropdown to select the Submitter change the file name if necessary and then click "Ok". The system will then create a submittable file. It will create both .txt and .zip file either file can be uploaded to the IRS Fire system.

Submitting 1099 files to the IRS Fire sys:

1. Go to the IRS Fire website: <https://fire.irs.gov/>
2. In the IRS area click on the Log In button and then enter your User ID and password.
3. **We strongly recommend testing your file before submitting it, especially if you are submitting multiple companies together.**
4. To test a file – you must log into the IRS’s test system at: <https://fire.test.irs.gov/> after logging in the follow the screen prompts to test your files. Find your file and then double click on it or single click on it and then click on Open. Once you submit a file for testing it will take a couple of days for the IRS to test the file. Any errors found will be shown on your screen. Please review the errors, go back into that company file and make necessary changes. If no errors then you can go back and submit it to the IRS FIRE Production system.

Resubmissions/Corrections:



If you try to add Recipients from a company to a que that has already been included on a prior que this warning screen will open.

Recipients in **Red** have been included in a que and a file was created that may have been sent to the IRS

1. If you don't want to add any of the Recipients to a new que click "Close"
2. If you need to resubmit the Recipient's because the IRS rejected them for some reason or you are making a change to the recipients 1099 Then Click the "Create with new Que" It will create a que with all the 1099's that were print previewed.
3. Go to "Creating 1099 Submittable File" above to create the file.

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