



# Filing Electronically With the IRS FIRE System and Pro1099

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# About the IRS FIRE System

The FIRE System is a website (<https://fire.irs.gov>) maintained by the Internal Revenue Service (IRS) that you can use to electronically file your IRSTAX file directly with the IRS.

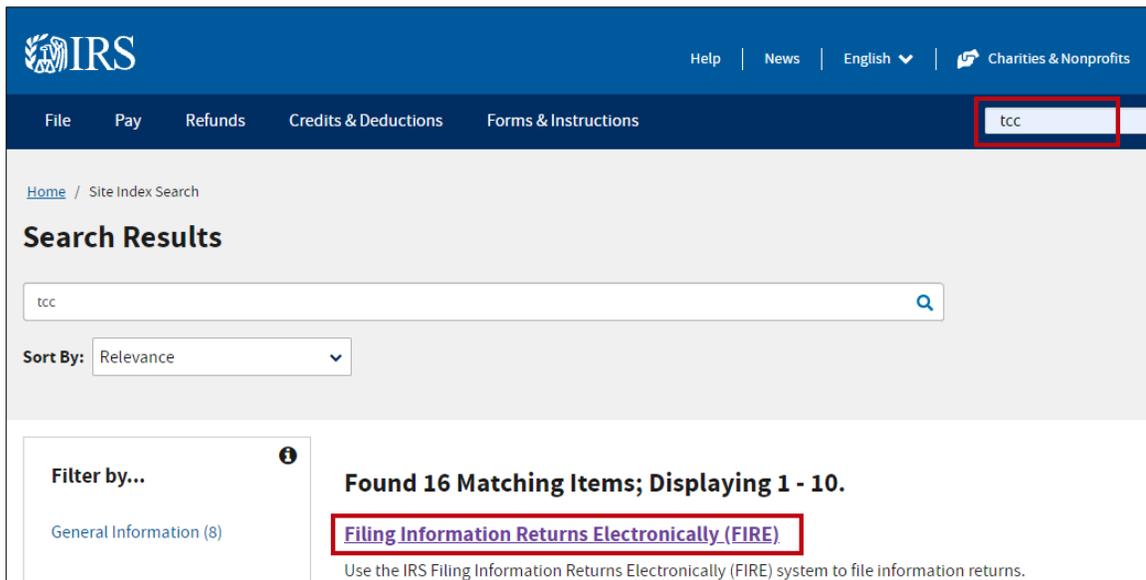
## IRS Resources

The IRS maintains documentation for their FIRE system. SoftPro advises that you reference their procedures directly for the most accurate information. Although the SoftPro Solution Center is ready to assist you with questions regarding any aspect of using Pro1099, including creating your IRSTAX files, you need to address your technical questions about using the FIRE System to the Internal Revenue Service, Enterprise Computing Center - Martinsburg (IRS/ECC-MTB). IRS technical assistance is available Mon- Fri, 8:30 A.M.-4:30 P.M. EST, (866) 455-7438. You may request publications related to the 1099-S filing by calling the IRS at (800) TAX-FORM or (800) 829-3676. Additionally, you may visit the IRS [forms and publications page](#) to download various documents.

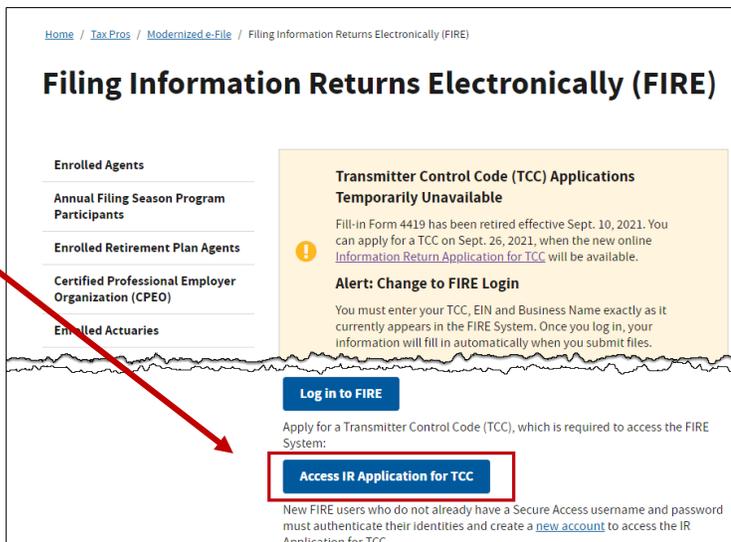
### Publication 1220

This document, found on the IRS website [here](#), outlines the specifications for electronically filing a variety of forms.

- Apply online for your Transmitter Control Code (TCC) at IRS.GOV. From the website, search for **TCC** and click the **Filing Information Returns Electronically (FIRE)** link from the Search Results.



Scroll down to the **Access IR Application for TCC** button to create a new account.



Home / Tax Pros / Modernized e-File / Filing Information Returns Electronically (FIRE)

## Filing Information Returns Electronically (FIRE)

Enrolled Agents

Annual Filing Season Program Participants

Enrolled Retirement Plan Agents

Certified Professional Employer Organization (CPEO)

Enrolled Actuaries

**Transmitter Control Code (TCC) Applications Temporarily Unavailable**

Fill-in Form 4419 has been retired effective Sept. 10, 2021. You can apply for a TCC on Sept. 26, 2021, when the new online [Information Return Application for TCC](#) will be available.

**Alert: Change to FIRE Login**

You must enter your TCC, EIN and Business Name exactly as it currently appears in the FIRE System. Once you log in, your information will fill in automatically when you submit files.

[Log in to FIRE](#)

Apply for a Transmitter Control Code (TCC), which is required to access the FIRE System:

[Access IR Application for TCC](#)

New FIRE users who do not already have a Secure Access username and password must authenticate their identities and create a [new account](#) to access the IR Application for TCC.

### SoftPro Updates

SoftPro Updates to the Pro1099 Application available starting in v21.2 sp2 and v31.2 sp2

1. The IRSTAX file now has a Date/Time stamp (i.e., IRSTAX\_031520\_1658)
2. P1errorlog will now be save to the local user directory (i.e., C:\Users\UserName\AppData\Local\Temp
3. Enhancements the List of Database Records Report, this report has the capability to format for export.
4. Modification to printing 1099S for Exempt and Corporation type returns has been changed. A 1099S will only render if the 1099 record is reportable (Individual and Others). This includes Batch printing of 1099s as well as a single record.
5. New report added to Pro1099 "Files Not Exported to Pro1099". This report was only available in ProForm and required an Order Tracking license, it is now a default report under the Report Tree in Pro1099

### Other Contacts

#### Information Reporting Program Customer Service Center

- Phone: Toll-free within the US: (866) 455-7438 - Outside the US: (304) 263-8700
- Email: [mccirp@irs.gov](mailto:mccirp@irs.gov)
- TDD (Telecommunication Device for the Deaf): (304) 267-3367
- Fax: Toll-free within the US: (877) 477-0572 - Outside the US: (304) 264-5602

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## *IRS FIRE System Guide*

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The IRS created a PDF walkthrough guide P3609 for FIRE users. For compliance purposes, SoftPro recommends that Pro1099 users reference this guide when submitting their IRSTAX files. Please see the [IRS Resources](#) section at the beginning of this document for details on what P3609 covers.

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## *Accessing the FIRE Site*

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You may access the FIRE system site with two methods:

- Use your web browser to go directly to <https://fire.irs.gov/>.
- From within Pro1099, click **Access the IRS FIRE Web Site** from the **Tools** menu.

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## *Preparing to Use the FIRE System*

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### **Getting a Transmitter Control Code (TCC)**

Before you submit your IRSTAX file to the FIRE System, you must associate it with a Transmitter Control Code. If you have not acquired a TCC from the IRS yet, submit the **IR Application for TCC** (refer to steps above to obtain the application) to IRS/ECC-MTB no later than 45 days before the due date of your information returns.

Once your TCC is received from the IRS, enter it in the SPAdmin > Pro1099 tab.

### **Adding the TCC to Pro1099**

For information about adding the TCC to Pro1099, see [Application Configuration](#) below.

### **File Compression and Browser Settings**

The time required to transmit a file can be reduced up to 95 percent by using compression:

- When sending electronic files larger than 10,000 records, data compression is encouraged.
- WinZip and PKZIP are the only acceptable compression packages. The IRS cannot accept self-extracting zip files containing multiple files.

Additionally, your web browser must:

- Have pop-up blocking software disabled before attempting to transmit files.
- Be capable of file uploads.
- Support SSL 128-bit encryption.
- Enabled to receive cookies, which are used to preserve your User ID status.

### ***Note to Existing IRS FIRE System Users***

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If you have already configured your computer to connect to the IRS FIRE system, and submitted using the FIRE system last year, see the **Subsequent Connections to the FIRE System** section of the **IRS P3609** when it is made available to get started quickly.

# Using SoftPro to Prepare Your 1099

## Introduction

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The 1099 preparation process can be time consuming. Start now and avoid the last minute rush!

Customers on versions v20 HF5, v20 SP4 and v21 and up – v30 SP1.2, v31 and up can update their system through SoftPro 360, using the instructions on the next page. Customers on other versions should [contact SoftPro support](#) to receive additional instructions regarding your Pro1099 update. [How to identify version number.](#)

## Submission Deadlines

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- **February 15, 2021:** The Recipient copy of the Substitute 1099-S must be postmarked by this date.
- **February 28, 2021:** All 1099-S paper form must be postmarked by this date.
- **March 31, 2021:** The date by which files must be electronically submitted to the IRS at <https://fire.irs.gov/>
- Submit test files to <https://fire.test.irs.gov/>
  - The Test FIRE system is usually available until early December of the current tax year. The Test site will be unavailable between early December and early January to update the Test site for the next years reporting.
- **Extensions:** File as soon as you know an extension is necessary; complete the 30-day extension at the IRS FIRE site. **Note:** To file for a second extension, this request must be approved by the IRS. Complete [Form 8809](#) and submit to the IRS for review (must be filed before the due date of the returns).

## Fines and Penalties

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Per 2021 General Instructions for Certain Information Returns, penalties (*Sec O. Penalties*) will affect customers who are late with their submissions. The amount of the penalty is based on when you file your information return. The penalty could be:

- **\$50** per information return if you correctly file within 30 days of the due date of the return.
- **\$110** per information return if you correctly file more than 30 days after the due date but by August 1<sup>st</sup>.
- **\$280** per information return if you correctly file after August 1<sup>st</sup>.

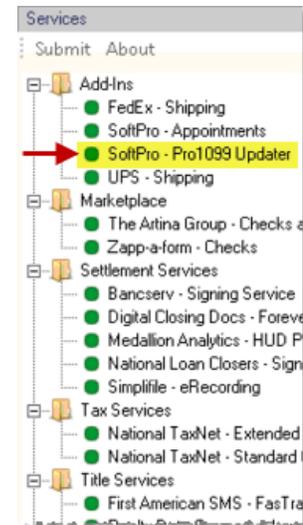
For additional information on assessed penalties, please refer to the IRS.gov website.

## Verify Pro1099 Version (2021 Tax Year)

Every year, the IRS updates documentation, which requires a 1099 software update to Pro1099. For the submission process, it is necessary to ensure you have the correct version of Pro1099.

The update is available for download via SoftPro 360. Just go the **SoftPro 360 Products** menu under the **SoftPro 360 Console** or go to **Services > Add-ins > SoftPro - Pro1099 Updater** and follow the installation instructions as provided in the wizard. See screenshot at right.

- If you are unsure of how to install SoftPro 360, please call the SoftPro Solution Center at (800) 848-0143.



## Application Configuration

Once you have obtained your TCC Code (see [Preparing to Use the FIRE System](#)), you can enter it into Pro1099 by following these steps:

1. Select Tools/Transmitter/Payer Information.
2. Enter Payer information in the fields provided. All fields are required by IRS regulation except for **Name Control, Email Address, Name Line 2, and Phone Extension.**
3. Click **OK**.

## Make Sure the Preparation Process is Complete

The preparation process consists of two primary steps:

1. Ensuring all files are accurately exported to Pro1099 (from ProForm).
2. Verifying that there are no outstanding Exceptions in those records prior to submission.

## Filtering Files that will Not Need to be Submitted

Review all 2021 ProForm files for cancelled and test files prior to exporting to Pro1099. This can be accomplished by using the **Orders by Settlement Status** report in Order Tracking and/or by using the basic search feature in ProForm. Multiple files cannot be successfully imported to Pro1099 without including the Settlement Date; single files can. It is recommended to ensure these files do not have a Settlement Date, thereby accidentally importing and submitting them to the IRS.

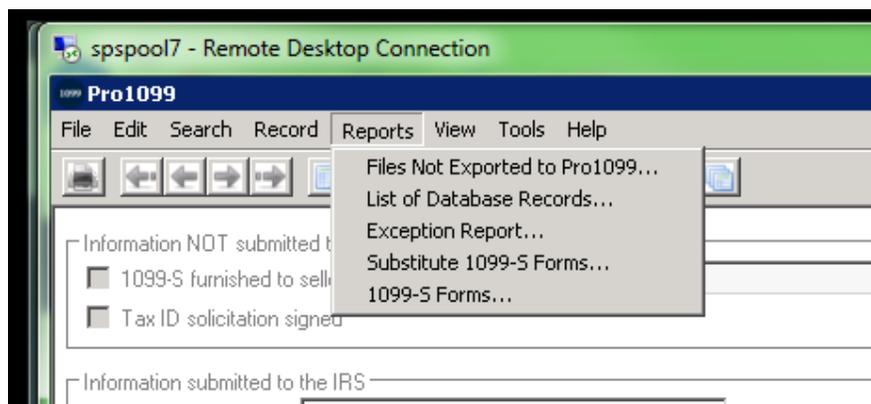
If records are in Pro1099, which should not be filed:

1. They must be manually deleted from Pro1099.
2. The corresponding settlement dates must be removed in ProForm.

This will prevent the ProForm File from being imported with future **Multiple Imports**.

If you have Order Tracking and use the settlement status of “Cancelled”, these files can still be unintentionally exported/imported to Pro1099 (a hint for finding these files in Pro1099: if they have already been exported or mass imported, they are likely to contain many exceptions). Identify these files ahead of time and remove the settlement dates to prevent the export. \*\* Otherwise, each unwanted 1099 record must be manually deleted from Pro1099.

New Pro1099 report – “**Files not exported to Pro1099**” is a new 1099 report. This new report will render all the ProForm orders (contains *Settlement Date, Sales Price, Purchase* and *Seller*) that *potentially* have reportable sellers that have not been exported from ProForm for the specified Tax Year. If this report is clear, you have exported all reportable ProForm files to Pro1099.



### Review the 2021 Records in Pro1099:

- Search for settlement dates between 01/01/2021 and 12/31/2021.
- Scan each record (as necessary) to be sure they are marked accordingly.
- Run a search for 2021 settlement dates again and mark the “Part one of a two-part correction” and “Part two of a two-part correction.” No correction indicators should exist at this point.
- Check for duplicate records, keeping in mind that some sellers may have sold multiple properties and some ProForm files have multiple sellers.

## Exporting Files to Pro1099

### Exporting from ProForm to Pro1099

Before submitting an IRSTAX file, export all applicable ProForm data files to Pro1099.

1. Open **ProForm** for Windows.
2. If a startup dialog box displays, click **Search**. If not, select **File > Search** from the ProForm menu bar. The **Search** dialog box displays.

3. Enter a range of settlement dates and an asterisk \* in the **Seller** field. Select **Pro1099** in the **Not Exported To** field.
4. Click **Search**. The Search Results dialog displays all the files in your ProForm database not yet exported to Pro1099.
5. Click the first file on the list and click **Open** and modify any Seller or file information as needed.
6. Select **File > Export**. The **Export dialog** box displays.
7. Select **Export to Pro1099 for Windows** and click **OK**. Pro1099 opens and a new record will be created using data from the exported ProForm file.
8. Select **Record > Save Record Changes** from the Pro1099 menu bar or press **Ctrl + S** to save the new record. A message will alert you that the export process is done. Select **Yes** to exit Pro1099.
9. Repeat steps 2 through 8 to search for and export the remaining ProForm files.

**NOTE:** An **Edit Test Failure!** message after a new record is saved means that there is an error or incomplete information that must be completed or corrected before the IRSTAX file can be created. The error message lists missing or incorrect information.

### **Mass Importing Files from ProForm INTO Pro1099**

The Mass Import option should be used *with CAUTION!* It cannot be undone, so please make sure you have a good backup of your database in advance!

1. Select **File/Import Multiple ProForm data files**. The **Import Multiple ProForm Data Files** dialog appears.
2. Enter the range of ProForm settlement dates that you want to import.
3. (Optional) Enter a file server or click **Browse** to select a file server to search for ProForm files.
4. (Optional) Click **Include files with \$0.00 seller proceeds** to include such files.
5. (Optional) If desired, click **Overwrite records from files that have been previously exported to Pro1099**. It is highly recommended to back up your Pro1099 database prior to performing this procedure.
6. Click **OK**. A message appears letting you know how many files fit the criteria. Click **Yes** to continue.
7. Once the import has completed, a message appears letting you know how many files were imported. Click **OK**.

**NOTE:** If one or more files could not be imported due to errors, a message appears stating that errors were found. Click **View Error Import Log** to open the log file to read about which files caused errors during the import.

### Additional Details about Getting 1099 Records into Pro1099

- The “overwrite” option with **Multiple File Import** should be carefully evaluated before being used. It may overwrite existing data which cannot be restored unless you have a backup. Backing up your database prior to multiple file import will ensure you can restore your data if necessary.
- If a startup dialog box displays, click **Search**. If not, select **File > Search** from the ProForm menu bar. The **Search** dialog box displays.
- Enter a range of settlement dates and an asterisk \* in the Seller field. Select **Pro1099** in the **Not Exported To** field.
- If you have Order Tracking, run the “**Not Exported to 1099**” report from the available reports tree in ProForm. This report is also available in Pro1099 under Reports in versions 21.2 SP2/31.2SP2 and later only.

### Identifying and Resolving Exceptions

There are two types of Exceptions that may exist in Pro1099 records that need resolved prior to submitting the IRSTAX file to the IRS:

- **Exception:** These exceptions are an indication that something is missing or incorrect about the record such as a missing Social Security Number, partial address, legal description, gross proceeds, etc. Warnings will be displayed for failure to check boxes “1099-S furnished to Seller” and “Tax ID solicitation signed”. The report will specify the exception(s).
- **Name Exception:** These exceptions are an indication that the format of the name is possibly incorrect due to the Tax ID type within the record. For example, the record is marked as an individual, but the seller is an LLC. Another exception is an indication that the Seller’s last name could be inaccurate and should be confirmed to prevent invalid name and SSN combination being sent to the IRS. For example, the seller’s last name is two names (St. John, Van Eyes, De La Cruz, etc.) and when the Seller’s name is exported to Pro1099 the last name is truncated.

#### The process for resolving exceptions is a cyclical process:

- Identify exceptions (Run the Exceptions Report)
- Resolve exceptions in ProForm and re-export
- Identify any remaining Exceptions (Re-run the Exceptions Report)
- Repeat until all exceptions are resolved, excluding name exceptions

This process will likely be the most time consuming part of the 1099 Submission process. Success in accurately identifying and resolving exceptions will reduce the risk of needing to file a corrected return.

To begin this cycle, run the Exceptions Report in Pro1099. *Go back to ProForm and correct all errors.* Export the corrected files back into Pro1099. Run the Exception Report again and make sure all exceptions have been resolved. Repeat as necessary.

To avoid potential fines, be sure to review the “Name Exceptions” portion of the report. It is a listing of names that may have *incorrect Seller Type* in ProForm and/or *Inaccurate Seller’s last name in Pro1099* and require corrections. **The Name Exceptions report will usually never be blank.** After making corrections to these “*incorrect Seller Type*” files in ProForm and re-exporting to Pro10999, most of the names will still appear on the report. However, they will now be in the correct format the IRS expects. If an “*Inaccurate Seller’s last name*” appears on the Name Exceptions portion of the report, those correction should be made in Pro1099 only. This type of correction should be done after all corrections are cleared on the 1st part of the exceptions report. This report will never be void of names, nor is intended to be “clear”. The key to this part of the Exceptions Report is that all Names Exceptions be legitimate. Names most likely to show on this report are LLCs, Estates, Trusts & Individuals with middle names. The information below is a guide on actions to take regarding these records and what to expect.

**Examples of Incorrect Entries on the Name Exceptions Report:**

EXAMPLE:	HOW TO CORRECT:	WHAT CHANGES:
Bank of America	Mark as Corporation in Seller screen in ProForm and export	Taken off report
Branson Construction, Inc	Mark as Corporation in Seller screen in ProForm and export	Taken off report
Sunset Development Corporation	Mark as Corporation in Seller screen in ProForm and export	Taken off report
LLC, Davis Builders	Mark as LLC or Other in Seller Screen in ProForm and export	Will stay on the report
Estate, Mary Pickford	Mark as Estate or Other in seller screen in ProForm and export	Will stay on the report
Trust, Family Jones	Mark at Trust or Other in seller screen in ProForm and export	Will stay on the report
John Ricky Smith	Mark as individual in seller screen in ProForm and export	Will stay on the report
Halen, Eddie Van	On 1099 Record: Move “Van” to the beginning of Seller Name field	Will stay on the report
Cruz, John De La	On 1099 Record: Move “De La” to the beginning of Seller Name field	Will stay on the report

**Corporations:** are treated as exempt by the IRS. If a Corporation appears on this report, it indicates the Seller type was *not marked* as a Corporation in the ProForm Seller screen. Anything marked as corporation will be removed from Name Exceptions part of the Exception Report (and the main Exception Report as well). Also, files marked as EXEMPT will also not show at all.

**LLCs:** appear as their actual name, not as shown above. This format indicates the Seller type wasn’t marked as Other, Trust, Estate, LLC, LLP or Partnership, depending on your version of SoftPro. LLCs will always show on the Name Exceptions report. If the file was marked LLC PRIOR to exporting, it will be formatted correctly. If it wasn’t marked as LLC first, it may be incorrect. If you’re unsure, a good rule of thumb is that if the Name Exceptions starts with something like “LLC,” or “Trust,” or something similar, it is formatted incorrectly. For detail, simply re-export a ProForm file to *Pro1099* after verifying that seller type *is marked* and view how the application formats this record. There is no LLC with 1099, only *other*.

**LLCs, Estates, Trusts, Partnerships:** If the file falls into one of these categories, the program will not attempt to separate out the last name and will bring the name over literally, which is correct.

**Estates:** appear as their actual name, not as shown above. This format indicates the Seller type was not marked as Other, Trust or Estate, depending on your version of SoftPro.

**Trusts:** appear as their actual name, not as shown above. This format indicates the Seller type was not marked as Other, Trust or Estate, depending on your version of SoftPro.

**Individuals:** appear as Full last name, first name, middle name. The format in the example above indicates the Seller type was not marked as a Male or a Female. Names with Dr., Jr., Sr., I, II, III, etc., will appear on the Name Exceptions report and should be reviewed for correct format as well.

**NOTE:** Formatting for suffixes – Jr. and Sr. must be followed by a period to be exported to Pro1099 correctly.

After the files have been properly marked in the Seller Type field and exported back to Pro1099, *most of the names will still be on the Name Exceptions report*; however, they will be in the format the IRS expects.

### *Identify where the IRSTAX Output File will be Saved*

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You must retain the IRSTAX file you send to the IRS for three years. This file can be opened in Notepad and reviewed for research in the event of an audit or a returned submission. However, it is important to keep in mind that *Pro1099 will always output a file with the same name, IRSTAX*, which could create problems if not noted carefully. To avoid sending an incorrect version of an IRSTAX file to the IRS, there are a few steps that can be taken:

Versions 21.2SP1 and lower and 31.2SP1 and lower:

1. Identify where you want to save the IRSTAX file BEFORE creating it in Pro1099 (e.g., “Desktop”).
2. Ensure that the folder or desktop location does not already contain a file called IRSTAX.
3. If there is an existing/older copy of an IRSTAX file, simply rename it appropriately (e.g., “IRSTAX2019”).
4. AFTER submitting the new file to the IRS, rename this file to something different (e.g., “IRSTAX2021”).

**NOTE:** You may name this output file whatever you wish, and you may likewise submit that file. For example, you may rename “IRSTAX” to “FIREsubmission2021”.

For versions 21.2sp2 and 31.2sp2:

We have added an enhancement that will append a date and time stamp to the IRSTAX. For example, IRSTAX\_031420\_0827; this will prevent the overwriting of older submission files.

## Create the IRSTAX Output File

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To create the actual IRSTAX file to send to the IRS, follow these simple steps:

1. Open Pro1099.
2. Go to **Tools** and then **Create IRS Submission File**.
3. Navigate through the Create IRS Submission File wizard (ensure the correct Tax Year Date and indicate if the filing is an original, corrected, or replacement filing) and save the IRSTAX file to the intended folder or desktop.

**NOTE:** The Create IRS Submission File wizard can be run multiple times if it is necessary to cancel or re-run it for any reason.

# Using the FIRE System

## Accessing the FIRE Site

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You may access the FIRE system site with two methods:

- Use your web browser to go directly to <https://fire.irs.gov/>.
- From within Pro1099, click **Access the IRS FIRE Web Site** from the **Tools** menu

# Extension of Time Request for 1099-S

1. **Logon** to the <https://fire.irs.gov> site with the current FIRE userid/password. Click the **Extension of Time Request** link:

**Internal Revenue Service**  
United States Department of the Treasury

**Menu Options**

- [Send Information Returns](#)
- [Extension of Time Request](#)
- [Check File Status](#)
- [E-Mail](#)
- [Change Password](#)
- [Update Account](#)
- [Change PIN](#)
- [Log Out](#)

**Where Do I Go From Here?**

If you want to electronically file 1042-S, 1097, 1098, 1099, 3921, 3922, 5498, 8027, 8935, W-2G and 8955-SSA click the *Send Information Returns* menu option on the left to begin the Electronic Filing process.

Similarly, you can choose the *Extension of Time Request* menu option to electronically file an Extension file for all of the above types except for 8955-SSA.

**Please note: this system does**

**IRS W  
T  
Elect**

File electronically and you will have your result business days, except for 1042-S, 8027 and 8 may require up to 5 business days.

3. Click **Fill-In Extension Form**:

Extension of Time Options

**Internal Revenue Service**  
United States Department of the Treasury

**Menu Options**

- [Main Menu](#)
- [Log Out](#)

**NOTE:** If you are requesting an extension of time for more than ten (10) payers, you must file the extension request electronically via the online fill-in extension form or by uploading an extension file. IRS encourages you to file your extension request using the online fill-in extension form in lieu of the paper Form 8809 even if you have 10 or less payers. If you have any questions, please call us at 1-866-455-7438.

**Definition of Options**

The fill-in form option is used in lieu of Form 8809, Application for Extension of Time To File Information Returns. (This does not apply to the 'Upload an Extension File' below.) This option will give you an instant approval or denial of your original extension request.

[Summary of Fill-In Extension Form](#)

This option will display all extension requests that a user has submitted for their User ID via the fill-in extension form option on FIRE for current and 1 prior year.

[Upload an Extension File](#)

This option is used to upload a file to request an extension for multiple payers. The file must be in the record format according to Publication 1220, Part D.

[Main Menu](#)

- Review the information below; note that **this extension is ONLY for 30 days**:

**Internal Revenue Service**  
United States Department of the Treasury

**Menu Options**

- [Main Menu](#)
- [Log Out](#)

**Extension of Time Request**

This option is used to request an automatic 30-day extension. This extension option **does not** give you additional time to give recipients their copies of the form and/or documents.

**NOTE:** If you are requesting an **additional** extension of time of not more than 30 days, you must submit a Form 8809, Application for Extension of Time To File Information Returns before the end of the first automatic extension period. These cannot be requested via the FIRE system. Requests for an additional extension of time to file information returns are not automatically granted. Generally, requests for additional time are granted only in cases of extreme hardship or catastrophic event. The IRS will send you a letter of explanation approving or denying your request of an additional extension only. If you do not have Form 8809, you can download the form from [www.irs.gov](http://www.irs.gov).

**Caution:** You cannot use this system to request an extension of time to file Form 1042 (*instead use Form 7004*) or to file Form 1040 (*instead use Form 4868*).

[Continue](#) [Main Menu](#)

- Select **Electronic** and the fields at the bottom of the screen will be enabled. Check the box labeled **1098/1099/W-2G/3921/3922**:

**Extension of Time for Tax Year 2021**

How will the Information Returns be Filed?	Type of Returns (Check all that apply)
<input type="radio"/> Paper <input checked="" type="radio"/> <b>Electronic</b>	<input type="checkbox"/> W-2 <input checked="" type="checkbox"/> <b>1098/1099/W-2G/3921/3922</b> <input type="checkbox"/> 5498 <input type="checkbox"/> 5498-SA <input type="checkbox"/> 5498-ESA <input type="checkbox"/> 1042-B <input type="checkbox"/> 8027

If an option is disabled, the form is past the due date and an extension cannot be filed for this type of return.

6. Once required fields have been entered, the **Submit** button will be enabled:

**Internal Revenue Service**  
United States Department of the Treasury

Menu Options  
■ [Main Menu](#)  
■ [Log Out](#)

### Extension of Time for Tax Year 2021

How will the Information Returns be Filed?	Type of Returns (Check all that apply)
<input type="radio"/> Paper	<input type="checkbox"/> W-2
<input type="radio"/> Electronic	<input type="checkbox"/> 5498-EBA
	<input type="checkbox"/> 1099/1099W-2G/3921/3922
	<input type="checkbox"/> 1042-S
	<input type="checkbox"/> 5498
	<input type="checkbox"/> 8027
	<input type="checkbox"/> 5498-SA

If an option is disabled, the form is past the due date and an extension cannot be filed for this type of return.

Tax/ID/SSN → TIN

Payer Name 1

Payer Name 2

Address

City

State  ZIP

Contact Name

Phone Number / Ext

TCC code → Transmitter Control Code  (If Applicable)

Foreign Country  Yes  No

- 7. Please **verify the information entered** and then click **Revise** or **Accept**. If no changes are needed, click **Accept** to proceed to the confirmation page.

- 8. **Print this page** for your records:

# SoftPro 1099 Recording FAQs

The 1099 reporting process can involve a lot of detailed editing for non-traditional reporting records (corporations, estates, multiple sellers, etc.). This complexity can be compounded by the need for accuracy in working with the IRS. Below are some common questions regarding 1099 reporting.

## **Q: I've run my Exception Report several times and made changes. Why are there still Name Exceptions on the report?**

- **A: Part 1** of the report should be clean of exceptions once any missing/incorrect data in your file has been repaired (i.e. – missing SSN, invalid address, etc.). It will need to be free of errors before you submit your final file.
  - For more detail, please reference [Identifying and Resolving Exceptions](#) above.
- **A: Part 2** of the Name Exceptions report *is not expected to be free of name exceptions*.
  - The Name Exceptions report is based on expecting certain formats for names for specific file types. For example, a traditional single seller name will be “last name, first name, middle name.” The name of an Estate as a Seller, however, can be listed in a variety of ways. As such, an ESTATE seller will ALWAYS show on the Name Exceptions report. A corporation should never be on the Name Exceptions report.

## **Q: If I choose the Import Multiple Files option in, will I lose all the work I've already done in Pro1099?**

- **A:** There is an option when importing multiple files to “Overwrite records from files that have been previously exported to Pro1099”. If this option is not selected, no orders should be overwritten. HOWEVER, a good backup of the Pro1099 database should be made before a multiple import is used, just in case.

## **Q: I have multiple entities/Tax IDs but only one Pro1099. How can I submit a separate file for each of my entities?**

- **A:** Pro1099 is set up to work with one ProForm installation. If that installation of ProForm requires multiple Pro1099 setups, our Support team can help configure this in your environment for future filings. Splitting your database into multiple setups involves custom application configuration. Please contact SoftPro for pricing and scheduling.

## Getting Help

The SoftPro Solution Center is available to you by telephone at **(800) 848-0143** and is open from 8:00 A.M. to 5:00 P.M. Monday–Friday during your local time. Platinum level support hours are from 8:00 A.M. to 10:00 P.M. EST Monday–Friday and 11:00 A.M. to 2:00 P.M. EST on Saturday.

You can extend technical support service by subscribing to the SoftPro Annual Maintenance Service program. Subscribing to Platinum Maintenance Service gives you access to technical support for longer hours Monday–Saturday. For more information, call SoftPro Sales at **(800) 848-0143**. You can email SoftPro Sales at [sales@softprocorp.com](mailto:sales@softprocorp.com).