

Filing Electronically With the IRS FIRE System and Pro1099

SoftPro Select | Tax Year 2024 October 3, 2024

4800 Falls of Neuse Road, Suite 600 | Raleigh, NC 27609 *p* (800) 848-0143 | *f* (919) 755-8350 | <u>www.softprocorp.com</u>

Table of Contents

Pro1099	3
About The IRS FIRE System	3
IRS Resources	3
Accessing the FIRE site	4
Preparing to use the FIRE system	4
Note to existing IRS FIRE system users	5
Submission Deadlines	5
Fines and penalties	5
Verify Pro1099 version (2023 tax year)	6
5 Steps to Prepare your 1099	7
Step 1: Application configuration	. 7
Step 2: 1099-S Exceptions Report 1	10
Step 3: 1099-S Duplicate Record listing report1	12
Step 4: Create Submission File1	12
Step 5: Submit File(s) to the IRS FIRE website1	18
Correcting 1099-S Returns 1	.9
Extension of Time Request for 1099-S 2	21
Getting Help 2	:5

Pro1099

Pro1099 automates the preparation of 1099-S forms for submission to the IRS and eliminates the need for pre-printed carbon 1099-S forms. Pro1099 stores 1099-S data throughout the year. Users can enter the 1099-S data directly into the program or, if you have ProForm, it automatically exports orders into Pro1099.

Pro1099 generates a substitute 1099-S form to give to the seller and keeps track of whether you have furnished the 1099-S information to the seller. To prevent the possibility of the submission being returned for incomplete or inaccurate data, Pro1099 includes an exceptions report. This report, which is run before submitting data to the IRS, lists any problematic records so that users can correct any errors or oversights.

Major Features

- Manages unlimited number of 1099-S records
- Produces IRS Tax file for submitting 1099-S data to the IRS via the FIRE Website
- Eliminates the need for carbon 1099-S forms
- Generates substitute 1099-S forms to give to sellers
- Produces exception reports for erroneous and missing information
- Integrates with ProForm for one-time data entry

About The IRS FIRE System

The FIRE System is a website (<u>https://fire.irs.gov</u>) 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.

Publication 1220

This document, found on the IRS website <u>here</u>, outlines the specifications for electronically filing a variety of forms.

Apply online for your FIRE Transmitter Control Code (TCC) at IRS.GOV.

From the website, search for TCC and click the link from the Search Results

An offi	icial website	of the United States	Government			
۲D]]	RS				Help News English 🗸 💋 Charities & Nonprofits	Tax Pros
File	Pay	Refunds	Credits & Deductions	Forms & Instructions	tcc	٩

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
- TDD (Telecommunication Device for the Deaf): (304) 267-3367
- Fax: Toll-free within the US: (877) 477-0572 Outside the US: (304) 264-5602

Accessing the FIRE site

You can access the FIRE system site using two methods:

- From your web browser, go directly to <u>https://fire.irs.gov/</u>.
- From within Pro1099 menu, click **Open IRS FIRE** button.

Preparing to use the FIRE system

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 (TCC). If you have not acquired a TCC from the IRS yet, submit the **Information Return Application For TCC** (refer to steps above to obtain the application).

Once your FIRE 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 <u>Application Configuration</u> below.

File Compression and Browser Settings

- If 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 selfextracting zip files compressed 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

If you have already configured your computer to connect to the IRS FIRE system, and submitted using the FIRE system last year, proceed to <u>Step 2: 1099-S Exceptions Report</u>.

Submission Deadlines

- February 15, 2025: The Recipient copy of the Substitute 1099-S must be postmarked by this date.
- March 31, 2025: The date by which files must be electronically submitted to the IRS.
- Submit test files to <u>https://fire.test.irs.gov/</u>
 - 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. You can file Form 8809 online by completing a fill-in Form 8809 through the FIRE system for an automatic 30-day extension. Acknowledgements are automatically displayed online if the request is made by the due date of the return.

Note: To file for a second extension, this request must be approved by the IRS. Complete Form <u>8809</u> and submit to the IRS for review (must be filed before the due date of the returns

Fines and penalties

Per 2024 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:

• **\$60** per information return if you correctly file within 30 days of the due date of the return.

- **\$130** per information return if you correctly file more than 30 days after the due date but by August 1st.
- \$330 per information return if you correctly file after August 1st.

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

Verify Pro1099 version (2024 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 most recent update should have been completed with a SoftPro-provided script.

5 Steps to Prepare your 1099

Step 1: Application configuration

Once you have obtained your TCC Code (see <u>Preparing to Use the FIRE System</u>), you can enter it into Pro1099 by following these steps:

1. Click the **SPAdmin** tab, and then click the **Configuration** button.



2. Under the **Security** folder in the left pane, click **Profiles**, double-click the **Profile** in the right pane that will be used to prepare the 1099 submission, and then select the **1099 Tab** on the dialog that appears.

a	H 🐮 -	📛 👻 🔻	Managem	ent Console ·	- SoftPro Sel	ect	Profiles		-		х
	ProForm	ProTrust	Pro 1099	SPImage	SPAdmin	360	Profiles				0
Edit Tree	2										
Mai	nagement (onsole 🗙								4 1	<u> </u>
♦ ⇒	2 2 8	🗄 👻 Filter by:	Default		- 👌	P					Wort
	General Sett ProForm ProTrust Automation Pro 1099 Security C Profiles C Groups C Users Permissic SPAdmin			Profiles							Work Lists

- 3. Confirm and/or enter your Transmitter/Payer data (detailed below). The **Transmitter** button won't be active unless your filing situation requires you to uncheck the **Payer functions as transmitter** checkbox. This checkbox is found under the **Options** area in the lower left.
- 4. Click **OK**.

Payer information

- **Payer Name**: Enter the name of the payer who owns the Tax ID Number (TIN). Filers shouldn't enter a transfer agent's name in this field. Any transfer agent's name should appear in the Second Payer Name Line Field.
- Name Control: The Payer Name Control can be obtained from the mail label on the Package 1099 that is mailed to most payers in December. Package has the mail label that contains a four-character name control.
 - If a Package 1099 has not been received, you can determine your name control using the following simple rules. For a business, use the first four significant characters of the business name. Disregard the word "the" when it is the first word of the name, unless there are only two words in the name. A dash (-) and an ampersand (&) are the only acceptable characters. Names of less than four characters should be left-justified, filling the unused position with blanks.
- **TCC**: The TCC (<u>Transmitter Control Code</u>) is required by the IRS before a file can be submitted electronically via the IRS FIRE System. Pro1099 requires the TCC number to be entered on the Transmitter/Payer Information screen. The transmitter's other contact information is also required on this screen.

Options

• **Payer functions as transmitter**: Check if the payer is also the transmitter (Default Setting). When the box is un-checked, the transmitter information becomes available.

Service bureau
Last time filing
Transmitter

- Note: If the payer functions as the transmitter, then only the payer information section needs to be completed. Also if submitting multiple TaxIDs under one TCC, it is recommended that a "Transmitter" be enter for each TaxID.
- **Display TCC warning**: Checked by default to remind user that a required TCC has not been entered.

EXPORT ONLY ESCROW "CLOSED" ORDERS

- This defaults to unchecked:
 - Unchecked: exports saved ProForm orders to Pro1099 when the order is a purchase with at least one seller, the Exclude order from IRS submission option is unchecked, the Settlement date is equal or prior to today's date and the order status or escrow status is not Hold, Duplicate or Canceled.

• **Checked**: exports saved ProForm orders to Pro1099 when the order is a purchase with at least one seller, the **Exclude order from IRS submission** option is unchecked and the escrow status is closed.

SPECIAL INDICATORS:

- Service Bureau: Check to indicate if an agency will produce or submit files for electronic filing.
- Last Time Filing: Check if this is the last year this payer name and TIN will file information returns electronically, or on paper; otherwise, enter a blank.
- Foreign Corporation: Check to indicate if the transmitter is a foreign entity.

Transmitter Information

• **Transmitter Name**: Enter the name of the transmitter in the manner in which it is used in normal business.

Transmitter and Payer Shared Fields

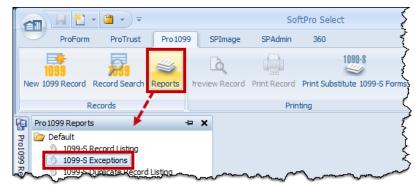
- Name Line 2: If more space is required for the name, use the Second Payee Name Line field. The use of the business name is optional in the Second Payee Name Line field. A dash (-) and an ampersand (&) are the only acceptable special characters for First & Second Payee Name lines.
- Tax ID Number: Enter the tax ID number (TIN 9-digit EIN/SSN).
- **Contact Name**: Required. Enter the name of the person to be contacted if IRS/ECC-MTB encounters problems with the file or transmission.
- **Phone Number**: Required. Enter the telephone number of the person to contact regarding electronic files. Note: If the foreign checkbox is checked, the field's format changes slightly to accommodate a foreign phone number (the area code parentheses and dash are removed and the field extends to 20 characters).
- Phone Extension: Enter the extension of the person to contact regarding electronic files.
- **E-mail Address**: Required if available. Enter the E-mail address of the person to contact regarding electronic files. If no E-mail address is available, leave blank.
- **Company Name**: Required. Enter the name of the company to be associated with the address where correspondence should be sent.
- Name Line 2: Enter any additional information that may be part of the name of the company where correspondence should be sent.
- Mailing Address: Required. Enter the mailing address where correspondence should be sent.
- **City**: Required. Enter the city, town, or post office where correspondence should be sent.
- State: Required. Enter the valid U.S. Postal Service state abbreviation.
- **ZIP**: Required. Enter the valid nine-digit ZIP assigned by the U.S. Postal Service.
- Foreign: Check if this is a foreign address.
- Foreign address (text box): Enter the foreign address. Check Foreign checkbox and the address.

Step 2: 1099-S Exceptions Report

Run the 1099-S Exceptions Report from Pro1099. The report will list the records which need to be corrected (i.e., missing TIN, partial address, legal description, gross proceeds, etc.). When the report runs with no errors, you are ready to create your IRS Submission file. This report lists all non-exempt Pro1099 records that contain one or more exceptions for the tax year specified in reports criteria.

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

- 1. From the Pro1099 ribbon, click the **Reports** button
- Double-click the 1099-S
 Exceptions Report from the Pro1099 Reports pane on the left



3. Enter your report criteria on the **1099-S Exceptions** report prompts/options dialog; click **OK** to generate the report

1099-S Exceptions	
Reporting year:	2024
Transmitter TCC:	☑ 12312
Payer tax ID number (TIN):	123-45-6789
Sort order: Include records with 0.00 proceeds:	Order Number
Report comments:	This is our 1099-S Exceptions Report.
	OK Cancel

4. Click **OK** to view the report

1	H	- 🗎 - =	1099-S	Exceptions -	SoftPro Sele	ct	Report Tools		-		×
	ProForm	ProTrust	Pro 1099	SPImage	SPAdmin	360	Report				0
() Reload	100%	 Zoom In Zoom Out 	P Find								
View		Zoom	Tools							4 ۵	•
Pro Co		rt was generated	d on 1/23/20	24 at 2:36:30	DM						
1099	morepor	re nos generates	a on 1/25/20	24 00 215 0155						•	Work Lists
Pro1099 Reports		_	_	_	_		_			8	i ii
ts									. 1		
								1099-S Exceptions			
			Reporting Ye Transmitter T(C: 12312							
			ID Number (TI mat/Sort Option	on: Sort by or	der number						
			Commen	ts: This is ou	r 1099-S Exce	ptions Rep	ort				
		Order Num Name (-		
			Payee name Exce	ptions							
		TRAN SMITTE R PAYER TAX II	TCC: Noten DNUMBER (T		ed					* *	
										Ĭ	
•										F	
	Out and (P)	E		al Death	M M P	age 1	of 1 🕨 🕨	1			
Ready.	orders 🙆	Errors and War	nings 🛩 Sea	Irch Results					urrent Profile:	: Defau	ult 🤞

5. To **Print**, click the **Select** button (far upper left) and select that option from the dropdown menu. Other options are available to you as well.

ſ	an H 🐮 - (■ • - =	Report Tools
	ProForm	ProTrust ProDesido Pro1099 SPImade SPAdmin 360	Report
	New	Preview and print a document.	
	Open	Click to print the active document.	
-	Save	Print Preview Click to preview the active document.	
	Start Page		
	My Work Items		1099-S Exceptions
	Print	•	
	Send	•	
	Publish	•	
	Export	•	
	Close		
		Select Options X Exit Select	

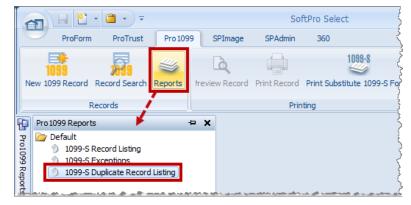
Note: you can preview the report by clicking the **Print Preview** option on the drop-down menu.

The additional 1099 exceptions (Missing and Orphaned 1099 Records Report and Pro1099 vs. ProForm Data Variances Report) are available for download at the SoftPro Document Portal for all Select users on v4.3.6 and above and v4.6.

Step 3: 1099-S Duplicate Record listing report

Run the 1099-S Duplicate Record Listing Report from Pro1099. The report will list all records where two or more records contain the same Social Security Number (TIN) and order number. One of the duplicates may need to be deleted prior to creating a submission file.

This report is in the same navigation pane as the 1099-S Exceptions Report from step 2 above.



The **1099-S Duplicate Record Listing report** lists all Pro1099 records where two or more records contain the same TIN number and order number.

Step 4: Create Submission File

Before producing the IRSTAX file for submission, ensure that all ProForm orders have been exported to Pro1099. The only orders that will be exported are purchase orders that contain a seller, have a settlement date prior to or equal to today's date, and are not canceled, duplicate, or hold status, and which do not have the Exclude order from IRS submission checkbox checked.

• **Replacement Files**: If you receive notification from the IRS that you need to <u>submit a replacement</u> <u>file</u>, you will create and submit the file in the exact same manner that you create the original file.

Follow these steps to create all submissions.

- 1. Create your file (**IRSTAX**). When prompted to save, save to your desktop.
- From the Pro1099 tab, click the Create Submission File button to Open the IRS Submission File Wizard

an) 🖬 🛅	- 🗋 - =				Start Page - SoftPro	Select	
ProForm	ProTrust	Pro 1099	9 SPImage	SPAdmin	360		
1099		*	لم		1099-8	1099	FIRE
New 1099 Record	Record Search	Reports	Preview Record	Print Record	Print Substitute 1099-S Forms	Create Submission File	Open IRS FIRE
I	Records			Prin	iting	Tools	

Welcome: The Welcome screen provides a brief summary of why and how often a file needs to be submitted. If you need an update, please contact SoftPro. If you only have one TCC code it defaults to your TCC code in the TCC code field. If you have multiple TCC codes, you are required to enter a TCC code before continuing to the next step.

- Confirm that your Pro1099 software has been <u>updated</u> with the current Tax Year
- 4. Click Next



Payer Information: If you have multiple Tax ID numbers for a single TCC code, you may leave this blank, and your file will include "A" & "B" records for each Tax ID number associated with the TCC code entered. If you'd like to submit separate files for each Tax ID, you will need to enter the Tax ID number before continuing to the next step.

- 5. In the **Payer's Tax ID** field enter the Tax ID
- Check the This will be a TEST file submission check box if submitting a test file. This isn't required but is suggested for first-time filers. A test file should include at least 11 records.
- 7. Click Next

IRS Submission File Wizard
Q
Payer Information Enter the TCC code and payer's tax ID below.
TCC code: Payer's Tax ID: This will be a TEST file submission (Note: You are not required to submit a test file; however, the IRS encourages submission of a test file, containing at least 11 records, for all new electronic filers.) Click next to continue.
Next > Cancel Help

From the Submission File Tax Year window,

- Enter the Tax reporting year
 NOTE: The year defaults to the current year; a future year
 cannot be entered.
- 9. Check Include records with \$0.00 seller proceeds

This includes records in the file that have \$0.00 gross proceeds and those with the **Property or services received check box** unchecked.

10. Click Next

IRS Submission File Wizard	×
Θ	
Submission File Tax Year	
Enter the tax reporting year below. If including records with \$0.00 proceeds, check the box below.	
Tax reporting year: 2024 Include records with \$0.00 seller proceeds.	
Click next to continue.	
Next > Cancel Help	

Corrected Returns: A correction is an information return submitted by the transmitter to correct an information return that was previously submitted to and processed by IRS / ECC-MTB but contained erroneous information. Corrections should only be made to records that have been submitted incorrectly, not the entire file.

- 11. Select the,
 - Yes, radio button to create a <u>corrected return</u>
 - No radio button if this is an initial submission and not a corrected return
 - Click **Next** to continue

IRS Subm	nission File Wizard
c	orrected Returns
	Is this a corrected return?
	You may file original (first-time) returns or corrected returns (records may be defined as corrected returns in the "Correction status" field on the Pro1099 record screen). All originals are filed first. You may need to file your corrected returns later in a separate submission file.
	Yes – The submission file will only contain CORRECTED returns.
	No - The submission file will only contain ORIGINAL (first-time) returns.
	Click next to continue.
	Next > Cancel Help

Exceptions: If you're submitting an IRS Submission file with error (not recommended), then you'll see the **Exceptions** window. You can generate an IRS submission regardless of 1099 record exceptions. You are encouraged to cancel the wizard, verify, and correct all exceptions (by running an <u>Exceptions Report</u>) before continuing with the submission.

- 12. Click the, **IRS Submission File Wizard** 83 Θ • **Cancel** button to exit the wizard without creating a submission file Exceptions and make corrections Do you understand penalties may be incurred when submitting records to the IRS -Orwith exceptions? Check the Yes, I • IRS Submission File W One or more records being submitted to the IRS contain exceptions. You are encouraged to cancel the IRS Submission File Wizard, run the 1099-S Exceptions report, and correct all exceptions prior to G understand the continuing with the submission process. above message Penalties may be imposed by the IRS if records contain missing information Exceptions as stated in IRS Publication 1220. check box and click Yes, I understand the above message and wish to continue with the Do you un submission process. Next with except Click next to continue. One You the Cancel cont Next > Help Pena as stated in IRS Publication 1220 Yes, I understand the above message and wish to continue with the V submission process. Click next to continue. Next > Cancel Help
- From the Destination Directory window, click the Browse button to select the path where the file will be saved.
- 14. Click Next to continue

IRS Submission File Wizard	×
G	
Destination Directory	
Select the "Browse" button below to enter a destination directory for the IRS Bectronic Submission file (IRSTAX).	
Browse Destination directory for the submission file	
CA	
Click next to continue.	
Next > Cancel Help	

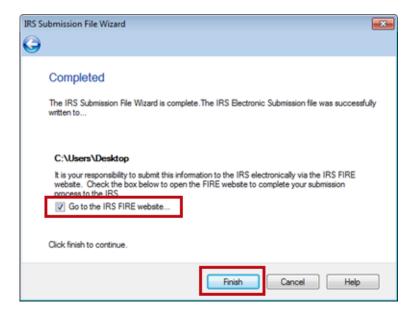
NOTE: You must retain the **IRSTAX** file you send to the IRS for three years. This text file can be opened in Notepad and reviewed for research in the event of an audit or a returned submission. However, it is important to keep in mind that *Pro1099 will always output a file with the same name, IRSTAX,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

- a. Identify where you want to save the **IRSTAX** file BEFORE creating it in Pro1099. (e.g., "Desktop")
- b. Ensure that the folder or desktop location does not already contain a file called IRSTAX.
- c. If there is an existing/older copy of an **IRSTAX** file, simply rename it (e.g., "IRSTAX*TaxYear*").
- d. AFTER submitting the new file, rename the file to something different (e.g., "IRSTAX2024").
- e. You may rename this output file whatever you wish and submit that file. For example, you may rename "**IRSTAX**" to "**IRSTAX2024**" and then submit to the IRS.
- f. Confirmation
- Select Yes, I understand the above message, click Next to generate the file

IRS Submission File Wizard	×
G	
Confirmation Do you understand the record keeping recommendations from the IRS?	
The IRS recommends that you maintain your 1099 data for at least three (3) years from the reporting due date. You should keep a copy of the IRSTAX submission file as well as your Pro1099 data for a minimum of three (3) years to conform with this IRS recommendation.	
Yes, I understand the above message. Click "Next" to generate the IRS Electronic Submission file.	
Next > Cancel Help]

The **Completed** window opens; this indicates your file has been generated and saved to your chosen location.

- 9. Check Go to the IRS FIRE Website check box
- Click Finish to connect to the IRS FIRE system via an Internet browser



Step 5: Submit File(s) to the IRS FIRE website

To upload your submission, file you'll need to access the IRS FIRE Website. For more information see the section above <u>About the IRS Fire System</u>.

1. From **Pro1099**, go to the **Tools** menu on the ribbon, then click the **Open IRS FIRE** button

The FIRE site opens within the Select application.

A	- 🖹 • 🗎 •	.					IRS FIRE H	ome - SoftPro Select	_	×
	ProForm ProTr	ust ProDe	sign Pro 1099	SPImage	SPAdmin	360				0
109 New 1099	Record Record Sea	arch Reports	Preview Record	Print Record	1	099-8 ute 1099-S Forms	Create Submission File	Den IRS FIRE		
	Records			Prir	nting		Tools			
Start	Page IRS FI	RE Home 🗙]							4 ۵
Address:	https://fire.irs.gov/									-
	Unite FIRE Productio	d States D	evenue S epartment of t							
	System User Options <u>Log On</u> <u>Create New</u> <u>Learn The E</u> <u>Forgot Pass</u>	asics	FILING INFOR	MATION RE	ETURNS ELI	ECTRONICALI	Y			
	Contact Tec Services Ope (TSO)		THIS U.S	6. GOVER	NMENT S	YSTEM IS F		DUSE ONLY!		

Submitting a Replacement File

WHAT IS A REPLACEMENT FILE?

Replacement files are not the same as corrected returns. A replacement file is an information return file sent by the filer because the CHECK FILE STATUS option on the FIRE System indicated the file was bad. A replacement file,

- may be required for **bad originals** OR **bad correction files**. If it is a **bad correction file**, it is created in Pro1099 as a correction and uploaded to the IRS as a replacement file for a bad correction file.
- must be submitted within 60 days from the day the original file was transmitted.

How does one submit a replacement file?

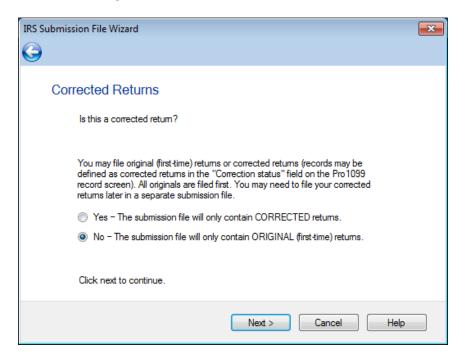
Replacement files are submitted in exactly the same manner as original submissions. After the necessary changes have been made, the file must be transmitted through the FIRE System. The IRS website will automatically code your submission as a Replacement. Filers shouldn't transmit anything to IRS/ECC-MTB as a **Replacement** unless the CHECK FILE STATUS option on the FIRE System indicates the file is bad.

HOW DOES ONE CREATE A REPLACEMENT FILE?

To create a replacement file, follow the same steps you would to <u>create an original submission</u> with Pro1099. Read the remaining warnings and follow all instructions until the replacement has been created.

Correcting 1099-S Returns

Corrections to 1099-S submissions to the IRS may take either one or two transactions, depending on the type of correction being made.



Corrections requiring one transaction.

Original return was filed with one of the following errors:

- Incorrect Payee Address
- Incorrect Payee Name

To make corrections requiring one transaction:

- 1. Retrieve each Pro1099 record that needs to be corrected.
- 2. Correct the error in the record.
- 3. Select "One part or first of a two part correction" in the Correction Status: field.

Corrections requiring two transactions.

Original return was filed with one or more of the following errors:

- No payee TIN (SSN or EIN) Contact SoftPro for additional details
- Incorrect payee TIN Contact SoftPro for additional details
- Wrong type of return indicator

• Incorrect payee name and address

To make corrections requiring two transactions:

Note: Please contact SoftPro for Tax ID corrections.

- 1. Retrieve each of the Pro1099 records that need to be corrected.
- 2. Do not correct the error. The record should appear exactly as it was in the original submission.
- 3. Select One part or first of a two-part correction in the Correction Status: field on the original 1099 record.
- 4. Add a new 1099 record containing the correct information.
- 5. Select Second of a two-part correction in the Correction Status field on the new 1099 record.

Submitting Additional Transactions

If you send the file to the IRS and discover that transactions were left out in error, you will need to <u>contact SoftPro Support</u>. The submission of these additional transactions is not considered a correction to the original submission; it is considered a "Second Original."

Extension of Time Request for 1099-S

- 1. Log on to the <u>https://fire.irs.gov</u> site with the current FIRE userid/password
- 2. Click the Extension of Time Request link



3. Click the Fill-In Extension Form link

	Revenue Service Department of the Treasury	
Menu Options Main Menu Log Out	request electronically via the online fi encourages you to file your extension	nsion of time for more than ten (10) payers, you <u>must</u> file the extens II-in extension form or by uploading an extension file. IRS a request using the online fill-in extension form in lieu of the paper payers . If you have any questions, please call us at 1-866-455-74
		Definition of Options
	, Fill-In Extension Form	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 Extensio 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 for 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	

4. Review the information below; click **Continue**

NOTE: The extension is ONLY good for 30 days.

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. 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			
	EIRE Privacy Policy			

- 5. Select **Electronic** to enable the fields at the bottom of the screen
- 6. Check the 1098/1099/W-2G/3921/3922 check box

United States I	Revenue S Department of t					
Menu Options Main Menu Log Out		Extension	of Time for Tax Year 2024			
	How will the Information Returns be Filed?	n Type of Returns				
	C Paper	「 5498 「 5498-SA If an option is disabled	d, the form is past the due date and an lied for this type of return.			

- 7. Enter required information; this enables the **Submit** button
- 8. Click Submit

Main Menu Log Out		Extension of	Time for Tax Year 2024	
	How will the Information Returns be Filed?		Type of Returns (Check all that apply)	
		□ w-2	1 5498-ESA	
	-	P 1098/1099/W-2G/	9921/3922 T 1042/8	
	C Paper	F 5498	F 8027	
7		extension cannot be file	the form is past the due date and an <u>4 for this troe o</u> f return.	
	Pa	yer Name 2		
		Address		
		City		
		State		
	Co	ntact Name		
	Dh	umber / Ext		
	Phone N	umper / Ext		

- 9. Verify the information entered
- 10. Click **Revise** or **Accept** If no changes are needed, click **Accept** to proceed to the confirmation page.

nu Options Main Menu Log Out	Please veri	fy the information entered and then click Revise or Accept Extension of Time for Tax Year 2024				
	How will the Information Returns be Filed?					
	C Paper C Electronic	W-2				
		TIN ayer Name 1 ayer Name 2				
		Addres⊾. Citv.				
	<i></i>	State ZIP				
	Phone N	lumber / Ext				
		eign Country Cover				

11. **Print** this page for your records

	Revenue Service es Department of the Treasury	
Menu Options <u>Main Menu</u> Log Out	Extension of Time for Tax Year 2024 Payer TIN. Your Tax/D Payer Name1. Current Payer Name User ID. Your User ID Date: Current Date	
	Type of Return Electronic Extended Due Date 1098/1099/W-2G/3921/3922 Extension due date **TBA	**
	Please print this screen for your records if you have not already done so. Print Do you have another extension of time to file? Yes No	
	If you have questions about this extension of time, please call us at 1-866-455-7438 or email us at fire@irs.gov This extension does not give you additional time to give recipients their copies of the form and/or documents listed above.	

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 provides 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 <u>sales@softprocorp.com</u>.