



Pension Reporter (PR)

1099-R Module Electronic Filing

DATAIR's 1099-R Module allows you to file 1099-Rs electronically using either the

IRS FIRE website or

DATAIR's 1099-R Service Bureau



**"Wow! DATAIR's 1099-R
Module makes filing easy!"**

Both filing options are easy and require only a few steps:

- ◆ Enter the 1099-R data for all of your plans by importing from a spreadsheet, transferring from DATAIR's Pension System or manually entering the data.
- ◆ Verify the data is correct and meets IRS requirements by validating (clicking a green checkmark on the toolbar). Valid 1099-Rs will have an X in the valid column on the screen listing all of the Payees.
- ◆ Invalid 1099-Rs will not have an X in the valid column. They are easy to review and correct before proceeding to electronic filing.

In Pension Reporter, select an Electronic Filing method in the 1099-R module and create a New Tax File. Select all the plans and 1099-Rs you want to submit. The Review tab allows you to see exactly what is in the tax file that is created prior to uploading. If everything is the way you want it, you will then be able to submit the file to the IRS FIRE website or DATAIR's 1099-R Service Bureau.



***For additional information, please contact a
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Electronic Filing with IRS FIRE website

In order to use the IRS FIRE (Filing Information Returns Electronically) website, you will need a Transmitter Control Code (TCC). If you do not have a TCC, you can apply for one by completing and submitting a Form 4419 online at irs.gov.

Once you have a TCC, enter it on the Additional Information screen of Pension Reporter's Form 4419 and check the "Use IRS FIRE Electronic Filing Systems" box.

The Form 4419 in Pension Reporter creates the basis for the Transmitter Record in the Tax File, so it must be there with the information you submit to the IRS online. Pension Reporter is now ready to prepare the tax file for your company as the Transmitter.

You will select Electronic Filing and create a New Tax File. Select all the plans and 1099-Rs you want to submit to the IRS FIRE website. Check the Review tab and if everything is the way you want it, go to the IRS FIRE website and submit the file.

Electronic Filing using DATAIR's 1099-R Service Bureau

DATAIR's 1099-R Service Bureau Option will:

- ◆ Print and mail the Recipient Copy using U.S. First Class Postage
- ◆ Electronically file with the IRS as well as participating states in the Combined Federal and State Reporting Program
- ◆ Provide Copy Ds for each Payer you submitted to the Service Bureau

You do not need a Transmitter Control Code (TCC) from the IRS to use the Service Bureau. You will just need to check the box "Use DATAIR Service Bureau" on the Additional Information screen of the PR Form 4419.

The Service Bureau is quick and easy to use, and likely costs less than the cost of the time required for ordering paper and envelopes, printing and processing 1099-Rs, and providing 1099-R data to the IRS. During an already busy time of year, why not have one less time-consuming task to perform?

The fee is \$2.75 per form, for forms with US mailing addresses, with no per-batch submission fees.

Please note:

The Service Bureau is only able to process forms with addresses that require standard US First Class postage. However, all forms submitted to the Service Bureau will be electronically filed with the IRS.

State electronic filing is accomplished by the Service Bureau for all distributions pertaining to a state participating in Combined Federal/State Reporting. There are some states that also require a paper filing for all distribution reporting for that state. Paper filings to the states are not included in the Service Bureau services. You always have the ability to generate paper copies, including the state copy of the 1099-R for any state.