



FORM 1099 REFRESHER COURSE



By: Holly Rousel



Introduction:

- My name is Holly Roussel – Nate Kroll will be joining me.
- We will be discussing how the ftwilliam.com Form 1099 Software works.
- This course is meant to help you get the most functionality out of the software.
- We will NOT be teaching you how to fill out the forms or address any technical questions today.



Questions during the Webinar

- If you have questions during the webinar you may send them to us using the Question and Answer option on your toolbar. They will be addressed at the end of the webinar.
- As always, feel free to contact us with questions or comments at 800.596.0714 or via email at support@ftwilliam.com.



TOPICS

- Selecting a company and plan
- Data Entry
 - Entering payer data
 - Entering data on 945
 - Payee data - individually
 - Upload - Nate
 - Selecting payees
 - Review 945
- Settings – preferences
- Printing and batch printing features
- Reports
- What forms you will need
- Electronic Filing - Nelco

Paper Forms

- Compatible forms available from Nelco Solutions
- Order by calling Branden at (800) 266-4669 extension 4347
- Information about product numbers will be available on 1099 Forms product pages

Efiling – IRS FIRE

- ftwilliam.com won't be efilng via FIRE for our customers this year
- Customers must apply for a Transmitter Control Code (TCC) with Form 4419
- Supply ftwilliam.com with the TCC letter to enable FIRE download feature
- More information will be available on the 1099 Forms product pages

E-filing - alternative

- ftwilliam.com will be partnering with Nelco Solutions to offer Federal e-filing and participant/payer mailings
- Nelco is contracted by DOL to handle Form 5500 e-filing
- Still in the works, might not be available for this filing this year

THANK YOU!

Again, if you have questions or comments feel free to contact us at 800.596.0714 or via email at support@ftwilliam.com.