



Pension Reporter (PR)

1099-R Module Electronic Filing

CalcAir's 1099-R Module allows you to file 1099-Rs electronically using the **IRS FIRE website**

It is easy and requires only a few steps:

- ◆ Enter the 1099-R data for all of your plans by importing from a spreadsheet, transferring from CalcAir'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.



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

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.

You always have the ability to generate paper copies, including the state copy of the 1099-R for any state.



CalcAir
Employee Benefit Systems

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