



HELPFUL INFORMATION ABOUT FILING FORMS ELECTRONICALLY

There is a **Major Change** for the **2023 Tax** filing season. If you have to file **10** or more forms for a client you **must file them electronically.**

Because the threshold for electronic filing has been reduced so dramatically, you need to be aware of what you need to do **AS SOON AS POSSIBLE** before filing electronically.

If you are going to file W2's electronically:

You need to get the file **EFW2.PDF**, which is available on the *Social Security Administration* website.

There is a section that tells you how to apply for a **USER ID** and **PASSWORD** which you need for the *Social Security Administration's BSO* (Business Services Online) website. This is where you will electronically file your **W2's**.

The **USER ID** is part of the electronic file, so without it, all files will be rejected. There are several ways to get this, but I advise you to get this as early as possible. It might be possible to get **USER ID** and **Password** in January, but don't count on it. The *SSA* is likely to be very busy at that time.

If you are going to file 1099's electronically:

You need to get the **Pub 1220** from the *IRS* website.

There is a section that tells you how to apply for a **TRANSMITTER CONTROL CODE (TCC)**.

The **TCC** is part of the electronic file, so without it, all files will be rejected.

You can apply online, but the **TCC** will arrive via **US Postal Service (paper)**.

The **Pub 1220** says to allow **45 days** for processing. So, if you wait until December to try to get your **TCC**, you will likely be paying someone else to electronically file your 1099's for you