Drake CWU

Client Write-Up — Preparing to e-File W-2s

Use Client Write-Up to create, print, and e-file W-2s and W3s.

> **Note**: Prepare TY2015 W-2s and W-3s using Client Write-Up 2015.

Make sure your CWU2015 is up to date

Before you get started, make sure you CWU program is up to date.

1) In CWU2015, go to **Tools > Install Program Updates**
2) Click **Check for Available Updates**
3) When asked "Are you sure you want to exit Client Write-Up?" click **Yes**
4) If updates are available, click **Get Updates**

Preparing to e-file Forms W-2 and W-3

Before you can upload W-2 and W-3 information to the Social Security Administration, you must register on their website and get a login ID and password. You will also need to establish which of the SSA's services you will be using.

REGISTER WITH THE SOCIAL SECURITY ADMINISTRATION:

1) In CWU2015, go to **E-Filing > W2 E-Filing (EFW2) > Transmit File**.
2) Click **Open Web Site**. The Social Security Administration's Business Services Online website displays.
3) Click **Register**. Enter your registration information. Once you've entered your information, you will be prompted to select the services you will be using.
4) From the **Main Menu** on the left side of the screen, go to **Manage Services**.
5) Select **Request New Services**.
6) Select **SSA Services Suite for Employers**.

See **Uploading W2s** for information on testing the upload file with AccuWage and uploading to the Social Security Administration.

Payroll Filings "On the Fly"

This feature enables you to create, process, print, and even e-file payroll forms for clients who keep their own books with very little setup required. Produce the following forms "on the fly" using CWU:

W-2	1099-MISC	941
W-3	1099-DIV	941-SS
	1099-INT	941-X
	1099-R	943
	1099-PATR	943-X
	1099-S	944
	1099-A	944-X
	1099-B	940
	1099-C	945
	1098-MORT	945-X
	W-2G	941X-PR
	1096	943X-PR
	1098-T	944-PR
		941-PR

"On the Fly" Overview

Generating "on the fly" payroll forms is easy and quick. Use this feature to generate income for your business with minimal time and effort.

FORMS W-2 AND 1099 "ON THE FLY"

Producing Forms W-2 and 1099 "on the fly" is a three step process:

1) Open or create the appropriate client. You can also bring forward an "on the fly" client entered in CWU2014.

> **Note**: To create a new client, you only need to complete the **Contact Information**, **Business Information**, and **W2/W3-1099/1098 Setup** tabs under **Setup > Client Information**.

2) Input basic demographic and pay information about each employee.
3) Process (and print) the forms.

94X SERIES TAX RETURNS "ON THE FLY"

Producing 94X series tax returns "on the fly" is also a three step process:

1) Open or create the appropriate client. You can also bring forward an "on the fly" client entered in CWU2014.
2) Input the information directly on to the form.
3) Print the form.

Quick Reference for CWU e-filing

W-2 Information

SSA website (register and upload W-2/W-3s): *http://www.socialsecurity.gov/bso/bsowelcome.htm*

Download AccuWage: *http://www.ssa.gov/employer/accuwage/*

SSA website User ID: _____

SSA website Password: _____

1099 Information

Download Form 4419 to apply for a Transmitter Control Code (TCC):
http://www.irs.gov/pub/irs-pdf/f4419.pdf

Fax completed 4419 to: 877-477-0572
Check status of 4419: 866-455-7438 (option 4)

TCC: _____

IRS FIRE website (register and upload): *http://fire.irs.gov*

Website User ID: _____

Website Password: _____

94X Information

To update 8633: Log in to your e-Services account

Name Control Verification: 800-829-4933

Your business's taxpayer PIN: __ __ __ __ __ __ __ __ __ __

Your Reporting Agent PIN: __ __ __ __ __

Alternate way to check 94X IRS Acks:

1) From CWU, go to **Help > Drake Support Web Site**
2) Go to **My Account > EF Database**
3) Go to **Tools > 94x Report**
4) Select the appropriate **Return Type** and **Date Range**
5) Select the **Status** to display or select "All" to include all statuses
6) Click **Run Report**