

Virtual Accounting e-filing packages

The process for filing 1099s and W-2s is changing in 2024, and it includes an e-file requirement for many companies. The intent of the new requirements is to reduce paper forms and make the filing process more secure, but it may mean that you will need to update your filing procedures. RFMS can help you navigate these changes through our Virtual Accounting Services (VAS) 1099/W-2 e-filing packages.

Enroll for our package to help automate the e-filing preparation process and take the stress out of tax time.



How can we help?

In order to help you stay compliant with the new IRS requirements for 2024, we've assembled e-filing packages to help you prepare 1099s and W-2s using data that's already on hand in your RFMS system.



How does it work?

STEP 1

Contact your CSM to enroll today

Once you've enrolled, you'll complete a checklist to prepare for our joint sessions.

STEP 2

Participate in 3 joint sessions

Next, we'll work together over three sessions to generate data and prepare for e-filing.

Session 1: Review checklist

- Review checklist
- Identify any potential issues
- Create a schedule for e-filing

Session 2: Generate information

- We generate 1099s and W2s in PDF format
- You review the PDFs for any corrections and print a paper copy for your workers

Session 3: E-filing process

- We create e-filing CSV
- We assist you with AccuWage check for W2s
- We assist you with e-filing 1099s and W2s to the IRS and SSA using your accounts

Important notes

You can e-file on your own.

You are not required to purchase an RFMS e-filing package. We are offering the package as an opportunity to help you eliminate stress and remain compliant with changes in IRS regulations.

RFMS does not file for you. Our role is to guide you through the process.

If you choose to use our e-filing package, we will assist you with e-filing. RFMS is not a 3rd-party filer. When you file, you will use your accounts with the IRS/SSA, and we will assist you with the process. Any corrections, refiling, questions, etc., will not be responsibility of RFMS.

RFMS HR/AP is required.

For us to assist with 1099s, you must be using RFMS HR or AP. For W2s, you must be using RFMS HR. Payroll processed outside of RFMS is not eligible for these packages.

You will still need to distribute forms to your workers.

Regardless of whether you purchase one of our e-filing packages, you will still be required to print 1099s and W2s to distribute to your workers.

Get it while
you can!

Purchase by
January 15, 2024

Sign up early to save your spot!

The number of available packages is limited, and packages must be purchased by January 15, 2024.

You must have your BSO and IRIS/FIRE number ready prior to enrollment.

Contact your CSM to enroll.

