

How to Manually Enter Payer Data

10/03/2025 12:19 pm CDT

At the top-left of the **1099-X Plan Year** screen, you'll find the **Edit Payer Data** box. Clicking **Edit Payer** opens the **Payer Data** screen, where you can edit or update payer information.

Most fields will be pre-populated from the **Edit Plan/ Edit Company** screens, except for the **Payer TIN**.

Note: The **Payer TIN** is the taxpayer's identification number used for 1099/5498 distributions. It is generally different from the Employer Identification Number (**EIN**) used on Form 5500/SF filings.

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Company:	A. Demo Corp	ID: a.demo
Plan:	A. Demo 401(k) Plan	ID: a.demo plan
Checklist:	Non-Standardized 401(k) (Adoption Agreement Format) - POST	
Details:	EIN: 25-1533392 • PN: 008 • PYE: 12-31	

1099 Menu

- [Bring forward 2023 1099 Participants to 2024 for this plan only](#)
- [Bring forward 2023 1099 Participants to 2024 for all plans](#)

Edit Payer Data		Edit Payees	
1096/1099-R/945	Status	Update/Add/Change	Status
Edit Payer		Doe, John Add Payee	Payee Selection
Edit 945		Delete Payee	OK
Edit 945A		Select Payee	Select Payees
Edit 945X			
Edit Paid Preparers			
		Participant Count: 1	Selected Participant Count: 1

To update payer information:

- Enter the new data directly into the fields.
- Changes are saved automatically as entered.
- Click **Run Edit Checks** in the upper left-hand corner of the **Payer Data** screen to validate the data.
 - Fields with invalid data will be highlighted in **red** and will not be saved.
 - Potential errors will be highlighted in **yellow**.

[Return](#)
[Run Edit Checks](#)
[- Show individual results](#)

Edit payee:

Select a payee...

Add Payee

Selected payees: 1

Edit Check status: OK

Edit Payer NOT-OK

94S

94SA

94SX

94SV

Final

Final

Final

Final

Final Print

Copy B, C, 2 (Blank)

[Settings](#)

Form 1099-R - 2024

Company: **A. Demo Corp**

Plan: **A. Demo 401(k) Plan**

Checklist: **Volume Submitter 401(k) (Adoption Agreement Format)**

Payer Data

a: Enter 'Yes' if final return for Payer:

No ??

b: Type of filing:

Original ??

c: Responsible for 1099/5498 reporting:

Yes ??

d: Date last processed:

??

1a: Enter the Payer's taxpayer identification number:

??

1b: Enter the Payer's TIN type:

EIN ??

2a: Enter the first line of Payer name:

A. Demo 401(k) Plan ??

2b: Enter the second line of Payer name:

??

2c: Enter the trade name, if any

??

2d: Entity entered on second line is the paying agent:

No ??

2e: Payer is a domestic entity:

Yes ??

3: Enter the Payer contact name:

??

4: Enter the Payer address line 1:

123 Sample Street Name ??

5: Enter the Payer City:

Beverly Hills ??

6: Enter the Payer state:

California ??

7: Enter the Payer zip code:

90210 ??

8: Enter the Payer phone:

555-555-5555 ??

9: Enter the Payer contact email:

??

10: Enter the Payer contact fax:

555-555-5555 ??

11a: Require state name and amount in 1099:

No ??

11b: Require locality name and amount in 1099:

No ??

Note: To update default Company/Payer data, refer to the following article: [Edit Company](#).