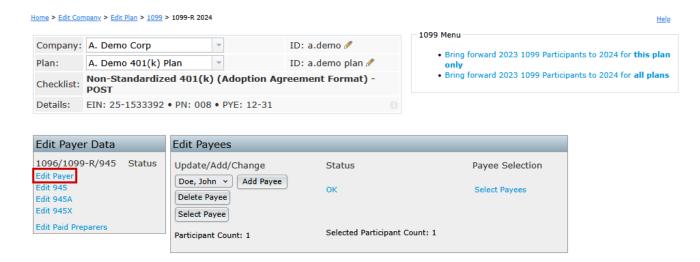
How to Manually Enter Payer Data

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.

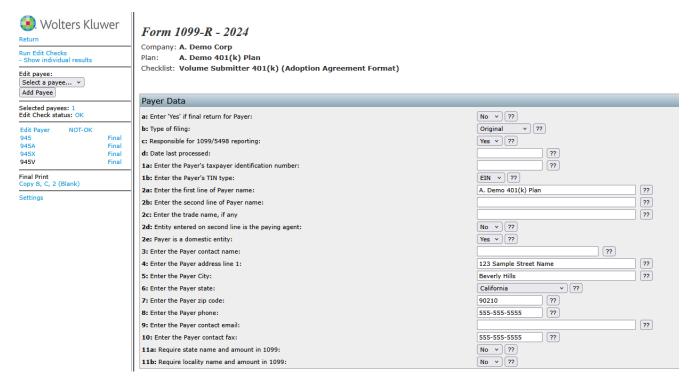
Most fields will be pre-populated from the Edit Plan/ Edit Company screens, except for the Payer TIN.

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.



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.



Note: To update default Company/Payer data, refer to the following article: Edit Company.