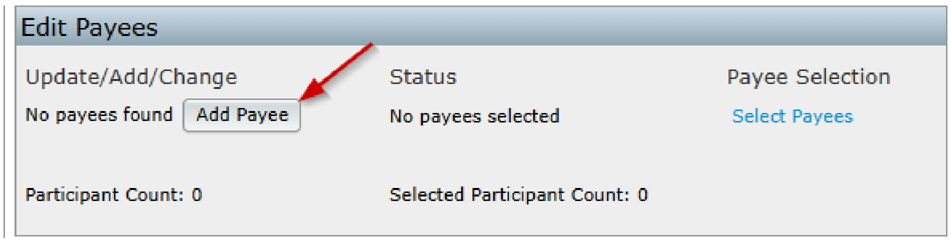
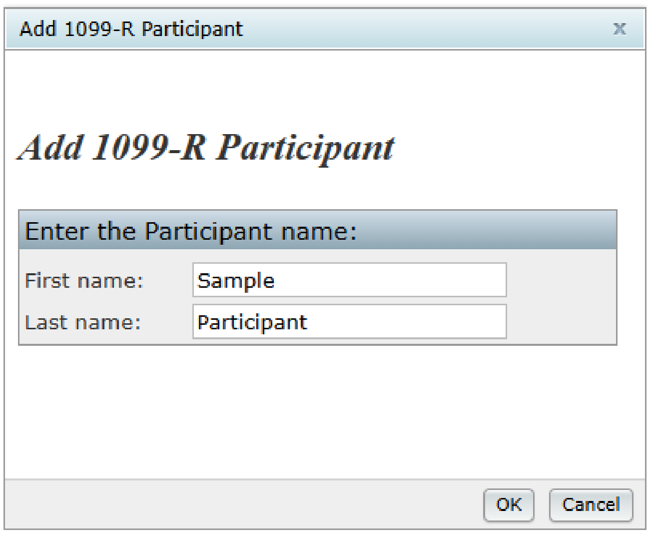
How to manually enter payee/participant data

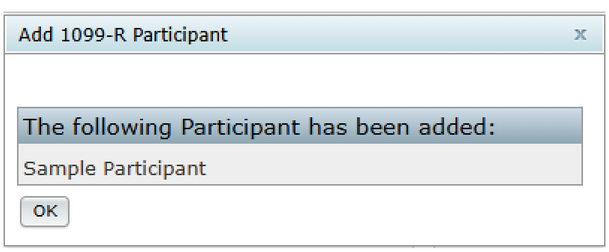
11/24/2025 4:07 pm CST

1. When the user is on the "1099-X - Year" screen, the user would click on "Add Payee" button within the "Edit Payees" box.

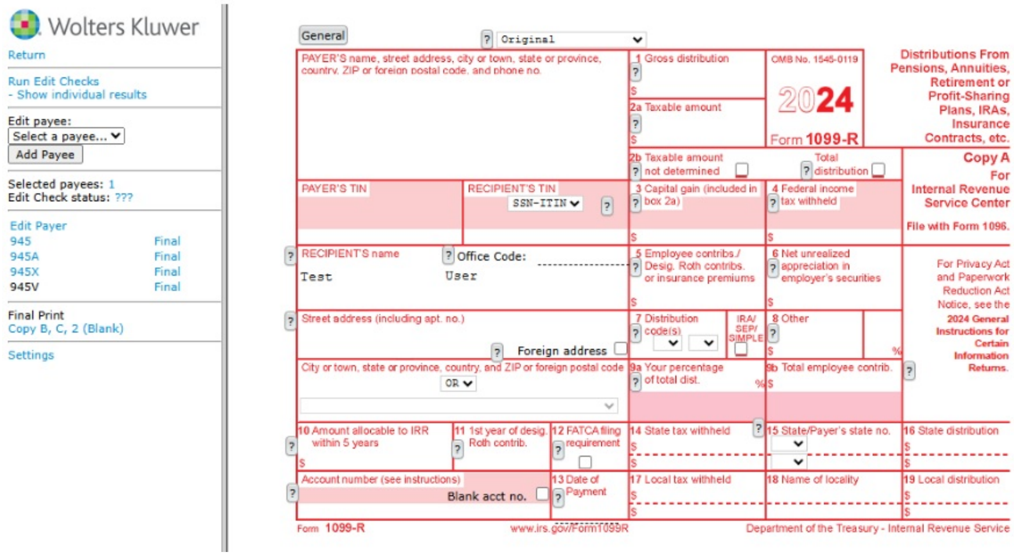


2. The user will receive a prompt to enter a Payee's First Name and Last Name. Then, the user will click "Add Participant", then "Click here to return" or "1099-X Year" within the breadcrumb trail.





3. This will direct the user to a draft Copy A for the user to complete. From this screen the user is able to run edit checks, add more Payees, go to the 945, 945-A, 945-X or even print non-Federal final copies.



Below the draft form, the user will have the option to add up to 12 distribution dates and amounts for the payee if those distributions have the same distribution code(s) as on the draft form. This is helpful for completing the Form 945. **Note:** If the payee received multiple distributions, but the distribution codes are not the same, the user will need to complete a 1099 record for each distribution type.

Distribution Date	Distribution Amount	Withheld Amount

The user should run edits checks once the form is complete. See Edit checking below.

Note: The Question Marks

?

on the draft screen are context-sensitive help buttons that reference the IRS instructions. The user should click on them for guidance.

Wolters Kluwer

Return

Run Edit Checks
- Show individual results

Edit payee:
Select a payee...
Add Payee

Selected payees: 1
Edit Check status: ???

Edit Payer	
945	Final
945A	Final
945X	Final
945V	Final

Final Print
Copy B, C, 2 (Blank)

Settings

General ? Original

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.

1 Gross distribution $

2a Taxable amount $

OMB No. 1545-0119

2024

Form 1099-R

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

2b Taxable amount not determined ☐ | Total distribution ☐

Copy A For Internal Revenue Service Center

File with Form 1096.

PAYER'S TIN

RECIPIENT'S TIN SSN-ITIN

3 Capital gain (included in box 2a) $

4 Federal income tax withheld $

RECIPIENT'S name: Test

Office Code: User

5 Employee contribs./ Desig. Roth contribs. or insurance premiums $

6 Net unrealized appreciation in employer's securities $

For Privacy Act and Paperwork Reduction Act Notice, see the **2024 General Instructions for Certain Information Returns.**

Street address (including apt. no.)

Foreign address ☐

7 Distribution code(s)

IRA/ SEP/ SIMPLE ☐

8 Other $ %

City or town, state or province, country, and ZIP or foreign postal code OR

9a Your percentage of total dist. %

9b Total employee contrib. $

10 Amount allocable to IRR within 5 years $

11 1st year of desig. Roth contrib.

12 FATCA filing requirement ☐

14 State tax withheld $ $

15 State/Payer's state no.

16 State distribution $ $

Account number (see instructions)

Blank acct no. ☐

13 Date of Payment

17 Local tax withheld $ $

18 Name of locality

19 Local distribution $ $

Form 1099-R www.irs.gov/Form1099R Department of the Treasury - Internal Revenue Service