

Corrections for batch submitted forms

01/30/2026 9:45 am CST

Correcting Payees in a Locked Batch (FTW Fulfillment Originals)

If the original records were processed through **FTW Fulfillment**, follow these steps to prepare a correction:

- **Access the FTW System**
 - Select the appropriate **Company/Plan**.
 - Click **1099** to choose the **Form Type** and **Year**, then click **OK**.
- **Navigate to the 1099 Module**
 - In the **Edit Payees** box, use the drop-down list to select the payee that needs correction.
- **Create a Correction**
 - On the left-hand side of the pane, click **Create Correction for Payee**.

The screenshot displays the Wolters Kluwer FTW Fulfillment system interface. On the left, a sidebar contains a 'Payee Locked: Any changes will not be saved' warning, a 'Return' button, a 'Run Edit Checks - Show individual results' button, and a 'ftwPro 1099Wiz Batch: 2750521' label. The 'Create correction for payee' button is highlighted in red and pointed to by a red arrow. The main area shows a 'General' tab with a dropdown menu set to 'Original'. Below this, a form contains the following information: 'PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.' followed by 'Example Company LLC', '123 Anywhere Street', 'Madison, WI 53701', and '555-555-5555'. At the bottom, there are fields for 'PAYER'S TIN' and 'RECIPIENT'S TIN' with a dropdown menu for 'SSN-ITIN' and a button for 'Create 1099 correction'.

- **Select Correction Type**
 - Under **Please select correction type**, choose **Error Type 1** or **Error Type 2**.
 - Click **Create Corrective Record** to finalize.

Corrective copy

First name: Example

Last name: Payee

ERROR TYPE 1: When the error on the original return is one of the following:

- Incorrect money amount(s), code, or checkbox
- Incorrect payee name
- Incorrect payee address
- Return was filed when one should not have been (enter zeroes for amounts)
- Incorrect code in the distribution code field
- Incorrect payee indicator

ERROR TYPE 2: When the error on the original return is one of the following:

- No payee TIN (SSN, ITIN, ATIN or EIN)
- Incorrect payee TIN
- Incorrect payee name and address

Note: If you need to correct more than one Error Type, select Error Type 2.

**** Please note that state corrections cannot be filed electronically through our system at this time.**

Please select correction type: 1 ▾

Create correction record

Cancel and return to previous page

- Enter Corrected Data
 - A new 1099 record will be created.
 - Enter the correct information for the payee.
- Go to ftwPro 1099Wiz.
 - When naming your batch, check the box in the upper right-hand corner labeled "Corrective batch?".
 - Only payees marked as corrections will be available for selection.

New Batch - 1099-R

Enter batch name: CorrectionBatch

Corrective batch?* ☒

Create new batch

* Corrective batch fulfillment includes ONLY corrections from previous ftwilliam.com fulfillment that were previously submitted via batch process.

* Corrective records can only be submitted via a corrective batch.

* Filing electronic state corrections is not supported.

* A corrective batch may only include either Type 1 or Type 2 correction records.

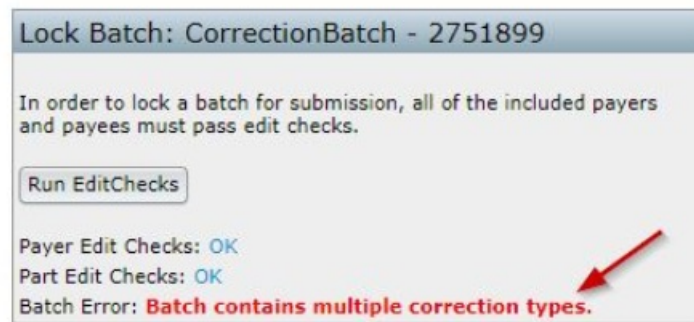
* Separate corrective batches will need to be created per correction type.

Please Note: *Only one correction type may be added to a batch. If both Type 1 and Type 2 corrections need to be submitted, each correction type will need to be added to separate Corrective Batches.*

Users will have to run the edit checks for the corrective batch before users can lock the batch and submit for fulfillment.

If correction types 1 and 2 are added to the same batch, the system will provide an error in place of the lock option. The

correction types will need to be separated to proceed.



ftwilliam.com does not offer a corrective service for state fulfillment.

Batch Locked for Batch Printing

- Unlock the batch.
- Follow the **IRS instructions** for corrections.
- **Note:** The correction process depends on whether the payee has a **Type 1** or **Type 2** error.

Batch Locked to Download a .txt FIRE File

- Unlock the batch.
- Remove the payee(s) that need correction.
- Follow the **IRS instructions**.
- **Important:**
 - If downloading a .txt file for FIRE, create a **new corrective batch** for the payee(s) needing corrections.
 - For **Type 2 errors**, you will need **two batches**:
 - One for the **corrective record**
 - One for the **new original record**
 - **After creating the corrective batch**, ensure you check the **"Corrective batch?"** box when naming the batch in **ftwPro 1099Wiz**.
 - Only payees marked as corrections will be available for selection.

NOTE:

- Selecting **"First Correction"** from the drop-down list indicates a **Type 1 error**.
 - Selecting **"Second Correction"** indicates a **Type 2 error**.
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