Rolling over data from a prior year

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A newer feature available for the 2014 and current 1099-Rs.

Similar to the 5500 Module, the 1099-R Module is now able to **"Bring forward [prior year] 1099 Participants for this plan only"**.

Master and Designated Admin Users also have the option to **"Bring forward [prior year] 1099 Participants for all plans"**.

The data that is pulled forward is **limited to basic Payee data, such as Payee Name, Address, Account Number and Distribution Code. No values will be brought forward as they are subject to change from year to year.**