


How to Manually Enter Payer Data

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At the top-left of the "1099-X Plan Year" screen is the "Edit Payer Data" box. By clicking on "Edit Payer", the user will be directed to the "Payer Data" screen where the user is able to edit/update payer data. Most information will be pre-populated from the "Select Plan" screen except for the payer TIN. **Note:** The Payer TIN is the taxpayer's identification number used to pay the 1099/5498 distribution, which is generally different from the Employer's Identification Number (EIN) used on the Form 5500/SF filing.

To update information, simply enter the data. The software will save any changes as entered. Click on "Run Edit Checks" in the upper left-hand side of the "Payer Data" screen to validate data. Invalid fields will highlight in red (will not save) and possible errors will be highlighted in yellow.

Note: To update Company/Payer data, see [Edit Company](#) above.



Edit Payer Data	
1096/1099-R/945	Status
Edit Payer	???
Edit 945	???
Edit 945A	???
Edit 945X	
Edit Paid Preparers	