

# How to Manually Enter Payer Data

12/09/2025 2:37 pm CST

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.

The screenshot shows the 1099-X Plan Year screen with the following details:

- Header:** Home > Edit Company > Edit Plan > 1099 > 1099-R 2024
- Right Panel (1099 Menu):**
  - Bring forward 2023 1099 Participants to 2024 for **this plan only**
  - Bring forward 2023 1099 Participants to 2024 for **all plans**
- Left Panel (Edit Payer Data):**
  - Company: A. Demo Corp
  - Plan: A. Demo 401(k) Plan
  - Checklist: Non-Standardized 401(k) (Adoption Agreement Format) - POST
  - Details: EIN: 25-1533392 • PN: 008 • PYE: 12-31
- Bottom Panel (Edit Payees):**
  - Update/Add/Change: Doe, John
  - Status: OK
  - Payee Selection: Select Payees
  - Buttons: Add Payee, Delete Payee, Select Payee
  - Participant Count: 1
  - Selected Participant Count: 1

## 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**.

[Return](#)
[Run Edit Checks](#)  
 - Show individual results

[Edit payee:](#)  
 Select a payee...  
[Add Payee](#)

 Selected payees: 1  
 Edit Check status: [OK](#)
[Edit Payer](#) NOT-OK  
 945 Final  
 945A Final  
 945X Final  
 945V Final

[Final Print](#)  
[Copy B, C, 2 \(Blank\)](#)
[Settings](#)

## Form 1099-R - 2024

 Company: **A. Demo Corp**

 Plan: **A. Demo 401(k) Plan**

 Checklist: **Volume Submitter 401(k) (Adoption Agreement Format)**

### Payer Data

<b>a:</b> Enter 'Yes' if final return for Payer:	<input type="radio"/> No <a href="#">??</a>	<input type="radio"/> Yes <a href="#">??</a>
<b>b:</b> Type of filing:	<input type="radio"/> Original <a href="#">??</a>	
<b>c:</b> Responsible for 1099/5498 reporting:	<input type="radio"/> Yes <a href="#">??</a>	
<b>d:</b> Date last processed:	<input type="text"/> <a href="#">??</a>	
<b>1a:</b> Enter the Payer's taxpayer identification number:	<input type="text"/> <a href="#">??</a>	
<b>1b:</b> Enter the Payer's TIN type:	<input type="radio"/> EIN <a href="#">??</a>	
<b>2a:</b> Enter the first line of Payer name:	<input type="text"/> <a href="#">??</a>	
<b>2b:</b> Enter the second line of Payer name:	<input type="text"/> <a href="#">??</a>	
<b>2c:</b> Enter the trade name, if any	<input type="text"/> <a href="#">??</a>	
<b>2d:</b> Entity entered on second line is the paying agent:	<input type="radio"/> No <a href="#">??</a>	
<b>2e:</b> Payer is a domestic entity:	<input type="radio"/> Yes <a href="#">??</a>	
<b>3:</b> Enter the Payer contact name:	<input type="text"/> <a href="#">??</a>	
<b>4:</b> Enter the Payer address line 1:	<input type="text"/> 123 Sample Street Name <a href="#">??</a>	
<b>5:</b> Enter the Payer City:	<input type="text"/> Beverly Hills <a href="#">??</a>	
<b>6:</b> Enter the Payer state:	<input type="radio"/> California <a href="#">??</a>	
<b>7:</b> Enter the Payer zip code:	<input type="text"/> 90210 <a href="#">??</a>	
<b>8:</b> Enter the Payer phone:	<input type="text"/> 555-555-5555 <a href="#">??</a>	
<b>9:</b> Enter the Payer contact email:	<input type="text"/> <a href="#">??</a>	
<b>10:</b> Enter the Payer contact fax:	<input type="text"/> 555-555-5555 <a href="#">??</a>	
<b>11a:</b> Require state name and amount in 1099:	<input type="radio"/> No <a href="#">??</a>	
<b>11b:</b> Require locality name and amount in 1099:	<input type="radio"/> No <a href="#">??</a>	

**Note:** To update default Company/Payer data, refer to the following article: [Edit Company](#).