

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.

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[Help](#)

Company:	A. Demo Corp	ID: a.demo
Plan:	A. Demo 401(k) Plan	ID: a.demo plan
Checklist:	Non-Standardized 401(k) (Adoption Agreement Format) - POST	
Details:	EIN: 25-1533392 • PN: 008 • PYE: 12-31	

1099 Menu

- [Bring forward 2023 1099 Participants to 2024 for this plan only](#)
- [Bring forward 2023 1099 Participants to 2024 for all plans](#)

Edit Payer Data		Edit Payees	
1096/1099-R/945	Status	Update/Add/Change	Status
Edit Payer		Doe, John	OK
Edit 945		Add Payee	
Edit 945A		Delete Payee	
Edit 945X		Select Payee	
Edit Paid Preparers			
		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:

Selected payees: 1

Edit Check status: OK

[Edit Payer](#) NOT-OK

94S

94SA

94SX

94SV

Final

Final

Final

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

a: Enter 'Yes' if final return for Payer:

b: Type of filing:

c: Responsible for 1099/5498 reporting:

d: Date last processed:

1a: Enter the Payer's taxpayer identification number:

1b: Enter the Payer's TIN type:

2a: Enter the first line of Payer name:

2b: Enter the second line of Payer name:

2c: Enter the trade name, if any

2d: Entity entered on second line is the paying agent:

2e: Payer is a domestic entity:

3: Enter the Payer contact name:

4: Enter the Payer address line 1:

5: Enter the Payer City:

6: Enter the Payer state:

7: Enter the Payer zip code:

8: Enter the Payer phone:

9: Enter the Payer contact email:

10: Enter the Payer contact fax:

11a: Require state name and amount in 1099:

11b: Require locality name and amount in 1099:

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