How to Batch Import Payer Taxpayer Identification Numbers (TINs)

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For a large number of Payers, Payer TINs and related data can be uploaded in batch mode. Companies and plans must already be set up in the system before proceeding.

NOTE: New users without plans set up can send a list of client EINs to **support@company.com**. Prior year **Form 5500/SF** data from the **Department of Labor (DOL)** can be imported, regardless of the previous vendor (**55AutoFill**). This service will add companies and any filed 5500 plans to the account. To use this free service, email a spreadsheet with all company EINs and include the ftwilliam.com **Company Code**.

Steps to Download and Upload Payer TINs and Data

• Step 1: Access the Upload/Download Center Go to Upload/Download Center in the Batch Features box on the 1099-X - Year screen.

Batch features	
Batch features	
ftwPro 1099Wiz	
ftwPro 945Wiz	
Upload/Download Center	
2024 1099-R Batches including payees from this plan:	
BatchName - BatchID	

• Step 2: Download Payer Data

Click **Download Payer Data** under **Upload/Download Payer Data** and save the **.csv** file to the hard drive. (*Tip: Right-click and select "Save As" or "Save Target As" for a quicker save.*)

Upload/Download Center - 1099-R

Upload/Download Center

Upload Payee Data Upload 1099 Data Generic XML File Upload Download 1099 Data

Upload/Download Payer Data Download Payer Data

Upload Payer Data

• Step 3: Open and Review the Spreadsheet

Open the spreadsheet, which will list all plans set up in ftwilliam.com.

- The first two columns are company and plan specific. **DO NOT** alter these columns.
- The remaining columns include:
 - PlanName, TrustEIN, PayerNameLine1, PayerAddress, PayerCity, PayerState, PayerZip, PayerPhone, PayerEmail, etc.

• Step 4: Update the Data

Update the **TrustEIN**, **Responsible Party**, and **Company Data** as needed. Plans that will not require **1099/5498s** can be removed, but new plans **cannot** be added through this upload. Missing plans must be added manually.

• Step 5: Upload the Updated File

Once updates are complete, save the file and return to the **Upload/Download Center** and select **Upload Payer Data**.

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• Step 6: Select and Submit the File

On the **Upload Payer Data** screen, browse for the saved file.

- If needed, enter the Number of Rows to Ignore Before Header Row (defaults to 0).
- **Do not** delete column headers.

• Step 7: Complete the Upload

Click **Submit** to upload the file. The total number of Payers added will be displayed.