How to Batch Import Payer Taxpayer Identification Numbers (TINs)

11/24/2025 11:36 am CST

For organizations managing 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@ftwilliam.com**.
> Prior year Form 5500/SF data from the Department of Labor (**DOL**) can be imported—regardless of the previous vendor (e.g., **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**.
> A subscription to the **5500 module is not required** to use this feature. It is intended solely to help establish companies, plans, and any applicable available data.

Steps to Download and Upload Payer TINs and Data

Step 1: Access the Upload/Download Center:

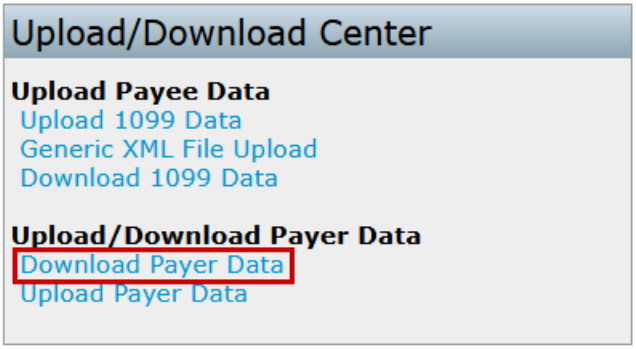
- Navigate to the **Upload/Download Center** located in the **Batch Features** box on the **1099-X - Year** screen.



Step 2: Download Payer Data:

- Click **Download Payer Data** under **Upload/Download Payer Data** and save the .csv file to your hard drive.

Upload/Download Center - 1099-R



Step 3: Open and Review the Spreadsheet

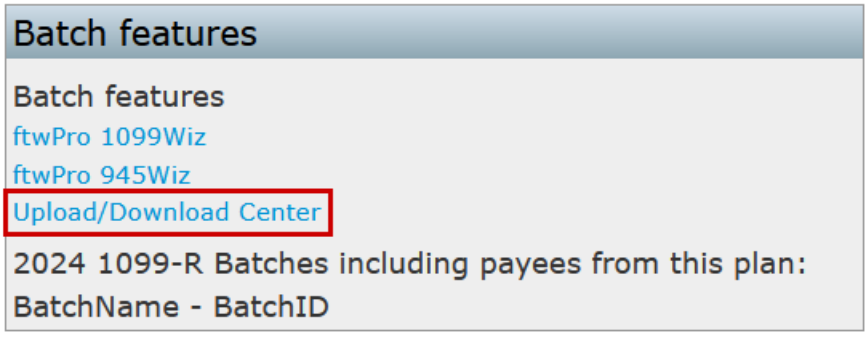
- Open the downloaded spreadsheet, which lists all the plans available within the company code.
    - The first two columns are **company and plan specific**—do not alter these.

Step 4: Update the Data:

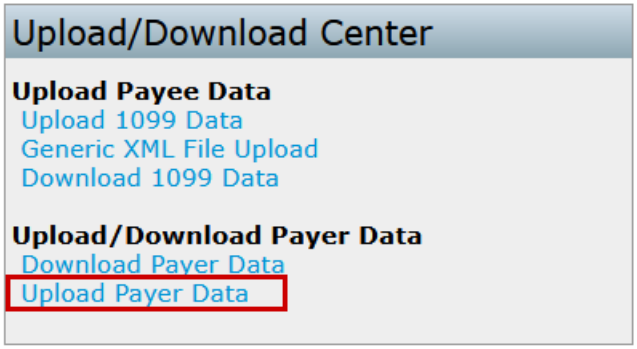
- Update the **TrustEIN, Responsible Party,** and **Company Data** as needed.
    - Plans that will not require **1099/5498s** can be removed, but it is not mandatory to do so. Any fields that are not altered will be silently skipped upon upload.
    - New plans **cannot** be added through this upload. Missing plans must be added manually as outlined in the following article: How to Manually Enter Payer Data.

Step 5: Upload the Updated File:

- Save the updated file and return to the **Upload/Download Center**.
- Select **Upload Payer Data**.



Upload/Download Center - 1099-R



Step 6: Select and Submit the File

- On the **Upload Payer Data** screen:
  - Browse for the saved file.
  - If notes were added above the header row, enter the **Number of Rows to Ignore Before Header Row**. This will default to zero, as the Header Row will typically be the first row on the user's spreadsheet. **Do not** delete the column headers.

Step 7: Complete the Upload

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