## How to manually enter payee/participant data

09/12/2024 1:06 pm CDT

1. When the user is on the "1099-X - Year" screen, the user would click on "Add Payee" button within the "Edit Payees" box.



2. The user will receive a prompt to enter a Payee's First Name and Last Name. Then, the user will click "Add Participant", then "Click here to return" or "1099-X Year" within the breadcrumb trail.

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Home > Edit Company > Edit Plan > 1099 > 1099-R 2014 > Add Participant	Home > Edit Company > Edit Plan > 1099 > 1099-R 2014 > Add Status		
Add Participant	Add Particpant		
Enter the Participant name:			
First name: Sample	The following Participant has been added:		
Last name: Participant	Sample Participant		
Add Participant	Click here to return Caution: Do not press the "Back" button on the browser.		

3. This will direct the user to a draft Copy A for the user to complete. From this screen the user is able to run edit checks, add more Payees, go to the 945, 945-A, 945-X or even print non-Federal final copies.

Wolters Kluwer	General 9898 ? Original			
Return Run Edit Checks	PAYER'S name, street address, city or town, state or province, country, and ZiP or foreign postal code 123 Sample 1099 Plan	1 Gross distribution	CMB No. 1548-0119 2014 Persions, Annuits Relinement Port 1090-R Contracts, e	Distributions From Pensions, Annuities, Retirement or
Edit payee: Select a payee	333 East Michigan Avenue Suite 23231 Long Beach, CA 44444	2a Taxable amount ? \$		Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
Add Payee		2b Taxable amount not determined	Total	Copy A
Selected payees: 1 Edit Check status: ???	PAYER'S tederal identification number SSN-ITIN • ?	3 Capital gain (included in box 2a)	4 Federal income tax withheid	Internal Revenue Service Center
Edit Payer 777 945 772 Final		\$	\$	File with Form 1096.
945A 222 Final 945X Final 945V Final	RECIPIENT'S name     POffice Code: Sample     Participant	<ul> <li>5 Employee contributions</li> <li>/Designated Roth contributions or insurance premiums</li> </ul>	<ul> <li>Net unrealized appreciation in employer's securities</li> </ul>	For Privacy Act and Paperwork Reduction Act
Final Print Copy B, C, 2 (Blank) Copy D Payer (Blank)	Street address (including apt. no.)	7 Distribution BAV 2 code(s) SHAPLT 1 x x	8 Other 2014 General Instructions for Certain	
Settings	City, state, and ZIP code	Re Your percentage of total detribution e	96 Tobilemployee contribution \$	Returns.
	10 Amount allocable to IRR 11 1st year of desig. Roth control within 5 years 2	12 State tax withheld \$	13 State/Payer's state no	14 State distribution
	Account number (see instructions) [2] Blank account number	15 Local tax = ithheid \$	16 Name of locality	17 Local distribution \$
	Form 1099-R Cat No. 144300 www.th.gov	S tam1099	Department of the Treasury	- Internal Personale Service

Below the draft form, the user will have the option to add up to 12 distribution dates and amounts for the payee if those distributions have the same distribution code(s) as on the draft form. This is helpful for completing the Form

945. **Note:** If the payee received multiple distributions, but the distribution codes are not the same, the user will need to complete a 1099 record for each distribution type.

Distribution Date	Distribution Amount	Withheld Amount		

The user should run edits checks once the form is complete. See Edit checking below.

Note: The Question Marks

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on the draft screen are context-sensitive help buttons that reference the IRS instructions. The user should click on them for guidance.