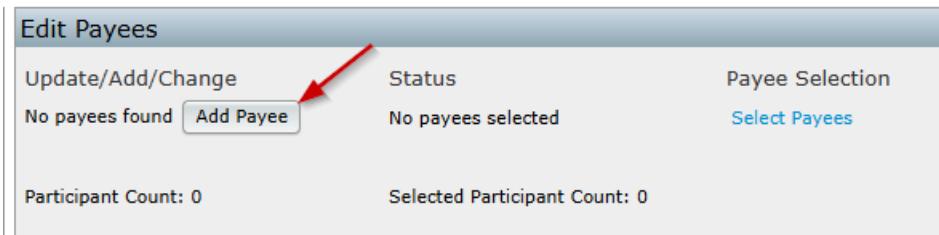


How to manually enter payee/participant data

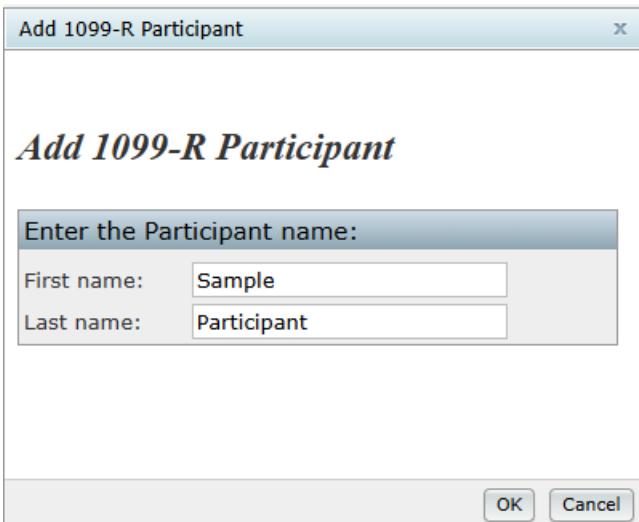
11/24/2025 4:07 pm CST

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

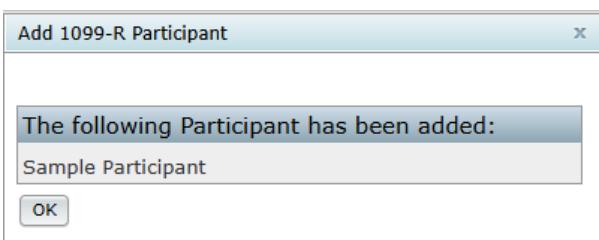


The screenshot shows the 'Edit Payees' interface. At the top left is a 'Update/Add/Change' button. Below it, a message says 'No payees found' and there is a prominent 'Add Payee' button with a red arrow pointing to it. To the right, a 'Status' section shows 'No payees selected'. On the far right, a 'Payee Selection' section has a 'Select Payees' button. At the bottom, it shows 'Participant Count: 0' and 'Selected Participant Count: 0'.

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.



The screenshot shows the 'Add 1099-R Participant' dialog. It has a title bar 'Add 1099-R Participant' with a close button. The main area is titled 'Add 1099-R Participant'. Below it, a label 'Enter the Participant name:' is followed by two input fields: 'First name: Sample' and 'Last name: Participant'. At the bottom are 'OK' and 'Cancel' buttons.



The screenshot shows the 'Add 1099-R Participant' dialog again. It displays a message 'The following Participant has been added:' followed by 'Sample Participant'. At the bottom is an 'OK' button.

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.

Return
Run Edit Checks
- Show individual results
Edit payee:
Select a payee... <input type="button"/>
Add Payee <input type="button"/>
Selected payees: 1
Edit Check status: ???
Edit Payer
945 Final
945A Final
945X Final
945V Final

Final Print
Copy B, C, 2 (Blank)

Settings

General		Original	?
PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.		1 Gross distribution ? \$	OMB No. 1545-0119
		2a Taxable amount ? \$	2024
		Form 1099-R	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
		2b Taxable amount ? not determined <input type="checkbox"/> Total <input type="checkbox"/> distribution <input type="checkbox"/>	Copy A For Internal Revenue Service Center
PAYER'S TIN		3 Capital gain (included in box 2a)	File with Form 1096.
RECIPIENT'S TIN SSN-ITIN <input type="button"/>		4 Federal income tax withheld ? \$	For Privacy Act and Paperwork Reduction Act Notice, see the 2024 General Instructions for Certain Information Returns.
RECIPIENT'S name Test		5 Employee contribs/ Desig. Roth contribs, or insurance premiums ? \$	
Office Code: <input type="button"/>		6 Net unrealized appreciation in employer's securities ? \$	
Street address (including apt. no.) <input type="button"/>		7 Distribution code(s) <input type="button"/> IRA/ SEP/ SIMPLE <input type="checkbox"/> 8 Other ? \$	
City or town, state or province, country, and ZIP or foreign postal code <input type="button"/>		9a Your percentage of total dist. <input type="checkbox"/> 9b Total employee contrib. ? % \$	
10 Amount allocable to IRR within 5 years ? \$		11 1st year of desig. Roth contrib. ? <input type="checkbox"/> 12 FATCA filing requirement ? <input type="checkbox"/>	14 State tax withheld ? \$
Account number (see instructions) Blank acct no. <input type="checkbox"/>		15 State/Payer's state no. ? <input type="button"/>	16 State distribution ? \$
13 Date of Payment Blank		17 Local tax withheld ? \$	18 Name of locality ? <input type="button"/>
			19 Local distribution ? \$
Form 1099-R www.irs.gov/Form1099R Department of the Treasury - Internal Revenue 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



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

Return	
Run Edit Checks	
- Show individual results	
Edit payee:	
Select a payee... <input type="button"/>	
<input type="button"/> Add Payee	
Selected payees: 1	
Edit Check status: ???	
Edit Payer	
945	Final
945A	Final
945X	Final
945V	Final
Final Print	
Copy B, C, 2 (Blank)	
Settings	

General		Original	2024	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.		Gross distribution ? \$? \$? \$? \$? \$? \$	OMB No. 1545-0119	Form 1099-R
PAYER'S TIN		2a Taxable amount ? \$? \$? \$	2b Taxable amount ? not determined <input type="checkbox"/> Total distribution ? \$	Copy A For Internal Revenue Service Center
RECIPIENT'S TIN SSN-ITIN <input type="button"/>		3 Capital gain (Included in box 2a) ? \$	4 Federal income tax withheld ? \$	File with Form 1096.
RECIPIENT'S name Test User		5 Employee contribs./ Desig. Roth contribs. or insurance premiums ? \$	6 Net unrealized appreciation in employer's securities ? \$	For Privacy Act and Paperwork Reduction Act Notice, see the 2024 General Instructions for Certain Information Returns.
Street address (including apt. no.) <input type="button"/> Foreign address <input type="checkbox"/>		7 Distribution code(s) ? \$	8 Other IRA/ DEFER/ SIMPLE ? \$	
City or town, state or province, country, and ZIP or foreign postal code OR <input type="button"/>		9a Your percentage of total dist. ? %	9b Total employee contrib. ? \$	
10 Amount allocable to IRR within 5 years ? \$	11 1st year of desig. ? Roth contrib. ? \$	12 FATCA filing requirement ? \$	14 State tax withheld ? \$	15 State/Payer's state no. ? \$
Account number (see instructions) Blank acct no. <input type="checkbox"/>		13 Date of Payment ? \$	17 Local tax withheld ? \$	18 Name of locality ? \$
				19 Local distribution ? \$
Form 1099-R www.irs.gov/form1099R Department of the Treasury - Internal Revenue Service				