

# Edit Checking

01/03/2025 12:56 pm CST

After entering or uploading Payee data, running edit checks ensures data integrity by identifying errors and warnings. Users can perform edit checks for multiple Payees or an individual Payees by follow the steps below:

## Running Edit Checks for Multiple Payees

- **Select Payees to Edit:**
  - Click **Select Payees** in the **Edit Payees** box.
  - Check the box next to each Payee to include in the edit check.
  - Click **Update** to confirm the selection. The number of selected Payees will display in the **Edit Payees** box.

**Note:** The Selected Participants will automatically default to all payees available unless the plan has been added to a batch. Therefore, the count from **Selected Participant Count** and **Participant Counts** may vary.

The screenshot shows the 'Edit Payees' interface. At the top, there are fields for Company (A.Demo), Plan (A.Demo), and Checklist (Non-Standardized 401(k) (Adoption Agreement Format) - POST). Below this is the 'Edit Payees' section with a table of payees. A red box highlights the 'Select Payees' dialog box, which is titled 'Select 1099-R Payees/Participants'. This dialog has a table with columns 'Selected', 'Correction IND', and 'Name'. Two payees are listed: 'Jones, John' and 'Smith, Bailey', both with 'Original' correction indicators and checked in the 'Selected' column. An 'Update' button is at the bottom of the dialog.

- **View Errors for Selected Payees:**
  - Click "???" or "NOT-OK" in the "Status" column.
  - All errors for the selected Payees will be displayed in a list.

The screenshot shows the 'Edit Payees' interface. The 'Edit Payees' section contains a table with columns 'Update/Add/Change', 'Status', and 'Payee Selection'. The 'Status' column for 'Jones, John' shows '???' with a red arrow pointing to it. Below the table, the 'Selected Participant Count: 2' is highlighted with a red box. A '1099 Menu' is visible on the right side of the screen.

**Note:** If errors are present, selecting the **Edit** link next to the payees name will open the payee's specific 1099 for editing.

## Edit Checks - 1099-R - 2024

Company: **A.Demo**

Plan: **A.Demo**

Year: **2024**

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\* Notice: Edit checks will only be run on selected payees \*

Jones, John [Edit](#)

Edit Test FW-15:

--> **Error:** Cannot use current distributions codes together.

**Status: NOT-OK**

### Running Edit Checks for a Single Payee

- **Select an Individual Payee:**
  - Choose the desired Payee from the dropdown menu in the **Edit Payees** box.
  - Click **Select Payee** to open the draft 1099-R for that Payee.

Edit Payees		
Update/Add/Change	Status	Payee Selection
Jones, John <input type="button" value="Add Payee"/>	???	Select Payees
<input type="button" value="Delete Payee"/>		
<input type="button" value="Select Payee"/> 		
Participant Count: 2	Selected Participant Count: 2	

- **Run the Edit Check:**
  - Click "**Run Edit Checks**" on the draft 1099.
  - Any questions on the form that fail the edit check will be highlighted in yellow.
- **Review Issues:**
  - Double-click a yellow-highlighted box to view the reason for the edit check.

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Return

**Run Edit Checks**

Show individual results

Edit payee:  
Select a payee...  
Add Payee

Selected payees: 2  
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.  
A.Demo  
123 anywhere  
City Name, CA 35004  
555-555-5555

1 Gross distribution \$ 10101.00  
2a Taxable amount \$ 10101.00  
2b Taxable amount not determined Total distribution

OMB No. 1545-0119  
**2024**  
Form **1099-R**

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.  
**Copy A**  
For Internal Revenue Service Center  
File with Form 1096.  
For Privacy Act and Paperwork Reduction Act Notice, see the 2024 General Instructions for Certain Information Returns.

PAYER'S TIN 25-1533849  
RECIPIENT'S name John  
The Trust of the Hobart  
Street address (including apt. no.) 123 Valley Lane  
City or town, state or province, country, and ZIP or foreign postal code Hobart WI 54155

3 Capital gain (included in box 2a) \$  
4 Federal income tax withheld \$ 1010.10  
5 Employee contribs./ Desig. Roth contribs. or insurance premiums \$  
6 Net unrealized appreciation in employer's securities \$  
7 Distribution codes (s)  IRA/SEP/SIMPLE   
8 Other %  
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   
13 Date of Payment  
14 State tax withheld \$  
15 State/Payer's state no. WI  
16 State distribution \$  
17 Local tax withheld \$  
18 Name of locality  
19 Local distribution \$

Account number (see instructions) 461993225-449098  
Blank acct no.

Form 1099-R www.irs.gov/Form1099R Department of the Treasury - Internal Revenue Service

**Edit Check**  
Edit Test FW-15:  
--> Error: Cannot use current distributions codes together.

## Understanding Edit Check Results

Edit checks are split into errors and warnings:

- **Errors:** Errors must be resolved before locking a batch. For example, a missing SSN for a Payee will trigger an error, preventing batch locking until corrected.
- **Warnings:** Warnings will not prevent batch locking but should still be reviewed and addressed as needed.

Once the data has been entered and the edit checks have been run users are ready to **print** and/or create **batches**.