Edit Checking

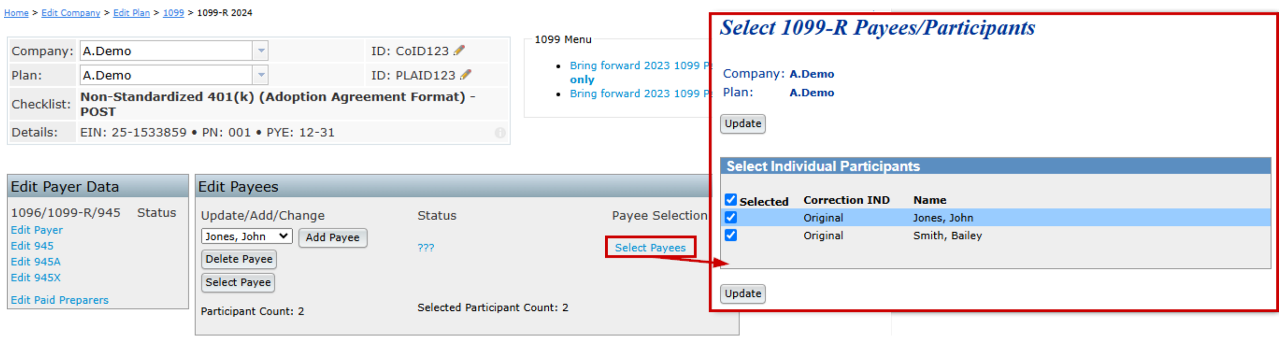
01/03/2025 12:56 pm CST

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:

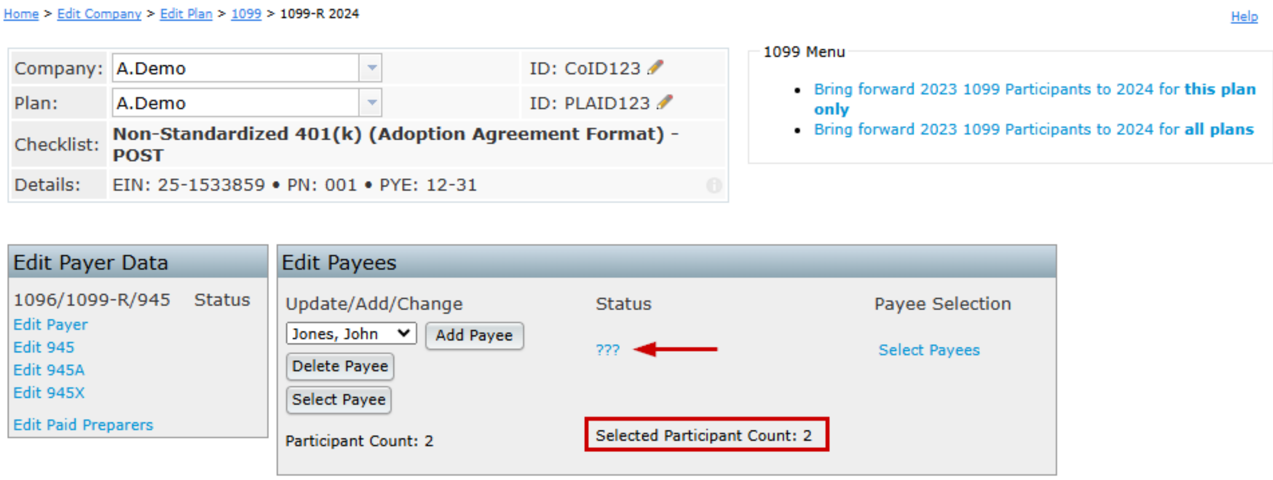
Running Edit Checks for Multiple Payees

- **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.

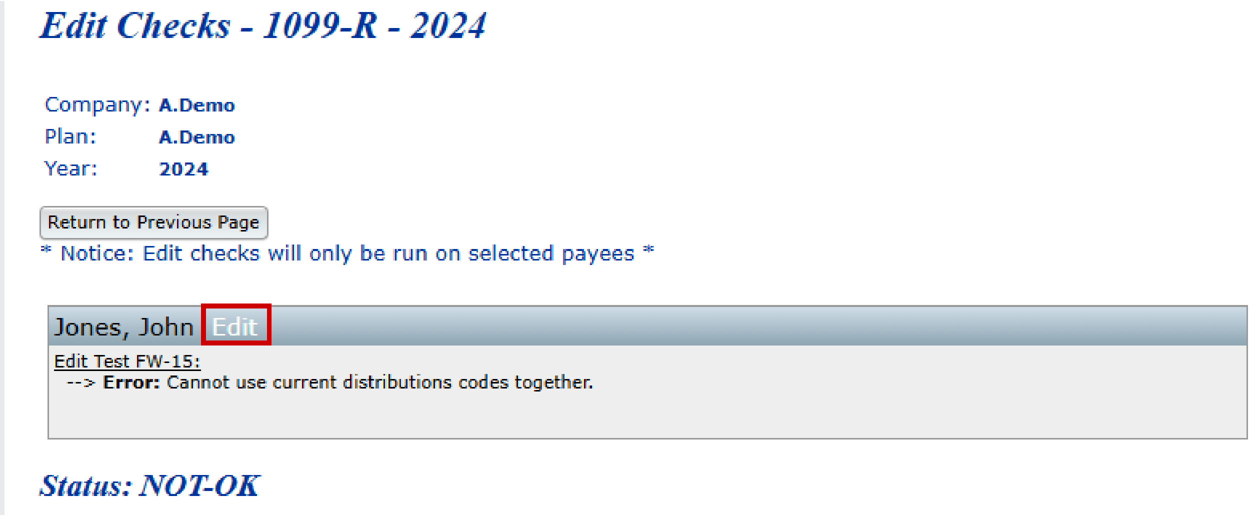
> **Note**: The Selected Participants will automatically default to all payees available unless the plan has been added to a batch. Therefore, the count from **Selected Participant Coun**t and **Participant Counts** may vary.



- **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.

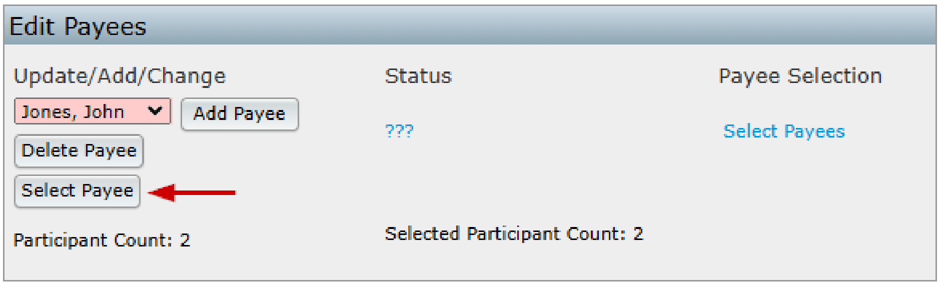


> **Note:** If errors are present, selecting the **Edit** link next to the payees name will open the payee's specific 1099 for editing.



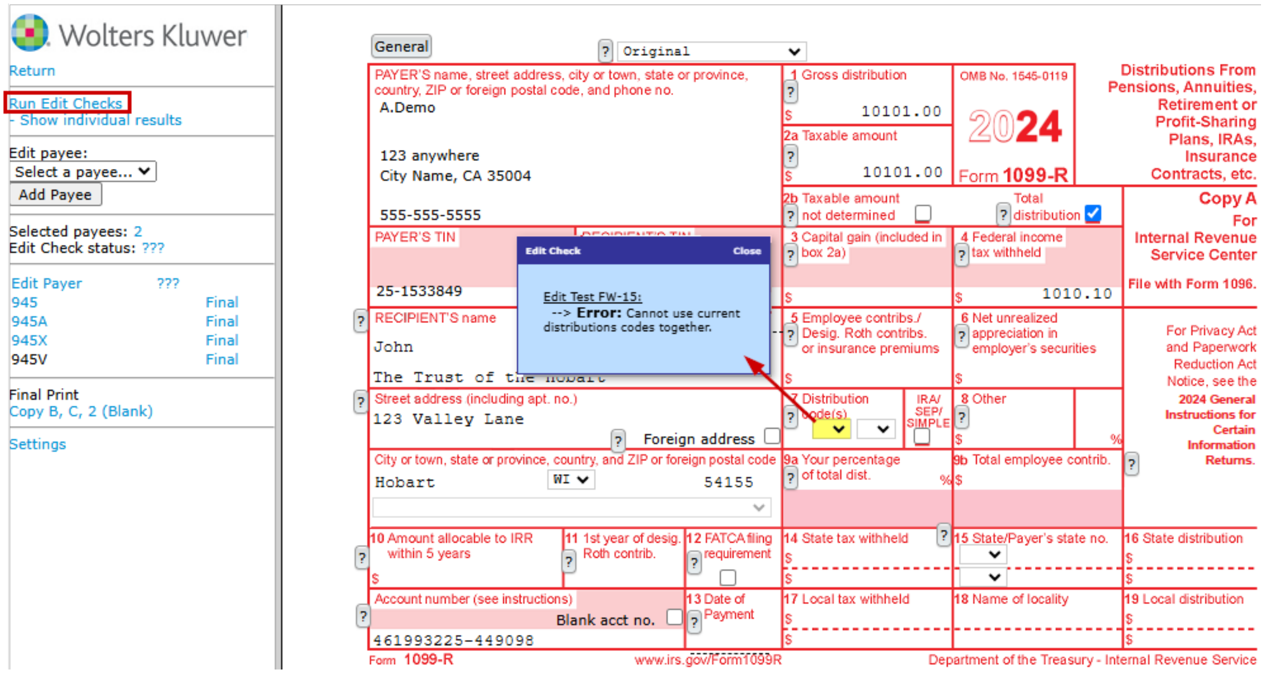
Running Edit Checks for a Single Payee

- **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.



- **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.



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.