

Preparing a 945 batch - ftwPro 945Wiz

11/24/2025 10:52 am CST

To prepare Form 945, click on the "Edit 945" link on the left of the screen; this will open the form to allow you to make any required adjustments. You can also add a Paid Preparer, if applicable, by selecting the preparer from the "Add Paid Preparer" drop-down box. To pull data from your already completed 1099s or 5498s, click on "Update Line 1 with Payee total W/H (Sel)" or "All". The first option will bring forward data just from payees that are marked as "Selected"; the second option will bring forward data for all payees under the same plan (i.e. withholding on 1099-R and 1099-Misc).

To learn more about completing Line 1, refer to the Form 945 Instructions for [Line 1](#).

The screenshot shows the top section of the Form 945 interface. It includes a checkbox for "If you don't have to file returns in the future, check here" and a button labeled "Update Line 1 with Payee total W/H (Sel)". A red arrow points to this button. Below it, there is a button labeled "(All)".

Similarly, users can click on the button above line 7 to autofill the monthly deposits table (only if monthly deposits is selected), or users can click on the button within the 945-A to autofill data entered for semi-weekly deposits.

Once your Form 945 is complete users can run edit checks to validate the data. Click on "Run Edit Checks" on the top left-hand side of the screen; any errors will be highlighted in yellow and users can double-click on the yellow area to see the reason for the edit check.

Note: Forms 945A and 945X can be prepared in a similar manner to the above.

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Note: Users are responsible for paper filing the Form 945s; it is not included in the [Fulfillment Services](#) offered by ftwilliam.com.

The 'ftwPro 945Wiz' link, located within the "Batch features" box, enables users to print all Form 945s in a single .pdf file.

Print Menu		
Print Options TIN Masking		
IRS Copies	Other Copies	Reports
1096 Single I	Copy B, C, 2 (Blank)	Fed Tax Summary (Sel) (All)
Copy A 2-up I	Recipient Instructions	State Tax Summary (Sel) (All)
945 I	Copy 1 State (Blank)	Combined Fed State Tax Summary (Sel) (All)
945-A I		Detail List (Sel) (All)
945-X I	Paper Needs	Payer Copies (includes background image)
945-V I	Nelco Solutions	1096
		Copy A

Batch features

Batch features

ftwPro 1099Wiz

ftwPro 945Wiz

Upload/Download Center

2024 1099-R Batches including payees from this plan:

BatchName - BatchID

TestBatch1 - 51669947

Click the "Select Payers" link from the "ftwPro 945 Batch - Year" page, then place a check mark next to each of the plans the user wants to include.

ftwPro 945 Batch - 2024

ftwPro 945 Batch
Select
[Select Payers](#)
Print
[Print 945](#) | [Print 945-A](#) | [Print 945-X](#) | [Print 945-V](#)

If users want to include every plan, place a check mark next to the "Selected" box at the top of the column, as shown in the screen shot below. Next, click "Update" and users will be taken back to the "ftwPro 945 Batch - Year" page. Click on the "Print 945" link to generate a pdf file for all the Payers users have selected.

Select 1099-R Payees/Participants

Select Payers	
BATCH MODE	
Note: Only selects 1099-R Payers where 'Edit Payer' item c is 'Yes' (Responsible for 1099 Filing)	
<input type="checkbox"/> Selected	Name
<input checked="" type="checkbox"/>	Test Plan
<input type="checkbox"/>	