

Preparing a batch - ftwPro 1099Wiz

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To create a batch for fulfillment, printing or FIRE File Download, users will need to follow these steps:

1. **Create a new batch.** Click [Here](#) to learn more about preparing corrective batches.
2. **Select Payers.** Payers/Plans will be listed on the next screen "Select 1099-R Payees/Participants". To select a payer, users need to select at least one payee for that payer by clicking on "Select Payees" along the right-hand side of the "Select 1099-R Payees/Participants" page.

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A screen will open where users can select all or a portion of the payees for that plan/payer. Click "Update" to save the selection and close the window.

Once selected, the number of payees selected will appear along the left-hand side of the "Select 1099-R Payees/Participants" page.

Note that users also have options to "Select All Unselected" and "Unselect All Selected" at the top-right side of the "Select 1099-R Payees/Participants" page.

3. **Lock the batch.**

Users can lock a batch by clicking on the link "locked" in the statement "Batch must be locked before fulfillment options available" below "Fulfillment Service" or by clicking on the lock icon on the "Show Batches" page for the particular batch.

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In order to lock a batch for submission, all of the included payers and payees must pass edit checks. If users have not yet passed all edit checks, a button will be displayed to "Run Edit Checks". If users pass all error checking, users will be given the option to lock the batch and receive the warning "Are you sure you want to lock this batch? Once a batch is locked participant information cannot be changed."

4. **Fulfillment, Printing and [FIRE File Download](#)**, if applicable, options will now be available on the batch menu screen as well as options to print reports of payees/payers in the batch.

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