## **Corrections for batch submitted forms**

05/15/2025 8:55 am CDT

## • Corrections for payees in a locked batch if:

• Originals done via ftw fulfillment

To prepare a correction in the ftw system, users would select the company/plan in the system, click on "1099" to select the Form Type and Year before clicking on "OK". Users will be directed to the 1099 Module where the user would select the payee from the drop-down list within the "Edit Payees" box to be corrected. On the left-hand side of the pane, users would click on "Create correction for payee". For the "Please select correction type:", select Error Type 1 or 2 and click on "Create corrective record".

General	? Original
PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and phone no.	
Example Company L	LLC
123 Anywhere Street Madison, WI 53701	
555-555-5555	
PAYER'S TIN	
	General PAYER'S name, street a country, ZIP or foreign p Example Company I 123 Anywhere Street Madison, WI 53701 S55-555-5555 PAYER'S TIN

## Create participant correction - 1099-R - 2022

original return is one of the following: r checkbox
ot have been (enter zeroes for amounts) de field
original return is one of the following: IN)
one Error Type, select Error Type 2.
ns cannot be filed electronically
1 ¥

A new 1099 record will be created in which the user can enter the correct data for the payee. After the payee has been corrected, then the user can create the corrective batch by going to the "ftwPro 1099Wiz". Make sure to check the box in the upper right-hand corner when naming your batch that it is a "Corrective batch?\*". Users will only be able to select those payees that are corrections.

lome > Edit Company > Edit Plan > 1099 > 1099-R 2022 > Shou	<u>v Batches - 1099-R - 2022</u> > ftwPro 1099Wiz - New batch
New Batch - 1099-R - 2022	
New Batch - 1099-R	
Enter batch name: CorrectionBatch	Corrective batch?* 🗹
Create new batch	<b>N</b>
<ul> <li><sup>6</sup> Corrective batch fulfillment includes ONLY correction that were previously submitted via batch process.</li> <li><sup>8</sup> Corrective records can only be submitted via a corre <sup>6</sup> Filing electronic state corrections is not supported.</li> <li><sup>8</sup> A corrective batch may only include either Type 1.</li> <li><sup>9</sup> Separate corrective batches will need to be created</li> </ul>	is from previous ftwilliam.com fulfillment ective batch. Type 2 correction records.

Please Note: Only one correction type may be added to a batch. If both Type 1 and Type 2 corrections need to be submitted, each correction type will need to be added to separate Corrective Batches.

Users will have to run the edit checks for the corrective batch before users can lock the batch and submit for fulfillment. If correction types 1 and 2 are added to the same batch, the system will provide an error in place of the lock option. The correction types will need to be separated to proceed.

Home > Edit Company > Edit Plan > 1099 > 1099-R 2022 > Show Batches - 1099-R - 2022 > Lock Batch

## Lock Batch - 2022



ftwilliam.com does not offer a corrective service for state fulfillment.

• Batch was locked for batch printing

Users would unlock the batch and follow the IRS instructions. Note: The process to correct will depend upon whether the Payee has a Type 1 or a Type 2 error being corrected.

• Batch was locked to download a .txt FIRE file

Users would unlock the batch, remove the payee(s) that need correction, and follow the IRS instructions. Note: The process to correct will depend upon whether Payees have a Type 1 or a Type 2 error being corrected. Users would have to create a new corrective batch just for the payee(s) that need corrections if users are downloading a .txt file for FIRE. Type 2 error would have two batches: one for the corrective record and one for the new original record.

**HINT.** Selecting a "First Correction" from the drop-down list indicates a Type 1 error and selecting a "Second Correction" from the drop-down list indicates a Type 2 error.