Corrections for batch submitted forms

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Correcting Payees in a Locked Batch (FTW Fulfillment Originals)

If the original records were processed through FTW Fulfillment, follow these steps to prepare a correction:

1. Access the FTW System

- Select the appropriate Company/Plan.
- Click 1099 to choose the Form Type and Year, then click OK.

2. Navigate to the 1099 Module

• In the Edit Payees box, use the drop-down list to select the payee that needs correction.

3. Create a Correction

o On the left-hand side of the pane, click Create Correction for Payee.

4. Select Correction Type

- Under Please select correction type, choose Error Type 1 or Error Type 2.
- Click Create Corrective Record to finalize.



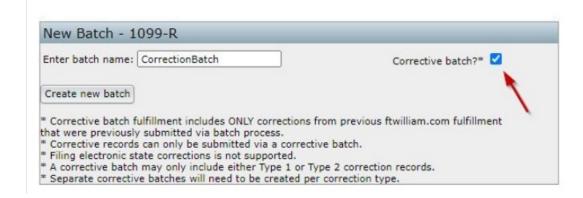


5. Enter Corrected Data

- A new 1099 record will be created.
- Enter the correct information for the payee.

6. Create the Corrective Batch

- Go to ftwPro 1099Wiz.
- When naming your batch, check the box in the upper right-hand corner labeled "Corrective batch?".
- Only payees marked as corrections will be available for selection.



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.



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

Batch Locked for Batch Printing

- Unlock the batch.
- Follow the IRS instructions for corrections.
- Note: The correction process depends on whether the payee has a Type 1 or Type 2 error.

Batch Locked to Download a .txt FIRE File

- Unlock the batch.
- Remove the payee(s) that need correction.
- Follow the IRS instructions.
- Important:
 - If downloading a .txt file for FIRE, create a **new corrective batch** for the payee(s) needing corrections.
 - For Type 2 errors, you will need two batches:
 - One for the corrective record
 - One for the new original record
 - After creating the corrective batch, ensure you check the "Corrective batch?" box when naming the batch in ftwPro 1099Wiz.
 - Only payees marked as corrections will be available for selection.

Hint

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