Copying Data From a Prior Year

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This is a simple process if the user used the ftwilliam.com 1099 software during the previous year:

1. Select the 1099 software for the previous year's filing;
2. Click on the "Upload/Download Center" under the "Batch features" box;
3. Click on "Download 1099 Data";
4. Click on "Select Payers";
5. Check the boxes for the Payers that will be uploaded into the current plan year, click update, click "Download 1099 data" within the breadcrumb;
6. Click "Download 1099 Data" to download the data, save file;
7. Update this file for changes (remove payees that are not applicable, update addresses and amounts, etc.). Ensure column names, etc are not being changed;
8. Click on 1099 within the breadcrumb and select the current plan year;
9. Click on "Upload/Download Center" under the "Batch features" box;
10. Click on "Upload 1099 Data";
11. Verify that the "Payer TIN" option is selected;
12. Users may want to review the "Field Names" file to see if there is new data to enter for the new year and to verify column headers are accurate; and
13. Browse for the saved file, enter zero for Number of rows to ignore before header row, if users have not added rows above the header rows, and click "Submit". The system will perform data integrity edits on uploaded data and will reject non-compliant data that cannot be corrected. Be sure data complies with 1099/5498 requirements before uploading and verify uploaded data afterwards.

NOTE: This document is intended for informational purposes only and does not constitute legal or tax advice.