

Push to 1099

11/05/2025 1:04 pm CST

If you will be preparing your Form 1099s in the ftwilliam.com software, you have the option to push all of the data that you collected in DTS directly into the Form 1099 Software. In order to do the push, please note the following:

- Your distribution records must have a Distribution Reason;
- your distribution records must have a DOB and SSN;
- your distribution records must have a Distribution Type;
- your distribution records must have a Gross Distribution Amount;
- your distribution records must have a Pay Date;
- your distribution records must have a 'Complete' status.

If any of this data is missing, you will not be able to push your distribution record into the 1099 Forms. The software will also take into account if you need two 1099s for a distribution or if distributions should be combined onto one 1099. It will also predict the first distribution code for you.

Once you are ready to push your data, locate the 'Module Options' button in the upper left corner of the dashboard. You have the option to push distribution records for all plans in your account or for the plan you are currently in. You will also need to choose the year end for your distribution records at this time. This will tell the software which 1099 forms to populate after the push. Once you've made your selections, click the 'Next' button to see the results of your selections.

Module Options ▾

Default Distribution Specifications
Email Settings
Portal Branding
Edit Document Templates
Open Participant Portal
Open Sponsor Portal
Global Dashboard
Distributions Specifications Upload

Push to 1099

Push to 1099 Preview [Beta]
Compliance Pull
Status Manager
Distribution Count
Notifications Manager
Help

Push to 1099

Plan
This Plan ▾

Year End
This Plan ▾

Close
Next

This Plan ▾
This Plan ▾
All Plans

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Plan
This Plan ▾

Year End
2024 ▾

2024
2023
2022

Close
Next

You should now see a list of distribution records based on your selections. It's important to review any errors prior to continuing on with the push. The software will indicate whether or not it can predict the 1099 code from the data provided or if you need to provide additional details in the distribution record.

Once you've completed your review of the results, select the distributions you wish to push and click the **Push** button to proceed with the data transfer to the Form 1099 Software.

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- All selected distributions will be pushed into the 1099 software.
- Selected distributions with the same Plan, SSN, and Code will be combined into a single 1099 record.
- Any existing 1099 records that have the same Plan, SSN, and Code that are not in a 1099 batch will be replaced.
- Please note the following special characters will be stripped from the list of participant names prior to populating the 1099 - periods, apostrophes.

☒	DistributionID	Plan Name	First Name	Last Name	SSN	Payee Type	1099 Code	Dist Type	Reason	Refund Reason	Birth Date	Exempt	Started	Completed	Pay Date
☒	165762	A. Demo 401(k) Plan	Ron	Weasely	6789	Participant	G	Roll Over to Qualified Plan	Plan Termination		01/01/1954		11/05/2025	11/05/2025	08/14/2024
☒	207384	A. Demo 401(k) Plan	Harry	Potter	0932	Participant	G	Roll Over to Qualified Plan	Plan Termination		03/15/1984		11/05/2025	11/05/2025	07/17/2024

Cancel

Push

The software will give you a confirmation screen indicating how many 1099 records were created.

Push to 1099

x

1099-R records created: 2

Close

When you arrive to the 1099 Software, you will find a list of participants. When you select a participant and view the distribution, you should see all of the data the software populated for you.

Edit Payees

Update/Add/Change

Wealey, Ron

Add Payee

Delete Payee

Select Payee

Status

No payees selected

Selected Participant Count: 0

Payee Selection

Select Payees

Participant Count: 2
