Push to 1099

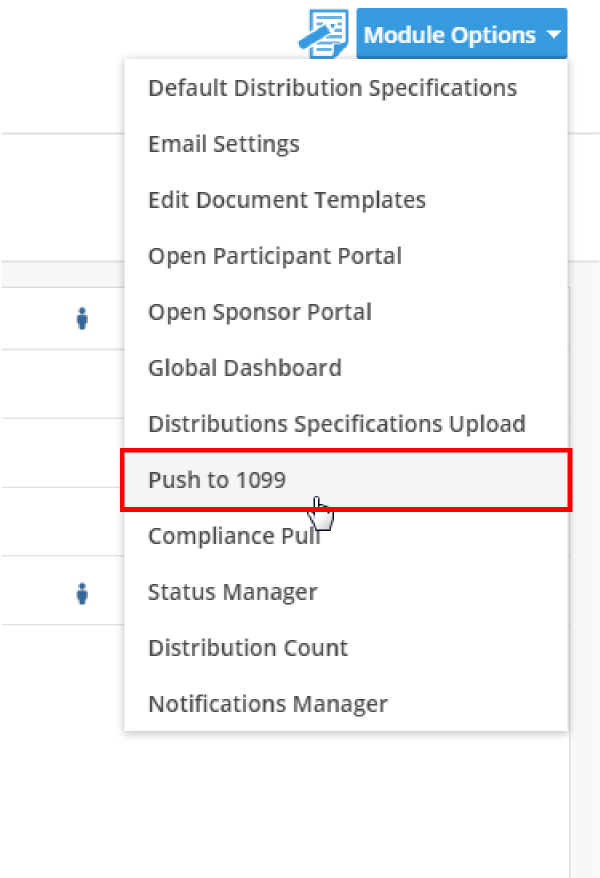
12/05/2024 8:32 am CST

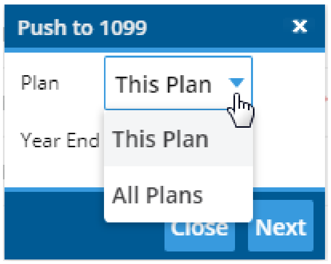
If you will be preparing your Form 1099s in the ftwilliam.com software, you have the option to push all of the data that you collected in DTS directly into the Form 1099 Software. In order to do the push, please note the following:

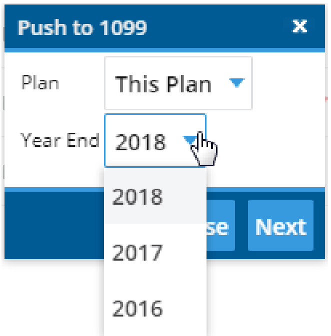
- Your distribution records must have a Distribution Reason;
- your distribution records must have a DOB and SSN;
- your distribution records must have a Distribution Type;
- your distribution records must have a Gross Distribution Amount;
- your distribution records must have a Pay Date;
- your distribution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

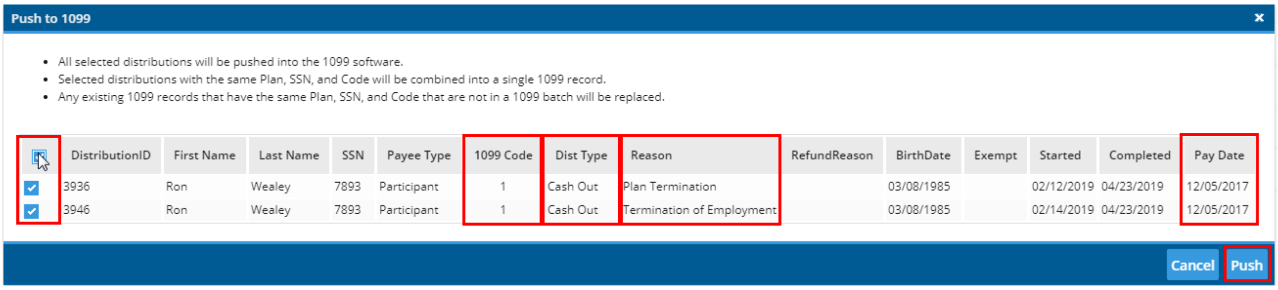
Once you are ready to push your data, locate the 'Module Options' button in the upper left corner of the dashboard. You have the option to push distribution records for all plans in your account or for the plan you are currently in. You will also need to choose the year end for your distribution records 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.



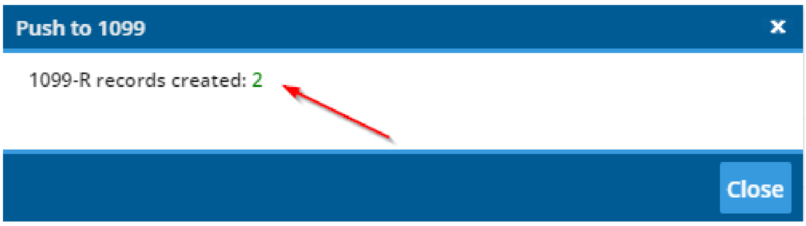




You should now see a list of distribution records based on your selections. It's important to review any errors prior to continuing on with the push. The software will indicate whether or not it can predict the 1099 code from the data provided or if you need to provide additional details in the distribution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



Once you've completed your review of the results, click the 'Push' button to proceed with the data transfer to the Form 1099 Software. The software will give you a confirmation screen indicating how many 1099 records were created.



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.