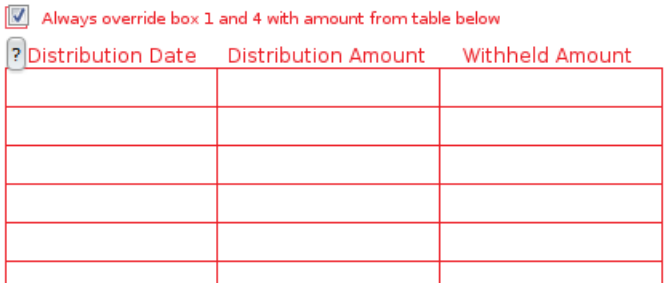
1099 Common Upload Errors and Tips

11/17/2026 3:28 pm CST

"PartAlwaysUseTableIND" Column Header on the 1099-R CSV Upload Spreadsheet

The schema file states the following in regards to the "PartAlwaysUseTableIND" column:

"Always override form with values calculated from table." If you have a participant that has more than one distribution and you plan to use the 945, we would recommend that you enter -1- in this column to check the box on the 1099R to "Always override box 1 and 4 with amount from table below" to be checked. We would also suggest that you leave "PartGrossDist" blank and "PartFederalTaxWH" blank. This way, the data will flow properly to the 945s.

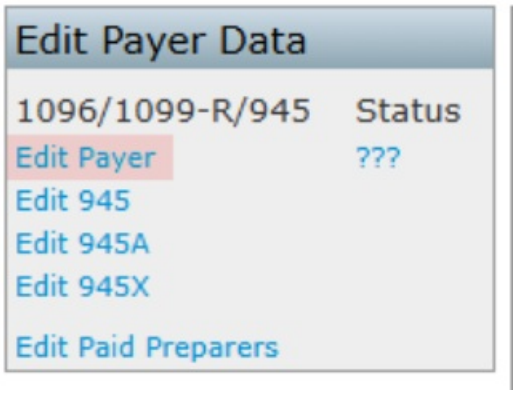


A participant that has only one distribution date can have the date of the distribution entered into the column marked "PartPayDate1". Either enter -0- into the "PartAlwaysUseTableIND" column or leave this column blank; enter data into the "PartGrossDist" and "PartFederalTaxWH" fields and the data will still flow onto the 945s properly.

PLEASE NOTE: If the box to "Always override box 1 and 4 with amount from table below" has been checked, but the table is blank because amounts have been entered in boxes 1 and 4, the system will remove the entries in boxes 1 and 4 and replace those fields with blank entries. The system believes that the blank amounts from the table should populate boxes 1 and 4.

Upload Error: No Payer found for TIN XX-XXXXXXX

This message appears because the system is looking for the TIN to be entered on the "Edit Payer" screen. To access this option, select the 'Edit Payer Data' link from within the 1099 module and update the information on Line 1a:





We would like to suggest performing the payer TIN Download and Upload to verify that all the correct TINs have been entered for your Payers. Once the TINs have been corrected and re-uploaded, the message should no longer appear.

Please click here to review the 1099 User Guide, which explains how to do the TIN download/upload for the Payers.

Zip Code Entry on the 1099-R Payee Upload Spreadsheet

The upload spreadsheet will allow the 5-digit zip code (11111) or the 5-digit zip code, dash and 4 extra digits (11111-1111).

The field is not limited to only 5 characters (11111).

UPLOAD ERROR: MORE THAN ONE PAYER TIN FOUND FOR TIN XX-XXXXXXX

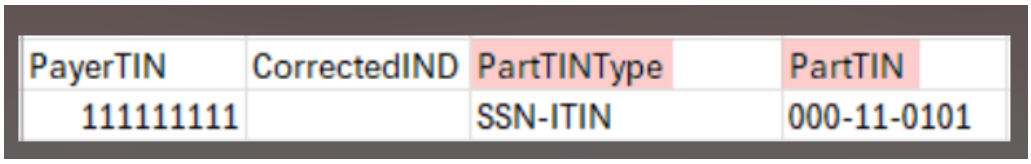
If using the "Payer TIN" upload, the "More than one payer TIN found" error occurs when the system finds two (or more) plans in the system with the same TIN entered on Line 1a of the "Edit Payer" screen. Since the system is finding more than one plan with the same TIN, it does not know which plan it should upload the data into from the spreadsheet. To resolve this error, do the following:

1. Change one of the plan's TINs (Line 1a on the "Edit Payer" screen in the "Edit Payer Data" box from the "Form 1099-R-Year" screen) slightly. For example: the current TIN is 11-1111111. Change the TIN to 11-1111112 within the "Edit Payer Data" box and on the spreadsheet.
2. Update the .csv file with the updated plan's TIN. Then, do the upload again.
3. Go back to the "Edit Payer" box and change the plan's TIN back to what is the correct one.

To resolve this issue, ftwilliam.com introduced another way to upload payee data based on the "Company EIN/Plan Number". If using this spreadsheet, the user would need to verify that the system has the correct EIN/PN on file on the "Edit Company" and "Edit Plan" screen.

Where to Place the SSN/EIN on the 1099-R Payee Upload Spreadsheet

For the column header marked "PartTINType," indicate "SSN-ITIN" for the payees that have an SSN. Enter "EIN" for the payees that have and EIN. Each payee will need to have either "SSN-ITIN" or "EIN" entered. Then, under the column header "PartTIN," indicate the SSN or the EIN of the payee(s).



PayerTIN	CorrectedIND	PartTINType	PartTIN
111111111		SSN-ITIN	000-11-0101