Important Notes to Remember When Creating a Batch

11/17/2026 4:01 pm CST

1. Each form type (e.g. B and C series) must be added to separate batches; you cannot include both form types within the same batch.

2. Batches are created by form year; for example, you cannot include a 2018 B series form in the same batch as a 2019 B series form.

3. In order to use ftwilliam.com's fulfillment service (print/mail or e-filing), your batch must be locked and in order to lock your batch, it *must* pass all edit checks. If any forms in your batch have "Error" edit checks present, these will need to be resolved prior to locking; "Warning" edit checks will allow your batch to be locked.

4. Corrected forms cannot be included in the same batch as original forms.