1099 Software User Guide

NOTE: This is intended to be a general guide to introduce you to the ftwilliam.com 1099 software features and structure. More details are often provided at ftwilliam.com and through free webinars preformed throughout the year. At the top of every screen after entering the 1099 software you will find a 'Help' link (where this guide appears) and a link to contact 'Support' (via email). You can also call (800) 596-0714 or (414)226-2442; phone lines are open Monday through Friday, 8 AM to 5 PM Central Time.

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Section A. Overview:

The 1099 Forms package provides customers the ability to simplify the burdensome task of preparing and filing 1099s and related forms. Our batch printing and upload features streamline the data entry and filing process while edit checking and context sensitive help ensure accuracy. For those customers who prefer not to do the filing and printing themselves, our Fulfillment Service (Service Bureau) is an excellent alternative.

What's Included in the Software:

The ftwilliam.com 1099 software enables you to prepare, print and file the following:

Form 1096 - Annual Summary and Transmittal of U.S. Information Returns;

Form 1099-R - Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc;

Form 1099-Misc - Miscellaneous Income;

Form 1099-Div - Dividends and Distributions;

Form 5498 - IRA Contribution Information;

Form 945 - Annual Return of Withheld Federal Income Tax;

Form 945-A - Annual Record of Federal Tax Liability; and

Form 945-X - Adjusted Annual Return of Withheld Federal Income Tax or Claim for Refund.

Filing Methods:

Form:	Recipient:	Method of Filing:	Type of Paper, if Applicable:
1096	Federal	Mail/E-File	Red Federal Pre-Printed
1099-R/Misc/Div/5498 Copy A	Federal	Mail/E-File	
1099-R Copy B/C/2	Payee	Mail	Blank 3-Up Perforated
1099-R/Misc Copy 1	State	Mail/E-File	
1099-R Copy D	Payer	Mail	
1099-Misc Copy B/2	Payee	Mail	
1099-Misc/Div/5498 Copy C	Payer	Mail	
1099-Div/5498 Copy B	Payee	Mail	
Form 945/945-A/945-X	Federal	Mail	Printer Paper

Section B. Adding Payers

Getting Started

Select your company and plan. From the Edit/Print screen of the ftwilliam.com website, in the 'Print Menu' box, select the type of form you would like to work on (1099-R, 1099-Div, 1099-Misc, or 5498), then select the year and click the 'Go' button. You are now on the main page of the website where you will prepare your 1099 filing.

❖ *Caution! You should always make sure to have the Payers set up before you add Payees (Participants). Payers are generally identified by their Taxpayer Identification Number (TIN) and ftwilliam.com needs to be able to recognize the TIN to associate the Payees with the correct Payer. Please note that this may be the same as the Employer Identification Number (EIN),*

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There are two methods you may use to add a Payer: manually or via upload.

Adding Payers via Manual Entry:
To add a payer manually, you will use the Edit Payer link under each plan you are preparing filings for. From the 'Form 1099-5498 – 2010' screen, click on 'Edit Payer' in the 'Edit Payer Data' box.

**Edit Payer Data**

1096/1099-R/945 Status

Edit Payer   OK
Edit 945   OK
Edit 945A
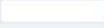Edit 945X

State Returns

Edit Paid Preparers

Complete all of the fields and click 'Update' to save the entries; 'Return' will bring you back to the previous screen, but will not save any changes. You may click on the help button ?? if you have questions regarding one of the fields.
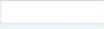
Payor Data

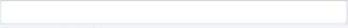|	
a:. Enter 'Yes' if final return for Payer:	No ▾ ??
b:. Type of filing:	Original ▾ ??
c:. Responsible for 1099/5498 reporting:	Yes ▾ ??
d:. Date last processed:	??
1a:. Enter the Payer's taxpayer identification number:	??
1b:. Enter the Payer's TIN type:	EIN ▾ ??
2a:. Enter the first line of Payer name:	Test Company ??
2b:. Enter the second line of Payer name:	??
2c:. Enter the trade name, if any	??
2d:. Entity entered on second line is the paying agent:	No ▾ ??
2e:. Payer is a domestic entity:	Yes ▾ ??
3:. Enter the Payer contact name:	??
4a:. Enter the Payer address line 1:	??
5:. Enter the Payer City:	Madison ??
6:. Enter the Payer state:	Wisconsin ▾ ??
7:. Enter the Payer zip code:	53719 ??
8:. Enter the Payer phone:	??
9:. Enter the Payer contact email:	??
10:. Enter the Payer contact fax:	??
11a:. Require state name and amount in 1099:	No ▾ ??
11b:. Require locality name and amount in 1099:	No ▾ ??
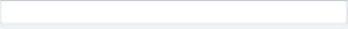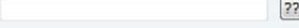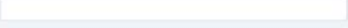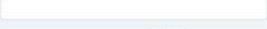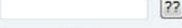
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Adding Payers via Upload:

If you have a large number of Payers, you can add the Payers using the 'Upload/Download Center'. To use this feature, you will:

- Download a list of the plans you have set up on ftwilliam.com.
- Edit the list to remove any plans you do not need to produce 1099s for
- Add the TINs and make any other adjustments needed to the data
- Upload the list to the 1099 software.

❖ *Please note that if you do not have plans set up on ftwilliam.com you can send a list of the company EINs to support@ftwilliam.com and we will load them for you. We can download prior year form 5500 data from the Department of Labor – this will add the companies, and any plans for which 5500s were filed, to our system under your account. To make use of this free service, please send a spreadsheet with the company EINs via e–mail to support@ftwilliam.com, and include your Company Code.*

Follow the steps below to complete the download, and upload of Payer TINs:

1. Click on 'Upload/Download Center' within the 'Print Menu' box.
2. Click the 'Download Payer TINs' link below 'Upload/Download Payer TINs'. Save the file to your hard drive; it will save as a csv (comma separated value) file.

Print Menu

Print Options   TIN Masking

IRS Copies	Other Copies	Reports	Batch features
1096 Single I	Copy B, C, 2 (Blank)	Fed Tax Summary (Sel) (All)	ftwPro 1099Wiz
Copy A 2-up I	Recipient Instructions	State Tax Summary (Sel) (All)	ftwPro 945Wiz
945 I	Copy 1 State (Blank)	Combined Fed State Tax Summary (Sel) (All)	Upload/Download Center
945-A I	Copy D Payer (Blank)	Detail List (Sel) (All)	
945-X I			Paper Needs
			Nelco Solutions

Upload/Download Center

Upload Payee Data
Upload 1099 Data
Generic XML File Upload

Upload/Download Payer TINs
Download Payer TINs
Upload Payer TINs

3. Open the spreadsheet in csv format; you'll see a listing of all the plans you have set up in ftwilliam.com. The first two columns are company and plan specific – **do not alter these columns**. The remaining columns are plan name, plan number and TIN.
4. Go through the spreadsheet to delete the plans that you will not be completing 1099/5498s for.
5. Add the TINs; if any data, such as plan name, plan number or TIN is missing, add it to the spreadsheet and save. **Please note that you may not add plans, so if there are plans missing from the list you should add them to the system manually as described on Page 3.**
6. Once you have updated and saved the file, click on 'Upload Payer TINs'.

7. You will be brought to the 'Upload Menu' screen where you will browse for your saved file. Enter the 'Number of rows to ignore before Header Row', if any. This will default to zero, as the Header Row will typically be the first row on your spreadsheet.

8. Click 'Submit' to upload the file. The results will give you the total number of payers added – see the screen shot on the right, below.

Section C. Adding Payees

Just as you added the payers, there are two methods you may use to add a payee: manually or via upload.

Adding Payees Manually:

1. When you are on the 'Form 1099/5498 – 2010' screen, you may add Payee data by clicking on the 'Add Payee' link within the 'Edit Payees' box.

2. You will be prompted to enter a Payee's First Name and Last Name. Then, click 'Add Participant'. This will bring you to a draft Copy A for you to complete. From this screen you are able to run edit checks, add more Payees, go to the 945, 945-A, 945-X or even print non-Federal final copies.

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? **Note:** The blue Question Marks on the draft screen are context-sensitive help buttons that refence the IRS instructions. You may click on them for guidance.

Adding Payees via Upload:

If you have a larger number of Payees, you can add the Payees using the 'Upload/Download Center'; this allows you to add the Payees in one batch instead of manually entering them one at a time. Follow the steps for Option 1 (Spreadsheet) or Option 2 (from another vendor) below to complete the upload for Payees:

Option 1 – Uploading 1099 Data from a spreadsheet that you create:
1. Begin by clicking on 'Upload/Download Center' within the 'Print Menu' box.
2. Click the 'Upload 1099 Data' link below 'Upload Payee Data'.

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3. From the Upload Menu below, click on 'Sample1099RPart2010.csv' and save the file to your hard drive (it will save as a csv file). You should use this sample file to enter all of your payee data. We also provide a schema file that indicates the format the data needs to be entered onto the sample spreadsheet. **Note:** You may upload a spreadsheet for each payer's payees, one at a time or you may do one batch upload of all of your payer's payees together on a single spreadsheet. However, if you choose to do one batch, all payees must be listed together based upon the payer's TIN. The upload will not work if payer's payees are sporadically placed throughout the spreadsheet.

4. Once the file has been updated, click on 'Upload 1099 Data', then browse for and select the saved csv file. You will also need to enter the 'Number of rows to ignore before header row', which will typically be zero if you have not added rows to the top of the csv file.

5. Click 'Submit' to upload the file. The results will give you the total number of payees added, as well as any 'Bad Data' that may have been uploaded.

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Option 2 - Generic XML File Upload:

1. The Generic XML File Upload is primarily used to import data downloaded from another vendor's Software. Please contact support@ftwilliam.com for more information.
2. Begin by clicking on 'Upload/Download Center' within the 'Print Menu' box.

Print Menu

Print Options TIN Masking

IRS Copies	Other Copies	Reports	Batch features
1096 Single I	Copy B, C, 2 (Blank)	Fed Tax Summary (Sel) (All)	ftwPro 1099Wiz
Copy A 2-up I	Recipient Instructions	State Tax Summary (Sel) (All)	ftwPro 945Wiz
945 I	Copy 1 State (Blank)	Combined Fed State Tax Summary (Sel) (All)	Upload/Download Center
945-A I	Copy D Payer (Blank)	Detail List (Sel) (All)	
945-X I			Paper Needs
			Nelco Solutions

3. Click the 'Generic XML File Upload' link below 'Upload Payee Data'.
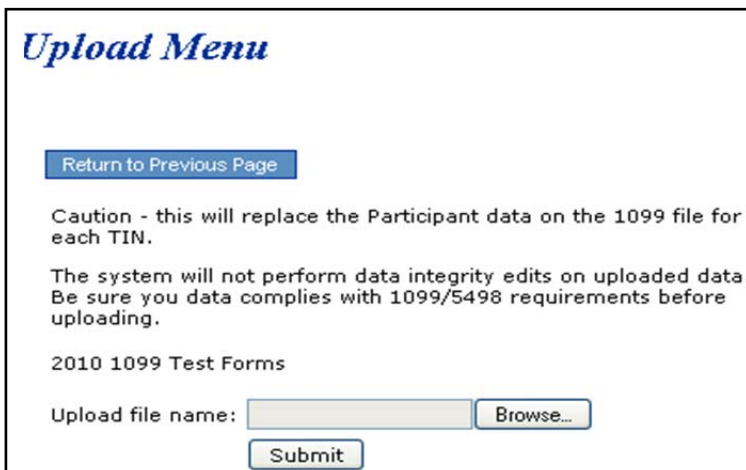
Upload/Download Center

Upload Payee Data
Upload 1099 Data
Generic XML File Upload

Upload/Download Payer TINs
Download Payer TINs
Upload Payer TINs

4. Browse for your saved xml file.

Upload Menu

Return to Previous Page

Caution - this will replace the Participant data on the 1099 file for each TIN.

The system will not perform data integrity edits on uploaded data. Be sure you data complies with 1099/5498 requirements before uploading.

2010 1099 Test Forms

Upload file name: _____ Browse...
Submit

Upload Results

No Errors Found, All data Uploaded
Return

4. Click 'Submit' to upload the xml file. The 'Upload Results' provided are not detailed and you should make sure to run the edit checks for the payees after the upload is complete.
5. Click 'Return' to go to the 'Form 1099-R – 2010' screen.

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Note: You should be aware that with either payer upload, the data you import will replace any data you have already entered. Once the upload has been completed, whether you used Option 1 or Option 2, you will notice that all the Payees you have uploaded are listed in the drop-down box within the 'Edit Payees' box. You should run the edit checks – see below for more details.

Section D. Running the Edit Checks:

Once your payee data is entered you can run edit checks to check data integrity. Before doing this, however, you need to select the payees that you want to include. Click 'Select Payees' in the Edit Payees box and check the box next to each name you want to select. Then click 'Update'. You'll see the number selected noted in that box – see: 'Selected Participant Count: 8' in the screen shot below.

You can run edit checks one of two ways:
1. By clicking the '???' or 'NOT-OK' in the Status column; this lists all errors for all selected payees.
2. Select each payee individually – select the Payee from the drop down box and click 'Select'. This will open the 1099-R for that payee; then click 'Run Edit Checks'. All questions on the 1099 that do not pass an edit check will be highlighted in yellow. You can double click on the yellow box to see the reason for the edit check.

Once your data is entered and the edit checks have been run you are ready to print the forms.

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Section E. Printing the Forms:

The Print Menu box on the main Form 1099-R – 2010 page of the website is where you will go to select your printing options and print your forms. You'll see that the menu is arranged into four columns – IRS Copies, Other Copies, Reports and Batch Features.

If you are printing and mailing the forms yourself, you will do this from the Print Menu on the main 1099/5498 page of the website. See page 15 for information on the ftwilliam.com Fulfillment Service – we can do the printing, mailing and e-filing for you.

Aligning Your Printing

Before you print Form 1096 and Copy A, you should be sure that Acrobat is set up so that the pdf document is printed at 100% of its correct size. You should do this by clicking on the printer icon on the Acrobat tool bar that is located underneath the main browser toolbar. Make sure the "Page Scaling" setting under the heading "Page Handling" is set to "None". (The default value is oftentimes set to "fit to page" which will shrink the Schedule to 94%). The "Page Scaling" setting must be set to "None" so that there is no size reduction on printing. You can confirm the proper setting by looking in the "Preview" section and observing that the zoom is 100%.

At the top of the menu box you'll see two links; the first is 'Print Options' where you can adjust the margins of your printing to ensure your forms align correctly on the special paper you are using.

You can also make an election on **TIN Masking** from that link at the top of the Print Menu Box - if you choose to enable TIN Masking all but the last 4 digits of the TIN/SSN will be masked just on the Payee copies (1099 Copy B, Copy C and Copy 2). Click on 'TIN Masking', select 'Yes' from the drop-down box, and click 'Update'. **Note:** You need to be a designated 'Admin' on your company account to exercise the TIN Masking option.

Printing Copies of Form 1096.

You need to print these returns on 1up Preprinted paper. This is obtainable from Nelco Solutions, a vendor that ftwilliam.com works with. Or you can use your own vendor. Before printing copies of Form 1096 it is necessary to check your printer. Every printer is different and it's important that yours is aligned correctly before you print multiple forms.

To check your printer, click on the '1096 Single', in the Print Menu box. This will produce a blank Form 1096 just containing the payer data. Print this on plain paper and then hold the printed copy up to a sheet of the 1up Preprinted paper to see if the printing aligns correctly with the boxes on the form. If it is not aligned correctly, click on 'Print Options' and make appropriate adjustments. Test your printer again before putting the 1up Preprinted paper in your printer and printing all your 1096's.

Printing Copies of Form 1099.
You can print copies of Form 1099 for the payee (Copy C), and for filing with state (Copy 2) and federal (Copy B) taxes, You need to print these on 3up Perforated paper. Click on 'Copy B, C, 2 (Blank)'. Put the 3up Perforated paper in your printer and print the copies. You should also print the Instructions for Recipient, either on the back or separately, and mail with the Copy B, C, 2.

To print Copy A of Form 1099 you should perform the same printer test and, if necessary make adjustments, as described above for Form 1096. Form 1099 Copy A is printed on Red Federal Pre-Printed paper, available from Nelco Solutions or a vendor of your choice.

Section F. Form 945

Use Form 945 to report withheld federal income tax from non-payroll payments, including:

- Pensions (including section 403(b) and governmental section 457(b) plan distributions), annuities, and IRA distributions;
- Military retirement;
- Gambling winnings;
- Indian gaming profits;
- Voluntary withholding on certain government payments; and
- Backup withholding.

You should report all federal income tax withholding from non-payroll payments or distributions annually on one Form 945. **Do not file more than one Form 945 for any calendar year.**

All federal income tax withholding reported on Forms 1099 (for example, Form 1099-R or 1099-MISC) or Form W-2G must be reported on Form 945. **Do not report the following on Form 945:**
- **Federal income tax withholding from wages.**
- **Federal income tax withheld on distributions to participants <u>from nonqualified pension plans</u> (including nongovernmental section 457(b) plans) and some other deferred compensation arrangements that are treated as wages and are reported on Form W-2.**

Form 945 is the return filed by the payer with the IRS, representing the total amounts disbursed; so it's a summary of all the information on the 1099s. This form is printed on blank paper. The 'top' portion is filled out automatically in most part from the 'Edit Payer' data. The Paid Preparer information at the bottom can be auto-filled if paid preparer information is added - see below. Many of the remaining fields are calculated from data in the 1099s or 5498s.

You are responsible for filing your own Form 945; it is not included in the Fulfillment Services offered by ftwilliam.com.

- ❖ *Tip for Companies who use their EIN and not a TIN to file 1099s and to make the Form 945 deposits: If the same EIN is used to file 1099s and to report taxes withheld for multiple plans you may file one Form 945. Otherwise, if a separate EIN/TIN is used for each plan, file one Form 945 for each plan.*

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Adding Paid Preparers

If you have Paid Preparers working on any of your filings, you can add a record for them. Click the 'Edit Paid Preparers' link under 'Edit Payer Data', then click 'Add Preparer'. Enter the preparer's first and last names and click 'Add Preparer'. You can then select the preparer and enter the rest of the information for them – click 'Update' to save the data.

Preparing Form 945

To prepare Form 945, click on the 'Edit 945' link on the left of the screen; this will open the form to allow you to make any required adjustments. You can also add a Paid Preparer, if applicable, by selecting them from the 'Add Paid Preparer' drop down box. To pull data from your already completed 1099s or 5498s, click on 'Update Line 1 with Payee total W/H (Sel)' or 'All'. The first option will bring forward data just from payees that are marked as 'Selected'; the second option will bring forward data from all payees within the given plan.

Once your Form 945 is complete you can run edit checks to validate your data. Click on 'Run Edit Checks' on the top-left of the screen; any errors will be highlighted in yellow and you can double click on the yellow area to see the reason for the edit check.

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Batch 945 Printing

The ftwPro 945Wiz link, located at the bottom right of the Print Menu box, enables you to print all your 945s in a single pdf file. Click on the link shown in the screen shot below:

You'll see the following screen:

Click the 'Select Payers' link, then place a check mark next to each of the plans you want to include; if you want to include every plan, place a check mark next to the 'Selected' box at the top of the column, as shown in the screen shot below. Next, click 'Update'; you'll return to the screen shot shown above. Click on the 'Print 945' link to generate a pdf file for all the Payers you have selected.

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Section G. Other Reports

There are various reports available in the Print Menu box that you can run based on either all or selected payees. To run for selected payees, click '(Name of report)(Sel)'; to run for all payees click 'All'

Federal Tax Summary – this lists all the payees for the payer including name, SSN, Gross Distribution, Taxable Amount and amount of Federal Withholding.

State Tax Summary - this lists all the payees for the payer including name, SSN, State ID, State Distribution amount, and amount of State Withholding.

Combined Fed State Tax Summary – this produces both the reports described above.

Detail List – this summarizes all the information entered by payee.

Section H. E-Filing and Fulfillment

Filing via the FIRE system

You can do your own electronic filing of the federal copies using the ftwilliam.com website – the software enables you to create a text file which you can then upload onto the IRS FIRE (Filing Information Returns Electronically) site to e-file.

The steps for this process are as follows:

1. Obtain a Transmitter Control Code (TCC) from the IRS; this is a 5-digit code and you'll need to fill out Form 4419 to apply for one. There's more information on the IRS website: http://www.irs.gov/taxtopics/tc802.html
2. Send the TCC together with your company EIN via e-mail to support@ftwilliam.com. We will then set you up for electronic filing.
3. When you are ready to do your e-filing, click on the 'ftwPro 1099Wiz' link in the Print Menu box of the Form 1099-R – 2010 page of the website.
4. Click 'Create new batch', give the batch a name so you can identify it, and click 'Create new batch'.
5. On the next screen, click the 'Select Payers' link. You'll see a list of all the Payers that you have added across all your clients. For the Payers that you want to include in the batch, click on the 'Select Payees' link. You can then place a check mark, in the box in the column on the left, against each payee that you want to include in the batch file. If you want to include all the payees listed, click the 'Select' box at the top of the column.
6. Make sure all edit checks are passed so that the status of all the payees is 'OK'. Then you can lock the filing. Note that you will not be able to lock the filing until all the edit checks have been passed. Below is a screen shot of the list of current batches – it gives the batch name and number, the status of the edit checks for payers and payee records, counts for both and the batch status. If the batch is locked, the date it was locked is indicated.

Batch Name	Batch ID	Payer EditCheck	Payee EditCheck	Payer Count	Payee Count	Batch Status	Batch Locked Date
HelloWorld	133141	OK	OK	2	4	LOCKED	2010-09-29 11:06:23

7. When you select a batch that is locked, you'll see a link to 'Download file for FIRE system'. Clicking on this link will produce a text file that you can take to the IRS website to upload to complete your filing.

*New for the **2011 1099 Fulfillment Service,** a $10 batch fee will be added per batch submitted.*

Forms 1099-DIV / 1099-INT / 1099-MISC / 1099-R / 1099-SA / 5498 / 5498-SA 2011 Forms Fulfillment Services		
Service	**Description**	**Cost (2011)**

Federal/State/Payee	1. **1099-DIV**
	   a. 1096/Copy A (e-file)
	   b. Copy B (print & mail)
	   c. State (e-file)***
	2. **1099-INT**
	   a. 1096/Copy A (e-file)
	   b. Copy B (print & mail)
	   c. State (e-file)***
	3. **1099-MISC**
	   a. 1096/Copy A (e-file)
	   b. Copy B/2 (print & mail)
	   c. State (e-file)***
	4. **1099-R**
	   a. 1096/Copy A (e-file)
	   b. Copy B/C/2 (print & mail)
	   c. State (e-file)***
	   d. See **Volume Discount Pricing** below if you have 5,001+ payees.
		$1.75/payee

Service	**Description**	**Cost (2011)**

Federal/State Only	1. **1099-DIV**
	   a. 1096/Copy A (e-file)
	   b. State (e-file)***
	2. **1099-INT**
	   a. 1096/Copy A (e-file)
	   b. State (e-file)***
	3. **1099-MISC**
	   a. 1096/Copy A (e-file)
	   b. State (e-file)***
	4. **1099-R**
	   a. 1096/Copy A (e-file)
	   b. State (e-file)***
		$1.05/payee

Service	**Description**	**Cost (2011)**

Federal/Payee Only	1. **1099-DIV**
	   a. 1096/Copy A (e-file)
	   b. Copy B (print & mail)
	2. **1099-INT**
	   a. 1096/Copy A (e-file)
	   b. Copy B (print & mail)
	3. **1099-MISC**
	   a. 1096/Copy A (e-file)
	   b. Copy B/2 (print & mail)
	4. **1099-R**
	   a. 1096/Copy A (e-file)
	   b. Copy B/C/2 (print & mail)
	5. **1099-SA**
	   a. 1096/Copy A (e-file)
	   b. Copy B (print & mail)
	6. **5498**
	   a. 1096/Copy A (e-file)
	   b. Copy B (print & mail)
		$1.25/payee

	7. **5498-SA**
	   a. 1096/Copy A (e-file)
	   b. Copy B (print & mail)	

Service	**Description**	**Cost (2011)**
Payee Only **(Print & Mail)**	1. **1099-DIV** - Copy B 2. **1099-INT** - Copy B 3. **1099-MISC** - Copy B/2 4. **1099-R** - Copy B/C/2 5. **1099-SA** - Copy B 6. **5498** - Copy B 7. **5498-SA** - Copy B	$0.84/payee
Service	**Description**	**Cost (2011)**
Federal Only **(1096/Copy A e-file)**	1. **1099-DIV** 2. **1099-INT** 3. **1099-MISC** 4. **1099-R** 5. **1099-SA** 6. **5498** 7. **5498-SA**	$0.50/payee
Service	**Description**	**Cost (2011)**
Payer Only **(Print & Mail)**	1. **1099-R** Copy D 2. **1099-DIV/INT/MISC/SA/5498/5498-SA** Copy C	$5.00/payer + $0.05/payee

Volume Discount Pricing		
Number of Payees	**% Discount**	**Price**
0-5,000	0%	$1.75/payee
5,001-10,000	5%	$1.66/payee
10,001-20,000	10%	$1.58/payee
20,001-30,000	12%	$1.54/payee
30,001-UP	14%	$1.51/payee

**There will be an additional 50% charge for submissions made after January 23, 2012. The cut-off for all submissions is 12 PM, CT on Friday, January 27, 2012 to ensure the participant copies are printed and mailed timely. You may submit batches after January 27, 2012 at the regular price; these batches will not be processed before January 31, 2012.

***What do we mean by state 1099 fulfillment?
1. It is electronic. We do not offer any print and mail services.
2. Many, but not all, states require 1099 fulfillment. These states need to know basic information about 1099-type distributions and recipients. The information sent to the states is approximately equivalent to the Federal 1096 (summary page) form and the Copy A (participant information) forms.
3. In addition, some states also require their own specific 1099 reconciliation form. Often times states are interested in knowing how the distributions occurred for each quarter or month, or other information specific to the needs of that state's tax code or other regulations.
4. We do not offer state-withholding reconciliation forms. These forms (e.g. CT-945) are very similar to the Federal 945 (which we also do not offer an e-file service for). For example, these are often related to 1099 forms because tax can be withheld from distributions shown on a 1099-R form; however, these are not considered a part of state 1099 fulfillment.
5. We do not offer correction services for state 1099 fulfillment. Due to the complexity and rarity in occurrence, we do not offer corrections at this time.

Corrections: You may file corrections using the fulfillment service (batch fee applies); however, this service is not available to correct state information.