Step 1: Create a Corrections Import Map

- Login to the administrative portion of the Corporate Suite software.
- Select the correct tax year, filing entity, & form type from the upper left menu options
  -

- Select the "Import Forms" Option from the left-hand menu
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- Select "Begin a New Import Process", make sure the correct form type is selected from the drop down menu, and then select "Add/update Import Maps".
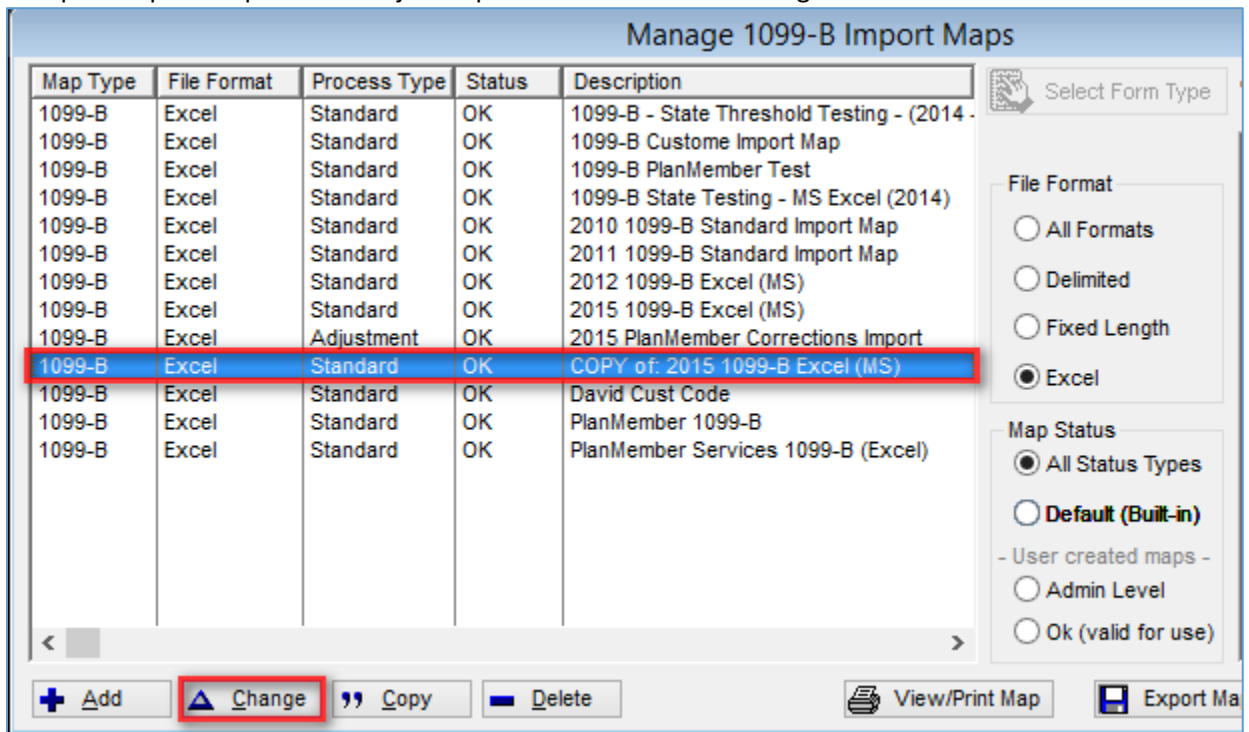 -

- Select the import map format that is being used for standard maps and create a copy. This copy will be updated to become a Corrections Import Map and will save the time from having to re-map each individual field.

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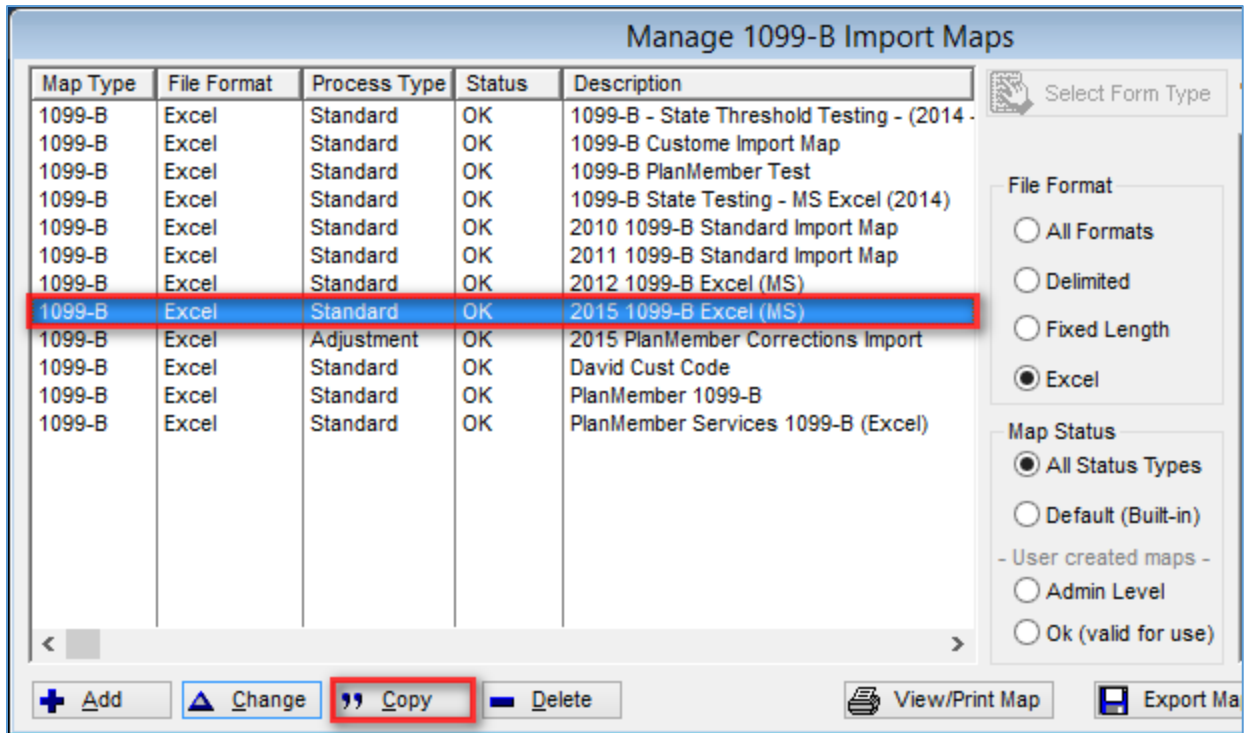
- Select the copied import map which was just copied and then select "Change".

○

- Click "Next" to all the wizard screens until the "Specify a Name and Usage Notes" screen is reached. Update the name to indicate that this is now a Corrections Import map.

- Click "Next" to all screens until the "Specify the type of Import" screen is reached. Choose "Adjustment/Corrections of Matched Forms".

- Click "Next" and select the matching process that is required. Generally, this will be "Simple Match" unless creating a map for Form 1099-R or Form 1042-S.

  o
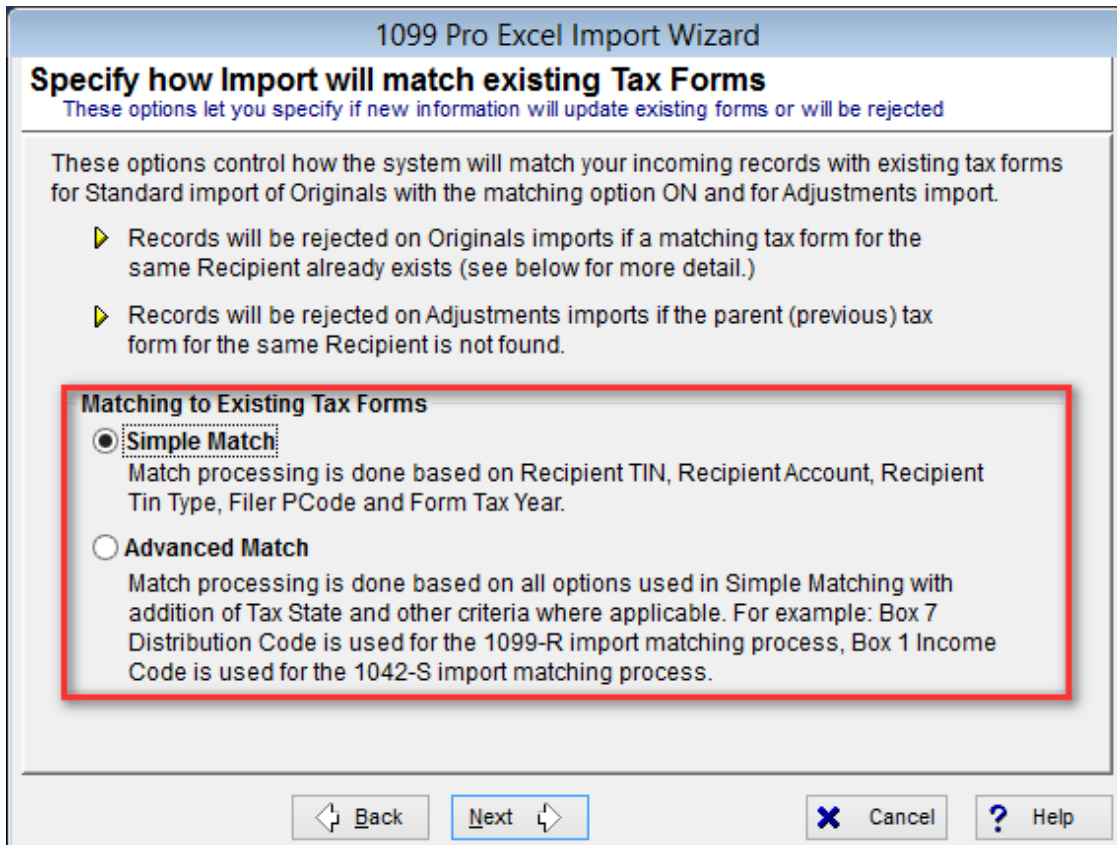
- Click "Next" and then select the "Finish" option. The corrections import map is now created.

Step 2: Importing Corrections

- The corrections import process is the same as any other import process after the corrections import map has been created. Please refer to the 1099 Pro help file or tutorial videos if unclear of how to import data into the software.
- There are few general pieces of information to be aware of when processing a corrections import.
  - o Records are matched based on the criteria in the above screenshot. Therefore, a corrections import cannot be used to update TIN/Account information as that is used as the matching criteria to update records.
  - o If duplicate records exist, with the same TIN/Account/TIN Type, for non 1099-R/1042-S forms, then only one of the duplicate records will be updated. This is regardless of how many instances of records with the same TIN/Account/TIN Type exist in the corrections import file.
  - o Recipient name information can only be updated if the records are in a "Pending" or "Printed" status. Name/state corrections cannot be imported if the records are in a "Filed" status.
  - o Only the records in the corrections import file will be used to update existing record data. If a record already exists in the software, but is not in the import file, then the record that exists in the software will be left as is.
- Record Status Updates:
  - o Pending: Pending records will be updated and remain in a pending status, if matched.
    - TIN/Account corrections cannot be imported.
  - o Printed: Printed records will be reset to pending and updated, if matched.
    - TIN/Account corrections cannot be imported.
  - o Filed: Filed records will cause a pending correction(s) to be created, if matched.
    - TIN/Account/Name/State corrections cannot be imported.