

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

The screenshot shows a software window with a menu bar (File, Reports, Forms, Filing). Below the menu, it displays 'Current Filer: PAYROLL' with the ID '12-555555' and name 'Stewart'. A 'Select Another Filer' button is present. Below that, 'Tax Year' is set to 2015 and 'Current Form' is set to 1099-B.

- Select the "Import Forms" Option from the left-hand menu

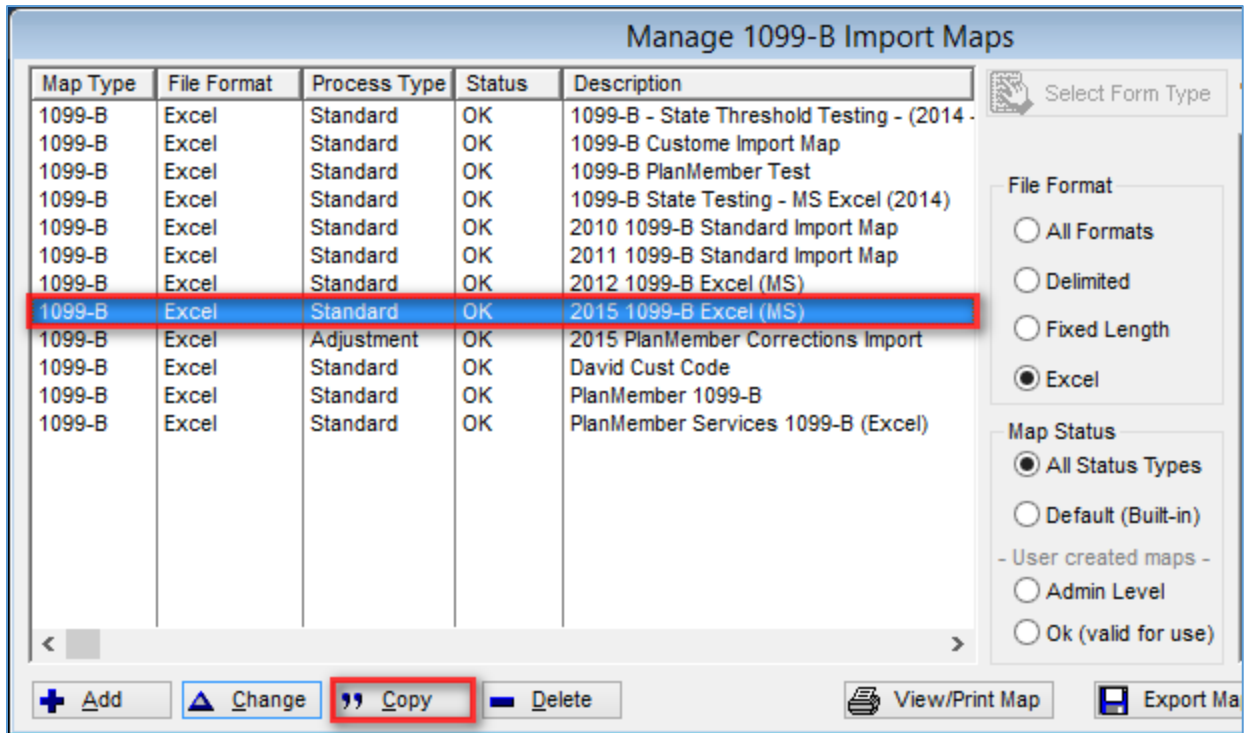
The screenshot shows a vertical menu with 'General Options' at the top. Below it are 'Filers List', 'Recipients List', 'Import Forms' (highlighted with a red box), and 'Export Forms'.

- 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".

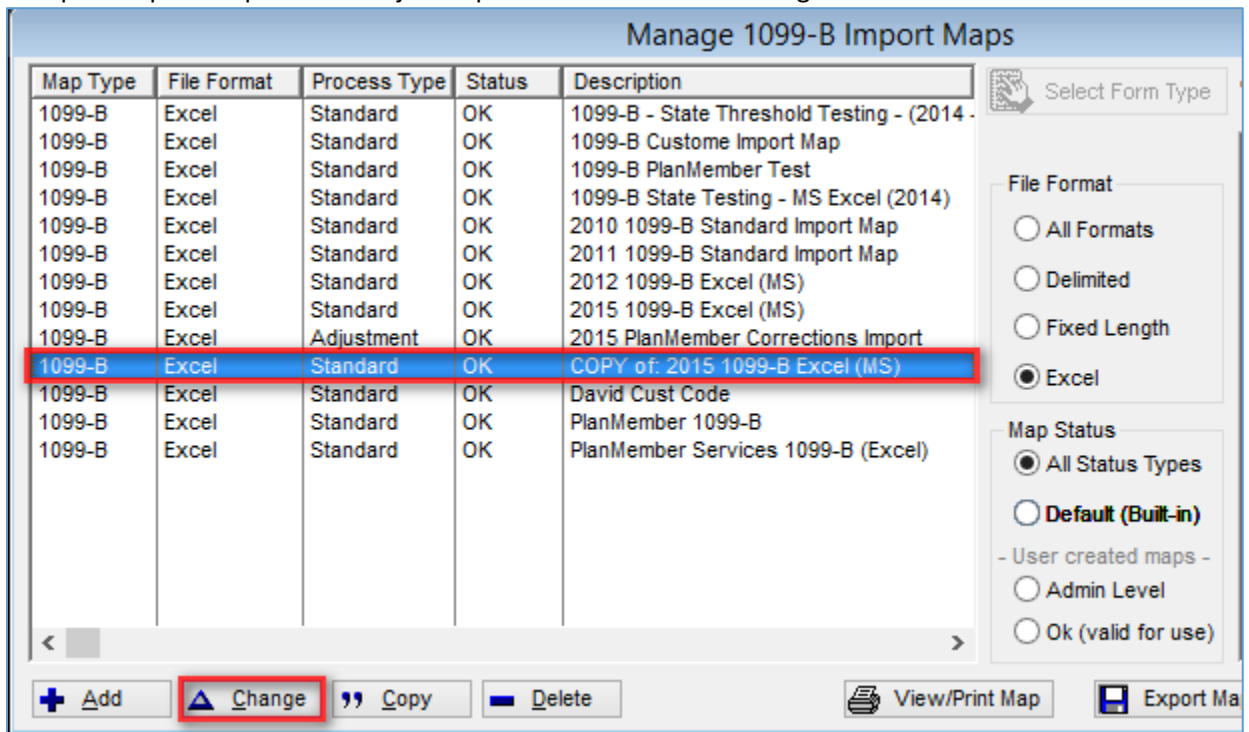
The screenshot shows a wizard window titled 'Import LOAD Wizard for 2015 Tax Forms - STEP 1 of 3'. The main heading is 'Select the type of data and format to use'. Below this, it says 'These options let you choose the contents and format for the file to import'. There are two main sections: 'Select the type of tax form to Import:' with a dropdown set to '1099-B', and 'Import File Formats to Show' with radio buttons for 'All', 'Delimited', 'Excel' (selected), and 'Fixed Length'. Below these is a table of import maps. The '2015 1099-B Excel (MS)' map is highlighted. At the bottom, there is a button 'Add/update 1099-B Import maps' which is highlighted with a red box. The 'Tax Year' is set to 2015. Navigation buttons 'Back', 'Next', 'Cancel', and 'Help' are at the bottom.

Import Format	Import Map Title/Description	Notes for the selected map:
Excel/Std	1099-B - State Threshold Testing - (2014 - Updated)	
Excel/Std	1099-B Custome Import Map	
Excel/Std	1099-B PlanMember Test	
Excel/Std	1099-B State Testing - MS Excel (2014)	
Excel/Std	2010 1099-B Standard Import Map	
Excel/Std	2011 1099-B Standard Import Map	
Excel/Std	2012 1099-B Excel (MS)	
Excel/Std	2015 1099-B Excel (MS)	
Excel/ADJ	2015 PlanMember Corrections Import	
Excel/Std	David Cust Code	
Excel/Std	PlanMember 1099-B	
Excel/Std	PlanMember Services 1099-B (Excel)	

- 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.



- 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.

1099 Pro Excel Import Wizard

Specify a Name and Usage Notes for the 1099-B Import map
This information is displayed on the Import map browse to help your users

Enter or update the map name and usage information

▶ The title and description will be displayed for users when they need to select an Import map to use.

Map description or title:

Map Usage Notes:
 (Optional but recommended)

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

1099 Pro Excel Import Wizard

Specify the type of Import
These options let you specify whether new information will update existing forms or replace them

Processing Options for Tax Form Imports

Standard
 All Tax Forms are added as individual records, independent of all other forms and regardless of whether other forms may exist in the system for the same recipient.

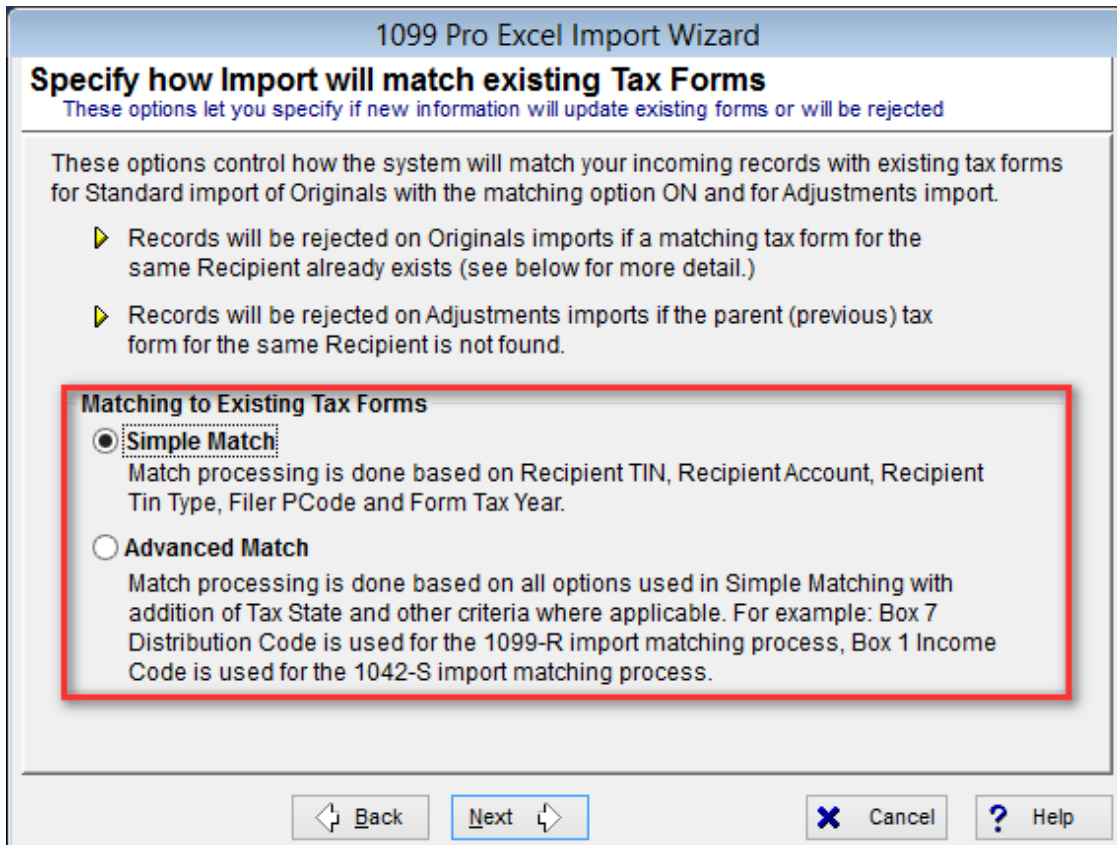
Transactional (aggregation must be enabled)
 If an existing forms are found for a recipient according to the form matching rules currently in effect for the Filer, the new information will update the existing record and be added as a transaction for that record. Non-matching forms are added as new.

Year To Date (YTD)
 Existing tax forms are replaced with the new YTD information showing the change in amount. Existing forms that are not Validated by a record in the import can be dropped in the Zero Drop Process.

Standard Originals with Matching On
 Standard Tax Forms are added as original records if other forms do not exist in the system for the same recipient. Duplicate Originals will be rejected.

Adjustments/Corrections of Matched Forms (for AutoCorrection Imports Only)
 The record to correct must exist in the database or the record will be rejected. Existing Pending or Printed records will be updated for non transactional forms only. IRS filed records will result in a correction. State filed records result in a state correction if there is state impact.

- 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.



- 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.
 - 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.
 - 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.
 - 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.
 - 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:
 - Pending: Pending records will be updated and remain in a pending status, if matched.
 - TIN/Account corrections cannot be imported.
 - Printed: Printed records will be reset to pending and updated, if matched.
 - TIN/Account corrections cannot be imported.
 - Filed: Filed records will cause a pending correction(s) to be created, if matched.
 - TIN/Account/Name/State corrections cannot be imported.