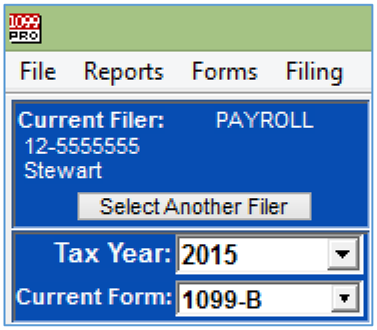
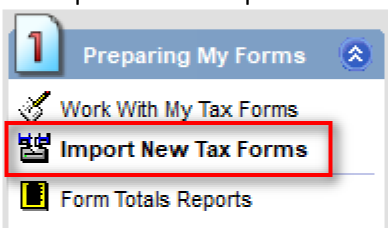
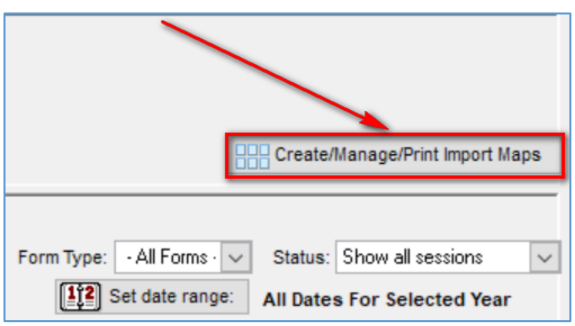
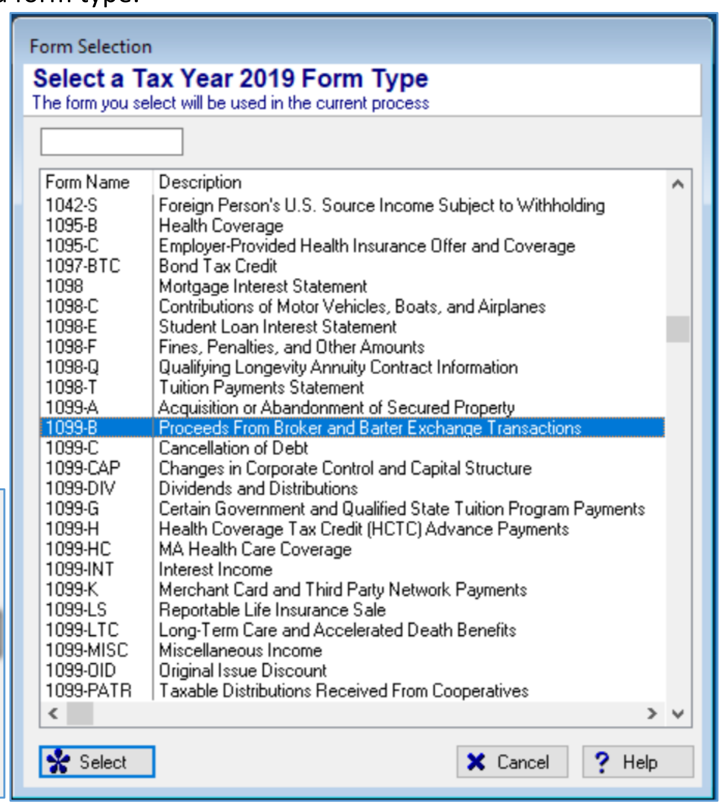
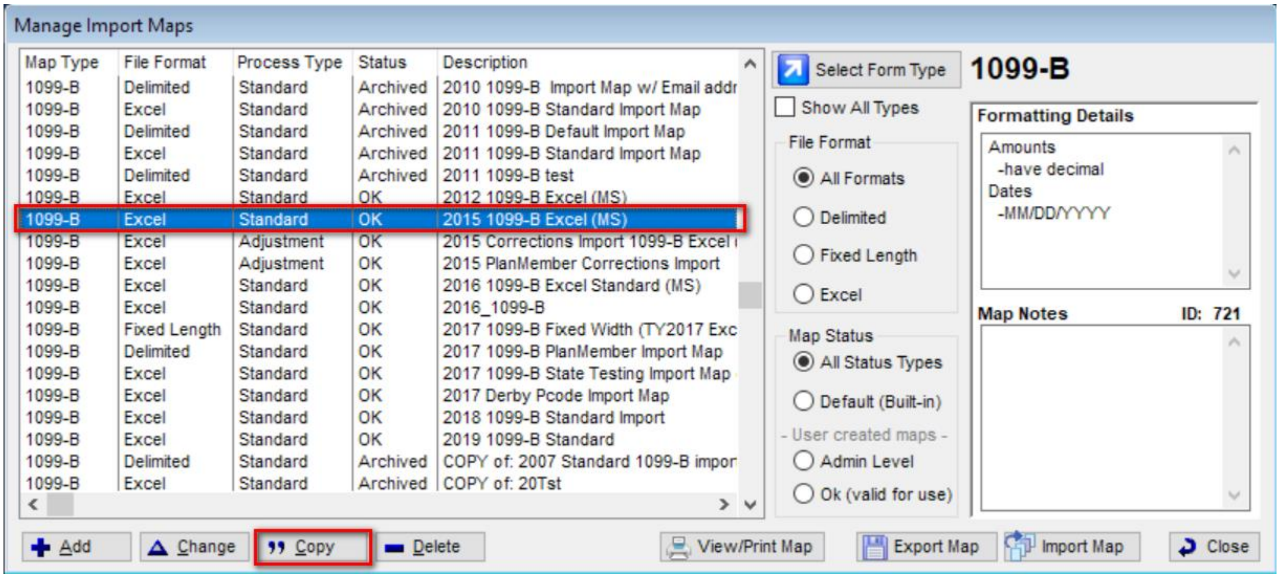
Step 1: Create a Corrections Import Map

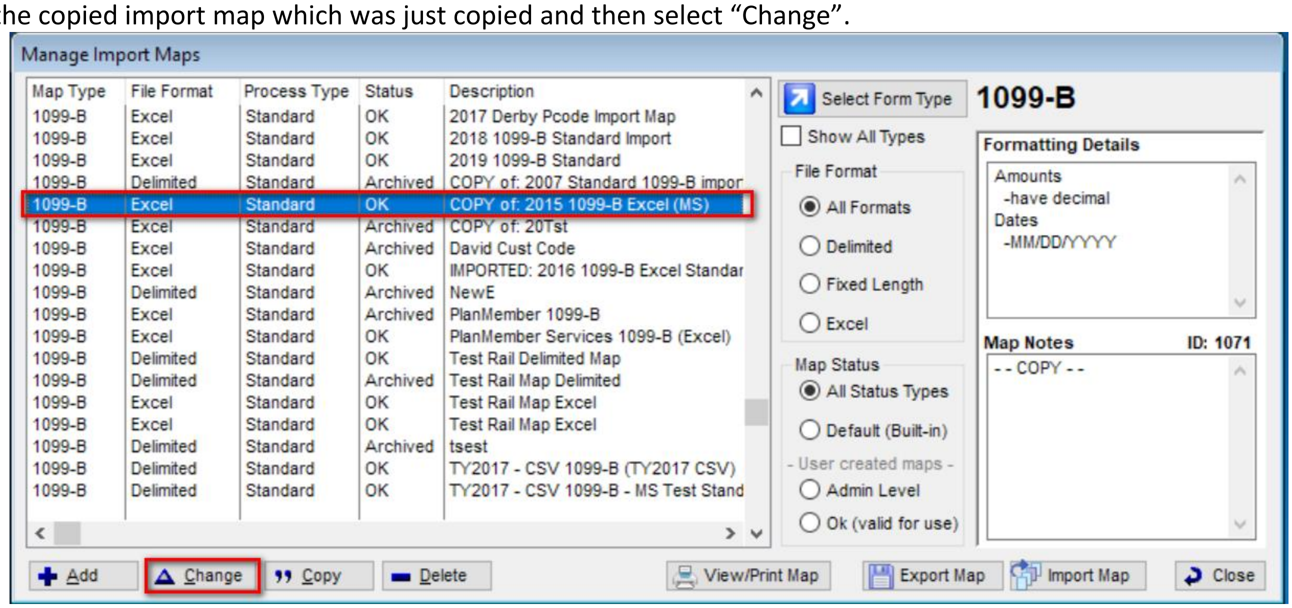
- Login to the administrative portion of the Corporate Suite software.
- Select the correct tax year, filing entity, & form type from the upper left menu options
    - 

- Select the "Import Forms" Option from the left-hand menu under "Preparing My Forms"
    - 

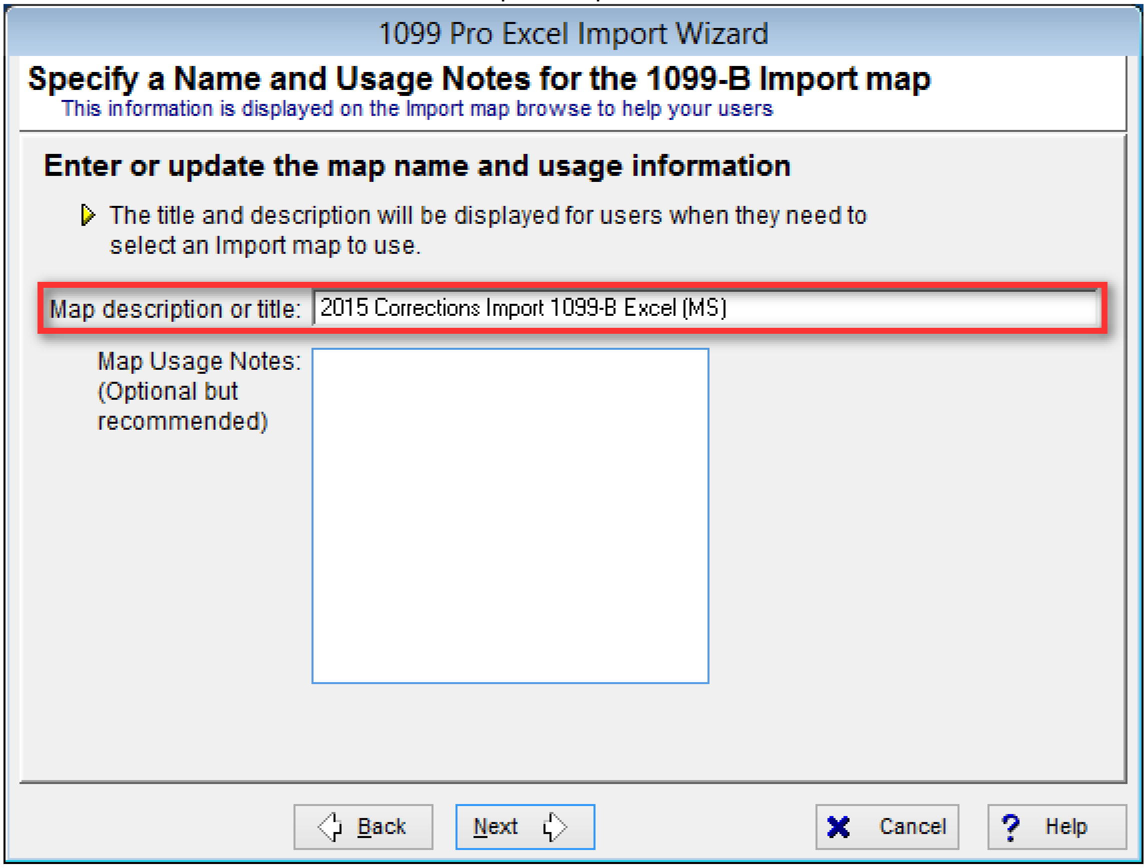
- Select "Create/Manage/Print Import Maps", make sure the correct form type is selected from the menu, and then choose "Select" to view all import maps for the selected form type.
    - 



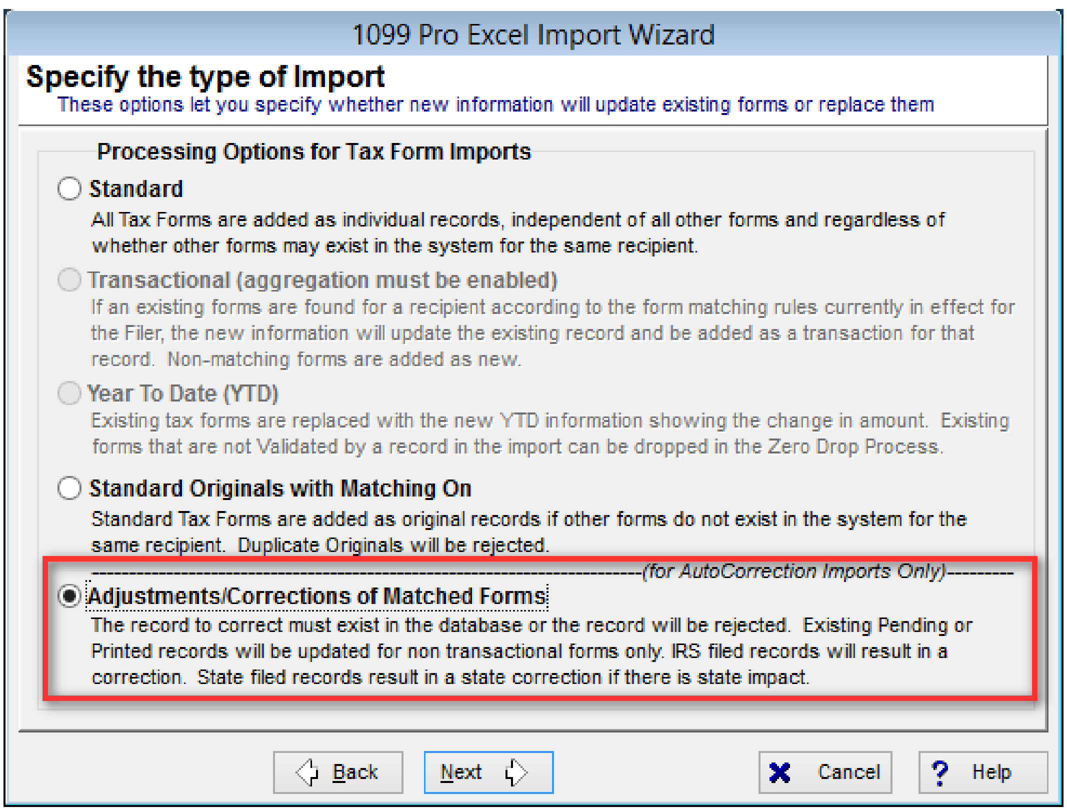
- Select the import map format that is being used for standard maps and create a copy. This copy will be updated to become a Corrections Import Map and will save the time from having to re-map each individual field.
  - ○ 

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

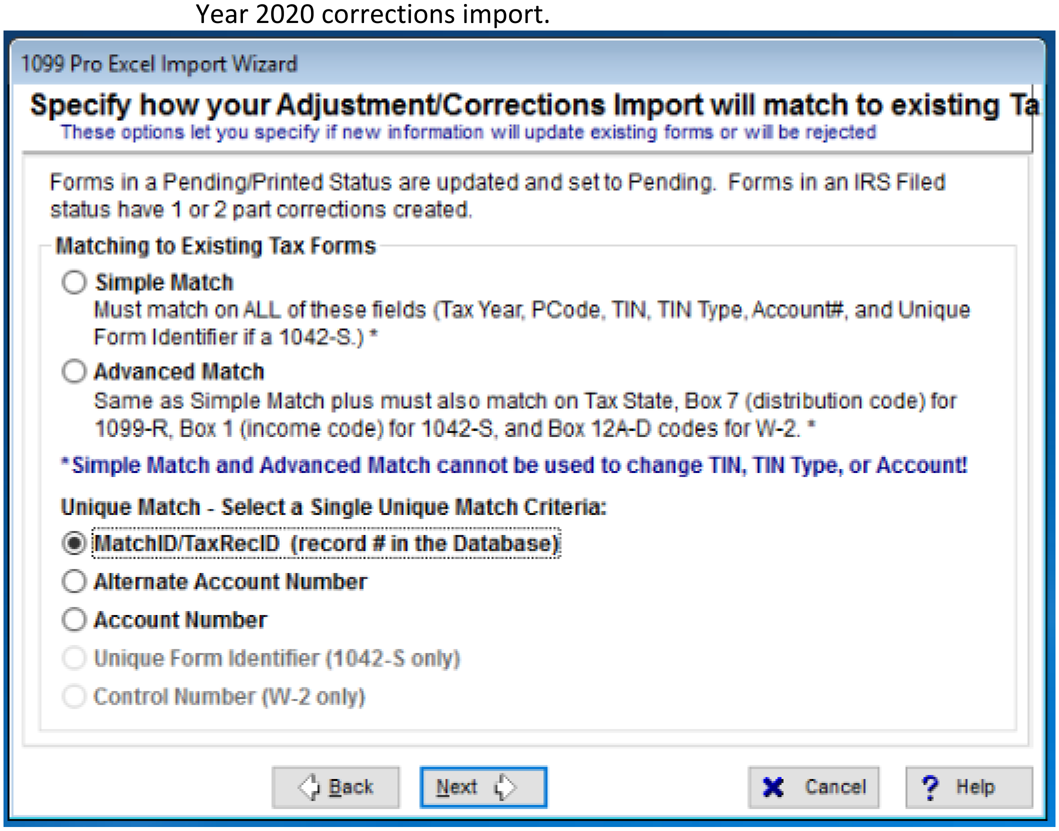
- Click “Next” to all the wizard screens until the “Specify a Name and Usage Notes” screen is reached. Update the name to indicate that this is now a Corrections Import map.



- 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. Here is a brief description of the differences between the matching methods.
  - **Simple Match** – This is a method of matching your incoming records to the tax records in the database. If all the matching fields in your import file (Tax Year, PCode, TIN, TIN Type, & Account Number) match the tax record in the software then it will be considered a match and the update/correction will be made. If any of the fields do not match, then no change will be made in the software.
    - Note: For the 1042-S form type, Unique Identifier is also used in the matching criteria
  - **Advanced Match** – This is the same as the Simple Match field above but adds additional matching criteria when matching for 1042-S, 1099-R, & W-2 form types.
    - 1042-S: Box 1 Income Code & Tax State must also match
    - 1099-R: Box 7 Distribution Code & Tax State must also match
    - W-2: Box 12A – 12D Codes & Tax State must also match
  - **Unique Matching Criteria** – The unique match field uses a single field to create a match as opposed to a group of fields like the Simple/Advanced Match options.
    - Unique Matching has two benefits of:
      - Allowing the updating of TIN, TIN Type, & Account. This is because the Simple/Advanced match options use those fields as part of their matching criteria and thus cannot be part of the information that gets updated/changed.
      - Providing more flexibility on how the match is made to your unique data.
    - Unique Matching also always uses the Tax Year & Payer Code (PCode) matching criteria
      - I.e only 2020 records would be eligible for updates/corrections if you are performing a Tax Year 2020 corrections import.



- 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 the field that it is matching on.
  - Transactional records, i.e records under a filer with aggregation turned on, that are in a Pending status cannot be update with a corrections import map. Please use an offsetting transactional import in this case.
  - If duplicate records exist, with the same TIN/Account/TIN Type, 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.
  - Only the records, and data, 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.
  - Printed: Printed records will be reset to pending and updated, if matched.
  - Filed: Filed records will cause a pending correction(s) to be created, if matched.