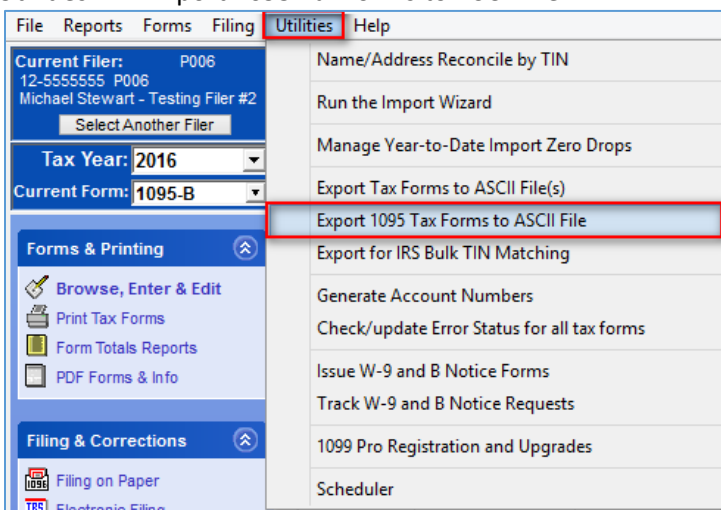


**Overview:** Corrections, or updates, can only be created for tax records that currently exist in the 1099 Pro Corporate Suite software. In order to import corrections for 1095 form types you will need the unique identifier (MatchID) associated with each record – which is what matches the record from your import file to the record in the software. In order to gain this information, and a spreadsheet that is useable for importing your corrections, complete the following steps.

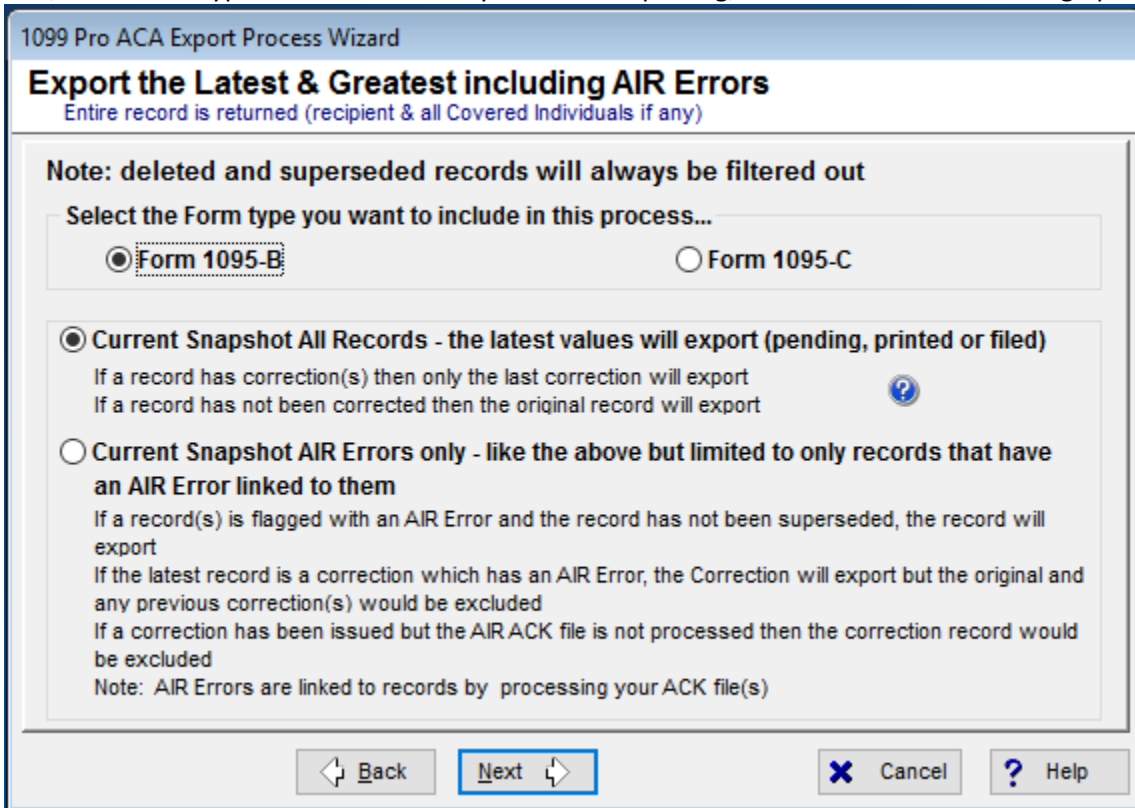
**Note:** Corrections imports **CANNOT** be reversed! It is highly recommended that you back up your database prior to importing corrections. If you are on our hosted environment, with DPS, please contact your Account Manager to request a backup beforehand.

## **Step 1: Exporting Records to Attain their MatchID**

- Login to the administrative portion of the Corporate Suite software
- Select “Utilities” -> “Export 1095 Tax forms to ASCII file.”



- Click “Next”, choose the type of 1095 form that you will be exporting, and select from the filtering options available.



- Please select the “?” icon to see a chart of the two different export scenarios.

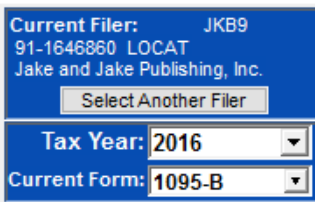
- Current Snapshot All Records – Exports all records, for that form type, with their MatchID’s and AIR Error messages, if available.
  - AIR Error messages are only available if your data has been submitted to the IRS, you have received the AIR Acknowledgment file, and you have attached the AIR Acknowledgment file to the electronic filing session in the Corporate Suite software.
- Current Snapshot AIR Errors Only – This export method exports only those records that have AIR errors. It is designed to streamline the correction process after you have filed with the IRS and attached your AIR Acknowledgment file.
  - Select which Filers should be included in the export by clicking “Select Filers To Process”. Tag which Filers should be included in the export and click “Proceed to Next Step” then click “Next”.
  - Choose the destination folder for the export by clicking on “Select the Destination Folder” or just leave it at the default “C:\1099 Pro\Pro99CS\Exports”.
  - Click “Finish”.

**Note:** The export file that is created has two additional columns for MatchID and AIR Errors. The MatchID column is required for the corrections import but the AIR Errors column is for your information only – it will not be imported. This export file can be:

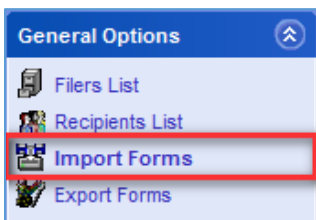
- Modified and imported directly back into the software as outlined by the instructions in Step 2.
- Used only to get the MatchID information so that you can apply it to the records on your own spreadsheet.

## **Step 2: Create a Corrections Import Map**

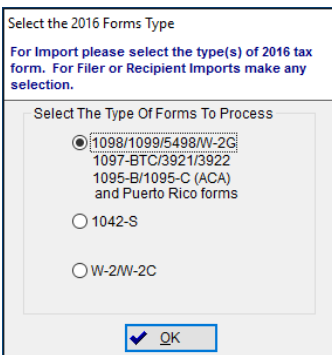
- Login to the administrative portion of the Corporate Suite software.
- Select the correct tax year, filing entity, & form type from the upper left menu options



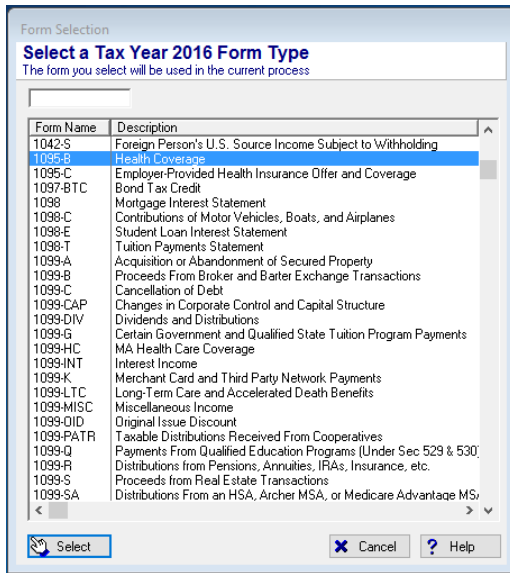
- Select the “Import Forms” Option from the left-hand menu



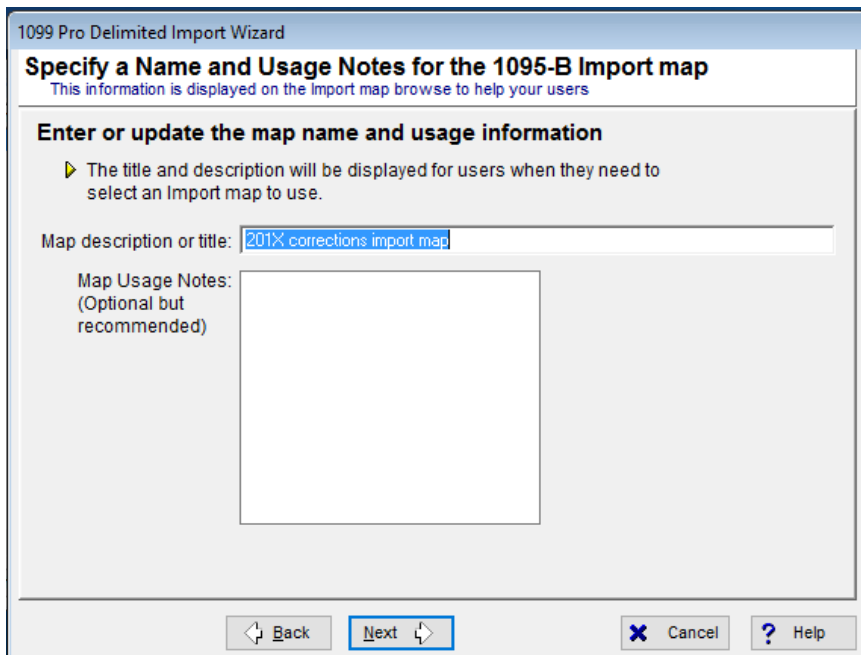
- Choose 1098/1099/5498/W-2G/1097-BTC/3921/3922/1095-B/1095-C (ACA) and Puerto Rico forms.



- Select “Create/Manage/Print Import Maps”.
- Choose the appropriate form type from the list.



- Click “Add”.
- Click “Delimited”.
- Click “Next”, “Next”, “Next”.
- Click “Browse and locate the file that was most recently Exported.”
- Click “Next”.
- Click “Map by name”.
- Click “Next”.
- Click “Next”, “Next”, “Next”.
- You will now have to choose a title for the corrections import, choose something appropriate like “201X Corrections Import Map”.



- Click “Next”.

- At this point you can optionally choose a default source folder for the custom import map to look when starting new imports, and also a default name, although the default name is not recommended.
- Click “Next”.
- 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.

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- Click “Next” and select the matching process that is required. Take note of the method that the software uses to match existing information. In order to import corrections for form 1095 you will be required to have the MatchID value for the record (A unique identifier for each record in the database).
- Click “Next” and then select the “Finish” option. The corrections import map is now created.

### Step 3: Importing Corrections

**Note:** Corrections imports **CANNOT** be reversed! It is highly recommended that you back up your database prior to 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 MatchID. Therefore, the wrong record can be updated if you use the incorrect MatchID.
  - 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 corrections import file, then the record that exists in the software will be left as is.
  - The corrections import process completely removed and replaces that matched record with the new information in your corrections import file. Therefore, the import file must have all the information required on the tax form and all covered individuals / dependents, not just a subset.
- 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.