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From the Oct. 2007 [Review of W-2/1099 Systems](#)

1099 Express provides two options for year-end information compliance: the self-titled 1099 Express system, which generates forms 1099, 1098 and 5498; and W-2 Express, which is geared toward year-end wage reporting. The systems operate completely independently of each other but utilize nearly identical interfaces, which offer simple integration with Microsoft Excel. Single-user pricing for the systems remains at \$199 for 1099 Express and \$149 for W-2 Express. Renewals cost \$95 annually. Both programs can print to blank or pre-printed paper, and electronic filing capabilities are included with the system. The company also offers service bureau filing options for additional costs. A 1042-S Express package for reporting the income of foreign persons is available for \$249.

Usability/Navigation – 4 Stars

As noted above, the two programs share nearly the same interface, opening to a spreadsheet view that closely resembles an Excel screen, providing icons and system menus across the top of the screen and the table grid in the bulk of the work area that serves as the recipient selection list for the currently open client/payer for each program. This selection list is sortable by any of the column heads and includes additional search features. The 1099 Express system also has navigation functions through tabs across the top that allow users to jump to recipient lists for any specific version of form 1099, acting as a filter function.

The system supports any number of payers and recipients. After setup of company/payer

data, which takes place on tabbed data collection sheets, 1099s and W-2s are

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The 1099 Express and W-2 Express systems are designed to be easy to learn and use, with all transactions occurring from within the system, without having to visit the websites of either the IRS or the SSA. The system does not offer password security but does maintain an audit trail record of data changes.

Reporting & Import/Export Capabilities – 4.5 Stars

Both programs provide basic reports for column totals and summary totals, as well as the audit trail report. The programs allow previewing reports on-screen prior to output to plain and pre-printed paper stock. Import is available directly from Excel, including the ability to cut and paste data, as well as from programs that can save data into *.CSV format, such as QuickBooks and Peachtree. Sample Excel and Access files are included in the programs that help demonstrate the import process. QuickBooks data can also be acquired through a “print capture” method, and data in magnetic media files produced by other programs can be imported. During data import, the systems alert users to potential errors. Data can also be drawn from dBase, Lotus, Quattro and Works formats. 1099 Express and W-2 Express can export to Excel, Access, Notepad and other formats using the copy and paste method.

Support for Paperless Transmission – 4.5 Stars

Both 1099 Express and W-2 Express offer electronic and paper-based filing, with built-in e-filing tools for submitting data to the IRS and SSA, automatically remembering filer passwords for both systems. The company also offers a full-service filing bureau for an additional fee.

Help/Training – 4 Stars

The programs include traditional built-in Help utilities along with right-click menu functions, mouse-over icon descriptions and other features. The vendor does not offer training options, but sample data files are included with the programs to aid in learning common tasks, and telephone support is included

at no additional cost. Program updates can be downloaded from the vendor's

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