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From the Oct. 2008 Review of
W-2/1099 Compliance Programs

CCH Small Firms Services offers the W-2/1099 & Payroll Compliance system under both the ATX and TaxWise brands, both of which were acquired by CCH about two years ago. The W-2/1099 systems are essentially the same in function and design, but offer integration with their respective tax packages for sharing of client data, document management and other features. The program provides print and electronic compliance functions for all federal reporting requirements to the IRS and SSA, along with all state payroll forms. The system can be used as a stand-alone federal, state and local payroll compliance reporting package, or in conjunction with the tax and Client Write-Up packages available for ATX and TaxWise. The W-2/1099 & Payroll Compliance Program costs $160, which includes unlimited e-filing and forms use, with support for up to three users. It is also offered as a bundled component of ATX's MAX package.

Usability/Navigation – 5 Stars
The W-2/1099 & Payroll Compliance system works as an integrated component of the ATX or TaxWise tax programs, essentially adding W-2 and 1099 compliance functions, forms and e-filing capabilities to the tax packages. If used as a stand-alone system, it still provides the same general interface of the tax package. After opening the tax system, users can access or create new 1099, 1098, W-2 or other forms just as they would for income reporting returns, using client selection windows that provide several sorting, filtering and searching functions. In addition to compliance functions, the program offer practice tools, receivables and additional management functions, all housed in an exceptional, user-customizable interface that is intuitive and provides simple navigation.

When creating a new 1099 or W-2, the system initially uses a worksheet to

transferred from individual W-2s and 1099s. Forms can also be instantly duplicated, with employer data automatically populated, easing the process of entering multiple W-2s or 1099s for the same payer client.

The W-2/1099 & Payroll Compliance system includes diagnostic tools that provide messages across the bottom of the screen. E-filing functions are available via an icon or through the E-Service Manager section of the main tax program. Client information rolls over year to year.

Reporting & Import/Export Capabilities – 4 Stars
In addition to importing from the ATX and TaxWise Client Write-Up application, users can import data from QuickBooks and Peachtree, and ATX and TaxWise both extend the ability to print to plain or preformatted paper to their W-2/1099 functions. All forms in the W-2 and 1099 families are included, plus over 1,900 state and local payroll reporting forms. Additional reporting options, including client lists, summaries, billing and others, are available through the primary tax package.

Support for Paperless Transmission – 4.5 Stars
The built-in E-Service Manager, although geared toward income returns, also provides good oversight of e-filing processes involved in electronically submitting year-end information returns to the IRS and SSA. Unlimited filing is included.

Help/Support – 5 Stars
Since the W-2/1099 functionality is added to either the ATX or TaxWise system, users have assistance features from the tax system, which includes extensive options ranging from right-click menus, a full index, content-specific functions and line-by-line guidance. Also built into the program are several tutorials geared specifically for W-2 and 1099 tasks. ATX and TaxWise both offer online

support centers with knowledgebases and access to various training tools and

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