

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Oct. 01, 2008

*From the [Oct. 2008 Review](#) of
W-2/1099 Compliance Programs*

Convey Compliance offers the 1099Convey Software, a wage and information reporting system designed for use by accounting professionals or as an in-house corporate solution. The program offers compliance capabilities for all federal and state reporting requirements, with customizable report options and the ability to import from several file types. 1099Convey is offered in the following four versions: Essential, Essential+, Advantage and Ultimate. The primary differentiator in these versions is the number of transactions and users supported. All include the ability to prepare all form 1099s, along with 1098, W-2, W-2G, 941, 5498 and W-9. The Advantage and Ultimate versions add support for B-Notices, while Ultimate also includes form 1042-S. The base, single-user Essential program, which supports up to 3,000 transactions per year, costs \$495.

Convey also offers several compliance service bureau functions, most notably through its Taxport Solution. Through this solutions, the vendor automatically manages all forms compliance and transmittals, including Puerto Rican and Canadian obligations, and produces and mails all payee statements.

Usability/Navigation – 4 Stars

The primary interface for 1099Convey is actually more of a resizable toolbar that provides only a few key icons for accessing the tax forms library, reporting output, and payer and recipient lists, along with a handful of pull-down menus. A third and final row on the toolbar offers links to forms that have been previously used in the system.

The program's payer and recipient centers open within a new, customizable

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Instead, forms are created from the forms library, which opens a data-entry screen that resembles the form selected and automatically performs calculations to W-2 withholdings as necessary. A form preview option is also available from this screen, offering a non-editable view of the actual form that can be printed, saved as a PDF or e-mailed from within 1099Convey. Data-entry screens include smart features such as selection lists for EIN and TIN/SSN, which automatically populates data for these areas, as well as ZIP Code recognition that fills in city and state. Within the form entry screen, the system also displays a list of all forms of the same type, with search functions similar to the recipient and payer lists. Also notable, 1099Convey interfaces with the IRS' TIN matching program to help reduce B-Notices.

Reporting & Import/Export Capabilities – 4.5 Stars

The 1099Convey system can print forms and reports to plain or pre-printed paper and offers the ability to save reports as PDF or Excel files. It can also import data from Excel, ODBC and ASCII formats and has its own utility for e-mailing returns and reports. A service bureau option is available for outsourcing filing and printing and mailing of recipient copies. Reports include batch lists, payer and recipient lists, summaries, and transmittal reports.

Support for Paperless Transmission – 4.5 Stars

1099Convey offers electronic filing with the IRS and SSA via each agency's online system, with a step-by-step guided process to aid users. State reports can be piggybacked onto federal filings.

Help/Training – 4 Stars

1099Convey includes a traditional index-based Help utility, along with links to a guided tour of the program and FAQs hosted on the Convey support website. Technical support is included with the system, while the company also offers

a variety of online training options. Convey also produces a quarterly newsletter

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Sponsors.

© 2024 Firmworks, LLC. All rights reserved