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Isaac M. O'Bannon • Oct. 01, 2009

*From the October 2009 Review of [W-2/1099 Compliance Systems](#).*

The 1099 Express program was developed using an Excel interface to offer 1099 compliance, while its sibling product W-2 Express offers the same for employer reporting. Both systems utilize the same interface, file structure and features, but for this review we've looked specifically at the 1099 system, which supports all 24 forms in the 1099 family, along with forms 1098, 1098-C, 5498 and W-2G. Both systems can be used by professionals managing the year-end wage and information reporting for any number of clients with unlimited employees, and both offer compliance for all states and federal entities including electronic filing to the IRS and SSA.

Software licenses can be used on any number of computers in the same office or networked. For new customers, the 1099 Express program costs \$199, and the W-2 Express system costs \$149; each is discounted at \$99 for renewals. The company also offers a 1042S program and a service bureau option for 1099 and W-2 printing and filings.

#### **USABILITY/NAVIGATION –**

Both programs open within a spreadsheet view that is similar to Excel, providing prebuilt macros and calculations that allow for quick access to individual recipients, adding recipients and entities, and other tasks. 1099 Express can support any number of payers and recipients. The screen's work area is the master entity selection list, displaying virtually all information for all recipients

of a particular form type from the fields and boxes on that recipient's

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tab through form boxes or use their mouse, with options for setting federal forms to be combined with their state counterpart. Payer data is automatically populated using information for the selected company/client, and the program can be set to automatically calculate fields such as FICA withholding amounts. 1099 Express also offers a merge feature that enables users to quickly find recipients with multiple copies of the same form (which might happen for forms 1099 or W-2G if entries are made as payments during the year), and then combine them into a single form. As an alternative to manual data entry, users can copy and paste from Excel spreadsheets or import from QuickBooks, Peachtree and other accounting systems, as well as from Microsoft Access, plain text and other formats.

#### **REPORTING –**

Both the 1099 and W-2 Express system offer the ability to print to laser-generated blank stock or pre-printed forms, or to electronically file to the IRS through the FIRE system and the SSA through its BSO filing option, with the ability to track submitted files. Users can also send test files through these online filing systems. In addition to compliance reporting and recipient forms generation, the programs offer reports for summaries and client lists, along with an audit trail report.

#### **IMPORT/EXPORT CAPABILITIES –**

1099 Express and W-2 Express can import from programs that save into CSV spreadsheet

format, which includes QuickBooks, Peachtree and most other small business accounting

systems, in addition to dBase, Lotus, Works and Quattro Pro. Because it is built on the Excel system, users can also copy and paste from Excel, Access and text files directly into the program, and can, conversely, copy and paste from 1099 Express or W-2 Express to those formats.

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