

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

Isaac M. O'Bannon • Oct. 01, 2009

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

The

1099Convey reporting system is designed for business entities or professional firms managing reporting for multiple entities, providing year-end wage and information reporting to the IRS, SSA, states and recipient copies. The program offers all versions of the form 1099 and W-2 families (including correction forms), as well as forms 1098, 5498, 941, 1042s and B-notices, along with transmittal forms 1096 and W-3. Electronic filing is also provided. The system is available in industry-specific versions for corporate, financial services, insurance, gaming and government entities.

Convey also offers an outsourced service for 1099 processing and reporting through which the vendor manages all printing, mailing and electronic reporting processes. The 1099Convey system is available in four packages, with the most economical Essential package costing \$495 for a single-user system that can process up to 3,000 transactions per year. The Essential+ package allows up to five users and 5,000 transactions at a price of \$895.

#### **USABILITY/NAVIGATION –**

1099 Convey opens to a simple toolbar that offers icon links to forms, reporting and payer and recipient management functions, along with form-specific buttons and a system menu across the top. When a function or form type is selected, the program opens a separate work area. The primary client selection list is accessed using the Payer icon, which brings up a window that offers searching and limited filtering options, with a summary of client information to the right.

Navigation tools enable scrolling between Payer records, while users can also

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

To work with an existing form or create a new one, users simply select the form type from the button or pull-down menu. The program automatically opens to the recipient form most recently worked on and provides an additional recipient list on the left that displays other entities that have a form of that type.

This screen also allows searching by several methods, while providing a form-like data-entry section that includes drop-down lists for selecting payer and recipient TINs if the payer or recipient data has already been entered into the system.

When creating a new payer or recipient, additional smart entry functions also aid in setup, such as ZIP Code first entry that completes the city and state and helps in validation. Payer information is automatically populated onto forms, and 1099Convey can be set to calculate W-2 withholding. The system includes several useful management tools, including the ability to make global changes, automated data backup and recovery, and user customization options.

## **REPORTING –**

1099Convey's reporting functions are accessed via the Output icon on the main taskbar, which opens a window that offers form-specific data summaries, transmittal reports, batch printing options, payer and recipient lists, and a forms library. Forms can be printed to blank paper or pre-printed stock, and electronic filing capabilities enable online submission of compliance reporting to the IRS, SSA and most states. The company also offers outsourced compliance services that can manage all or part of the printing, mailing and compliance processes.

## **IMPORT/EXPORT CAPABILITIES –**

1099Convey's reports and forms can be output to PDF or Excel, or emailed from within the program. The system offers import from common file formats such

as Excel, CSV, ODBC and text files. A built-in interface with the IRS'

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

**2009 OVERALL RATING:**

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved