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## **IDMS, Inc. – Account Ability Tax Form Preparation**

**888-IDMS-inc (436-7462)**

**[www.IDMSinc.com](http://www.IDMSinc.com)**

From the Nov. 2012 [Review of W-2 and 1099 Preparation programs](#).

**Best Fit:** Firms managing year-end compliance and ATF payroll for multiple mid- to large-sized businesses

### **Strengths**

- Complete print and mail services available
- Comprehensive reports
- Built-in document management feature

### **Potential Limitations**

- Built-in billing and invoicing features not available

Account Ability provides users with a year-end compliance and ATF payroll solution. The software supports multiple clients and the most commonly processed forms. Account Ability also supports importing from Excel or other formatted text files, as well as electronic filing and TIN matching. The program's print capabilities allow users to choose between self-printing on plain or pre-printed forms or outsourcing through the vendor's printing and mailing services.

### **Basic System Functions: 4.5 Stars**

Account Ability has a simple user interface that guides users through the setup process. The software is not web-based but can be installed on workstations or

network servers with support for unlimited users. There are several menu bars, with

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and SSA. Account Ability supports TIN matching and verification as well as a document management system. The system offers several error reports and exported PDFs can be password-protected when sent to clients.

### **Reporting: 4.5 Stars**

Account Ability supports unlimited clients with unlimited recipients and e-filing with the IRS and SSA for all 1098 and 1099 forms as well as W-2, W-2G, 3921, 3922, 5498, 941, 943 and 944 forms. The solution also supports compliance for Washington D.C., Puerto Rico, Guam, the Virgin Islands, American Samoa and the Northern Marianas Islands. Users can also generate state and local wage and withholding reports, client activity reports and register listing. The data entry screens mimic the respective form, allowing users to type directly into the appropriate boxes.

Account Ability generates reports for missing TINs, federal and state exceptions, and TIN matching errors. The system also supports truncating social security numbers on returns. Users are able to password protect files at the client level and save forms as PDFs, using the built-in PDF print writer. In addition, users can print forms on plain paper or pre-printed forms. Account Ability also supports printing continuous forms on dot matrix printers.

In addition to the self-printing options, IDMS offers print and mailing services. Through these services, IDMS will print and mail forms to recipients. Customers can select whether all forms are sent to all clients. Account Ability doesn't have any integrated billing and invoicing capabilities.

### **Import/Export Capabilities: 4.25 Stars**

Account Ability supports Excel and text files, with a mapping utility to match the imported data to the correct data entry fields. There is also an option to import the

previous year's data into the program. Account Ability also supports exporting to

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## Summary & Pricing

Account Ability offers numerous features and tools for electronically filing year-end forms for multiple businesses. Complete printing and mailing services are also available. Licensing for Account Ability starts at \$219.95, with each concurrent user license costing \$35.

## 2012 Overall Rating: 4.5 Stars

Financial Reporting • Income Tax

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