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CPA Practice Advisor



From the Nov. 2013 issue.

AvaTax 1099 is Avalara's web-based 1099 preparation solution. The solution is

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necessary forms for users. AvaTax 1099 includes real-time TIN verification and error checking, matching tax IDs and names with those on file with the IRS. The solution supports the most commonly used 1099 forms. Once forms have been completed, users can preview them before submitting by using the File Manager in the Advanced Options.

The solution has been updated with an enhanced user interface and user management tools. The new user management tools allow system administrators to easily add, deactivate and update user profiles and access.

Reporting- 4.5 Stars

AvaTax 1099 supports the most common forms like 1099-MISC, 1099-DIV and 1099-INT while also including many additional, less common 1099 form types like 1042-S, 3921 and 3922. The built-in validation feature checks and verifies addresses, TINs and SSNs against the IRS database. Users also have the option to choose to mask TINs when generating forms and reports. All uploaded documents and prepared forms are accessible via the File Manager under the Advanced Options.

Forms can be submitted to the vendor for printing and electronic filing and users can approve all forms or select which forms they would like to submit.. Users now have the ability to print in bulk on-site, as well as print 1099 forms from the cloud to remote print facilities.

Import Capabilities – 4.5 Stars

Data can be imported from delimited text or Excel spreadsheets. Once users select the appropriate file and import type, AvaTax selects the appropriate form for users to match data to the form. Once users complete the data mapping, the solution will check for errors and guide users through error correction and TIN validation. Users can also generate and access reports and forms for download, as well as every uploaded file.

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Best Fit: Accounting practices preparing and managing year-end compliance for multiple clients.

What's New:

- Updated User Interface
- User Management Tools
- Self-Bulk Print

Strengths:

- Built-in error checking and TIN Validation
- Comprehensive mailing and filing service

Potential Limitations:

- The system is designed for 1099 generation only, not W-2s
- No built-in client billing utility

2013 Overall Rating: 4.75 Stars

Financial Reporting • Income Tax • Payroll • Small Business

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