www.W21099.com

The W-2/1099 Filer system from EG Systems provides a comprehensive multi-payer program for year-end and quarterly wage and information reporting to federal and all state entities. Forms can be printed to plain or pre-printed stock, and free electronic filing to federal and state is available. The system offers barcoded form W-2s, SSN masking on all forms, multiple data-entry views, strong import and export options, PDF output of recipient copies, full audit trail, and free encrypted online backup of data. The system can be used on individual computers or over a network.

Basic System Functions

The main interface in The W-2/1099 Filer uses a well-designed collection of navigation and feature menus that make it easy to move quickly to key program areas, payer and payee selection lists, reporting functions and form entry tasks. Both selection lists provide similar spreadsheet view access to entities, with summary data sortable by column and options for searching across files. Recipient selection screens add the ability to quickly copy recipients or use default data assigned to automatically populate much of the information forms.

General payer information screens provide intuitive features for selecting form-specific defaults, electronic filing data and masking, along with application of state SUTA rates. For general recipient records, users can easily add new forms. Screens include lookup fields for city, state and other lines. Users can also retrieve and edit forms by choosing from one of the form family buttons at the top of the main interface, with quick button options for W-2, W-2C and 1099 forms MISC, INT, DIV, S and R, which brings up selection windows with only those types of forms for a selected payer entity. Form data entry can be performed in multiple views, including a form replica screen, interview-style mode or a multi-recipient batch mode. Having

multiple options for manual data entry lets users choose the method they prefer,

season, while interim system updates are available for download as necessary. Major new features for 2010 include free secure online backup of data files, masking of TINs on 1099 and W-2 forms, barcoding on form W-2, and a correction return wizard. A separate net payroll calculator program is also included with the program. 5

Reporting

The W-2/1099 Filer system can be used to produce all forms 1099 and 1098, plus W-2, W-2C, W-3, W-3C, 1096, 1042-S and 5408, in addition to auto-populating forms 940, 941 and 943. It includes free electronic and magnetic media filing for federal and all states, with a status log that tracks all filings. The program also offers printing to blank paper or pre-pre-printed forms, with laser or inkjet, as well as duplex printing capabilities. Printed forms can be used with standard window envelopes or pressure-seal forms, and the system offers recipient mailing lists with the ability to print directly to envelopes. The vendor does not offer a printing and mailing service bureau. Other reporting options include an audit trail, summaries, edit reports, proformas and state wage listings. Reports can be output to various formats for complete customization or analysis.

While an integrated invoicing function is not available, the program offers data export to various formats for use in transferring to accounting systems, and payer management functions offer some additional monitoring tools. 4.75

Import/Export Capabilities

The W-2/1099 Filer allows rollover of prior-year data and can import data from Excel, CSV, XML and PDF formats, allowing import from payroll systems. It can also pull W-2 and 1099-MISC data directly from QuickBooks, Peachtree and other accounting packages, and can export to Excel. All reports can be saved to PDF, and payer recipient lists can be saved to HTML format for sharing with clients via email.

The system is not web-based, so it doesn't provide online portals for recipient access.

e-filing instructions and links to the IRS, SSA and all state taxing entity websites. The program can be set to automatically check the vendor's website for system updates. Online support options for The W-2/1099 Filer include access to remote live support and contact information. Live technical support is included with pricing. 5

Summary & Pricing

The W-2/1099 Filer offers comprehensive support for all year-end wage and information reporting forms, with free e-filing to federal and all states, and excellent import capabilities. It has a variety of print and digital output options, including PDF formatting of recipient copies and reports. Pricing is module-based, with the base program costing $109, a laser engine for most common forms at $35, QuickBooks import $35, Universal Import $25, PDF import facility $50. Other laser image forms are available at a nominal charge. All licenses are for a network version, which can be used by any number of users.

2010 Overall Rating 5

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.