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## EG Systems – W-2/1099 Filer

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The W-2/1099 Filer from EG Systems produces forms W-2, W-2C, all 1099s, all 1098s, 5498, 941, 940, 943 and 1042-S, which can be submitted electronically, magnetically or in print. The program is available in both Windows and DOS versions and costs \$89 for the base package (\$59 renewals), but the standard laser printing module for forms W-2, 1099-MISC, 1099-INT, 1099-DIV, 1099-R, 1099-S, 1098, W-2C, W-3 and 1096 is a highly recommended feature that costs an additional \$35.

Laser modules for other forms are also available at varying costs. All licenses enable use of the software on a network or on stand-alone computers. The company also includes a free Net Payroll Calculator that can calculate gross to net or net to gross.

### Usability/Navigation – 5 Stars

After setting up preparer information, the program opens to a well-designed interface that includes a To-Do list popup, which can be used to monitor tasks by several methods. The primary screen uses icons, buttons and pull-down menus to offer shortcuts to the main features of the program, including jumping to specific forms such as W-2, INT, MISC, DIV and others. All functions are also accessible by keyboard shortcuts.

When working within a client/payer file, the W-2/1099 Filer provides a list of all records for the client. Individual payee/recipient forms can be opened by double clicking. Because the program files forms by grouping them under the employer/payer, it automatically fills in employer/ payer information lines for all recipients for that client, as well as other forms being prepared for that client. Users can optionally set default values for payer and recipient fields, including city, state

and zip codes. These can be overridden on actual forms, if necessary, and can noticeably speed up data-entry time. Users have multiple options for data entry, including using exact replicas of the actual forms, entering data through a spreadsheet interface, or an interview style format. Throughout data entry, W-2/1099 Filer automatically performs calculations where possible. The program also has a 1098 allocation feature with split-year capability.

During setup, users can choose several navigation preferences, including Tab and Enter key functions, which helps customize the program for the user. Toolbars can also be set up by the user. The program includes an audit trail and reporting functions, as well as proforma functions that carryover payer and recipient information from year to year.

New for this year, the program has a ZIP code utility that automatically fills in the city and state when the user enters the ZIP code. The system also remembers new codes as the user enters them. This can help speed entry and also prevents errors. A new popup calculator has also been added, which offers an electronic “adding machine tape” feature that makes it easy to go back and check calculations.

### **Reporting & Import/Export Capabilities – 5 Stars**

W-2/1099 Filer can import data from QuickBooks, and from ASCII and \*.DBF formats, which many accounting programs can output to, making a two-step export-import process available for many users. The program also has a Universal Import Capability feature that enables it to draw data from any program that can produce a W-2. The program shares data internally between forms, minimizing redundant data entry when creating forms for already existing payers and payees. It also integrates with the company’s After-the-Fact Payroll system for quarterly reporting. The system can use any Windows-compatible printer to print on preformatted forms or on blank paper, and offers printing of mailing labels and envelopes. Available reports include Summary, Edit, Proforma, Transmittals and State/Local Wage Listings.

### **Support for Paperless Transmission - 4.5 Stars**

W-2/1099 Filer includes a magnetic media filing feature for Federal and all states and can be used to electronically file to the SSA and IRS.

### **Help/Training – 4.5 Stars**

W-2/1099 Filer provides extensive built-in help, including an index-based utility, links to agency web sites, and the user’s manual. It also includes navigational help

elements, such as mouse-over information and right-click menus. EG Systems offers free online training sessions for up to five students at a time and offers free support, including remote support that, with user approval, enables the support staff to view client files and resolve difficulties directly on the user's computer.

### **Relative Value – 5 Stars**

W-2/1099 Filer offers excellent features for a low-cost package. The program's interface eases navigation with intuitive icons and menus, as well as good reporting and import capabilities that complete the system. The system's capabilities are strong enough to be employed by large firms or in-house clients, and simple enough to understand that even a small firm with only occasional use would find value in it.

### **2004 OVERALL RATING: 5**

For this review section, we scored the reviewed products on the following:

**Usability/Navigation**, which covers ease-of-use; number of clients and form recipients; primary navigation tools; and general operation of the program, including data entry.

**Reporting & Import/Export Capabilities** focuses on managerial tasks, printing functions and data transfer between the program and spreadsheets and other applications such as payroll and AP modules.

**Support for Paperless Transmission.** With increasing state and federal requirements for magnetic or electronic transmission of W-2s and 1099s, as well as the cost and timesaving benefits of minimizing printing, we considered the capabilities of these programs to perform paperless transmission of year-end returns.

**Help/Training** looks at built-in help utilities such as right-click menus and tutorials, external help tools such as online support centers and functionality, as well as productivity tools and training options.

**Relative Value** provides the reviewer's subjective opinion of what the user gets for the price. There is some variance in the pricing of the programs in this review, but it is not very wide. Value, of course, is not exclusively related to cost. However,

sometimes the best deal is not the cheapest, and sometimes the most expensive option does not provide the best function.

The **Overall Rating** represents a comprehensive view of how a product scored in the above categories, and is the average of those scores rounded to the nearest half-star.

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