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*From the Oct. 2007 [Review of W-2/1099 Systems](#)*

The 1099Convey Desktop Edition provides year-end information return compliance for all 1098 and 1099 forms, in addition to 5498, W-2, W-2G, W-9n 1042-S and B-Notices. The system can print to plain paper and pre-printed stock and also offers built-in electronic filing functions for both IRS and SSA reporting.

The vendor also offers a variety of related services, including outsourced reporting and compliance, managed withholding remittances, TIN verification, and web and print service options. The network-ready 1099Convey Desktop Edition costs \$495 for the first year for a single-user version capable of 3,000 transactions per year. Annual program renewals are priced at \$350.

**Usability/Navigation – 4.5 Stars**

1099Convey's primary interface provides icons for accessing a tax forms library as well as Payer, Recipient and Output functions, while a button bar extends across the window that offers direct links to all of the forms available within the program. Selection lists for payers and recipients display and allow sorting only by TIN, while the screens display more detailed information for the selected payer entity. 1099Convey offers the ability to duplicate payer and recipient records when creating new ones. New payers or edits to existing ones are entered on line-based forms. The program offers several customization options for the interface, including the data-entry screens.

After selection of either a payer business or recipient, users can jump directly into form creation by selecting the appropriate document from the menu. Initially, this brings up a list of currently existing forms for that payer or recipient. New ones can be created by selecting the Insert icon, which brings up a screen

that allows entry of financial and tax information. The screens include several

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screens follow form design, and the program automatically calculates SSI and Medicare withholding, with the ability to override these amounts if necessary. An audit trail tracks all changes to payer and recipient information. Data can also be imported from several accounting programs using a wizard that simplifies the task of mapping and acquiring the data. 1099Convey also provides an easy process for creating corrections.

### **Reporting & Import/Export Capabilities – 4 Stars**

1099Convey's output capabilities include the ability to query and print user-specified reports for virtually any data within the program, allowing users to sort and filter criteria as needed or to display specific fields. Reports and forms can be printed either to plain paper or pre-printed stock. The program can export to Microsoft Excel or text formats and offers import directly from Excel, ODBC and ASCII. As well, the import mapping wizard can pull client data from most other accounting programs. Convey also offers a Print Services option for outsourcing all statement printing and mailing responsibilities to the vendor.

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

The 1099Convey system supports electronic and magnetic media filing, with the program easing the process of selecting which records to prepare for transmittal, formatting them appropriately, and then either transferring the data to disk or uploading the information to the IRS and SSA. The system's Transmittal utility includes reporting options for checking and balancing totals and other review functions. Convey's Taxport Solution provides outsourced compliance, including transmittals, information returns processes and all filings, as well as creation of payee statements.

### **Help/Training – 4.5 Stars**

The program provides good assistance features, including screen-specific Help

and various wizards that guide users through processes. Additionally, data-entry

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