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

The Account Ability system is designed for preparers who handle the annual wage statements and information returns for multiple clients. It also offers support for any number of payer companies and payees and offers compliance functions

for all versions of forms 1099, 1098 and W-2, W-2c, along with W-3, W-3c, 1096, 5498, 5498-ESA and 5498-SA. The network-ready program allows printing to plain, pre-printed paper or pressure seal forms and includes unlimited e-filing and magnetic media filing to the IRS and SSA, as well as to states supporting the MMREF-1 format. Account Ability costs \$154.95 per year for a single-user network-ready

license; additional users can be added for \$35 each. An optional add-on e-filing service through which IDMS submits and tracks returns for the user costs \$50 per year. As well, the vendor extends a 10 percent volume discount on all tax forms and envelopes to subscribers of *The CPA Technology Advisor*, which is obtained by entering the reseller code CPATECH on the shopping cart when checking out at www.idmsinc.com/1099Forms.php.

Usability/Navigation – 5 Stars

Account Ability installs quickly and opens to a mostly blank primary window with pull-down menus across the top for Module, Preferences, Forms, Window and task-related Help functions. Most tasks are accessed either via the Module or Forms windows. Working within client data files is performed by selecting the Client Management option from the Module menu, which provides a spreadsheet client selection list that includes search and sort functions. The window also

offers icons for creating new clients or copying existing ones, displaying all

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calculations for various fields such as FICA and Medicare taxes as data is entered. Data is not automatically saved, and the right-side menu with the save button is a little odd at first. However, the form-based data entry is otherwise very simple to understand and navigate, and most users should grow accustomed to the program quickly and with no training. Account Ability watches for duplicate taxpayer IDs and includes a U.S. Postal Service address verification function as well as password security at the payer level. Backup and restore functions are easily accessible, and the user is prompted to backup each time the program is closed. The system uses the SSA's AccuWage and AccuW2c tools to identify file errors prior to transmission. Users can customize the system desktop and navigation features, as well as font and color options.

Reporting & Import/Export Capabilities – 5 Stars

The system's Client Activity Report and Client Master Report are easily accessible via icons on the top toolbar, while all forms can be printed to plain or pre-printed paper or to pressure seal forms. The program also has a state/local wage and withholding report. In addition to laser and inkjet printers, the program still supports dot-matrix printers for continuous forms printing. Account Ability also offers PostNet barcoding, which enables the system to automatically print the USPS postal barcode on envelopes. Account Ability can import from QuickBooks, Excel, ASCII and MMREF-compliant files, while the vendor also offers free conversion services for importing data from third-party payroll programs. Filer and recipient data can be exported to ASCII formatted files that can be imported into most financial applications, including Excel.

Support for Paperless Transmission – 4.5 Stars

Electronic and magnetic filing functions are handled via links to the SSA Business Services Online portal and the IRS FIRE reporting system. Magnetic and electronic

media files are formatted per each agency's requirements. IDMS'

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cost of the program.

2007 Overall Rating: 5 Stars

Technology

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