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*From the [Oct. 2008 Review](#) of  
W-2/1099 Compliance Programs*

The name of 1099 Express fairly well sums up the primary purpose of the system, which is designed for generating year-end 1099s, 1098s and form 5498. An optional add-on to the system, W-2 Express, is offered to provide wage reporting functions. Both allow paper or electronic format filing to the IRS and SSA. The core components of the system are intended for use by professional accountants who may offer after-the-fact payroll or year-end compliance services to clients who otherwise manage their own payroll processing. The system offers import from major small business accounting systems.

Additional offerings from the company include 1042-S Express as well as a service bureau option through which all processes are managed by the vendor. 1099 Express Enterprise costs \$199, W-2 Express is \$149; renewals for each are priced at \$95.

### **Usability/Navigation – 4.5 Stars**

For spreadsheet lovers, the primary interface for both 1099 Express and W-2 Express will be manna, providing a quick view of all previously entered forms for a particular client business, opening automatically to the last company used. This view doubles as the selection screen, allowing sorting by form type as well as by each of the form lines, such as name, SSN or any other field, including box data. The program also offers icons and menus for other functions such as calculation tools, spell checking, search features and Help options.

Data entry, whether creating a new form or editing an existing one, is easily performed on well-designed form replicas, with payer/employer data pre-populated and form fields navigable using either the tab key or the mouse. Users simply

select the appropriate form from one of the tabs, select the New icon, and

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on the progress of files. As an alternative to the IRS' Bulk TIN Matching program, which can take months and requires security clearance, 1099 Express offers the option of managing this process directly, helping to ensure against mismatched SSNs and names, whether through accidental typos or deception. In turn, this can help reduce potential penalties. An audit trail is also available, recording all data changes.

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

As previously noted, 1099 Express offers copy and paste capabilities to move data from Excel. It also offers import options to pull in 1099 and W-2 data from QuickBooks, Peachtree, Microsoft Access and other file formats. Since it is spreadsheet-based, users can also use the copy and paste method to transfer data to Excel, Access and other formats. Forms can be printed to regular paper stock with envelopes printing to traditional formats.

### **Support for Paperless Transmission – 4 Stars**

The 1099 Express system, and its sister product W-2 Express, both provide electronic filing options, most notably through built-in links to the IRS and SSA online filing systems, both of which include tracking of submitted files.

### **Help/Support – 4 Stars**

Tech support is included free, while sample data files aid in familiarization with the program, and a familiar Help utility provides an index and how-to functions.

The system is only offered via download from the vendor's website, as are program updates.

**2008 Overall Rating: 4 Stars**

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