

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

Dec. 01, 2008

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

ATX, which was acquired by CCH, a Wolters Kluwer business, a little more than a year ago, offers an unlimited W-2/1099 preparation system that is functional as either a stand-alone system or can be used in conjunction with the vendor's suite of tax preparation products that includes federal and state income tax compliance for all entity types, Kleinrock research tools, and trial balance and document management functions. The ATX W-2/1099 system offers year-end information reporting for all versions of forms 1099 and 1098, as well as 1096, W-2, W-3 and 5498. All federal and state payroll forms, such as 940, 941, 943, 944 are also included. The program supports printing of forms to plain or pre-printed stock and includes electronic filing of information returns to the IRS and SSA. ATX W-2/1099 costs \$140 per year for a version that supports up to three concurrent users. The system is included with many of ATX's bundled tax preparation packages.

Usability/Navigation – 4.5 Stars

All ATX programs open within the same interface, which starts with the Return Manager, a sortable spreadsheet list of clients and their returns. This provides a panel for searching for returns and tabs for additional primary functions, including the Rollover Manager, Preparer Manager, E-Service Manager and Bank Manager. A series of icons and pull-down menus also offer quick access to specific features.

Existing returns display the return type and information, and can be opened by clicking on the entry, which brings up the data-entry screen. The data-entry

screen provides tabbed access to basic information, state IDs, data input, details

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

entering information to the appropriate form. During electronic filing processes,

the program displays error messages at the bottom of the screen, alerting the user to potential and real mistakes.

The program organizes its databases and lists by returns instead of client/payer or payees. This means that there are no payer or recipient selection functions when creating new forms, although the program's reporting features do offer client lists for output. Overall, the program provides a great interface and simplified navigation, with easy access to all features and the ability to create numerous user-defined data fields, to make and save form templates, and to customize parts of the interface to user preferences. Additionally, ATX's W-2/1099 system provides an AR system that provides client billing and tracking functions.

Reporting & Import/Export Capabilities – 4 Stars

ATX's W-2/1099 system can print to plain or pre-printed stock and includes quick preview screens to see how output will look. The program allows data import from QuickBooks, Peachtree and the ATX Accounting Office suite, as well as from text formats.

Support for Paperless Transmission – 4.5 Stars

Electronic filing of information returns to the IRS and SSA is included, with the program saving data into the format required by each agency. The system's E-Service Manager serves as the hub of all electronic activity, providing tracking capabilities and other management functions.

Help/Training – 5 Stars

ATX's W-2/1099 system provides outstanding user assistance features, from wizards, tutors and tutorials to help get people started, to templates, customization

functions, right-click menus, content-specific guidance and a great Help utility.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

(Firmworks) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved