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1099 & W-2

2013 Review of EG Systems, Inc. – The W-2/1099 Filer

Oct. 31, 2013

CPA Practice Advisor



The W-2/1099 Filer is a comprehensive year-end compliance and reporting solution. It supports several data entry methods, federal and state forms, import formats and printing options. The solution also offers local and remote backup features. In addition to several updates that were delayed by Hurricane Sandy in 2012, the vendor has also released various new features for 2013, including a new look and feel.

Basic System Functions – 4.75 Stars

The W-2/1099 Filer can either be installed on individual workstations or networked servers and used by an unlimited amount of firm staff. Users can manage any number of payers and recipients within the program, including managing user rights and access and generating reports and forms.

Data can be entered in numerous ways including traditional data entry fields or interactive forms, which simulate the federal and state forms. Recipients can be used across multiple companies and FICA wages and withholding are automatically calculated. The solution also offers a full-time audit trail. The solution now features a reminder that will alert users when it's time to change SSA and FIRE passwords.

Reporting – 4.75 Stars

The W-2/1099 Filer supports all 1099 and 1098 forms, 1042-S, 5408, W-2, W-2C, W-3, W-3C, 1096, 940, 941 and 943 forms. Users can connect directly to the IRS and SSA websites through the W-2/1099 Filer's e-filing feature to submit forms and check the status of previously submitted forms. Users can also file for extensions electronically now.

Reports can be saved to PDF format and security features can be added for secure electronic distribution. The W-2/1099 Filer features a built-in document management feature that lets users attach scanned images and documents to files. Other reporting options include summaries, tally reports and state and local wage listings. Users have the option to print forms on either pre-printed forms or plain paper. Batch printing and sorting are also available, along with outsourced printing and mail services. Users can also print mail labels and envelopes.

Import/Export Capabilities – 4.5 Stars

The W-2/1099 Filer supports multiple formats including QuickBooks, Excel, CSV and XML. The software can pull directly from QuickBooks and offers two-step integration with other payroll systems through the use of other data import formats. It also supports data rollover from the previous year's data. Data can be exported to Excel or PDF formats and emailed directly from within the software. In addition, Proforma and Edit reports can now be printed directly to Excel.

Help/Support – 5 Stars

The W-2/1099 Filer's help options have been updated to include video tutorials. All help resources have been moved to the website, although users can still access a local help file. Remote desktop support is also available. The W-2/1099 Filer can be set to automatically update from within the program.

Summary & Pricing

The W-2/1099 Filer system offers extensive reporting capabilities for federal and state e-filing. Several options are available for report generation and printing as well. Pricing for the basic package starts at \$109, while laser engine printing can be added for \$40 and support for forms 940, 941 and 943 can be added for \$10.

Best Fit: Accounting practices managing year-end reporting for multiple clients.

What's New:

- New look
- Enhanced help options
- Client dashboard
- Bulk TIN matching
- Encrypted PDFs

Strengths:

- Comprehensive state, federal and local form support
- Batch filing and printing options
- Supports multiple data formats
- Remote and local backup options available

Potential Limitations:

- After-the-fact payroll is offered as a separate solution

2013 Overall Rating: 4.75 Stars

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