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screen format.

When processing the current year forms, users have three options available to them to carry information forward. Users may generate only the names and address information for payers and recipients from the prior year, generate the names and address information and zero fill recipient forms or generate the names and address information and populate recipient forms with prior year data.

The 2013 release introduced an on-screen comparison view of the prior year data. For the 2014 release, a new feature has been added that gives users the ability drag and drop prior year record information into current year field data. This allows simple record creation by simply clicking on the appropriate prior year information.

Reporting – 4.75 Stars

W-2/1099 Filer provides electronic filing for all federal forms and several state forms. Direct upload of IRS and Social Security Administration files is provided within the system. The system also provides direct links to check status of these uploaded files. States requiring data file uploads are supported within the system through a spreadsheet export format. Users may need to modify the resulting file to meet filing requirements, however.

W-2/1099 Filer is intended for filing federal level forms. Recent enhancements, however, have introduced some state level forms and reports. Most of the recently added state forms focus on withholding and unemployment reporting. Depending on the state, 1099 transmittals may also be available.

The core module provides all functions required to calculate and electronically file year-end compliance forms. By default, the core module will only print to preprinted forms. A separate module is required to print forms and reports on plain paper, but

the cost to add this functionality is minimal. This add-on module will also provide

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Help/Support – 4.75 Stars

Help and support options are provided with the system. An online user guide is provided on the company website and provides detailed program instructions and a variety of troubleshooting tips. Traditional assistance is also provided through email, phone and fax support with each option fully included in W-2/1099 Filer's licensing fees.

Added in 2013 and further enhanced for the current release are a number of video tutorials. These tutorials offer users a visual guide through the program. One final support option is through remote desktop, which allows the W-2/1099 Filer support team to control the user's computer and aide in troubleshooting issues.

Best Firm Fit

Accounting practices managing year-end reporting for multiple clients.

Strengths

- Prior year data viewable on screen
- Strong reporting options
- Remote desktop assistance for users

Potential Limitations

- Limited state forms and report options

Summary & System Pricing

W-2/1099 Filer includes a wide variety of form and reporting options for year-end compliance. Strong electronic filing options and the ability to view prior year data

on-screen make W-2/1099 Filer a valuable solution for accounting professionals.

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