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**1099 & W-2**

# **2014 Review of EG Systems – W-2/1099 Filer**

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W-2/1099 Filer is a year-end form compliance software solution. New for the current release is an enhancement to the on-screen, prior year data view and additions to state electronic filing compliance.

### **Basic System Functions – 4.75 Stars**

W-2/1099 Filer is installed on local machines, but can also be used in a multi-user, network environment for no additional charge. The user interface offers a variety of customizable features and users have the option to enter data through an interactive form view, which mirrors the printed form, or through a traditional data entry 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 PDF generation capabilities.

### **Integration/Import/Export – 4.5 Stars**

W-2/1099 Filer will import data from Microsoft Excel and a variety of text file options. W-2/1099 Filer provides a QuickBooks import utility to capture all of the appropriate W-2 and 1099 vendor information. This will allow users to utilize QuickBooks to track all financial aspects and use W-2/1099 Filer to print the year-end compliance documents.

### **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. Initial year pricing currently runs \$109 for the core product that includes calculations and electronic filing capabilities. A plain paper print module is available for \$40 and the 940/941 module is available for \$10. A discount is offered for renewal pricing on the core product.

**2014 Overall Rating: 4.75 Stars**

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