Wolters Kluwer Tax and Accounting, North America, Small Firm Segment

http://cchsfs.com/professional-accounting-software/

Best Fit: The product works best for smaller firms that are currently using other Wolters Kluwer Tax and Accounting, North America, Small Firm Segment products which include ATX, TaxWise, and Payroll.

Product Strengths:

- Product is designed to work with other Wolters Kluwer Tax and Accounting, North America, Small Firm Segment products
- Handles electronic filing for all necessary payroll and related forms
- Affordably priced

Potential Weaknesses

- Is not designed to be a stand-alone product

From the **2016 review of W-2 and 1099** preparation and filing systems.

Basic System Functions: – 4.5 Stars

Both W-2/1099 and Payroll Compliance Reporting are designed to work directly from

The W-2/1099 add-on is geared toward year-end compliance and form filing for federal forms, Payroll Compliance supports federal state, and local filing, with some overlap of features.

Both products use mirror images of the tax form currently being processed, simplifying the data entry process. The product also makes effective use of drop-down menus and function icons. Both products easily support multiple system users, and can also support an unlimited number of clients, payers, and recipients.

Data can be imported directly from ATX, TaxWise, or Payroll, with both the W-2/1099 and Payroll Compliance Reporting add-ons designed to handle compliance form filing. Users can also opt to create a new form by entering data directly into the Payers Information Worksheet or the Employer Information Worksheet. Payroll data can also be imported from third-party applications such as Sage 50 and QuickBooks. Both products are updated annually, with updates usually finalized in late fall.

Reporting: 4.25 Stars

W-2/1099 files quarterly forms such as 940, 941, and 944, and prepares both W-2 and W-3 forms that can be distributed to recipients. The product also handles both paper filing and electronic filing with SSA. 1098s, 1099s, and 5498s are also filed electronically, with users able to prepare forms as needed to recipients, or save forms as PDF files.

The Payroll Compliance add-on contains more than 1,600 federal, state, and local forms including W-2, W-3, W-2G, W-2AS and 4852. Like W-2/1099, Payroll Compliance also handles all 1099 forms as well as 1098 and 1098C. Forms can be printed for distribution and electronic filing options are available as well.

Data can be printed on both pre-printed forms as well as plain paper, and the

North America, Small Firm Segment. In addition, both products can also import client and payroll data directly from either QuickBooks or Sage 50 applications, as well the PaperlessPLUS document storage program that allows users to easily store documents electronically.

Help/Support 5: Stars

Both W-2/1099 and Payroll Compliance offer excellent help functionality within the product. Both form instructions and product tutorials are available to new users, and the ATX/TaxWise Solution Center offers a variety of help and support functions including a Knowledge Library, additional product tutorials, downloadable user guides, as well as the download center, where product users can quickly download the latest version of the product. U.S. based product support is available during regular business hours, with extended support hours offered during tax season.

Summary & Pricing

Designed as an add-on module to Wolters Kluwer Tax and Accounting, North America, Small Firm Segment accounting and tax products, both W-2/1099 and Payroll Compliance offer accountants with an excellent tool for handling year-end compliance reporting. Both products are affordably priced, with W-2 /1099 currently available for $239.00, and the more comprehensive Payroll Compliance available for $394.00. The Payroll Compliance add-on also provides users with the ability to e-file an unlimited number of payroll returns at a cost of $1.50 per return.

2016 Rating 4.5 Stars

Payroll • Taxes

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