CPA
Practice Advisor

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**5999**

**888-IDMS-inc (436-7462)**

**www.IDMSinc.com**

The Account Ability system from IDMS, Inc. is an annual information reporting program designed for multi-employer/client management. The program supports all versions of forms 1098, 1099, 5498 and W-2, W-2C and W-2G in addition to compliance for all states and U.S. territories using the combined filing program. Multiple data import and export options are available, along with the ability to generate reports into various formats.

## Basic System Functions

Account Ability opens into a full-screen window that offers pull-down menus across

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Forms can be started by selecting the specific form version from the right-hand menu's selection list, which brings up a form replica for the work area and automatically populates payer name, address, EIN and other common fields. While working in the forms view, the pull-down menus at the top of the screen change to provide additional options for filing, forms management, security settings and other system tools. The system offers a FREE Import Mapping Utility on the module menu, which provides a record view of spreadsheets and delimited text files. Record views are easily mapped to any tax form by simply dragging and dropping. Users can easily move forward and back between recipient copies of forms using navigation arrow icons. The program is designed for network or standalone use, with network settings allowing multiple concurrent users and user-level security.

Account Ability does not offer state payroll tax tables and is not designed to provide after-the-fact payroll capabilities, instead focusing only on the year-end reporting and compliance functions. The program is updated annually in December and is available on disk or can be downloaded. 4.25

## Reporting

Account Ability provides compliance for all versions of forms 1098, 1099, 5498 and W-2 and W-3, and recently has added compliance for forms 3921 and 3922. It does not provide generation of forms 940 to 945. Forms can be printed to plain paper or pre-formatted forms or electronically filed using the online reporting formats supported by the IRS and SSA, including the combined filing program for reporting to all states. Recipient returns can be saved to PDF format, and the vendor also sells laser forms and envelopes, including pressure seal forms that act as their own envelope.

Managerial reporting options include activity and control reports, register listings and state and local wage reports, which can be only slightly customized within the

system and cannot be output to common file formats. The program does not offer

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mail merge utilities. No portals are available, but PDF copies of recipient W-2 copies can provide electronic distribution options. Data can be easily and quickly rolled over from prior years. 4

## Help/Support

Account Ability supports all modern Microsoft operating systems, including Windows 7, and includes a comprehensive built-in Help utility, plus PDF user manuals, form instructions and links to the company's support website. The site includes a broad FAQ section, tips knowledgebase and information on conversions, along with contact information for live support, which is included in program pricing. 4.5

## Summary & Pricing

Account Ability is a very user-friendly and intuitive system for managing year-end information reporting processes and includes good import capabilities and tools for managing large client bases. It does not offer quarterly wage reporting or ATF payroll options, so is best suited to users who have those capabilities via other programs. IDMS also offers a good outsourced service for handling the printing and mailing processes. Account Ability costs $169.95 for a network-ready license.

**2010 Overall Rating 4.25**

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