



WAGE REPORTING SOFTWARE

Release Notes

WinFiler Plus 2009, Quarter 3, Update 2

ENHANCEMENT

- **Import from QuickBooks** – An error was occurring during the Import that referenced a “Reserved” field. This has been fixed.

Release Notes

WinFiler Plus 2009, Quarter 3, Update 1

NEW FEATURES

- **New York MTA-305** – New form for New York to report the new Metropolitan Commuter Transportation Mobility Tax. This form is to be filed by employers in New York City and surrounding counties. The initial return for 3rd quarter 2009 must include wages from March 1st through September 30th unless the form is being filed for a public school district. A \$2,500 threshold will be applied separately to each quarter to determine whether to include the quarter’s wages in the initial return. Refer to the Help file for more information.
- **NY Amount Types** – Two new W-2 amount types were added for the New York MCTMT form: NY State 1 MCTMT Wages and NY State 2 MCTMT Wages. If a Payer is required to file the New York MTA-305, add the amount types to the W-2 returns and enter the payroll expense subject to MCTMT since January 1, 2009 for each employee. The new amount types amount will be used to fill Line 1 of Form MTA-305.

Release Notes

WinFiler Plus 2009, Quarter 3

NOTICE

The IRS added Code 9 to Box 3 (Type of Wager Code) and reassigned ‘Any other type of gambling winnings’ from Code 8 to Code 9. Code 8 now represents ‘Poker winnings.’ After updating WinFiler Plus 2009 to Quarter 3, all W-2G returns that contain Code 8 in Box 3 will automatically be converted to Code 9 (Any other type of gambling winnings) and marked as reviewed.

NEW FEATURES

- **Automatic Check for Updates** – The program will automatically check for updates every time it is opened. Remember, if WinFiler Plus is installed on a network, you must update the server before you update your workstations. Once the server update is complete, open the program on your workstations and update them.
- **Security** – Force Password Change at Next Login checkbox has been added to the User Information screen. The Administrator can check this box after resetting a user’s password to force them to change their password the next time they log into the program.
- **Payee Forms** – A link to the PDF files containing the official IRS instructions has been added to all W-2 and 1099 forms’ data entry screens. If you do not have a PDF reader installed, you can go to www.adobe.com and download the reader or insert the WinFiler Plus CD into your computer and run the .exe file in the Acrobat folder to install the reader.
- **Fix W-2G Type of Wager Code Utility** This new utility will give you the opportunity to convert Code 8 to Code 9 for any imported W-2G returns. You will be reminded whenever the program opens if there are W-2G returns that have not been reviewed. Run the utility to either convert Code 8 to Code 9 (marking the return as reviewed) or just mark any W-2G returns as reviewed.



WAGE REPORTING SOFTWARE

ENHANCEMENTS

- **Colorado State ID for SUI** – The format has changed. The new format is 123456.78-9.
- **New Jersey NJ927 & NJ927W** – The Bank Account Number in the Summary Balance Due and Payment Information section is now validated for allowable characters: A-Z, 0-9, and blanks.

FORM CHANGES

Updated Federal Forms

- **941-X** – Government revision.
- **W-2** – The 2009 Blank Form version of Copy A is available for printing.
- **W-3** – The 2009 Blank Form version is available for printing.
- **1099 Forms** - 2009 forms are available for printing. This includes all Forms 1098, 1099, 5498, and W-2G.
- **W-2G** – The Box 3 codes for Type of Wager have changed. Code 9 was added and now represents 'Any other type of gambling winnings' and Code 8 now represents 'Poker winnings.'

State Government Form Changes

- **Iowa 60-0103** Employers Contribution And Payroll Report
- **Maryland OUI15/OUI16** – Form printouts were updated.
- **New York NYS-45** Quarterly Combined Withholding, Wage Reporting, and Unemployment Insurance Return
- **Utah 3** Employer's Quarterly Wage Report And Unemployment Tax Return

Release Notes

WinFiler Plus 2009, Quarter 2, Update 1

FORM CHANGES

Updated Federal Forms

- **941-X Adjusted Employer's Quarterly Federal Tax Return or Claim for Refund:** The revised form includes COBRA premium assistance information on lines 17a and 17b.

State Government Form Changes

- **Tennessee LB-0456 Premium Report:** The recently-enacted Additional Fee rate (0.6%) has been added to the form, and will automatically be included in the rate for calculating the Combined Premium Due on line 4.
- **IMPORTANT:** You should re-save any Quarter 2 Tennessee LB-0456 forms in order to include the Additional Fee.

ENHANCEMENTS

- **New Jersey NJ927 and NJ927W:** The Balance Due on Line 17 was occasionally reflecting a one-cent discrepancy. This has been corrected. The Bank Account Numbers used for electronic payments have been updated to allow only valid characters.

Release Notes

WinFiler Plus 2009, Quarter 2

NEW FEATURES

- **Federal Form 943-X:** This form has been added to the WinFiler Plus program for adjusting Annual Form 943 or for Claiming a refund. Use 943-X for errors discovered after December 31, 2008.
- **Federal Form 945-X:** This form has been added to the WinFiler Plus program for adjusting Annual Form 945 or for Claiming a refund. Use 945-X for errors discovered after December 31, 2008.

ENHANCEMENTS



WAGE REPORTING SOFTWARE

- **Federal Form 941-c:** This form has been removed from the program. Use the corresponding adjustment form (e.g. Form 941-X to adjust Form 941, etc.) for the Federal form that you need to adjust.
- **Import from Previous:** The size of the Payer List window has been increased to allow you to see more Payers at one time.
- **Release Notes:** The Release notes are now displayed using your PDF viewer, if one is installed, after an update. We recommend printing them for future reference.

NEW FORMS, FORM CHANGES

Updated Federal Forms

- **W-2c:** Government form change. A fourth line has been added in Box 14.
- **W-3c:** Government form change.
- **W-2:** The 2009 form is available for printing with the exception of Blank Form version of Copy A.
- **W-2c:** The updated form is available for printing with the exception of Blank Form version of Copy A.
- **W-3:** The 2009 form is available for printing with the exception of the Blank Form version.
- **W-3c:** The updated form is available for printing with the exception of the Blank Form version.

The following forms have been updated but cannot be printed until Quarter 3:

- **1098-E:** Box 2 description changed.
- **1099-C:** Added checkbox to Box 5.
- **1099-G:** Added field on Box 9.
- **5498:** Added Boxes 12a through 15b.

State Government Form Changes

- **Alabama A-6** Employer's Monthly Return of Income Tax Withheld
- **Florida UCT-6A** Quarterly Report
- **Iowa 44-105** Payment Voucher
- **Louisiana ES4B/ES4C/ES61** Quarterly Wage and Tax Report
- **Massachusetts WR-1** Contribution Report
- **Maryland MW508** Annual Employer Withholding Reconciliation Return
- **Michigan IUA 1020** Employer's Quarterly Tax Report
- **Ohio JFS-66111** Employer's Contribution Report
- **Oregon WR** Annual Withholding Tax Reconciliation Report
- **Utah TC-941** *Utah Withholding Return:* Currency fields are now rounded to the nearest dollar and no longer display or print cents.
- **Utah TC-941PC** *Payment Coupon for Utah Withholding Tax:* Currency fields are now rounded to the nearest dollar and no longer display or print cents.
- **Utah TC-941R** *Utah Annual Withholding Reconciliation:* Currency fields are now rounded to the nearest dollar and no longer display or print cents.
- **Washington 5208A** *Employer's Quarterly Report:* The text for Lines 9 and 10 changed.

Release Notes

WinFiler Plus 2009, Quarter 1, Updates 1 & 2

ENHANCEMENTS

- **Express Services – State Quarterly for NJ** – New Jersey (Form NJ927) and New Jersey (Form NJ927W) options have been added to the Select State for State Quarterly screen. The new checkbox in the upper right corner of the NJ927 or NJ927W prep screen must be checked in order for the Payer to appear in the Select Payers for State Quarterly screen in Express Services.
- **W-2 Amount Types for NJ** – The following amount types were modified or added to allow reporting of Family Leave Insurance Combination Plan wages on Forms NJ927 and NJ927W:
- **NJ State 1 DI Combo Plan Wages** and **NJ State 2 DI Combo Plan Wages:** "DI" was added to the description to differentiate between the FLI amount types for Combo Plan wages.



WAGE REPORTING SOFTWARE

- NJ State 1 FLI Combo Plan Wages and NJ State 2 FLI Combo Plan Wages are new.

FORM CHANGES

Federal Form Changes

- **941** – When a COBRA value was entered on Line 12a, Lines 14 and 15 were incorrectly being calculated. The printed form was not affected. Only the prep screen was affected by this. If you prepared a Form 941 prior to this update, you will need to Open the saved Form 941 and Save it again to make sure you have the correct calculations.

State Government Form Changes

- **New Jersey NJ927 and NJ927W:** You can now file the Employer's Quarterly Report (NJ927 and NJ927W) electronically through Express Services. Because the state made many changes to the form, any previously saved forms will be deleted when Update 1 is installed. Electronic payments (E-Check or EFT) of contributions due for Gross Income Tax and Unemployment, Workforce, Disability and Family Leave are available on the new prep screen when filing electronically via Express Services. The Payer must be registered with New Jersey to make EFT debit payments.

REMINDER FOR STATE QUARTERLY FILING USING EXPRESS SERVICES

- It is required that you file your state forms through WinFiler's Express Services at least TWO BUSINESS DAYS PRIOR TO THE STATE FILING DEADLINE.



WAGE REPORTING SOFTWARE

Release Notes

WinFiler Plus 2009, Quarter 1

NEW FEATURES

- **Federal Form 944-X** – This form has been added to the WinFiler Plus program for adjusting Annual Form 944 or Form 944-SS Federal return or for Claiming a refund. Use 944-X for errors discovered after December 31, 2008.
- **Express Services State Quarterly Filing** – New Jersey Form WR-30 can now be filed through Express Services. In order to file WR-30 through Express Services, prepare the form from the Select Payer screen as usual. Check the Express Services checkbox in the upper right corner of the form prep screen to include the Payer in the list of eligible forms to transmit. Select the Express Services menu option, following the step-by-step flow. Select the State Quarterly Forms option on the Select Form Type screen.

ENHANCEMENTS

- **ASCII and CSV Imports** – You can now import Payee Data without having to import form data.
- **Express Services – Prepaid Codes** – When more than one Payer form is sent in a batch, the total amount to be deducted will be calculated and the 'Remaining balance' message displays only once. The Prepaid Code displays only once on the Confirmation screen.
- **Saved Payer Forms** – When a 941-X or 944-X is saved, the name includes the Quarter and Year of the correction. WinFiler Plus now adds a number after each one to help identify the forms since multiple forms can be created for the same Quarter/Year.

NEW FORMS, FORM CHANGES

Updated Federal Forms

- **941/Sch B Employer's Quarterly Federal Tax Return** Lines 12a and 12b were added to Form 941 for COBRA premium assistance information required by the American Recovery and Reinvestment Act. For more information about the payroll tax credit available to employers for COBRA premium assistance payments, please visit the IRS web site: <http://www.irs.gov/newsroom/article/0,,id=204505,00.html>
- **941-V Payment Voucher**

State Government Form Changes

- **Connecticut CT-941** Quarterly Reconciliation of Withholding
- **Illinois IL 941** Quarterly Withholding Income Tax Report
- **Maine 941/C1-ME** Combined Filing for Income Tax Withholding and Unemployment Contributions
- **North Carolina NC-3** Annual Withholding Reconciliation
- **Oregon OQ** Quarterly Tax Report (Tri-Met and Lane Transit District tax rates changed for 2009)
- **Utah TC-941** Utah Withholding Return This form has been added to the WinFiler Plus program.
- **Utah TC-941R** Utah Annual Withholding Reconciliation This form has been added to the WinFiler Plus program.

LOOKING AHEAD

New Jersey NJ-927 and NJ-927W: Effective for first quarter 2009, New Jersey has a new requirement to file the Employer's Quarterly Report (NJ-927 and NJ-927W) electronically. WinFiler Plus will provide a solution in an update planned for release in April. Update your program using the online update feature or download the WinFiler Plus for Tax Year 2009 update from www.WinFiler.com.



WAGE REPORTING SOFTWARE

Release Notes

WinFiler Plus 2009, Setup

IMPORTANT INSTALLATION NOTES – READ BEFORE INSTALLING

- Please make sure to review the [System Requirements](#) for proper installation of the software.
- System Requirements - Do not install the WinFiler Plus program to Compressed or Encrypted drives because the program will not work properly.
- Authorization codes are required during installation or when you replace your PC or need to re-install your software for any reason. Authorization codes are located on the back inside cover of your WinFiler package. **Please keep your codes in a safe place!**
- Authorization Codes may be entered at the time WinFiler Plus 2009 is installed or after installation via the **Enter Authorization Codes** option on the **File** menu. Authorization codes for a network installation must be entered when the program is installed.
- When installing a network version of the software, a workstation must be installed on the server for importing data. This Workstation installation does not count against the number of licenses purchased.
- Updates – The Server must be updated prior to updating Workstations for proper functionality.

NEW FEATURES

- **Security** – Password protection has been added to the program. When security is enabled, an Administrator can create User accounts and limit access to Payee forms, Payer forms, Printing, Imports, Backup/Restore, Express Services, and Utilities.
- **Utah TC-941PC** – New payment coupon for Utah.

NEW FORMS, FORM CHANGES

Updated Federal Forms

- **W-2:** The Social Security Wage Limit for 2009 is \$106,800.00.
- **W-2 NJ MMIPAA:** Removed amount type for NJ MMIPAA since New Jersey no longer collects the MMIPAA assessment.
- **1098-C:** This form has not been released by the government. The 2009 form will be available in a late December WinFiler Plus update.

State Government Form Changes

- **Iowa 44-105** Withholding Payment Voucher
- **Georgia GA-V** Withholding Payment Voucher
- **New York NYS-1** Return of Tax Withheld
- North Carolina NC-5 *Withholding Return*
- North Carolina NC-5P *Payment Voucher*
- **Utah TC-96 Q / TC-96 M** *Employer's Income Withholding Return* These forms are obsolete for 2009.
- **Utah TC-96R** *Annual Withholding Reconciliation* This form is obsolete for 2009.
- **Virginia VA-5** Employer's Return of Virginia Income Tax Withheld

REMINDER FOR IMPORTING DATA

- **Import from Previous Version of WinFiler or Plus:** If installing WinFiler Plus on a network, the import must be done on the server. Install a Workstation on the Server to perform this import.

REMINDER FOR PRINTING FORMS

Prior Year Forms: Annual and quarterly Federal and State Payer forms, W-2 Forms, and 1099 Series Forms that have not been updated for 2009 cannot be printed in the Setup program; however, you may enter data for these forms. Forms will be enabled for printing as they are available from government agencies. Remember to update your program quarterly to receive 2009 forms.

LOOKING AHEAD

- An update is planned for release in late December. Remember to update your program using the online update feature or download the WinFiler Plus for Tax Year 2009 update from www.WinFiler.com.
- The following new forms will be available in a future release of WinFiler Plus 2009: Federal Form 941-X, Utah Form TC-



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941, Utah Form TC-941R.

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