



WAGE REPORTING SOFTWARE

Release Notes

WinFiler 2007, Updates 1, 2, 3, 4, & 5

REMINDER FOR STATE FULFILLMENT

- Through Express Services, you are able to file W-2, 1099-MISC, 1099-R, 1099-DIV & 1099-INT forms directly to the appropriate state agency. To help facilitate this for you, it is required that you file all your state forms through WinFiler's Express Services at least 48 HOURS PRIOR TO THE STATE FILING DEADLINE.
- **Revised state deadlines:**
 - Alabama A-3: 2/29/08
 - Louisiana: L-3: 2/28/08
 - North Carolina NC-3M: 2/29/08
 - Vermont WH-434: 2/28/08

NEW FEATURES

- **Express Services for States:** In addition to Federal electronic filing for W-2 and 1099 returns, Express Services has been expanded to include state filing for W-2, 1099-DIV, 1099-INT, 1099-MISC, and 1099-R returns.
IMPORTANT: If you need to submit any W-2 or 1099 returns to **more** than 1 state for a single Payer, you must select **all** of the states on the Select States to File screen and file the forms to the states **at the same time**.
- **Express Services – State Reconciliation Forms:** If the state you are processing requires a state reconciliation form, a new dialog appears that lists the Payers in the order and if a reconciliation form is required. Please see the User Manual or Help file for more information.
IMPORTANT FOR STATE RECONCILIATION FORMS: Because Express Services prepares state reconciliation forms for the single return type (W-2, 1099-MISC, or 1099-R) that is selected for filing, any data that you enter on a reconciliation form should apply only to the single return type selected. This is especially important for any Tax Withheld or Tax Paid throughout the year that is reported on a reconciliation form; be sure to include only the tax that applies to the return type that you are filing.
- **Express Services for Federal:** You may file your W-2, 1099, and W-2C forms to Federal agencies. Many of the Express Services screens have been revised in conjunction with the new features for filing to state agencies.
- **Express Services – New Services added:** There have been a number of new services added to Express Services. Those services are: State Fulfillment, Recipient Print and Bulk Ship to Address, CD Archive, Payer Copy Print and Bulk Ship to Address (newly available as a standalone service).
- **Express Services – Employment Type (W-2):** When filing W-2 forms to State agencies through Express Services, only one employment type can be selected per order. W-2 forms sent to states having additional employment types must be filed in a separate order. Orders containing W-2 forms sent **ONLY** to the Social Security Administration (Federal e-file only) can include more than one employment type.

ENHANCEMENTS

- **Import Quickbooks® Form Data:** During the import process, the Employment Type screen would not list employees in certain circumstances. This issue has been corrected.
- **Third Party Import and ASCII Import:** Abbreviations for U.S. Territories and Possessions and Military Post offices can now be imported for Payers and Payees.
- **Express Services – Foreign Addresses:** When filing forms to state agencies, Payers and Payees having foreign addresses cannot be filed electronically and will be excluded from the Payer and/or Payee lists.
- **Express Services – Payers with SSN – W-2:** Payers that send W-2 forms to Federal or State agencies must have a Federal Employer Identification Number (FEIN). Payers that only have an SSN cannot be filed electronically and will be excluded from the Payer list.
- **Express Services – Payers with SSN – 1099:** Payers that send 1099 forms to State agencies must have a Federal Employer Identification Number (FEIN). Payers that only have an SSN cannot be filed electronically and will be excluded from the Payer list.
- **Express Services – State Reconciliation Forms:** On the state reconciliation prep screens, the Fill button will clear and fill the forms. The separate Clear button does not appear on the Express Services State Reconciliation prep screens.
- **W-2 Summary Journal:** This journal has been updated to list the states based on the states on the W-2 returns rather than on the States for Payer screen. The State ID number once again appears on the journal.



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- **Printing W-2s or 1099s:** When printing returns using Payer Groups with the setting of Print W-2 (or 1099) Totals Returns selected, a 1 Payee per page Copy would incorrectly print/preview only the first Payer in the Group. This has been fixed.
- **Express Services - Rejected Payers:** A Rejection Reason has been added to the Order Detail Report on the Status screen for Payers having a status of Filing Rejected.
- **Express Services:** Rejected Payers were not appearing in the Payer List to allow for resubmission - this has been corrected. See below for a known issue.
- **Express Services:** Payer Statuses were not showing on the Order Detail report correctly when more than one Payer was included in an order - this has been corrected. This only affected the report, not the actual filing.
- **Express Services:** The Order Detail report was displaying \$0.00 for Box 1 (W-2s) when the 3rd Party Import was used and returns had not been modified after the import - this has been corrected. This only affected the report, not the actual filing.

KNOWN ISSUE

- **Express Services:** When one or more Payers in a multi-payer order have been rejected by a government agency, the entire order will be released for you to resubmit any rejected Payers. All Payers from that Order will appear in the Payer list to allow for resubmission. Resubmit only the rejected Payer(s).

FORM CHANGES

Updated Federal Forms

- **W-2:** On the Pre-printed Copy D, the Employer's EIN will print on the top W-2 on each page.

Other State Form Changes

- **Utah TC-96R Annual Withholding Reconciliation** – Due date was changed back to 2/28/08.

REMINDERS ...

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

Technical Support

Internet: www.WinFiler.com

Email: WinFilerSupport@WinFiler.com

Phone: 920.339.3200

Normal Hours:

Monday through Friday:

8:00 AM to 5:00 PM Central Time

Customer Service and Sales

Internet: www.WinFiler.com

Phone: 800.968.1099

Normal Hours:

Monday through Friday:

8:30 AM to 5:30 PM Eastern Time

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