



WAGE REPORTING SOFTWARE

Release Notes

WinFiler 2009, Update 5

The update contained general maintenance not visible to the user.

Release Notes

WinFiler 2009, Update 4

The update contained general maintenance not visible to the user.

Release Notes

WinFiler 2009, Update 3

The update contained general maintenance not visible to the user.

Release Notes

WinFiler 2009, Update 2

ENHANCEMENTS

- **Localities for PA** – LCTCB for Lancaster County was added to the list of Localities.

Release Notes

WinFiler 2009, Update 1

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.
- **State Reconciliation Forms:** Because Express Services prepares state reconciliation forms for the single return type (W-2, 1099-DIV, 1099-INT, 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.

NEW FEATURES

- **Express Services – Illinois and Oregon for Form W-2:** W-2s are available for filing to Illinois and Oregon.

ENHANCEMENTS

- **Express Services including State filing** is now available.
- **Wisconsin WEIC:** Refer to the State Specific Information for W-2s in the Help file for information regarding how to capture this information.
- **Instructions for IRS W2/1099 Forms** The PDF instructions for forms W-2 & W-3, 1099-MISC, and 1099 General Instructions now contain IRS corrections for reporting Military Differential Pay at the beginning of the documents. Please review these corrections if you are filing any of these forms.
- **Import from QuickBooks** – An error was occurring during the Import that referenced a "Reserved" field. This has been fixed.



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FORM CHANGES

Updated Federal Forms

- **W-2c** – The updated Blank Form version of Copy A is available for printing.
- **W-3c** – The updated Blank Form version is available for printing.

State Government Form Changes

- **Mississippi 89-140 Annual Information Return** The reconciliation form is required for filing 1099-DIV and 1099-INT returns to Mississippi via Express Services.
- **City of Philadelphia Annual Reconciliation of Employer Wage Tax:** The 2009 form is now available.
- **Utah TC-941R Utah Annual Withholding Reconciliation** This reconciliation form replaces the Utah TC-96R and is required when filing W-2, 1099-R, or 1099-MISC returns to Utah via Express Services..

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.
- **State Specific Information for filing** your W-2 and 1099 forms to states is included in the Help file.

Release Notes

WinFiler 2009

IMPORTANT INSTALLATION NOTES – READ BEFORE INSTALLING

- Please review the System Requirements for proper installation of the software.
- Authorization codes are used during installation or whenever reinstalling the 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 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.
- The Server must be updated prior to updating Workstations for proper functionality.
- 64-Bit Operating Systems: WinFiler can now be installed on a 64-bit operating system starting with Vista and beyond.

NEW FEATURES

- **Automatic Check for Updates** – The program will automatically check for updates every time it is opened. Remember, if WinFiler is installed on a network, you must update the server before you update your workstations.
- **Security – A 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** – Links to PDF files containing the official IRS instructions have been added to all W-2 and 1099 forms' data entry screens. If you do not have a PDF reader installed, please go to www.adobe.com to download the reader. Alternatively, navigate to the Acrobat folder located on the installation disk and double click the 'AdbeRdr70_enu_full.exe' file to begin installation of the Adobe Acrobat reader.
- **1099 Summary Journal** – This new journal functions similar to the W-2 Summary Journal.
- **Fix W-2G Type of Wager Code Utility** – This new utility will provide the opportunity to convert Code 8 to Code 9 for any imported W-2G returns. There will be a reminder whenever the program opens if there are W-2G returns that have not been reviewed. Run the utility to convert Code 8 to Code 9 (marking the return as reviewed) or mark any W-2G returns as reviewed.

ENHANCEMENTS

- **ASCII and CSV Imports** – Payee data can now be imported without importing form data.
- **Import from Previous:** The size of the Payer List window has been increased to allow for more Payers to display at one time.
- **Release Notes:** The Release notes are now displayed using a PDF viewer, if one is installed, after an update. We recommend printing them for future reference.
- **User Manual:** The User manual has been removed from the program. The Help file has been expanded to include more



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information.

NEW FORMS, FORM CHANGES, NEW FORMATS

Updated Federal Forms

- **W-2:** The Social Security Wage Limit for 2009 is \$106,800.00.
- **W-2c:** Government form change. A fourth line has been added in Box 14.
- **W-2c:** The updated form is available for printing with the exception of Blank Form version of Copy A.
- **W-3c:** Government form change.
- **W-3c:** The updated form is available for printing with the exception of the Blank Form version.
- **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' (formerly code 8). Code 8 now represents 'Poker winnings.'

1099 Forms

- 2009 forms are available for printing. This includes all Forms 1098, 1099, 5498, and W-2G.
- **1098-E:** Box 2 checkbox description changed.
- **1099-C:** Added checkbox to Box 5. Debt Description is now Box 4 (previously Box 5).
- **1099-G:** Added field on Box 9.
- **5498:** Added Boxes 12a through 15b.

REMINDERS FOR IMPORTING DATA...

- **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.

LOOKING AHEAD...

- **Express Services including State filing will be available in December.** Update the program at that time by selecting 'Update Program Online' on the Update menu.
- **Philadelphia Annual Reconciliation** has not been released yet. The reconciliation form will be available in an update in December.

Technical Support

Internet: www.WinFiler.com
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Normal Hours:

Monday through Friday:
8:00 AM to 5:00 PM Central Time

Extended Hours for January:

Monday - Friday (Jan. 4, 2010 through Jan. 29, 2010):
7:00 AM to 7:00 PM Central Time

Saturday (Jan. 9, 2010 through Jan. 30, 2010)

9:00 AM to 1:00 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

Stay up-to-date with the latest information – receive e-mail Technical Bulletins from WinFiler.

Visit www.WinFiler.com to opt-in.