



WAGE REPORTING SOFTWARE

Release Notes

WinFiler Plus 2007, Quarter 4, 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 – 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.
- **Express Services – Enter Prepaid Code:** Prepaid Authorization Codes are now validated at the time they are entered to ensure the codes match the services selected.

ENHANCEMENTS

- **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.
- **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



WAGE REPORTING SOFTWARE

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).

STATE MAGNETIC MEDIA

- **W-2 - Colorado:** WinFiler Plus will create a file on the hard drive that can be uploaded to the state's web site. This file cannot be sent to the state on diskette, CD, or email.
- **W-2 & 1099 - Connecticut:** WinFiler Plus will create a file on the hard drive that can be copied to a CD if you have obtained a waiver from filing electronically. Refer to the Help file for more information. After downloading the Connecticut Magnetic Media module, refer to the Publications folder for Connecticut specifications and waiver from filing electronically when filing on CD.
- **W-2 - Maryland:** When filing W-2 forms on magnetic media, data from the MW508 Reconciliation is automatically included in the magnetic media file. Do NOT send a paper Form MW508 to the state in addition to the magnetic media file. A Record Copy of the form can be printed from the Select Payer screen.
- **W-2 - New Jersey:** WinFiler Plus will create a file on the hard drive that can be uploaded to the state's web site. The state no longer accepts filings on diskette or CD.
- **W-2 - Ohio:** WinFiler Plus will create a file on the hard drive that can be uploaded to the state's web site or copied to a CD. The state no longer accepts filings on diskette.
- **1099 - Wisconsin:** When filing online, it is no longer necessary to rename the output filing name.
- **Transmittals:** The following transmittals are no longer required by the state and have been removed from the program: Idaho and Massachusetts.

FORM CHANGES

Updated Federal Forms

- **944 Employer's Annual Federal Tax Return** – This form is now available for printing.
- **944 Instructions:** Updated instructions are available in the Publications folder.
- **W-2:** On the Pre-printed Copy D, the Employer's EIN will print on the top W-2 on each page.

State Government Form Changes

- **California DE-7 Alternate (Data Only) Annual Reconciliation Statement**
- **Connecticut CT-W3 Annual Reconciliation of Withholding**
- **Kansas KW-3 Employer's Annual Withholding Tax Return**
- **North Carolina NC-3 Annual Withholding Reconciliation**
- **Tennessee LB-0456/LB-0851 Security Premium and Wage Report**

Other State Form Changes

- **Florida UCT-6/6A Employer's Quarterly Report** – Line 10 will no longer display and print 'See Attached' when there are no Payees for the quarter.
- **Utah TC-96R Annual Withholding Reconciliation** – Due date was changed back to 2/28/08.

Technical Support

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