

Release Notes

WinFiler 2005, Update 1

NEW IN THIS UPDATE

Enhancements

- **Express Services:** The "Print Receipt" button on the Confirmation screen has been changed to "Print Details" to more accurately describe the functionality of the button.
- **Pro Forma Journals:** There was a problem printing the City if the city name started with "End." This update corrects that problem.

Updated Federal Forms

- **1099 Instructions:** The IRS has revised some of the 1099 instructions located in the **pubs.zip** file in the 2005 folder. The update includes revisions to instructions for the following forms: 1099-A & C, 1099-MISC, 1099-PATR, 1099-R & 5498, and the 1099 General Instructions.
- **1099-B:** The Number of Shares field now correctly prevents a decimal point from being entered. Prior to installing the update, the decimal and anything following it was dropped when printing the form. **You will need to edit your data if you entered a decimal in this field prior to installing this update.** Also, the field was shortened to only allow 8 digits to comply with magnetic media specifications.
- **1099-C:** Due to IRS changes in the instructions, Copy B/B/Instr and the Instruction page have changed.
- **1099-CAP:** The 2005 form is now available for printing and magnetic media preparation.
- **1099-PATR:** Due to IRS changes in the instructions, Copy B/B/Instr and the Instruction page have changed.
- **5498:** Please use the format "TT YYYY \$\$\$\$" (where "TT" = Text indicator listed in IRS Instructions for 1099-R and 5498, "YYYY" = year of contribution, and "\$\$\$\$" = dollar amount of contribution) when entering prior year contributions by U.S. Armed Forces using the "Prior yr contrib by qual combat zone individ/RMD Amount and Date" field on the prep screen. This specific format determines the location of the data in the magnetic media and Express Services file.
- **W-2 Box 14:** When the W-2 Box 14 Customized Amount Type Name and the Amount exceeds 17 characters in length and Express Services is used, an error will be displayed - "The 'Box14TextOne' element has an invalid value according to its data type."

To correct this, you must edit your W-2 Customizable Box 14 Amount Types so that the Short Name plus the Amount does not exceed 17 characters.

New Jersey Example:	UI/HC/WD 12345.12	(will work)
	UI/HC/WD (NJ) 123.12	(will cause an error)

Federal Magnetic Media

- The creation of the Federal magnetic media for 1099-B was updated to include the Corporation's Name and Address information.
- The creation of the Federal magnetic media for 5498 was updated to include the "Prior year contributions by U.S. Armed Forces." Note: Refer to the Updated Federal Forms section above for the correct format of this data.

State Magnetic Media

Connecticut 1099:

To correctly include the following 1098 information in the CT 1099 Magnetic Media file, the data must be entered in the following manner:

Real Estate property taxes paid to a Connecticut municipality:

In Line 1 of Box 4 of the 1098, enter the text "CT Property Tax" followed by the dollar amount, with or without a dollar sign. Example: "CT Property Tax 999999.99" or "CT Property Tax \$99999.99". When a dollar sign is entered, there is only room for 5 digits to the left of the decimal point (due to 25 characters max in the field





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on the 1098).

City and State location of property:

In Line 2 of Box 4 of the 1098, enter the City and State. Example: Hartford CT.

This information is used for CT magnetic media only if Line 1 is formatted as described above.

Massachusetts W-2:

Fields that must be filled in to comply with MA Specifications for Filing W-2's Magnetically:

SSA Submitter Form:

Submitter Information: EIN

Company to receive MMREF filing instructions: Company Name, Address, City, and State

Payer Information:

TIN, Name, Address, City, and State

Payee Information:

SSN and Last Name

W-2 Return Information:

State (One or Two) Wages and State (One or Two) Tax Withheld

Wisconsin 1099:

For customers who want to file WI 1099 Magnetic Media online, the files must each contain only one type of return.

- 1) Select only one type of return at a time (1099-MISC, 1099-R, or W-2G).
- 2) Rename the output file to the appropriate file name. The file name should be WI1099MISC, WI1099R, or WI_W2-G, respectively.

Release Notes

WinFiler 2005 Initial Release

NEW FEATURES

- **Open Payer List on Program Start:** This new feature is found under the Settings Menu on the Printing and Data Entry Settings Options. You have the option to automatically open the Payer list whenever the program starts.
- **Auto Place Decimal Point:** This new feature is found under the Settings Menu on the Printing and Data Entry Settings Options. You now have the option to enter dollar amounts without having to enter a decimal. When this feature is on, you can enter a string of numbers in a dollar amount field so 12345 will become \$123.45 when you move to the next field.
- **Journals:** Two new buttons were added for printing Journals: Printer Setup and Print. In addition, the OK button has been changed to Preview.
- **Delete Multiple Payers:** This feature is found under the Utilities Menu. You have the option to delete one, several, or all payers.
- **Delete Multiple Payees:** This new feature is found under the Utilities Menu. You have the option to delete one, several, or all payees for the selected Payer.
- **Autofill 1099 Account Number:** This new feature is found on the Utilities menu. The use of an account number is now required if you have multiple accounts for a recipient for whom you are filing more than one information return of the same type. This number must be unique for each information return. This feature works for the selected Payer.

ENHANCEMENTS

- **Import:** The options of "Last Year's Data" and "Prior to Last Year's Data" have been replaced with "Previous Version of WinFiler or Plus." When importing data from 2002 or earlier, import the 2002 data into the 2003 or 2004 WinFiler program. Then from the WinFiler program that you just imported into, import the data into the 2005 WinFiler program using the "Previous Version of WinFiler or Plus" option on the Import menu. If you do not have the 2003 or 2004 WinFiler program, please email WinFiler Support. One of the representatives will provide you with a text file to display the "WinFiler 2002/Plus 2003 or Earlier" menu option to perform the import.



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- **ASCII Import:** Previously, checkboxes needed to have a “Y” for Yes or “N” for No in the data to be imported, to indicate if they should be checked or not. Now you can also use “T” for True or “F” for False; “1” for check or “0” for uncheck; or an “X” for check with a blank for uncheck.
- **ASCII Import:** When “Alter Previous File Layout” is selected when using the ASCII Import feature, you no longer have to identify the first and last positions of each field. The program remembers this for you and you only have to confirm that this is still correct.
- **ASCII Import:** When Company Names are mixed with Payee Names, the import can now separate this information based on the type of TIN.
- **Payee Information:** The Payee “Account Number” field has been relabeled to be “W-2 Control Number” since this is where the number is used and the 1099’s now have their own “Account Number” field.
- **Restore:** This enhancement allows you to restore more than one Payer at a time.
- **State Abbreviations:** The state abbreviation fields are still a drop-down list but now you can also type in the two-letter abbreviation.
- **Country List:** Yugoslavia was removed and replaced with Serbia and Montenegro. The Country Code is YI.
- **Journals:** The Payer Journal was displaying the Payer Phone Number where the Contact Phone Number was listed. This has been corrected.

NEW FORMS, FORM CHANGES, NEW FORMATS

Updated Federal Forms

- **W-2s:** The Social Security Wage limit for 2005 is \$90,000.00.
- **W-2s:** The IRS has added three new Box 12 codes:

Code	Amount Type
Q: Nontaxable combat pay	Non Taxable Combat Pay
Y: Deferrals under a section 409A on a nonqualified deferred compensation plan	Deferrals Sec409A Nonqual Plan
Z: Income under section 409A on a nonqualified deferred compensation plan	Income Sec409A Nonqual Plan

- **1098-C:** New form added this year.
- **1099-CAP:** The IRS has scheduled the release of this form for mid-November. In December, an update will be available through the Update menu option. If you need this form and do not have Internet access, please contact the Sales department at 800-968-1099. WinFiler will allow you to prepare the form for 2005 but you will not have the ability to preview, print, create magnetic media, or file through Express Services until the final form is installed.
- **1099-G:** The new field “ATAA Payments” was added as Box 5 on the form.
- **1099-H:** Greatland no longer sells Pre-printed 1099-H forms although Pre-printed Copy A is still an option in the program. This form is aligned to the IRS-provided red Copy A. We allow Copies B and C to print Blank Forms even for users who have not purchased the Blank Forms authorization code.
- **1099-MISC:** The IRS has changed the use of Box 15. The text fields were removed and Boxes 15a – “Section 409A deferrals” and 15b – “Section 409A Income” were added. The “Payer’s No.” field lengths in Boxes 17a and 17b have been increased to 15.
- **1099-PATR:** A new field was added as Box 6 labeled “Domestic production activities deduction.” The previous Box 6 is now Box 10 labeled “Certain Credits.” “Pass-through credit Text” field was removed.
- **1099-R:** The “Payer’s No.” field length in Box 11 has been increased to 15.
- **W-2G:** “Payer’s State ID No.” field length has been increased to 15.

W-3 and 1096 Transmittal Forms

- If you have changed the Payer Contact information after having already Previewed Copy A of the Form W-2 for a



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1099, you no longer have to re-preview Copy A in order for the Form W-3 or 1096 to update the Payer Contact information.

- A reminder message has been added to these print screens that reads "Transmittals summarize only the most recent set of Copy A forms Printed/Previewed." In other words, when you print or preview the Copy A and then print the transmittal, the transmittal contains information for only those Copy A forms most recently printed or previewed. If you make changes to a form after printing or previewing Copy A, you must print or preview Copy A forms again for the information to be reflected on the transmittal.
- To clear up some confusion when printing these forms, the labeling of the print options has been changed.
 - For W-3: When 'Blank Form' print type is selected, the 'Select Copy' list box displays "Print On Blank Paper."
 - For 1096: When 'Blank Form' print type is selected, the 'Select Copy' list box displays "File Copy (for your records)."
- Transmittal Form 1096 was stripping the dash in the contact email. For example: here-i-am@now.com was printing as hereiam@now.com. The form has been corrected to include the dashes.

MAGNETIC MEDIA

- When filing W-2 Federal Magnetic Media on the web site for the SSA, you will need to rename the magnetic media file created by WinFiler, adding a valid extension, i.e. '.txt', to the file name, in order to upload the file.

KNOWN ISSUES

- **Sending the Registration Form Online:** If Mozilla is set as your default browser, you will be unable to send your Registration form online. Solution: When proceeding through the registration process, select the radio button 'Print for mailing' instead of selecting the radio button 'Online Registration.' Next, print the registration form and mail to the address listed at the top of the form.
- **McAfee Virus Scan issue:** There is a known issue with the McAfee VirusScan Enterprise 8.0i. If you experience empty drop-down boxes and message boxes, please go to the following Website at <https://mysupport.nai.com/> to download and install Patch 9 for McAfee VirusScan Enterprise 8.0i. You must be registered with Prime Support Service Portal and have a valid Grant number for McAfee to access the patch. To learn more about this patch, enter VSE80P09.zip in the Key Word Search. The following result will appear: Solution ID KB38881 - Patch 9 for McAfee VirusScan Enterprise 8.0i.

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

Extended Hours for January:

Monday through Friday (December 27, 2005 through February 1, 2006):

7:00 AM to 8:00 PM Central Time

Saturday (January 7, 2006 through January 28, 2006):

8:00 AM to 12:00 PM Central Time

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