



Release Notes

Yearli Desktop 2014, Quarter 3 update 2

The update contained general maintenance not visible to the user.

Yearli Desktop 2014, Quarter 3 update 1

Enhancements

- **Winfiler has a new name** - Yearli Desktop has all the features and functions you have come to expect from Winfiler.
- **TIN Matching** – Greatland provides easy access to a service implemented by the IRS allowing a 1099 filer to check the TIN (Taxpayer Identification Number) and a specific recipient name to ensure that there is a match for it in the IRS database. This process helps filers avoid IRS penalties and B-Notices for missing TINs or incorrect Name/TIN combinations. Greatland delivers an easy-to-understand TIN matching report within three business days. (Available in early December)
- **Improved Interface** –
 - Dashboard – Provides quick access to the most commonly used features you will use on a regular basis, including easier to use windows for Importing and Printing. This was created to give you an easy way to navigate the workflow for filing your returns.
 - Payers & Recipients screen – Provides a consolidated screen to manage your Forms, Payers and Recipients. This one screen has replaced four screens resulting in an enhanced workflow. Click the “What’s New” button on the Payers & Recipients screen to learn more.
 - If you want to purchase additional forms and envelopes for Yearli, click the Order Supplies button on the updated tool bar.
- **Supports Transactional Data Entry AND Year End Data Entry** – The best of Winfiler and Winfiler Plus have been combined. Yearli Desktop allows you to enter after-the-fact payroll, 94x or state UI reporting by using Quarterly Data Entry selection. This enables entry of dated transactions in whatever frequency you need (e.g. weekly, bi-weekly, monthly, etc.). If you are looking for a simple way to enter W-2 or 1099 forms, select Year End Data Entry if you only need to complete your W-2 and 1099 forms.
- **Payee Now Called Recipient** – Formerly Winfiler referred to payees. That has been replaced with recipients in Yearli.

FORM CHANGES

State Government Form Changes

- **Kansas – State ID for W-2** – The expected format of the Kansas State ID for W-2 is 15 digits, starting with “036”, containing an “F” in the 13th position; the 4th character may be an “A” or “K”.
- **City of Philadelphia Annual Reconciliation of Employer Wage Tax** – Government revision. Resident and nonresident tax rates updated for 2014.
- **Colorado DR 1094 W-2 Wage Withholding Tax Return** – Government revision.
- **Colorado DR 1107 1099 Income Withholding Tax Return** – Government revision.
- **North Carolina Annual Withholding Reconciliation** – Government revision. Form NC-3M is obsolete and has been removed from Yearli Desktop; all North Carolina W-2/1099 payers must file Form NC-3 (Form NC-3 will be updated for 2014 in a future release of Yearli Desktop).

Winfiler Plus 2014, Quarter 3

NEW FORMS, FORM CHANGES

Updated Federal Forms

- **1099 Forms** – 2014 forms are available for printing. This includes all Form 1098, 1099, 5498, and W-2G.
- **1096** – Government revisions – Updated calculations in summarization of Box 5.



- **1096** - 2014 form is available for printing.
- **1099-B** – Government revision – new copies have been added:
 - Copy 1 – for Payer to file with state tax departments
 - Copy 2 – for Recipient to file with state income tax return
 - Condensed format that includes all Recipient copies on one page (Copy 2, Copy B, and instructions)

State Government Form Changes

- **CO UTR-1/1a** – *Employer's Report of Wages and Premiums* – Government revision
- **OK WTH10001** – *Quarterly Wage Withholding Return* – Government revision
- **PA UC-2/2A** – *Employer's Report for Unemployment Compensation* – Remove option on line 11 for "Magnetic Media UC-2A".
- **UT 33H/33HA** – *Employer Quarterly Wage List and Contribution Report* – Add Signer's Name field.
- **VA VA-5** – *Employer's Return of Virginia Income Tax Withheld* – Government revision
- **VA VA-6** – *Employer's Annual or Final Summary of Virginia Income Tax Withheld* – Government revision; due date changed to January 31.
- **VT C-101/C-147** *Employer's Quarterly Wage & Contribution Report* – Vermont's standard premium for employer Health Care Contributions has changed from \$119.12 to \$133.30 for Q3 2014. Form printouts were changed to Record Copy; all employers are now required to file Vermont unemployment returns electronically.

Winfiler Plus 2014, Quarter 2

ENHANCEMENTS

- **ALLOW COPYING OF ALL PAYEES** – the checkbox for "Allow Copying to Other Payers" has been removed. It is no longer necessary to indicate which Payees are eligible to be copied. All Payees are eligible to be copied to another Payer at all times.

NEW FORMS, FORM CHANGES

Updated Federal Forms

- **1098 Mortgage Interest Statement** – Removed field for Mortgage Insurance Premiums
- **1098-T Tuition Statement** – Government revision
- **1099-B Proceeds From Broker & Barter Exchange Transactions** – Government revision
- **1099-C Cancellation of Debt** – Identifiable Event Code field is now required
- **1099-G Certain Government Payments** – Government revision
- **1099-INT Interest Income** – Added fields for Market Discount and Bond Premium
- **1099-OID Original Issue Discount** – removed Foreign Tax Paid field and Foreign Country field. Added fields for Market discount and Acquisition premium.
- **1099-MISC Miscellaneous Income** – removed fields for Foreign Tax Paid and Foreign Country or US Possession
- **1099-R Distributions From Pensions, etc.** – Added new Distribution Code (K)
- **5498 IRA Contribution Information** – Added new fields for FMV of certain specified assets and the corresponding codes
- **941-X Adjusted Employer's QUARTERLY Federal Tax Return or Claim for Refund** –
 - Removed: Number of qualified employees first paid exempt wages/tips this quarter
 - Removed: Number of qualified employees paid exempt wages/tips this quarter
 - Removed: Exempt wages/tips paid to qualified employees this quarter
 - Removed: Advance earned income credit payments
 - Removed: Number of qualified employees paid exempt wages/tips
 - Removed: Exempt wages/tips paid to qualified employees
 - Added: Special addition to wages for Additional Medicare Tax
 - Other Government revisions
- **W-2** – The 2014 W-2 form is available for printing.
- **W-3** – The 2014 W-3 form is available for printing.

State Government Form Changes



- **IL UI-3/40** *Employer's Contribution and Wage Report* – Updated format of State ID for SUI for UI-3/40 / 40A.
- **LA ES4B/ES4C/ES61** *Quarterly Wage and Tax Report* - Changed to Record Copy; all employers are now required to file Louisiana unemployment returns electronically.
- **OR WR** *Annual Withholding Tax Reconciliation Report* – Government revision.
- **PA UC-2/2A** *Employer's Report For Unemployment Compensation* – Changed to Record Copy; all employers are now required to file Pennsylvania unemployment returns electronically.
- **TX C-3/C-4** *Employer's Quarterly Report* – Changed to Record Copy; all employers are now required to file Texas unemployment returns electronically.
- **Vermont C-147** *Employer's Quarterly Wage Report* – Government revision.
- **Wisconsin UC-7823** *Quarterly Wage Report* – Government revision.
- **Wisconsin UCT-101** *Quarterly Contribution Report* – Government revision.

Winfiler Plus 2014, Quarter 1

ENHANCEMENTS

- **UNIVERSAL IMPORT** - the mapping and validations have been improved for the Payee Name and Association Name on 1099 type forms.

NEW FORMS, FORM CHANGES

Updated Federal Forms

- **W-2, W-2c** – Government revision
 - 2014 Social Security Wage Limit: \$117,000.00
 - 2014 Social Security Tax Withheld Maximum: \$7,254.00
- **941/Sch B/Sch D** *Employer's Quarterly Federal Tax Return* – Government revision.
 - Removed "COBRA premium assistance" text and fields (was lines 12a -13)
 - Updated remaining fields and calculations to accommodate removing the COBRA fields
- **941-V** *Payment Voucher* – Payment amount calculation updated.
- **943-X** *Adjusted Employer's Annual Federal Tax Return for Agricultural Employees of Claim of Refund* – Added fields for Additional Medicare Tax
- **944-X** *Adjusted Employer's ANNUAL Federal Tax Return or Claim for Refund* – Added fields for Additional Medicare Tax
- **945-A** *Annual Record of Federal Tax Liability* – Government revision.
- **945-X** *Adjusted Annual Return of Withheld Federal Income Tax or Claim for Refund* – Government revision.

State Government Form Changes

- **CO UIITR-1/1a** *Quarterly Report of Wages Paid and Premiums Owed* – Government revision.
- **CT CT-941** *Quarterly Reconciliation of Withholding* - Government revision. Connecticut now requires electronic filing of withholding returns. The paper CT-941 from Winfiler Plus may continue to be filed by employers that have obtained a waiver from electronic filing from the state.
- **CT CT-W3** *Annual Reconciliation of Withholding* – Government revision. Connecticut now requires electronic filing of withholding returns. The paper CT-W3 from Winfiler Plus may continue to be filed by employers that have obtained a waiver from electronic filing from the state.
- **CT UC-5A/UC-2/UC-5B** *Employee Quarterly Earnings Report / Employer Contribution Return* – Changed to Record Copy; all employers are now required to file Connecticut unemployment returns electronically.
- **FL RT-6/6A** *Employer's Quarterly Report* – Government revision.
- **GA G-7** *Quarterly Return for Monthly (or Quarterly) Filers* – Government revision.
- **GA G-1003** *Income Statement Return* – Government revision.
- **IA 44-105** *Withholding Payment Voucher* – Government revision.
- **IL IL-941** *Withholding Income Tax Return* – Government revision.
- **IL UI-3/40** – *Employer's Contribution And Wage Report* – Added functionality to accommodate tax rates greater than



5.4% for newly-subject employers with quarterly wages less than \$50,000.

- **KS K-CNS 100/101** *Quarterly Wage Report and Unemployment Tax Return* – Government revision. The Pre-Printed forms option has been removed. The Blank Form version of Kansas K-CNS 100/101 is acceptable for filing with the state.
- **ME 941/C1-ME** *Combined Filing for Income Tax Withholding and Unemployment Contributions* – Government revision.
- **NC NC-3** *Annual Withholding Reconciliation* – Government revision.
- **NE 941N** *Withholding Return* – Government revision.
- **OK OES-3** *Employer's Quarterly Contribution Report* – Government revision.

Winfiler Plus 2014, Quarter 0, Update 2

- **Universal Import** – Payee Name / Association Name validation has been updated along with other fixes not visible to the customer.
- **Import from QuickBooks** – The validation for TINs has been updated to allow SSNs beginning with “8”.

Winfiler Plus 2014, Quarter 0, Update 1

- **Universal Import** – The formatting of SSN and EINs will be automated during import. The format can be edited in the payer/payee entry screens.
 - Payer and Payee Type Of TIN field can now be mapped during the import.
 - When the length of the State Identification Number matches the state specifications, the State ID will be formatted with appropriate hyphens, spaces, etc. on the Preview tab in Step 2. This formatting will be retained when the imported data is written to the database.

Winfiler Plus 2014, 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 used during installation or when you replace your PC or need to re-install your software for any reason. Authorization codes are located on the packing slip. **Please keep your codes in a safe place!** The authorization code was also emailed to the email address on your account. *You can request another email to be sent by contacting your account manager or technical support.*
- Authorization Codes for non-networked versions may be entered at the time Winfiler Plus 2014 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. **Entering the hyphens is optional.**
- 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.

ENHANCEMENTS

- Universal Import – Workflow has been improved to provide a better experience when importing data.

NEW FORMS, FORM CHANGES

Updated Federal Forms

- **1098-C** – Government revision – added new “Odometer mileage” field to be completed for donations of motor vehicles.
- **W-2 & W-2C** – Government revision – updated Social Security maximum amounts. The 2014 Wage Limit is \$117,000.

State Government Form Changes



- **Alabama A-6** – This form has been removed from WinFiler Plus.
- **California DE 9** – Government revision - updated DI Wage Limit.
- **Georgia GA-V** – Government revision.
- **Iowa Monthly Worksheet** – This form has been removed from WinFiler Plus.
- **New Jersey NJ927 / NJ927W** – Government revision – Worker Disability Insurance rate updated.
- **New York NYS-1** – Government revision.
- **North Carolina NC-5** – Government revision – updated for current year.
- **North Carolina NC-5P** – This form has been removed from WinFiler Plus.
- **Oklahoma WTH10001** – Government revision – now quarterly only.
- **Oregon OQ/Schd B/132** – Government revision – updated rates for Transit District taxes and Special Payroll Tax offset.

REMINDER FOR IMPORTING DATA

Import from Previous Version of Winfiler or Plus:

- If installing Winfiler 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 2014 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 2014 forms.

LOOKING AHEAD

- **Support for Windows XP ending** – Microsoft will end support for the operating system, Windows XP in April of 2014. WinFiler will no longer support Windows XP as of December 31, 2014.

Technical Support

Internet: www.yearlidesktop.greatland.com

Email: desktop.support@greatland.com

Phone: 920.339.3200

Normal Hours:

Monday through Friday:

8:00 AM to 5:00 PM Central Time

Extended Hours for January:

Monday - Friday (Jan. 2, 2015 through Feb. 2, 2015):

8:00 AM to 6:00 PM Central Time

Saturday (Jan. 2, 2015 through Jan. 31, 2015)

9:00 AM to 1:00 PM Central Time

Customer Service and Sales

Internet:

www.greatland.com/category/software+&+online+filling/yearli+desktop.do.com

Phone: 800.968.1099

Normal Hours:

Monday through Friday:

8:30 AM to 5:30 PM Eastern Time