



on Client Ledger System™ Software

A Financial MicroSystems, Inc. Publication • Volume 14, Issue 1 • 4th Quarter of 2008

CLS 5.9 Release Scheduled for December 5th

CLS 5.9 is nearing completion, and is currently scheduled for release December 5th. It includes complete support for 2008 W-2 and 1099/1098 forms, including *laser-printed* plain-paper and pre-printed forms, and *dot-matrix* pre-printed forms. The formats of the standard (2-up) W-2, W-3, 1099, 1098 and 1096 forms are basically unchanged for 2008 (although there is a new Distribution Code "H" for the 1099-R). **However, the CLS 5.9 update is required if you plan to print submittable payroll tax forms on plain paper.**

CLS 5.9 also includes any required changes to the federal 940, 941, 943 and 944 forms for 2008. A new 941 form for 2009 will be included in the March CLS 5.9 update.

In February 2009, the IRS will release a new **Form 941-X** (*Adjusted Employer's Quarterly Federal Tax Return or Claim for Refund*) to replace the 941c form currently used to correct mistakes on 941 forms. New **Forms 943-X** and **944-X** will also be released at this time. These forms should be used to correct any mistakes found after January 1, 2009. While the 941c form will be acceptable for the first quarter, the new forms should be much easier to use. A CLS 5.9 update will be provided to you as soon as the new forms become available.

State unemployment wage reports (continuation sheets) have been updated as needed. Continuation sheets for Iowa, Montana, New York and Washington have been revised. A new format for Florida will be released for the first quarter of 2009 and will be included in the March CLS 5.9 update. Continuation sheet formats for other states have either been approved or are awaiting approval.

CLS 5.9 also provides additional flexibility for departmental and division-level profit & loss statements. In Master File Maintenance (MF), a "D" option placed on the *gross profit* account caused all departmental P&Ls to end with that account, while the company-level P&L would be "complete". This was very useful if departments were *only* being used to track product-line sales, cost of sales, and gross margin, but not if you wanted some departmental or division reports to be complete, while others should end with the gross margin account. New options let you choose how each departmental report behaves.

CLS~CheckWriter (CW) Payroll Tax Updates

CW 2.71 includes new federal and state payroll tax tables for 2009. It also provides some additional payroll reporting capability, along with the ability to close the previous calendar year. The new version will be released just before Christmas so that we may include as many updated state tax tables as possible.

Printfil and Right PDF Printer Pro

Available since early 2006, *Printfil* and *Right PDF Printer Pro* add much-needed printing flexibility to CLS. *Printfil* lets you easily capture a network or USB-port laser printer. You can also use it print CLS reports (except payroll tax forms) on Windows-only printers or PDF writers. If you don't already own a PDF writer, *Right PDF Printer Pro* is an inexpensive, high-quality product that works well with CLS.

FMSI Holidays

Please take note! Financial MicroSystems will be closed on [November 27th - 28th](#) for Thanksgiving, and [December 24th - 26th](#), and [December 31st](#) through [January 2nd](#) for the holidays.

Status of CLS II

Development of the Windows® version of CLS (CLS II) is continuing, and we've made a lot of progress over the past few months - it's on track to be finished next summer. However, there are still a number of programs to be finished before it can be released to test sites.

What can you expect from CLS II?

- Your learning curve will be very short (10-15 minutes)
- The new version of CLS looks and acts much like the current version, but screens are taller
- Windows® Vista does not support the full-screen mode currently used by CLS, so CLS II will use either a "simulated" full-screen or a window - your choice
- When reports are displayed on-screen, a lot more of each page will be visible to you
- You can easily convert all of your existing clients using a batch process
- You can also convert your existing transmittal letters
- There is a built-in PDF writer for all reports, including payroll tax forms
- There is a built-in *Rich Text* editor for transmittal letters
- Tractor-fed, dot-matrix payroll tax forms will not be supported by CLS II
- The new CLS data files have grown in size and number, so backing up to floppy disks is no longer an option
- You can print to any Windows® printer without the use of third-party software
- CLS II requires Windows® XP or Vista (both 32-bit and 64-bit versions are supported)

We are looking for volunteers to begin testing CLS II right after the upcoming tax season. Please let us know if you are interested by sending an email to programming@clientledgersystem.com.

While most of the ET program has been finished, we could use your feedback about a couple of payroll-related transaction-entry features:

- 1) When entering a paycheck in CLS, the current version prompts you through each column on the payroll journal. We can use the same approach in the new version, or we can pop up a "paycheck-entry screen" and let you enter an entire paycheck before accepting it. Which would you prefer?
- 2) CLS II lets you attach a memo to each check or journal entry during transaction entry. Do you also need the ability to add a memo to individual transaction lines, or is a single memo per check sufficient?

In a few weeks we will email you a link to a short survey about CLS II, which will include the above questions. Be sure to verify the email address printed on your order form and correct it if necessary. Please take a few minutes to give us your suggestions, or you may fax your comments to 770-446-1802.

Beginning in December, you will be able to check the status of CLS II on our website. Our progress will be updated on a regular basis.

CLS Focus is published by Financial MicroSystems, Inc. for users of Client Ledger System™ software. We encourage readers to share ideas for publication. Forward all correspondence, including address changes, to:

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Updates for CLS Add-on Packages

Add-on packages for CLS currently include:

- SUTA Magnetic Media Processing (SM)
- W-2/1099 Magnetic Media Processing (TM)
- CLS Tax Package Interface (TX)
- Unemployment Plus (UP)
- XML Processing of 940, 941, 941c and 944 forms (XM)

The **SUTA Magnetic Media** (SM) program, *for filing state unemployment tax wage information on magnetic media*, has been updated to reflect file format changes for 2008.

With the **SM** add-on program, you can submit *wage continuation sheet information* electronically. A few of the states also require a separately printed tax return or transmittal form. Except for South Carolina, filing requirements are per employer.

State	Filing Requirement	Comment
Alabama	10+ employees	Must also submit UP form unless filing online
Arizona	Not required	Must also submit UP form
Arkansas	250+ employees	Online submission only
California	250+ employees	
Connecticut	250+ employees	Online submission only after 2008
Florida	Varies	Online submission only
Georgia	100+ employees	
Illinois	250+ employees	
Kansas	250+ employees, 100 in 2009	Online submission only
Kentucky	10+ employees	Online submission only
Louisiana	250+ employees	
Maryland	100+ employees	Must also submit UP form unless filing online
Massachusetts	All employers	
Michigan	Not required	Online submission, must also submit UP form
Minnesota	All employers	Online submission only
Mississippi	250+ employees	Must also submit UP form
Nebraska	Payroll of \$500,000 or more	Online submission, must also submit UP form
New Jersey	4+ employees, all new employers	Online submission only
North Carolina	100+ employees	
Ohio	Not required	Must also submit UP form
South Carolina	100+ employees (all clients)	Must also submit UP form
Tennessee	250+ employees	Must also submit UP form
Texas	10+ employees	
Virginia	250+ employees, 100 in 2009	Must also submit UP form
Wisconsin	25+ employees	Must also submit UP form unless filing online
Wyoming	Not required	Must also submit UP form

The **W-2/1099 Magnetic Media** (TM) program has been updated to reflect file format changes for 2008.

The **Unemployment Plus** (UP) program, *which provides the ability to print submittable unemployment tax cover pages for certain states*, has been updated for 2008. Form changes have been made for *Louisiana* and *Michigan*. *Arkansas* is in the process of being added and is currently pending approval. A new format for *Florida* will be available for the first quarter of 2009.

With the **UP** add-on program, you can *print unemployment tax returns* for:

Alabama UC-CR4	Arizona UC-018	California DE-7
Connecticut UC-2/5A	Florida UCT-6	Georgia DOL-4
Illinois UI 3/40	Kansas K-CNS-100	Kentucky UI-3
Louisiana ES4-B/C	Maryland DLLR/OU-15	Michigan UIA-1020
Minnesota DEED-1 (file copy only) *	Mississippi UI-2/3	Nebraska UI-11T
North Carolina UI-101	Ohio JFS-66111	South Carolina UCE-120/101
Tennessee LB-0456/0851	Texas C-3	Virginia VEC-FC-20
Wisconsin UCT-101		

* *Minnesota* now requires electronic filing for all employers. You can use **UP** to print a *file copy* of the tax return.

The **XML filing of 940, 941, 941c and 944 forms** (XM) program lets you create 940, 941 and 944 XML files to be submitted to the IRS electronically. Additional third-party software is required to transmit the XML files to the IRS. Ericom Software's *ProTerm Enterprise Suite* may be purchased through Financial MicroSystems, Inc., and it works well with CLS. The current XML file formats have been updated for 2008. A first-quarter update, which will include file formats for the new **941-X**, **943-X** and **944-X** forms, will be available in March and will be automatically sent to all current XM users.

Tech Support News

When you purchase a CLS update, you automatically receive 90 days of free (warranty) technical support. Our technical support staff will be happy to assist you with any questions about the new version – at no additional charge. *And, if you order the update by 11/21/08, you'll receive coupons for three additional free support calls to use throughout the rest of the year!*

Help us help you

Please include your CLS customer number, company name, and contact person when calling or e-mailing for technical support. Support calls are logged in as they are received. Users with Priority Support appear first on our call-back screen, then those with warranty support, followed by those with no support or an older version of CLS. Support calls without a CLS customer number appear *last*. To ensure the quickest response when using e-mail, please make sure to direct all support e-mails to:
techsupport@clientledgersystem.com

FMSI Still Active in NACTP

FMSI remains an active participant in the NACTP's Payroll and Information Reporting Committee (PIRC). Vicki Massey, our *Senior Programmer/Analyst*, continues to represent FMSI at all NACTP and PIRC meetings. For the last five years, this committee has worked closely with the IRS and state governments to help standardize payroll tax reporting. This year, PIRC met again with the IRS and SSA, and met with state representatives from Alabama, Indiana, Minnesota and Texas.

CLS Website

Visit our CLS website (www.clientledgersystem.com) for answers to many of the frequently asked questions (FAQs) about CLS, and a list of laser printers supported by CLS. It also provides current information about compatibility with Microsoft Windows XP and Vista, any known problems with Novell Netware or Pervasive SQL, and how to resolve these issues.

While most of the CLS website is open to anyone, current CLS users will need to register (and receive a password) in order to download updates, view your company's current CLS account status, or receive e-mail notification about new CLS updates.

Update Reminders

- Order confirmations are now being emailed as orders are entered. Please verify that we have the correct email address listed on your order form and correct it if necessary.
- CLS add-on programs are compatible *only* with the CLS version for which they are released. If you use the Tax Package Interface, W-2/1099 Magnetic Media Processing, Unemployment Plus, SUTA Magnetic Media or XML Filing of 940, 941, 941c and 944 Forms add-on products. Remember to update them also.
- Update prices for add-on products apply *only* if you own licensed versions of those products.
- Place your order early! Orders are processed and shipped in the order received. Once CLS 5.9 is released, orders are processed *during* shipping, which increases the turn-around time. During the holiday season, delivery delays are beyond our control.
- Updates for CLS bug fixes are available free of charge from the CLS website. If you would prefer to receive those bug fixes by mail, you may subscribe to CLS 5.9 updates-by-mail for only \$59.
- Review your order form for accuracy. Is your credit card number correct, including the expiration date? Is the grand total correct? If you charge the update to a personal credit card, be sure to provide the billing address associated with that card.
- Do not include sales tax *unless* you are located in *Georgia*.

We'd like to hear from you! CLS year-end updates reflect your needs; let us know how CLS can better serve your client write-up needs.

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