Vista / Aatrix 2022 Update

Based on customer feedback from the US/Canada 2021 year-end, Vista will support an extended set of W-2, 1099, and T4 print and eFile options in time for the 2022 tax year-end.

Specifically, Vista is reintroducing standard print options for W-2s, T4s, and 1099-NECs, as well as limited eFiling for W-2s and 1099s.

W-2 Printing

1) **Aatrix W-2 Complete Service -** Aatrix will print and distribute W-2s to employees as part of its W-2 Complete Service (Aatrix charges apply). Copies are mailed or emailed (with employee consent) and hosted online for employee self-serve access. There are no forms, envelopes, or stamps to buy, saving mailing costs and staff time. The service includes Federal eFiling with SSA and all State eFilings and Reconciliations.

2) **Aatrix W-2 Printing -** If a Vista site prefers to print and distribute W-2s themselves, they can redirect employee W-2 printing from Aatrix to a local network printer (at no charge from Aatrix). They will need to pre-order Aatrix format W-2 forms *(4-up blank quad format w/backer instructions for employees)*, and complete the print process using their in-house staff and resources. Employee W-2 hosting and eFiling services are optionally available from Aatrix to handle Federal and State eFilings and Reconciliations (Aatrix charges apply).

3) **Vista W-2 Printing -** New for the tax year 2022, Vista will reinstate the ability to print and reprint employee W-2s (copies B, C, 2) for current and prior years from a standard Vista report - **PR W2 Employee Copies**. If the intent is to distribute these at year-end, customers should pre-order Vista format W-2 forms *(4-up blank stacked format w/backer instructions for employees)*. Vista will only support a single year's W-2 layout that will be refreshed each year-end. If a prior year's W-2 is printed, it will read data from the year specified, but print on the current year's layout.

Please be careful to order and use the correct matching forms if you intend to print and distribute employee W-2s yourself from either Aatrix or Vista. Both formats (4-up quad and 4-up stacked) are available from [Viewpoint Business Forms](#).

Note: Printing employee W-2s for current and prior years is also available through Vista Web's Employee Portal > Paystub Tools. These print on plain paper without the need for special forms.

W-2 eFiling

1) **Aatrix eFiling -** Aatrix is the preferred option for creating and securely transmitting W-2 eFiles to the appropriate Federal and State agencies (Aatrix charges apply). Aatrix validates and guarantees up-to-date, accurate formats with all of its eFilings, and will track each company's filing history to facilitate corrections if needed.

2) **Vista EFW2 -** Viewpoint is reinstating the ability to generate and download a Federal W-2 eFile meeting current EFW2 format specifications. This file is provided as an additional resource for customers needing a copy of Vista W-2 data in a commonly accepted format.

Note: If W-2s are printed or eFiled through Aatrix, data is read directly from Aatrix, and when printed or generated from Vista, data is read from Vista. If W-2 data is modified after the update to Aatrix, it will <u>not</u> automatically sync to reflect changes made in the other system. Depending on the nature and scope of the change, you may wish to make corrections in Vista and resend W-2 data to Aatrix.

1099 Printing

1) **Aatrix 1099 Complete Service -** Aatrix will print and distribute 1099s (DIV, INT, MISC, NEC) to recipients as part of its 1099 Complete Service. Copies are mailed or emailed (with recipient consent) and hosted online for recipient self-serve access. There are no forms, envelopes, or stamps to buy, saving you mailing costs and staff time. The service includes Federal eFiling with the IRS and all State eFilings and Reconciliations.

2) **Aatrix 1099 Printing -** If a Vista site prefers to print and distribute 1099s themselves, they can redirect recipient 1099 printing from Aatrix to a local network printer (at no charge from Aatrix). They will need to pre-order Aatrix format 1099 forms *(4-up blank quad format w/backer instructions for recipients)*, and complete the print process using their in-house staff and resources. Recipient 1099 hosting and eFiling services are optionally available from Aatrix to handle Federal and State eFilings and Reconciliations (Aatrix charges apply).

3) **Vista 1099 Printing -** New for the tax year 2022, Vista will reinstate the ability to print and reprint recipient 1099-NECs (copies B, 2) for current and prior years from a standard Vista report - **AP 1099-NEC Recipient Copies**. If the intent is to distribute these at year-end, customers should pre-order Vista format 1099 forms *(2-up blank stacked format w/backer instructions for recipients)*. Vista will only support a single year's 1099-NEC layout that will be refreshed each year-end. If a prior year's 1099-NEC is printed, it will read data from the year specified, but print on the current year's layout.

Please be careful to order and use the correct matching forms if you intend to print and

distribute recipient 1099-NECs yourself from either Aatrix or Vista. Both formats (4-up quad and 2-up stacked) are available from Viewpoint Business Forms.

1099 eFiling

1) **Aatrix eFiling -** Aatrix is the preferred option for creating and securely transmitting 1099 eFiles to the appropriate Federal and State agencies (Aatrix charges apply). Aatrix supports multiple 1099 types (DIV, INT, MISC, NEC) and will validate and guarantee up-to-date, accurate formats with all of its eFilings. Aatrix also tracks each company's filing history to facilitate corrections if needed.
2) **Vista 1099 eFile -** Viewpoint is reinstating the ability to generate and download a Federal 1099 eFile meeting current IRS Pub 1220 format specifications. This file is provided as an additional resource for customers needing a copy of Vista 1099-NEC data in a commonly accepted electronic format.

Note: If 1099s are printed or eFiled through Aatrix, data is read directly from Aatrix, and when printed or generated from Vista, data is read from Vista. If 1099 data is modified after the update to Aatrix, it will not automatically sync to reflect changes made in the other system. Depending on the nature and scope of the change, you may wish to make corrections in Vista and resend 1099 data to Aatrix.

T4 Printing

1) **Aatrix T4 Complete Service -** Aatrix will print and distribute T4 slips to employees as part of its T4 Complete Service (Aatrix charges apply). There are no forms, envelopes, or stamps to buy, saving mailing costs and staff time. The service includes Federal eFiling submitted to the CRA.
2) **Aatrix T4 Printing -** If a Vista site prefers to print and distribute T4 slips themselves, they can redirect employee T4 printing from Aatrix to a local network printer (at no charge from Aatrix). T4 employee copies print on plain paper without the need for special forms, however, the process will need to be completed using in-house staff and resources. T4 Federal eFiling services with the CRA are optionally available from Aatrix (Aatrix charges apply).
3) **Vista T4 Printing -** New for the tax year 2022, Vista will reinstate the ability to print and reprint employee T4 slips for current and prior years from a standard Vista report - **PR Canada T4 Slip**. Vista will only support a single year's T4 layout that will be refreshed each year-end. If a prior year's T4 is printed, it will read data from the year specified, but print on the current year's layout.

Note: Printing employee T4s for current and prior years is also available through Vista Web's Employee Portal > Paystub Tools. These print on plain paper without the need for special forms.

T4 eFiling

1) **Aatrix eFiling -** Aatrix is the preferred, and only option supported for creating and securely transmitting T4 eFiles to the CRA (Aatrix charges apply). Aatrix validates and guarantees up-to-date, accurate formats with all of its eFilings, and will track each company's filing history to facilitate corrections if needed.