

1099 State Filing for Medical Communications Company

PROJECT DETAILS

 Accounting services

 Apr. 2021

 Less than \$10,000

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"They were incredible and, they were very particular."

PROJECT SUMMARY

Tab Service Company provided accounting services to a pharmaceutical firm. The team filed the client's 1099 state forms for 12 states. They discussed all the requirements and helped upload the forms.

PROJECT FEEDBACK

The client was extremely pleased with Tab Service Company's work. They filed all the 1099 forms in a quick and efficient manner thanks to their knowledge of the requirements for each state. Their detailed process and understanding of the company's needs led to the project's success.



The Client

Introduce your business and what you do there.

I'm a controller at eNova, and our organization does medical communications and publications for speaker bureaus and meetings across the country.

The Challenge

What challenge were you trying to address with Tab Service Company?

Our previous provider only filed our federal forms for us. Since they didn't file our state forms, Tab Service Company stepped in to file our 1099 forms for 2020 on behalf of our company.



Carol Franklin
Controller, eNova



Pharmaceuticals



51-200 Employees



New Providence, New Jersey

CLIENT RATING

5.0

Overall Score

Quality: 5.0

Schedule: 5.0

Cost: 5.0

Would Refer: 5.0



The Approach

What was the scope of their involvement?

Initially, we thought that we needed to process 36 states which would've cost us a lot of money. However, Matthew (Director of Business Development) explained the requirements to us and told us we only needed to process 12 states. He showed us the chart of the requirements for each state.

He also walked us through what we needed to do on the forms so they could be uploaded to the state websites. We followed his recommendation, and he reviewed what we did in the file. Then, he sent us corrections the same day. A day after, he sent 1099 forms to the various states, and then we got confirmation that everything was uploaded and done on April 26, 2021.

There were also state identifications (IDs) that we needed to file. I knew our New Jersey ID, but I was unaware that we had one in Pennsylvania. Matthew just told us about it. He then called Pennsylvania for us and got the ID for us.

What is the team composition?

We only worked with Matthew.



How did you come to work with Tab Service Company?

Tab Service Company was one of the few companies who wanted to file the state forms for us because other companies were looking to file both federal and state forms. We contacted their company via email, and they immediately responded. They answered several questions for us, and they sent us a state requirement summary which my boss wanted us to do.

When I presented to my boss what Tab Service Company could do, she approved and requested a contract. Matthew was very amendable on working with us at a reduced rate per state. When we asked him for references, every single person we contacted gave an extremely positive reference about them. Previous companies that worked with them also mentioned their quick turnaround and how accurate they were.

How much have you invested with them?

The final cost for the project was \$2,100. This is exactly what we expected.

What is the status of this engagement?

Our partnership happened in April 2021. However, we're going to work with them again. As a matter of fact, they would be working on our 1099 forms for 2021.



The Outcome

What evidence can you share that demonstrates the impact of the engagement?

They speedily finished everything and it was all done in a timely manner. From the minute we called them, they immediately assessed our situation, and they were extremely proactive. It would've taken months to get our Pennsylvania ID, but with the Tab Service Company's support, we were able to get it quickly.

How did Tab Service Company perform from a project management standpoint?

We communicated through email, phone calls, and Microsoft Teams. When we set up a call with them before the engagement started, they were very thorough. They explained what needed to be done, and they understood perfectly what we wanted to do. Our contract also stated that their turnaround would be 24–48 hours, but they finished everything in less than 24 hours.

Matthew was our main point of contact and we appreciated that he was very knowledgeable; he knew what each state needed. It was nice to have someone who could solve our problems quickly. Overall, Tab Service Company did an excellent job.

What did you find most impressive about them?

Tab Service Company's contributions to our company were well worth the money. We were impressed that they answered a lot of our queries even before we signed the contract. Overall, I'd highly recommend their services to others.

Are there any areas they could improve?

There's nothing negative that I could say about them. I asked my fellow internal member who helped with the process, and she felt the same way. They were incredible and, they were very particular.



Do you have any advice for potential customers?

Do not hesitate to ask any questions; they answer them quickly, and they're easy to work with. They have a site to upload your particular files and it's very user-friendly.

When you get to the end of the year, and you have to file 1099 forms, you have to provide a lot of information including social security numbers and company numbers. They have that on their site and that makes them a step ahead of the process.

