

# Anthology Payroll

Product Version: Anthology Payroll for Dynamics 365 Finance: Year-End Preparation for United States Localization

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## Introduction

This document describes the general procedures required to prepare for a new tax year in Anthology Payroll for Microsoft Dynamics 365 Finance. This document can be used as a checklist to ensure your implementation is properly configured for the start of a new tax year.

If you have questions regarding these instructions, then contact:

- Your Anthology Payroll implementer; or
- <u>https://support.campusmgmt.com</u>

## Prepare for the New Tax Year

The following objects in your implementation of Anthology Payroll must be updated for the new tax year.

#### **Date Groups**

If you are using date groups, new dates for each group must be added for the new year. To update date groups:

- 1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Dates** > **Date groups** to open the **Date groups** form.
- 2. On the **Overview** tab, select the date group to update.
- 3. On the **Dates** tab, create a new date to the date group. Specify fields accordingly.
- 4. Repeat as necessary for additional date groups.

#### **Date Period Dates**

Your date periods must have date ranges set up for the new year. For the date periods that had date period dates for the year now ending, set up a new set of dates for the upcoming year. Take note of which date periods have a pay group in the current year.

Some typical date periods are:

- Calendar Month
- Calendar Quarter
- Calendar Week
- Calendar Year
- Pay Period
- Pay Year
- Tax Year
- Tax Week

To update date period dates:

- In the Anthology Payroll navigation pane, click Setup > Tables > Dates > Date period dates to open the Date period dates form.
- 2. On the **Fast entry** tab, specify a **Date period** to add dates for. Specify a **Pay group** if the dates are applicable only to that pay group; otherwise leave **Pay group** blank to allow the dates of that date period to apply to all pay groups.
- 3. Fill out the other fields as necessary to generate the new dates for the new year. Ensure that your new date periods start the day after the corresponding previous year's date periods end. Click **Generate** to create the new dates.
- 4. After generating the new dates, check for gaps to ensure that there are none. If there are gaps, adjust dates accordingly.

5. Repeat for each pay group with different pay periods (e.g. *Weekly* and *Bi-weekly*) and additional date periods.

If you have *Weekly* and *Bi-weekly* pay periods, It is recommended to create 53 *Weekly* periods and 27 *Bi-weekly* periods. Then check the **Statement date** of the last pay period created. If the date is in the next tax year, then delete the last period.

**Note**: once you have completed the setup, compare the **Dates Period Dates** from the current year with the previous years to ensure the current year setup is the same as the previous year setup. This can be done by filtering on the year, exporting the data to a spreadsheet and inserting a pivot table to compare the current year and the previous year's date periods.

#### **Benefit/deduction Schedules**

Benefit/deductions must be scheduled for the new year otherwise they will not be deducted. It is recommended to copy the schedules from the current year to the next year with the same **Benefit/deduction rule groups** (if any).

To update benefit/deduction schedules:

- 1. In the Anthology Payroll navigation pane, click Setup > Tables > Schedules > Pay period benefit/deductions to open the Pay period benefit/deduction schedules form.
- 2. On the **Overview** tab, review the schedules that were set up for the previous year.
- 3. If your benefit/deduction schedules are set up for **Benefit/deduction groups** (e.g.: *Apply every pay period*, *Apply monthly*, etc.):
  - a. On the Fast entry tab, select the applicable Pay groups and Benefit/deduction group.
  - b. Select the **Pay period end dates** to schedule for the benefit/deductions in the group. These are the pay periods when the benefit/deductions will deduct.
  - c. If your benefit/deduction rule groups have different schedules, select the appropriate **Benefit/deduction rule group**. Note that you must repeat this process for each rule group with different schedules.
  - d. Click **Insert** to create the schedules for the group.
  - e. Repeat as required for additional benefit/deduction groups and/or rule groups.
- 4. If your benefit/deduction schedules are set up individually for each **Benefit/deduction**:
  - a. On the **Fast entry** tab, select the applicable **Pay groups** and the **Benefit deduction**.
  - b. Select the **Pay period end dates** to schedule for the benefit/deduction. These are the pay periods when the benefit/deduction will deduct.
  - c. If your benefit/deduction rule groups have different schedules, select the appropriate **Benefit/deduction rule group**. Note that you must repeat this process for each rule group with different schedules.
  - d. Click **Insert** to create the schedules for the benefit/deduction.
  - e. Repeat as required for additional benefit/deductions and/or rule groups.

#### **Entitlement Schedules**

Entitlements must be scheduled for the new year otherwise they will not accrue.

To update entitlement schedules:

- 1. In the Anthology Payroll navigation pane, click Setup > Tables > Schedules > Pay period entitlements to open the Pay period entitlement schedules form.
- 2. On the **Overview** tab, review the schedules that were set up for the previous year.
- 3. If your entitlement schedules are set up for **Entitlement groups** (e.g.: *Apply every pay period*, *Apply monthly*, etc.):
  - a. On the **Fast entry** tab, select the applicable **Pay groups** and **Entitlement group**.
  - b. Select the **Pay period end dates** to schedule for the entitlements in the group. These are the pay periods when the entitlements will accrue.
  - c. If your entitlement rule groups have different schedules, select the appropriate **Entitlement rule group**. Note that you must repeat this process for each rule group with different schedules.
  - d. Click **Insert** to create the schedules for the group.
  - e. Repeat as required for additional entitlement groups and/or rule groups.
- 4. If your entitlement schedules are set up individually for each **Entitlement**:
  - a. On the Fast entry tab, select the applicable Pay groups and the Entitlement.
  - b. Select the **Pay period end dates** to schedule for the entitlement. These are the pay periods when the entitlement will accrue.
  - c. If your entitlement rule groups have different schedules, select the appropriate **Entitlement rule group**. Note that you must repeat this process for each rule group with different schedules.
  - d. Click **Insert** to create the schedules for the entitlement.
  - e. Repeat as required for additional entitlements and/or rule groups.

#### **Generated Earning Schedules**

Generated earnings must be scheduled for the new year otherwise they will not be generated.

To update generated earning schedules:

- 1. In the Anthology Payroll navigation pane, click Setup > Tables > Schedules > Pay period generated earnings to open the Pay period generated earning schedules form.
- 2. On the **Overview** tab, review the schedules that were set up for the previous year.
- 3. If your generated earning schedules are set up for **Generated earning groups**:
  - a. On the **Fast entry** tab, select the applicable **Pay groups** and **Generated earning group**.
  - b. Select the **Pay period end dates** to schedule for the generated earnings in the group. These are the pay periods when the generated earnings are generated.
  - c. If your earning rule groups have different schedules, select the appropriate **Earning rule group**. Note that you must repeat this process for each rule group with different schedules.
  - d. Click **Insert** to create the schedules for the group.
  - e. Repeat as required for additional generated earning groups and/or rule groups.
- 4. If your generated earning schedules are set up individually for each **Generated earning**:
  - a. On the Fast entry tab, select the applicable Pay groups and the Generated earning.
  - b. Select the **Pay period end dates** to schedule for the generated earning. These are the pay periods when the generated earning is generated.
  - c. If your earning rule groups have different schedules, select the appropriate **Earning rule group**. Note that you must repeat this process for each rule group with different schedules.
  - d. Click **Insert** to create the schedules for the generated earning.
  - e. Repeat as required for additional generated earnings and/or rule groups.

#### **Statutory Deduction Rate Changes**

For most statutory deduction rates, Anthology Payroll maintains the latest rates with the latest version of the Statutory Deductions Spreadsheet for Anthology Payroll. The spreadsheet is imported to update your environments.

If you have defined your own rates in calculations for other statutory deductions that are specific to your company and jurisdiction, and they are changing in the new tax year, you must update them in an effective-dated change. For example, if you have any of the following types of calculations that are not managed by the Statutory Deductions Spreadsheet:

- state unemployment insurance rates
- other rates that are managed manually

To update calculations:

- 1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Calculations** > **Calculations** to open the **Calculations** form.
- 2. On the **Overview** tab, select the calculation containing the rate to update. Expand the **Maintain effective date entries** pane.
- 3. On the **Maintain effective date entries** pane, create a new effective-dated record of the calculation.
- 4. Change the **Active date** of the new record to the first day of the new tax year (or the appropriate date the new rate is to take effect).
- 5. On the **Rule** tab, click **Edit** to open the **Calculation setup** form. Change the **Calculation result** (or **Calculation string**) to the new rate.
- 6. Click **Validate** to validate your calculation string. Verify that the validation passes.
- 7. Click **Save** to save your changes and close the **Calculation setup** form.
- 8. Repeat for each rate change defined in a calculation.

#### **Calculations with Explicit Dates**

If you have defined any calculations that incorporate explicit dates (non-system dates) that change each year, you must update them with an effective-dated change.

To update calculations:

- 1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Calculations** > **Calculations** to open the **Calculations** form.
- 2. On the **Overview** tab, select the calculation containing the date to update. Expand the **Maintain effective date entries** pane.
- 3. On the **Maintain effective date entries** pane, create a new effective-dated record of the calculation.
- 4. Change the **Active date** of the new record to the first day (or another appropriate date) of the new tax year.
- 5. On the **Rule** tab, click **Edit** to open the **Calculation setup** form. Change the explicit date in the **Calculation result** (or **Calculation string**).
- 6. Click **Validate** to validate your calculation string. Verify that the validation passes.
- 7. Click **Save** to save your changes and close the **Calculation setup** form.
- 8. Repeat for each calculation with explicit dates.

## **Statutory Deductions Spreadsheets**

Anthology Payroll provides regularly-updated statutory deductions in the form of importable Microsoft Excel spreadsheets for each version and localization.

To obtain the latest spreadsheet for your jurisdiction, please contact our Client Support:

https://support.campusmgmt.com

## **Year-End Forms**

Year-end forms are generated from Anthology Payroll and then filed using the Greenshades Tax Filing Center. The following forms are supported by Anthology Payroll:

- 940 annual federal unemployment
- W-2 reporting

#### **Create 940 Annual Federal Unemployment Report**

940s are created annually for reporting FUTA (Federal Unemployment Tax Act) returns. The **940 creation** process includes creating a transmission file for 940s intended for upload to the IRS. The process uses third-party software, Greenshades, to submit the report.

To create a 940 submission file:

- In the navigation pane, click Periodic > Year end > 940 creation to open the 940 creation dialog.
- 2. Specify a **Date period** of *Tax Year* and select the current (or previous) year in the **Date period year** and **Date period number** fields.
- 3. Enter **Total FUTA Tax Deposited** for the year, including any overpayment applied from a prior year. This is equivalent to *Box 13* on the 940 form.
- 4. Select an option for **All taxable FUTA wages were excluded from state unemployment tax**. This option is used in *Box 9* on the 940 forms.
- 5. If **All taxable FUTA wages were excluded from state unemployment tax** is *No*, enter your total taxable FUTA wages into the **Box 10** field. Otherwise, leave this amount as zero. This is equivalent to *Box 10* on the 940 forms.
- 6. Click **OK** to generate the 940-submission form.

To download the XML file to your local computer, click **Periodic** > **Download files to local network**.

After the 940-submission file has been created, you must open the **Tax Filing Center** to file it electronically.

#### **Create W-2 Report and Submission File**

The W-2 listing report shows a summary of worker W-2 data for a specified year. The report can be reviewed and printed as desired. Successfully running the listing report is also a good indication that W-2s can be properly run.

To run the W-2 listing report:

- In the navigation pane, click Reports > USA reports > W2 listing to open the W2 listing pane.
- 2. Specify a **Date period** of *Tax Year* and select the current (or previous) year in the **Date period year** and **Date period number** fields.
- 3. Click **OK** to view the report in a new browser window.

The **W2 creation** process includes creating a transmission file for W-2s intended for upload to the IRS. The process uses third-party software, Greenshades, to create and submit the report.

To create a W-2 submission file:

- In the navigation pane, click Periodic > Year end > W2 creation to open the W2 creation pane.
- 2. Specify a **Date period** of *Tax Year* and select the current (or previous) year in the **Date period year** and **Date period number** fields.
- 3. Click **OK** to generate the W-2 submission form.

To download the XML file to your local computer, click **Periodic** > **Download files to local network**.

After the W-2 submission file has been created, you must open the **Tax Filing Center** to file it electronically.

## **Greenshades Tax Filing Center**

The Greenshades Tax Filing Center (TFC) manages all form filings and submissions from Anthology Payroll to the IRS and respective government organizations. Additional documentation on the TFC is provided by Greenshades, but this section contains general information on submitting the various forms through the Filing Center.

The Tax Filing Center must be installed locally on your workstation and opened manually. You can electronically file your returns from the TFC. Additionally, you may distribute year-end forms to your employees from <u>greenshadesonline.com</u>, which is launched from within TFC.

Dynamics AX Filing Center			
Your Upcoming Deadlines	View Your Upo	coming Deadlines	$\bigcirc$
🧯 Greate E-File Returns	Review the reminders you	u have set for upcoming tax filings.	G
🕑 View Filing History	Filter: All Types	•	
View Recent Tax Changes		Edit Reminders	
Contr Mars Ford Frame	Due within 30 Days		<b>^</b>
Greate Year-End Forms	🗖 🛃 Due: 31/01/2015	Return for State Withholding	
×	🗖 🔮 Due: 31/01/2015	Return for Federal 941	
O'mar l'C.	🗖 🎯 Due: 31/01/2015	Return for State Unemployment	
Simplify	🗖 😨 Due: 31/01/2015	Return for Federal Unemployment	
Year End Processing	Due within 3 Months		
	🗖 🔮 Due: 28/02/2015	Return for Federal Year End W-2	
	Due within a Year		
LET US HANDLE THAT	🗖 🔮 Due: 30/04/2015	Return for State Unemployment	
$\sim$	🗖 🎯 Due: 30/04/2015	Return for Federal 941	
and the second sec	🗖 😨 Due: 31/07/2015	Return for State Unemployment	
Settings	Dury 21/07/2015	Return for Federal 9/1	-

Additional documentation on the TFC can be found at:

http://www.greenshades.com/download-tax-filing-center.php

#### Submit 940 Annual Federal Unemployment

After the 940 submission file has been created, it can be reviewed and submitted through the **Tax Filing Center**. To review or submit it:

- ics AX Filing Cente Select Returns to File Your Upcoming Deadlines **Greate E-File Returns** iker: 94x ٣ Select All View Filing History Electronic Return Status View Recent Tax Change Internet 🔄 US - 94x (940) Awaiting Creation • **Create Year-End Forms** Simplify ear End Processing **GREEN**SHADES Check here if you would like the ability to edit your data prior to creating your electronic file (Adva Quit < Back Next > 2
- 1. Open the Greenshades Tax Filing Center on your local environment.

2. In the Tax Filing Center, click Create E-File Returns to open the E-File Wizard.

			S
File: 94x	Status	Sei Method	ect All Build?
🔯 US - 94x (940)	Awaiting Creation	Internet	

- 3. On the **Select Returns to File** dialog, select *94x* in the **Filter** field to view pending 940 reports.
- 4. Check the **Build?** option for the *US 94x (940)* **Electronic Return**. Click *Check here if you would like the ability to edit your data...* to open an editor prior to completing the e-file record. The editor will allow you to make any changes to amounts or other reporting fields as needed. Click **Next** to proceed to the advanced editor, which opens in a new window.

	1 errors 💌 Po	rm 940 Save & Exit Cancel & Exit
Form 940 Department	for 2016: Employer's Annual Federal Unemployment (FUTA) Ta of the Treasury - Internal Revenue Service	x Return
Company Ir	formation	
Employer ide Name (not yo Trade name ( Address	Intification number (EIN) 64 - 123789 ur trade name) US Testing (any) 449 OH-125 Mamber Evert Suite or raom number City Street Amber Other City Street Provige country name Provige country name Provige country name	Type of Return (Oreck all that apply.)  a. Amended b. Successor employer c. No Psymmetry made to employees in 2016 d. Final: Business closed or stopped paylog wages Instructions and prior-year forms are available; here.
Part 1: Tell	us about your return. If any line does NOT apply, leave it blank. See instruction	s before completing part 1.
1a If yo	a had to pay state unemployment tax in one state only, enter the state abbreviation	1a
1b If you employed	a had to pay state unemployment tax in more than one state, you are a multi-state over	1b Check here. Complete schedule A (Form 940)
2 If yo	a paid wages in a state that is subject to CREDIT REDUCTION	2 Check here, Complete schedule A (Form 940)
Part 2: Det	ermine your FUTA tax before adjustments. If any line does NOT apply, lea	ve it blank.

- 5. On the **Advanced Editor** window, change fields on the form as desired before proceeding with filing. Values in the form are generated from Anthology Payroll and Greenshades. Errors are highlighted in red and must be resolved before proceeding.
- 6. After making edits, click **Save & Exit** to return to the wizard. You may also download a PDF copy for your own records.
- 7. On the **Review Built Files** dialog, click the **Click to Begin Filing** link for the US 94x (940) **Electronic File** to begin filing your 940 report. If your report had errors, click to view the errors. Click **Back** to return to the previous screen and rebuild and reopen the editor to resolve errors, if any.
- 8. On the **View Totals** dialog, you can view, print, or save a copy of the e-file. Reconcile these totals against those you are expecting to file. Click **Next** to proceed through the prompts to complete your filing. You must provide your company's identification to proceed.

You may save a copy of the 940 for your own records from TFC.

#### Submit and Distribute W-2s

After the W-2 submission file has been created, use the Greenshades Tax Filing Center to greenshadesonline.com.

To submit your W-2 through the TFC:

- 1. Open the Greenshades Tax Filing Center on your local environment.
- 2. In the Tax Filing Center, click Settings and click About tab.



- 3. The box in the lower right corner of the **About** tab contains "xmlpath:" followed by a directory and file name. Ensure that the file containing your W2 data is in this directory and uses this file name.
- 4. Click **Cancel** to close the **Settings** dialog box.
- 5. In the left column of the **Tax Filing Center**, click **Create E-File Returns** to open the E-File Wizard.
- 6. Check the **Build?** option for the US W-2 Electronic Return. Click Check here if you would like the ability to edit your data... to open an editor prior to completing the e-file record. The editor will allow you to make any changes to amounts or other reporting fields as needed. Click Next to proceed to the advanced editor, which opens in a new window.

Editor								. O ×
File Tools								
E FederalW2File	Detail View	ListView	1					
Submitter - 111-222-333	111-222-333							
- Employee - 6517991		EIN	MMREFPin	SoftwareVendorCode	ResubIndicator	Resub/w/FID	SoftwareCode	CompanyNai
Total -	Submitter	22-333	12345678	1453				Loki Canadia
- Final -								
المحدية الشماعية في يتبوني الأسمالية	a survey and		and a state	hearing grow the second	and the second	and the second	بيريد ويرتجع	the Acres of

- 7. In the **Editor**, view the W-2 form. You may change the fields as desired before printing or submitting the form. Values in the form are generated from Anthology Payroll and Greenshades.
- After making edits, click File > Done Editing to return to the wizard. You may also click File > Save a Copy to save a copy of your changes to your local computer.

Electronic Return	Status	Combined Summary
🛳 US W-2	Employees: 1	Click to Begin Filing

9. On the Review Built Files dialog, click the Click to Begin Filing link for the US W-2 Electronic File to open the View Totals dialog. If the report has errors, click the corresponding link to resolve them. If the Enter Missing Information dialog appears, enter corresponding information as needed to continue with building the e-file.

Please check t	ie accuracy of the totals	tound below.			(=
View Details	Print Totals	Save Tota		Save E-File	
JS - W2					
JS - W2 Dverall Tota	lls tal Advanced Earned Inco	ome Credit	\$0.00		
JS - W2 Overall Tota To	l <b>ls</b> tal Advanced Earned Inco otal Deferrals Under Sec	ome Credit ction 409A	\$0.00 \$0.00		
JS - W2 Dverall Tota	lls tal Advanced Earned Inco 'otal Deferrals Under Sec Total Deferred C	ome Credit ction 409A Comp 401k	\$0.00 \$0.00 \$0.00		
JS - W2 Dverall Tota	tal Advanced Earned Inco otal Deferrals Under Sec Total Deferred C Total Deferred C	ome Credit ction 409A Comp 401k Comp 403b	\$0.00 \$0.00 \$0.00 \$0.00		
JS - W2 Dverall Tota	tal Advanced Earned Inco otal Deferrals Under Sec Total Deferred C Total Deferred C Total Deferred C	ome Credit tion 409A Comp 401k Comp 403b Comp 403k	\$0.00 \$0.00 \$0.00 \$0.00 \$0.00		

10. On the **View Totals** dialog, you can view, print, or save a copy of the e-file. Reconcile these totals against those you are expecting to file. Click **Next** to proceed.

Ch Ch	oose Submission Method
•	Automatic Submission Microsoft Dynamics will log into the Social Security Administration's servers and securely transmit your W2 information. Once transmitted, you will receive a government EFile Identifier which can later be used to reference your submission.
0	Manual Submission You will be given steps that guide you through logging into the Social Security Administration's website and uploading your W2 information. You will walk through pages of the website and will receive confirmation information when finished.
?)	Quit < Back Next >

11. On the **Choose Submission Method** dialog, select your method of submission and proceed through the prompts to submit your W-2 report. You must provide your company's identification to proceed.

To distribute the W-2s to your employees:

1. In the **Tax Filing Center**, click **Create Year-End Forms** to open the **Year-End Forms** wizard.

Choose a s	et of Forms
lse this wizar ireenshades( rocess inclus	d to upload your W-2s, 1099s, and other year-end tax forms to Infine.com. You will be able to use that website to complete your year-end fing reviewing and editing your forms, enabling online access for recipients, w remaining forms, and trady submitting an E-Fie to the government.
Please select	the forms that you wish to wark with:
Please select /ear:	2014

2. On the **Year-End Forms** dialog, select *W-2* in **Type of Tax**. Verify the **Year**. Click **Next** to proceed.

- 3. On the next screen, select the Work with these forms... option if your year-end forms are already uploaded to greenshadesonline.com. Click Next to open greenshadesonline.com in a new browser window and continue with your form creation. If you made changes to your W-2 forms from within the TFC, select the *Replace the year-end forms...* option and click Next to proceed to upload your latest W-2 submission file to greenshadesonline.com. You can also upload your file from greenshadesonline.com.
- 4. On greenshadesonline.com, log in with your greenshades account.

ear-End Fo	rms					
ect a workspace beik						
		660	here to import new law	forms into Year:	faul Forms	
58F1	Al 🗸 -	form Type	4 V ·		View	Equilat M =
	Enter Workspace Name	Sort By:	Workspace Title	- A to Z 💙 =	Recipient Name/TIN:	

5. If you need to upload your W-2, click the *Click here to import new tax forms...* hyperlink at the top of the page to open the **Import Forms Wizard** in a new window. Otherwise, select your W-2 form to file and click the option to begin filing.

Year-End Forms	Need Holg?
Import Forms Wizard Company Inte 🍁 Upload 🕪 Bacusty 🚸 Finish	
Upload Click beinv to select the excel file containing year forms.	
Browse Download a 2019 W-2 Excel Template	
In wat to the in tooms non-waty using Treat-End Forms.     In an using an XML generated by my Dynamics AX accounting package	
Start Over	Continue C
W5 - 62065-2020 Green Shades Software Ive. By avcessing and using this page you agree to the Englisher License Agreement.	Read our Patsacz Statement

- 6. If you are not uploading a new W-2, skip to the next step. If you are uploading a new W-2, on the **Import Forms Wizard**, select your company and the **Year** and **Form Type** to import. Click **Continue** to proceed to select your import file. On the **Upload** screen, check the *I am using an XML generated by my Dynamics AX accounting package* option and browse to and select your XML file produced from Anthology Payroll. Proceed through the rest of the wizard by selecting users in your company who can view the forms and finalizing the upload. The upload may take several minutes.
- 7. When distributing your W-2, you will be redirected to <u>downloadmyform.com</u>. Proceed through the prompts to complete your form generation.

Year-End Forms Need Hit	2
Welcome to your 2019 W-2 Tax Forms	
You can use this administrator portal to oversee your entire year end form process: monitoring employee develoads, mailing the forms, making corrections, and e-filing your information to the government. For help at any time, please call Greenahades Support at 504-807-0160x1 or email support@greenahades.com	
Company Information	
Please review the company information below and make any edits necessary.	
Official Company Name	
Your community metalated states that self annexes as user from a	
Company FIN	
Company Line	
Your company's Employer Identification Number that will appear on your forms	
Designate a Billing Contact	
Choose the Accounts-Payable contact at your company who will pay for charged services from this site.	
Your Company's Contacts	
V	
Select "(Add a New Contact)" to enter your billing contact's information if it is not listed.	
Please verify your account payable contact's information	
We will use this information to contact your company about billing inquiries.	
Name	
The series of every second its equable endoor	
The name of your ecounto peyable contact	
Phone Namber	

- 8. Review your company's information on the welcome page. Verify your contact information and proceed.
- 9. Select an option for **Formset Archiving** depending on your organization's requirements and continue.

🔶 Year-End Forms	2019 W-2 Tax Forms 👻	C 🖻 🗘 Ø
Welcome to Year-End F You can view your forms and report	OFTINS s below as well as a checklist which will guide you through the year-en	d forms process.
My W-2s Vew, E	dit, and Print individual W-2 Forms	
My Reports View R	sports on User Activity and Overall Form Information	
Year-End Forms Checklist:		
COMPLETED ON SZSCI20	Complete Company Setup     Jaced the welcome wizard to configure Year-End Forms	on 5/26/2820.

- 10. On the **Welcome to Year-End Forms** homepage, verify that you have completed the items on the **Year-End Forms Checklist**. From the homepage, you can access several functions:
  - My W-2s: view, edit and print individual W-2 forms.
  - My reports: view reports on user activity and other metadata
  - **Complete Company Setup**: complete and validate your company's contact information. Needs to be completed only once.
  - **Employee Identity Verification**: validate the contact information for your employees.
  - Resolve Warnings with your Forms
  - Verify W-2 Form Totals: reconcile your W-2 form totals with your expected results.
  - Email Employees with links to W-2 Forms
  - **Distribute any remaining W-2s to your Employees**: you can choose to distribute electronically, which would incur a fee from Greenshades, or to download and print the remaining W-2s and distribute manually.

• E-File Federal W-2 Return: submit your W-2s electronically through <u>downloadmyform.com</u>, following the on-screen prompts. For more information on this process, see <u>https://cdn.greenshadesonline.com/DMF/Help/E-</u> <u>File%20Federal%20Returns.htm</u>.

## **Tax Filing Troubleshooting**

This section contains some troubleshooting options when it comes to filing your forms through the TFC or <u>greenshadesonline.com</u>. These are some common issues that you may run into while configuring or reporting your year-end forms and the solutions for resolving them.

Area	Symptom	Problem	Resolution
SUTA	When attempting to submit an e-file for SUTA, an error appears in the TFC stating that the TFC was unable to find any data in your system that you are authorized to E- File.	Your company setup in Greenshades is not authorized to file returns in the state you are trying to file.	Contact Greenshades Support ( <u>support@greenshades.com</u> ) to request that the state you are trying to file be added to the list of approved states for your company.
Tax Filing Center	You are running .Net framework version 4.0 or 4.5.	As of 2020, Greenshades has discontinued support for these older versions of the .Net framework. Greenshades recommends updating to version 4.8 or later.	Update the version of .Net framework on the server running the Greenshades Sync Service or Tax Filing Center. Download links are available here: <u>https://www.greenshades.com/download- tax-filing-center.php</u>
	When submitting an e- file, an unexpected error occurs.	The email address specified during the submission is in a different domain from your company domain. As such, the e-file process does not recognize the submitter as an approved user	Contact Greenshades Support ( <u>support@greenshades.com</u> ) to request that the email address be added to your company domain in GSO. This must be performed by Greenshades security team.

For more documentation on greenshades software, see <u>http://www.greenshades.com/download-tax-filing-center.php</u>.

Area	Symptom	Problem	Resolution
	The directory location of where the TFC stores submission files is no longer valid.	The directory location where the TFC stores submission files can be updated from within the TFC application.	<ol> <li>In the TFC, click <b>Settings</b> to open the <b>Settings</b> dialog.</li> <li>On the <b>Advanced</b> tab, click <b>Change</b> to change the directory location of where the TFC stores electronic files.</li> </ol>
	When the TFC is opened from Dynamics, a message prompt appears stating that a valid registration key is required.	Your registration key for the Greenshades application has expired and must be renewed. Your registration key is displayed in the TFC under Settings > Registration	Verify that your registration key in TFC matches the one located in your <b>Registration</b> <b>Information</b> on <u>http://my.greenshades.com</u> . Contact our Client Support ( <u>https://support.campusmgmt.com</u> ) to request that your registration key be extended or to request a new registration key.

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