



GREENSHADES

LET US HANDLE THAT

Year End Forms Guide

W-2 forms

1 Table of Contents

| | | |
|------------|---|-----------|
| 2 | <u>ABOUT THE GREENSHADES YEAR-END FORM PROCESS</u> | 5 |
| 2.1 | ACCESSING THE YEAR-END FORMS PORTAL | 5 |
| 3 | <u>GETTING STARTED WITH THE YEAR-END FORMS</u> | 6 |
| 3.1 | UPLOADING FORMS | 6 |
| 3.1.1 | UPLOADING FORMS THROUGH GREENSHADES CENTER | 6 |
| 3.1.2 | UPLOADING FORMS DIRECTLY VIA GREENSHADESONLINE | 11 |
| 4 | <u>CONFIGURING A NEW WORKSPACE</u> | 15 |
| 4.1 | COMPANY INFORMATION | 15 |
| 5 | <u>USING YEAR-END FORMS</u> | 16 |
| 5.1 | SELECTING A WORKSPACE | 17 |
| 5.1.1 | SEARCHING FOR A WORKSPACE | 17 |
| 5.2 | TOP NAVIGATION BAR | 17 |
| 5.3 | TASK-DRIVEN HOMEPAGE | 18 |
| 5.3.1 | HOW TO ACCESS FORMS | 19 |
| 5.3.2 | HOW TO COMPLETE A TASK | 19 |
| 5.3.3 | HOW TO CHANGE TO THE CLASSIC VIEW | 20 |
| 5.4 | CLASSIC HOMEPAGE | 20 |
| 5.4.1 | LEFT SIDE MENU | 20 |
| 5.4.2 | CURRENT ALERTS | 21 |
| 5.4.3 | COMPANY TOTALS | 22 |
| 5.4.4 | USER ACTIVITY | 22 |
| 5.4.5 | FORM BATCHES | 22 |
| 6 | <u>MANAGING YOUR FORMS</u> | 23 |
| 6.1 | VIEWING FORMS | 23 |
| 6.1.1 | PRINT A FORM | 24 |
| 6.1.2 | EDITING A FORM | 24 |
| 6.2 | RESOLVING WARNINGS WITH YOUR FORMS | 26 |
| 6.3 | MAKING FORM CORRECTIONS | 27 |
| 6.3.1 | CORRECTING A W-2 | 27 |
| 7 | <u>VERIFYING TOTALS</u> | 30 |



| | | |
|-----------|---|------------------|
| 8 | <u>MANAGE EMPLOYEE ACCESS</u> | <u>31</u> |
| 8.1 | GREENEMPLOYEE.COM ACCESS | 31 |
| 9 | <u>EMPLOYEE NOTIFICATIONS</u> | <u>32</u> |
| 9.1 | RECIPIENTS | 32 |
| 9.2 | MESSAGE | 33 |
| 9.3 | SEND NOTIFICATIONS | 33 |
| 10 | <u>MAILING FORMS THROUGH GREENSHADES</u> | <u>35</u> |
| 10.1 | PREVIOUS MAIL SERVICE ORDERS | 35 |
| 10.2 | NEW MAIL SERVICE ORDER | 36 |
| 10.2.1 | CHOOSE FORMS | 36 |
| 10.2.2 | VIEW TOTALS | 36 |
| 10.2.3 | DELIVERY OPTIONS | 37 |
| 10.2.4 | ADVANCED OPTIONS | 38 |
| 10.2.5 | REVIEW AND MAIL | 38 |
| 11 | <u>DISTRIBUTING FORMS YOURSELF</u> | <u>39</u> |
| 11.1 | PREVIOUS SELF-DISTRIBUTE BATCHES | 39 |
| 11.2 | NEW DOWNLOAD BATCH | 40 |
| 11.2.1 | CHOOSE FORMS | 41 |
| 11.2.2 | VIEW TOTALS | 41 |
| 11.2.3 | DELIVERY OPTIONS | 41 |
| 11.2.4 | ADVANCED OPTIONS | 42 |
| 11.2.5 | REVIEW AND DOWNLOAD | 42 |
| 12 | <u>E-FILE STATE RETURN</u> | <u>44</u> |
| 12.1 | SUBMITTER INFORMATION | 44 |
| 12.2 | REVIEW TOTALS | 45 |
| 12.3 | DOWNLOADING STATE-E-FILE | 45 |
| 13 | <u>E-FILE FEDERAL RETURNS</u> | <u>47</u> |
| 13.1 | SUBMITTER INFORMATION | 47 |
| 13.2 | REVIEW TOTALS | 48 |
| 13.3 | SUBMIT FILE | 49 |
| 14 | <u>YEAR-END FORMS REPORTS</u> | <u>50</u> |



| | | |
|-------------|-----------------------------------|-----------|
| 14.1 | USER ACTIVITY REPORTS..... | 50 |
| 14.2 | CHANGE REPORTS | 51 |
| 14.3 | FORMSET REPORTS..... | 51 |

2 About the Greenshades Year-End Form Process

The Greenshades Year-End Forms process uses a combination of software, web sites and government E-File services to ensure that employers can complete all of their year-end tax form requirements quickly and easily.

Anthology Payroll holds your W-2 source data. You will transmit that information into a web portal called Year-End Forms (formally Year-End Forms) which you access at www.GreenshadesOnline.com. It uses that information to create digital tax forms which can be edited, accessed by employees/vendors, automatically printed and mailed, and also E-Filed to the appropriate government agencies. Administrators will use Year-End Forms to easily handle all of the headaches that are typically associated with year-end forms.

2.1 Accessing the Year-End Forms Portal

After you have uploaded your form information to the Year-End Forms portal, you can access it on the internet at www.greenshadesonline.com. The sign-in page will appear first and ask for your email address and password.

If this is your first time logging in, you may not have a password. If you don't have a password or have forgotten your password, simply click the 'First time here or need password help?' link and follow on-screen instructions.



The screenshot shows the 'Account Login' page for GreenshadesOnline. On the left is a green sidebar with the Greenshades logo and tagline 'Let Us Handle That'. The main content area is white and contains the following elements:

- GreenshadesOnline logo
- Account Login heading
- Email Address input field
- Password input field
- Login button with a right-pointing arrow icon
- Link: [First time here or need password help?](#)
- Footnote: Please let us know what you think of these new sign in pages by [sending us an email](#). If you are experiencing issues, the previous sign in pages are available for a limited time. [Go to old sign in page](#).

3 Getting Started with the Year-End Forms

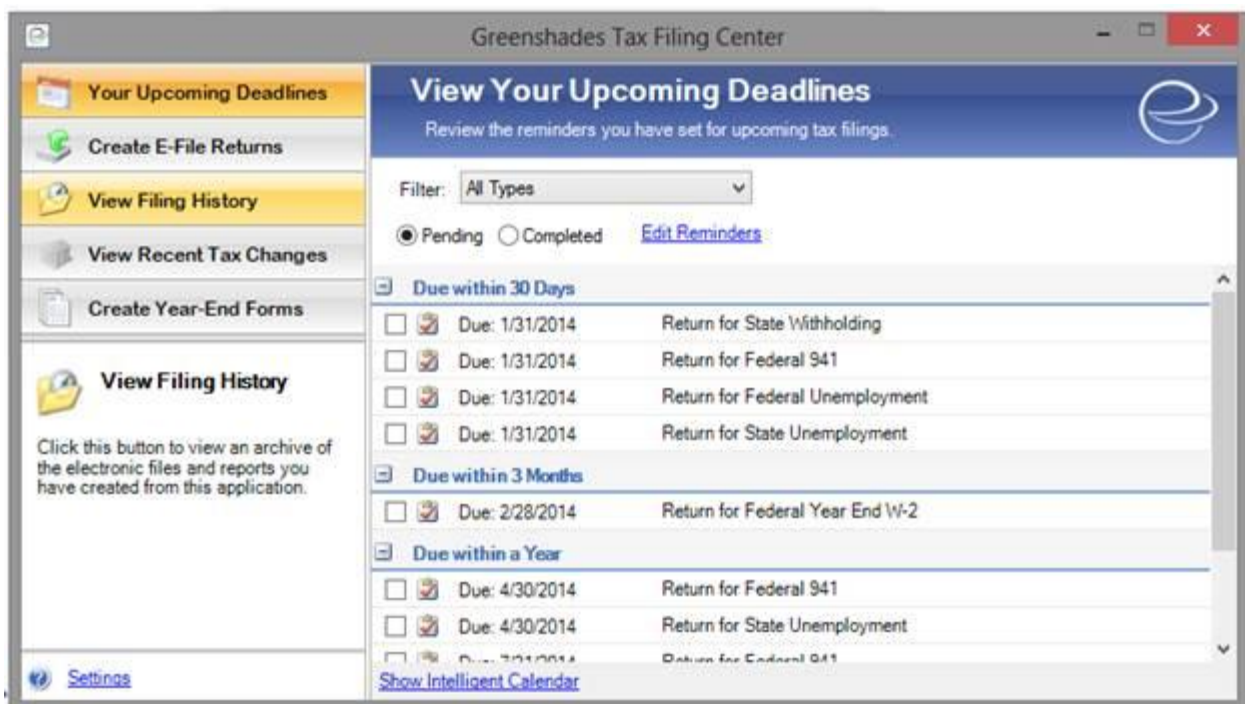
Year-End Forms allows you to complete your year-end process using year-end form data which is managed by Anthology Payroll. To get started, you will need to upload this data into a Year-End Forms workspace. A workspace contains all forms of a specific type for any individual company and year.

3.1 Uploading Forms

There are multiple ways to upload your forms into a Year-End Forms. This guide will provide assistance with using the Greenshades Center (Section 1.1.1) and uploading directly into GreenshadesOnline (Section 1.1.2).

3.1.1 Uploading forms through Greenshades Center

If you already have the Greenshades Center installed and operating against your payroll data, you may use the Year-End Forms to import your forms to Year-End Forms portal. The Year-End Forms Wizard supports many form types. The following instructions are provided for W-2s. Uploading forms of other form types follows a similar path.



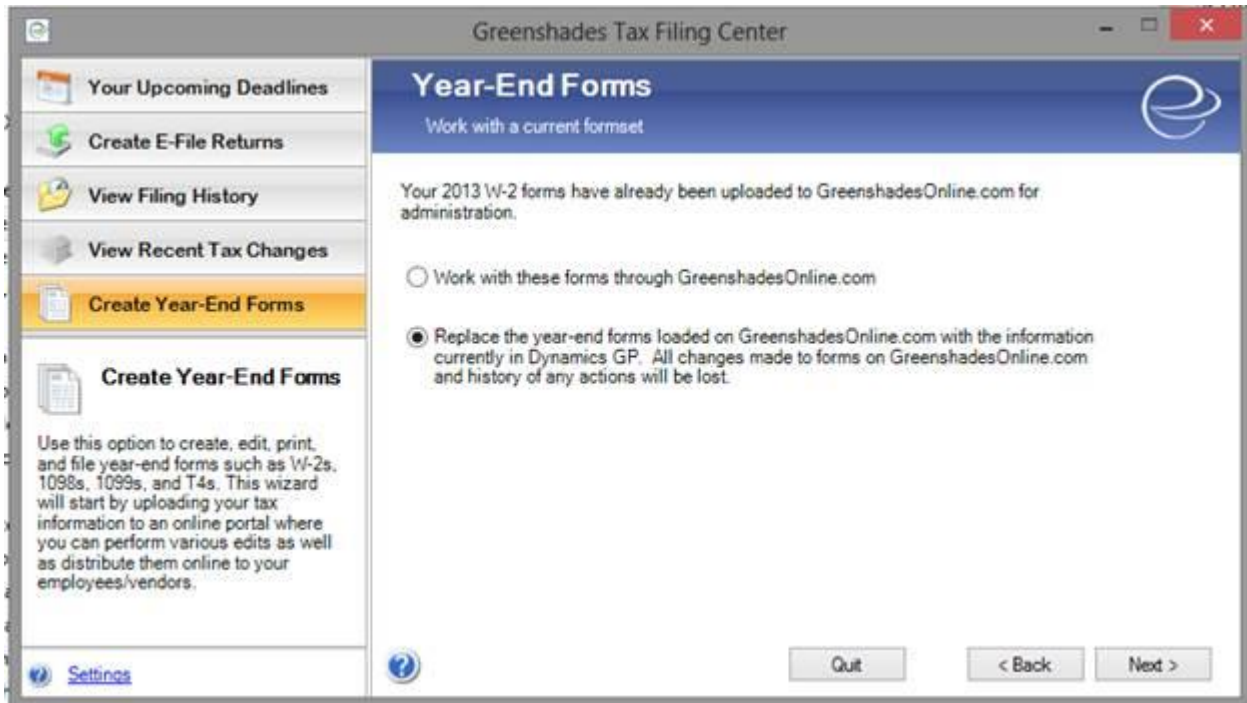
The Year-End Forms Wizard will ask you what form you wish to upload to Greenshades Online.



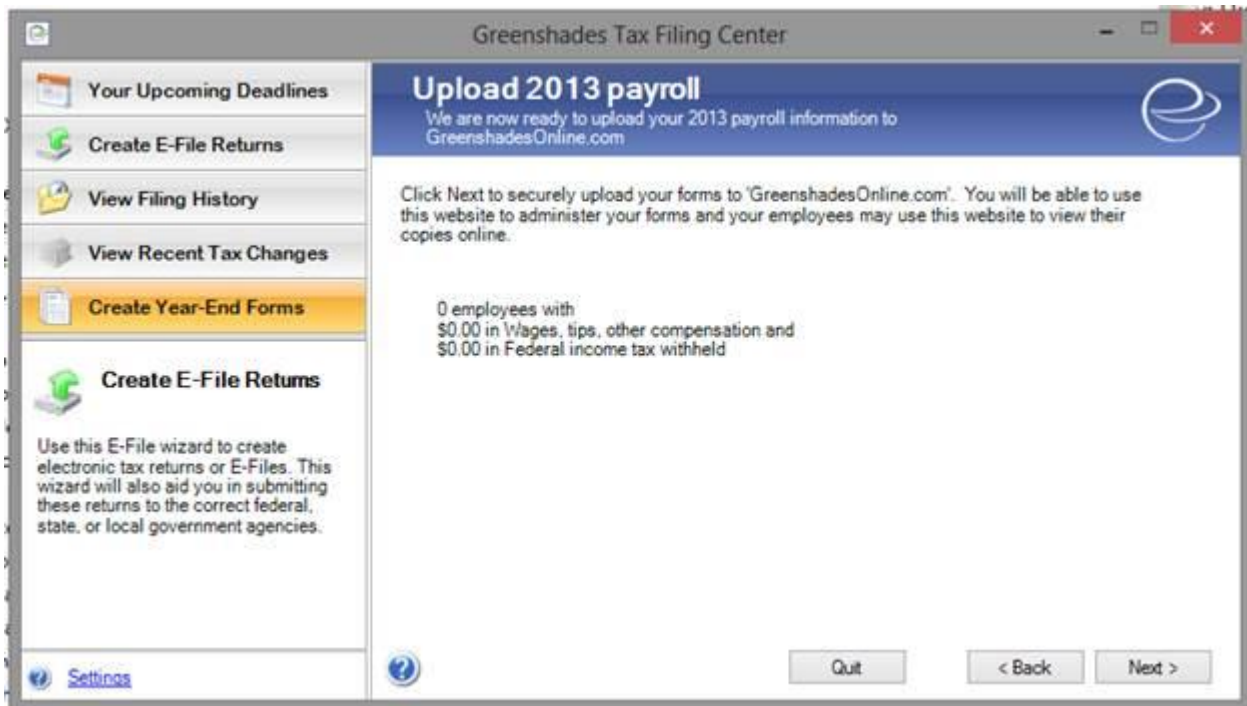
The screenshot shows a web application window titled "Greenshades Tax Filing Center". On the left is a navigation menu with options: "Your Upcoming Deadlines", "Create E-File Returns", "View Filing History", "View Recent Tax Changes", "Create Year-End Forms" (highlighted), and "Create Year-End Forms" (with a sub-description: "Use this option to create, edit, print, and file year-end forms such as W-2s, 1098s, 1099s, and T4s. This wizard will start by uploading your tax information to an online portal where you can perform various edits as well as distribute them online to your employees/vendors."). The main content area is titled "Year-End Forms" and "Choose a set of Forms". It contains instructions: "Use this wizard to upload your W-2s, 1099s, and other year-end tax forms to GreenshadesOnline.com. You will be able to use that website to complete your year-end process including: reviewing and editing your forms, enabling online access for recipients, mailing out any remaining forms, and finally submitting an E-File to the government." Below this, it asks "Please select the forms that you wish to work with:" and provides two dropdown menus: "Year:" set to "2013" and "Type of Tax:" set to "W-2". To the right of these menus is an image of several tax forms. At the bottom of the main area are buttons for "Quit", "< Back", and "Next >". A "Settings" link is visible in the bottom left corner of the main area.

Select the appropriate year and “W-2,” then click “Next”.

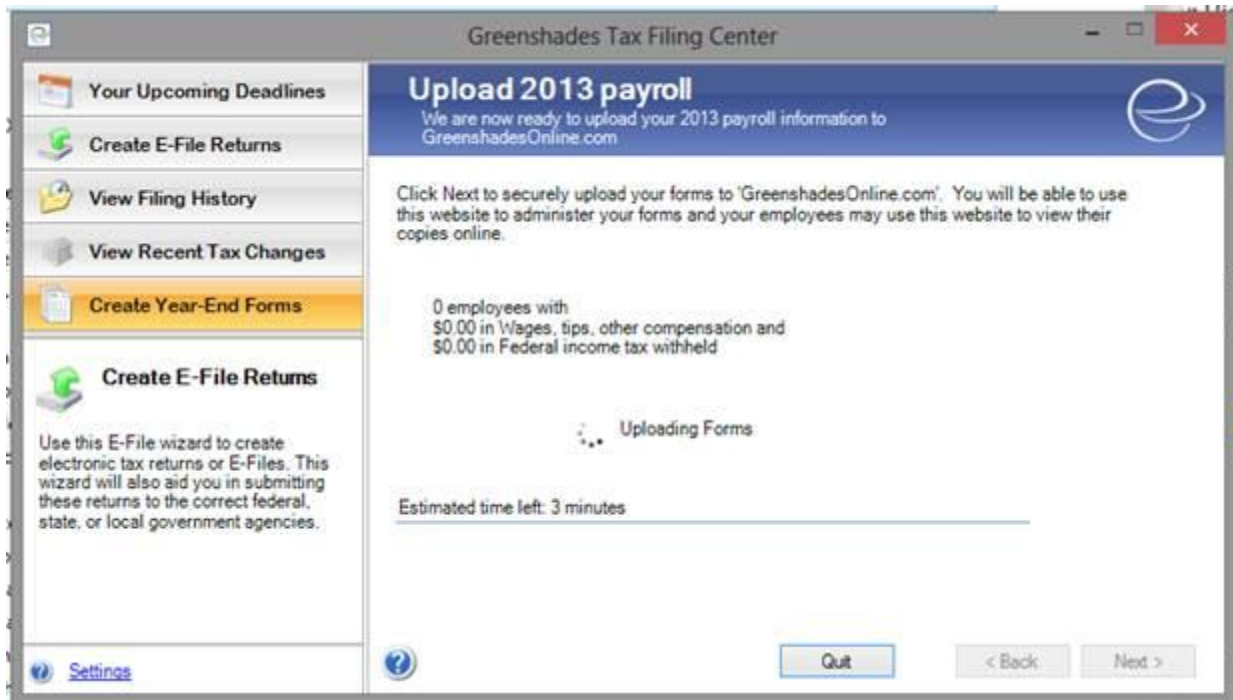
If you have already imported forms into the Year-End Forms portal, you will be given the option of merging these forms into that workspace or adding these forms to a new workspace. If you have already uploaded these forms of this type and for this year, you will be asked if you wish to work with or replace the current forms.



Once you have selected how you want the forms to be treated, you will be provided the totals for the forms. Please verify these totals represent the form data you wish to upload to Year-End Forms. The next step is to begin the upload process.

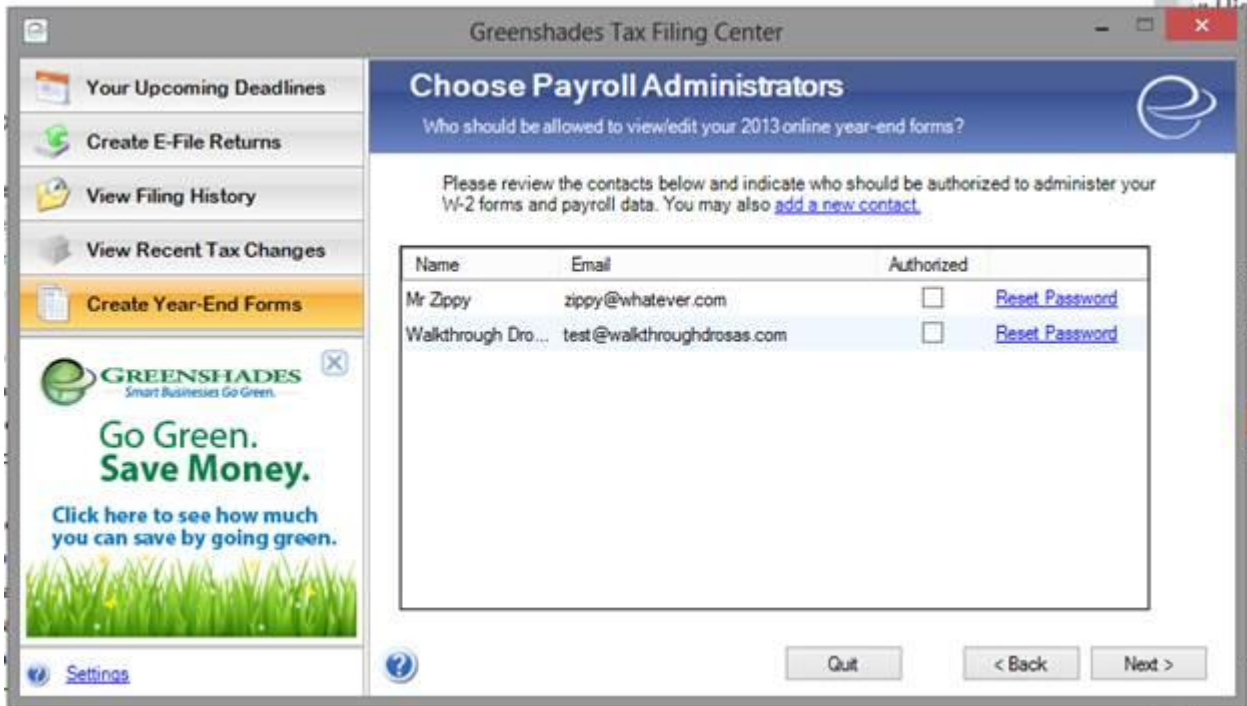


The upload process may take several minutes, based upon the amount of data you are uploading. A larger allowance of time should be given for slower internet connections.



When the forms are uploaded, you will see a confirmation and be asked to click Next to Continue.

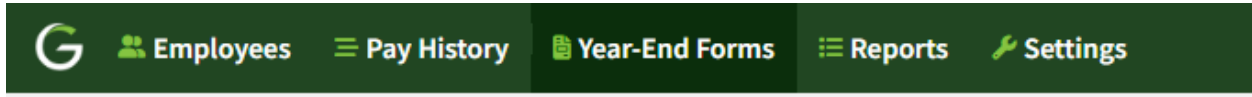
Now that your forms have uploaded, you'll need to grant an administrator access to those forms. Simply place a check mark in the 'Authorized' box next to any administrator who should have access to those forms. If an admin needs to be added to this list, click 'add new contact', and if any existing admin needs to reset their password, simply click 'Reset Password' to do so.



Your forms are being uploaded! Click the link provided on this page to direct you to the Year-End Forms portal. You may now click the 'Finish' button to close the Greenshades Center or alternatively provide an email address to receive a confirmation email when your upload has completed.



3.1.2 Uploading forms directly via GreenshadesOnline



Once your Excel file is ready and you've signed in, and click the link centered at the top of the page that reads, "Click here to import new tax forms into Year-End Forms" (shown below outlined in red on both Year-End Forms and GreenshadesOnline Portals).

Figure 1: Year-End Forms Portal

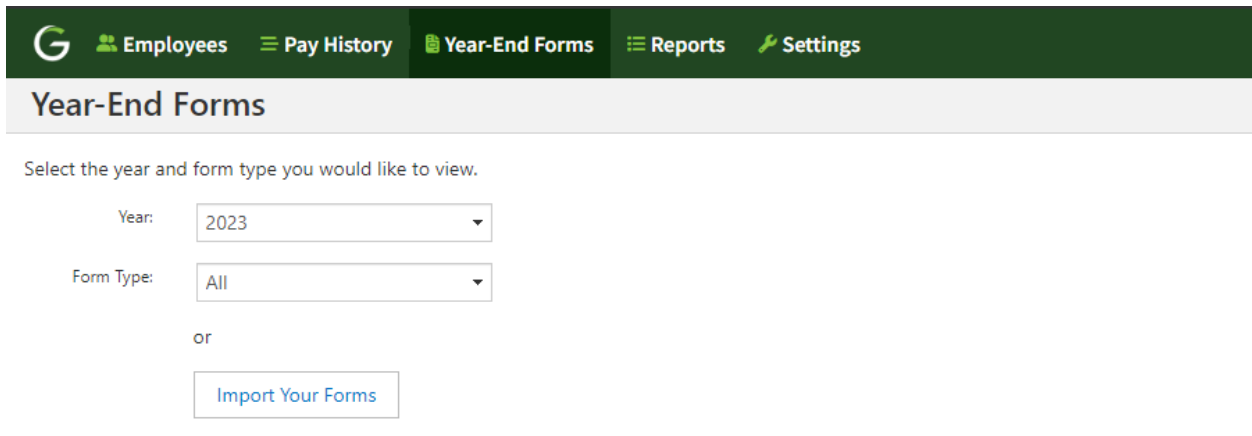


Figure 2: GreenshadesOnline Portal

Year-End Forms

Select the year and form type you would like to view.

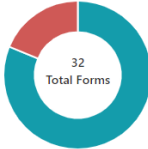
Year:

Form Type:

or

GREENSHADES UNIVERSITY 2023 W-2

- ✓ **Formset** Ready
- ✓ **Status:** 03/07/2024
- ✓ **Forms Loaded:** 10/28/2024
- Issued:**
- E-File**
- Submitted:**



32
Total Forms

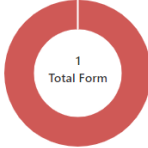
Total Employees: 32
Total Federal Wages: \$1,101,431.18

- Mailed by User 0
- Mailed by Greenshades 0
- Consented for Online Only 0
- Not Distributed 6

Formset 10012999

GREENSHADES UNIVERSITY 2023 1099-R

- ✓ **Formset** Ready
- ✓ **Status:** 03/15/2024
- Forms Loaded:**
- Issued:**
- E-File**
- Submitted:**



1
Total Form

Total Vendors: 1
Total Federal Wages: \$0.00

- Mailed by User 0
- Mailed by Greenshades 0
- Consented for Online Only 0
- Not Distributed 1

Formset 10013021

Note: GreenshadesOnline Portal users will be transitioned in the Year-End Forms portal once that link has been clicked.

You will now begin the upload process. Year-End Forms will first gather information from you about your company. If you already have forms on Year-End Forms, you may use your existing company's information by selecting your company from the drop down menu.

[Need Help?](#)

Import Forms Wizard

[Company Info](#) → [Upload](#) → [Security](#) → [Finish](#)

Import Forms

Welcome to the web forms importer. This process will allow you to create a new set of forms either by using data from an excel file or by filling in information manually on Year-End Forms.

If possible, you should use the Greenshades Center Year-End Forms Wizard to import your forms directly from your accounting package instead of using this webpage. For help using the Greenshades Center, please contact DownloadMyForm.com Support at 904-807-0160x1 or support@DownloadMyForm.com.

NOTICE: There will be a charge of \$0.30 per imported form.

Company Info

Choose the company your new set of forms will belong to.

Company Info
Choose the company your new set of forms will belong to.

[Use a New Company] ▼

Please enter the following information. Bolded items are required.

Company Name

Company Name 2

Tax ID

GP Company ID

SSA User ID

Address 1

Address 2

City

State (abbrev.)

Zip Code

Zip Extension

If you would like to setup a new company, select [Use a New Company] from the drop down and complete the required information.

All bolded items are required.

Choose the year and type for your forms.

Year ▼

Form Type ▼

Once you have selected a company to work with, you will select the year and type for your forms.

If you are using a company with existing forms, you may be asked to choose whether you want to add-on your excel file or erase the existing forms.

There is already a set of forms loaded for that company, year, and type. What would you like us to do with these new forms?

Replace: I want to erase the existing forms and start fresh.

Append: I want to add my excel file to the existing forms.

Next, you will upload your completed Microsoft Excel template file. It is possible to skip this step and fill in your forms manually on Year-End Forms, however for the purpose of this guide we will cover the next steps as if that option has not been selected.



The screenshot shows the 'Year-End Forms' interface with a 'Need Help?' link. The main heading is 'Import Forms Wizard' with a progress bar showing 'Company Info' (completed), 'Upload' (current step), 'Security', and 'Finish'. Under the 'Upload' heading, it says 'Click below to select the excel file containing your forms.' There is a 'Choose File' button, a 'No file chosen' status, and a link to 'Download a 2013 W-2 Excel Template'. Below that is a checkbox for 'I want to fill in forms manually using Year-End Forms.' At the bottom, there are 'Start Over' and 'Continue' buttons.

Click the 'Choose File' button, locate your completed Excel file for import, and click "OK", then click the 'Continue' button.



The screenshot shows the 'Security' step with the question 'Who do you want to have access to the new formset?'. There are two checkboxes: one for 'Bill Biller (bill@greenshades.com)' which is unchecked, and one for 'Test Tester (test@greenshades.com)' which is checked.

Next you'll be presented with the option to grant other individuals within your company access to the forms. If you do not already see their name and email address listed, you may add it at this time by clicking "Add Administrator".



Year-End Forms may take several minutes to prepare your new set of forms based on the size of your excel file and your position in line. Please be patient.

If you wait on the current screen, you will be provided a continue option when your forms are uploaded. This will open up the Welcome Wizard for your new workspace.

If you leave the import screen, your new workspace will appear at the top of the Change Workspace page and listed as New when it is finished. When you are ready, select the workspace and complete the Welcome Wizard as described in section 1.2 below.

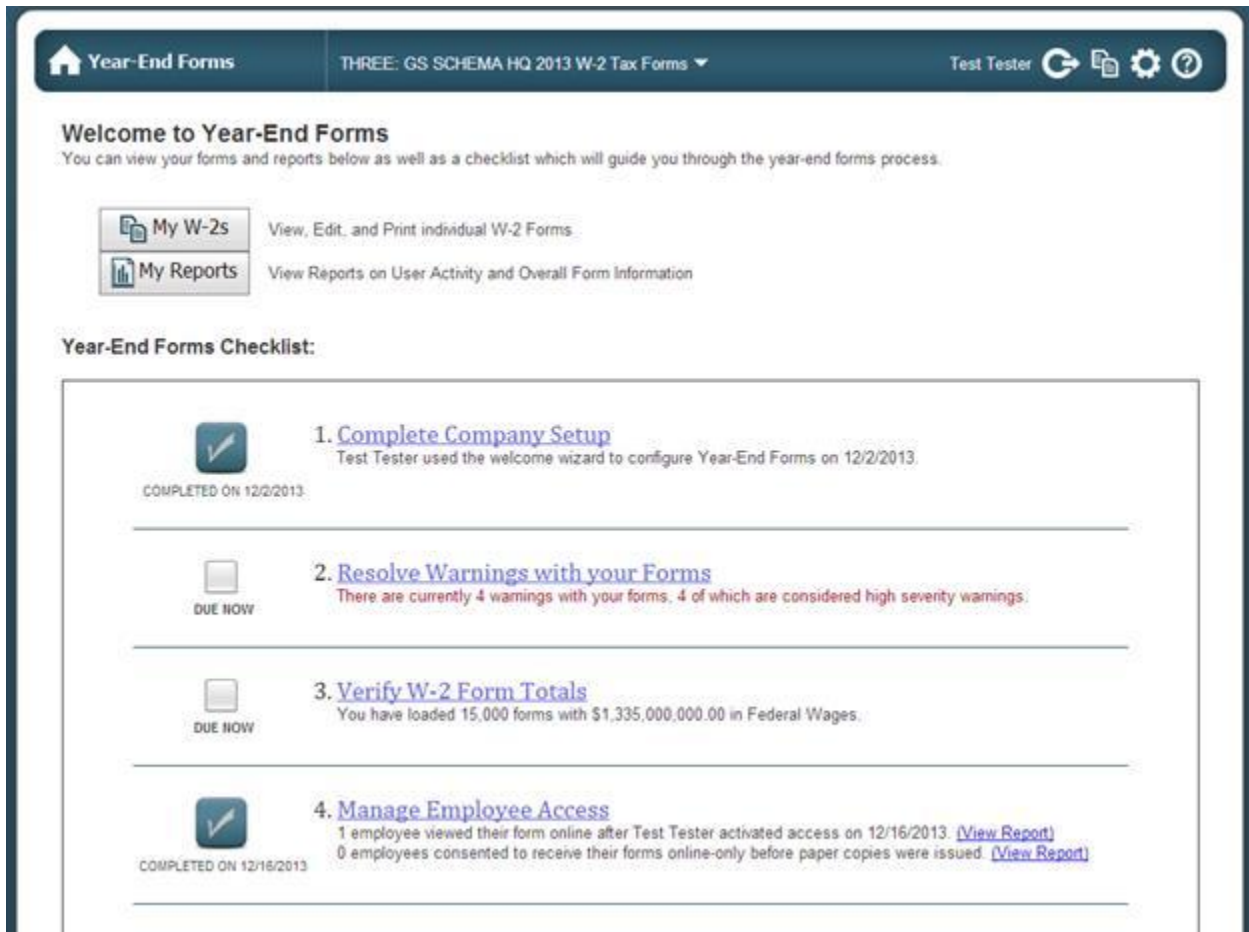
4 Configuring a New Workspace

Once your form information has been uploaded into a new workspace on Year-End Forms, any authorized Administrator can start completing the year-end form process.

The first time that you log into a new workspace on Year-End Forms, you will be presented with a Welcome Wizard. The steps for the Welcome Wizard are explained below. Once you have completed the Welcome Wizard, you can return to it at any time from the workspace homepage.

4.1 Company Information

For the first step of the Welcome Wizard, you must verify the basic company information and designate a billing contact. This page will ask you for your Official Company Name, EIN, and a billing contact. If the billing contact drop down does not contain the person you wish to designate, select “[Add a New Contact]” to enter the correct contact’s information. Adding the appropriate billing contact is important as this contact will be used for contact regarding billable services on Year-End Forms. Billable services include:



Year-End Forms | THREE: GS SCHEMA HQ 2013 W-2 Tax Forms | Test Tester

Welcome to Year-End Forms
You can view your forms and reports below as well as a checklist which will guide you through the year-end forms process.

My W-2s | View, Edit, and Print individual W-2 Forms
My Reports | View Reports on User Activity and Overall Form Information

Year-End Forms Checklist:

- 1. Complete Company Setup**
Test Tester used the welcome wizard to configure Year-End Forms on 12/2/2013.
COMPLETED ON 12/2/2013
- 2. Resolve Warnings with your Forms**
There are currently 4 warnings with your forms. 4 of which are considered high severity warnings.
DUE NOW
- 3. Verify W-2 Form Totals**
You have loaded 15,000 forms with \$1,335,000,000.00 in Federal Wages.
DUE NOW
- 4. Manage Employee Access**
1 employee viewed their form online after Test Tester activated access on 12/16/2013. [View Report](#)
0 employees consented to receive their forms online-only before paper copies were issued. [View Report](#)
COMPLETED ON 12/16/2013

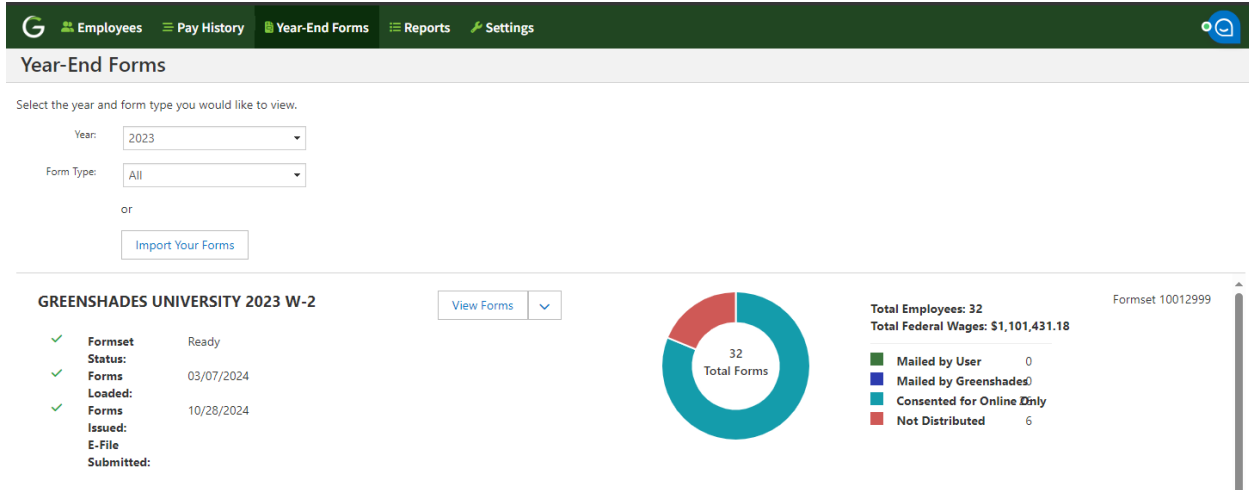
5 Using Year-End Forms

Year-End Forms (YEF) is organized into workspaces. A workspace contains all forms of a specific type for any individual company and year. For instance, “Fabrikam 2024 W-2 forms”. YEF allows you to access and manage each workspace differently and allows you to switch between all of the workspaces you need to process. After completing a Welcome Wizard and setting very basic options for a workspace, the administrator is presented with a homepage that may be used for the rest of the process. Two separate homepage options are provided on YEF: the *Task-Driven Homepage* and the *Classic Homepage*. The default homepage is the Task Driven Homepage which guides administrators through the year-end process while providing real-time status updates. Administrators who are accustomed to older versions of our homepage may prefer the Classic Homepage. Both homepages allow full access to year-end features and processes found on YEF. More information on how to interpret and use these pages is provided below.

5.1 Selecting a Workspace

5.1.1 Searching for a workspace

The Select a Workspace screen allows you to search for a workspace by selecting the year, and selecting the Form Type. When you have found the workspace you wish to manage, simply click the “View Forms”.



The screenshot shows the 'Year-End Forms' interface. At the top, there is a navigation bar with options: Employees, Pay History, Year-End Forms (selected), Reports, and Settings. Below this, the 'Year-End Forms' section allows users to select a year (2023) and a form type (All). An 'Import Your Forms' button is also present. The main content area displays a table for 'GREENSHADES UNIVERSITY 2023 W-2' with columns for Formset, Status, Forms, Loaded, Issued, E-File, and Submitted. A 'View Forms' button is next to the table. To the right, a donut chart shows '32 Total Forms' with a breakdown: Mailed by User (0), Mailed by Greenshades (0), Consented for Online Only (6), and Not Distributed (6). Summary statistics include 'Total Employees: 32' and 'Total Federal Wages: \$1,101,431.18'. A 'Formset 10012999' label is visible on the right side.

5.2 Top Navigation Bar

The main navigation bar is located at the top of each workspace page on YEF. This top bar provides many convenient options which will assist in the basic usage of YEF. First, you can return to the workspace homepage at any time by clicking the Year-End Forms button on the left side of the bar.



The screenshot shows the top navigation bar. On the left, there is a 'Year-End Forms' button with a home icon. In the center, the current workspace is identified as 'THREE: GS SCHEMA HQ 2013 W-2 Tax Forms'. On the right, the user is identified as 'Test Tester' with icons for refresh, copy, settings, and help.

If you have multiple workspaces, you can use the top bar to switch between them. Simply hover over the current workspace name and select the new workspace. If you would like to see all workspaces (including other years), click the top of ‘View all workspaces for all years...’ option to be taken to the Select a Workspace page



described in Section 2.1 above. Finally, the icons on the right side of the top bar allow access to the Forms for the Settings, Forms, and Help pages for the current workspace as well as allow you to Sign Out of YEF entirely.



HELP: Will take you to the help content most appropriate for the page you are on



FORMS: Will take you to the View Forms page for the current workspace



SETTINGS: Will take to the Settings page for the current workspace



SIGN OUT: Will sign you out of Year-End Forms

5.3 Task-Driven Homepage

By default, all workspaces start with the task-driven view. This view has organized the year-end process into a checklist of tasks which are typically performed. The Task-Driven homepage of a W-2 workspace will appear as shown in Figure 2 below. Note however, that limited admins will also see this checklist but not the check boxes since they cannot complete entire tasks themselves.

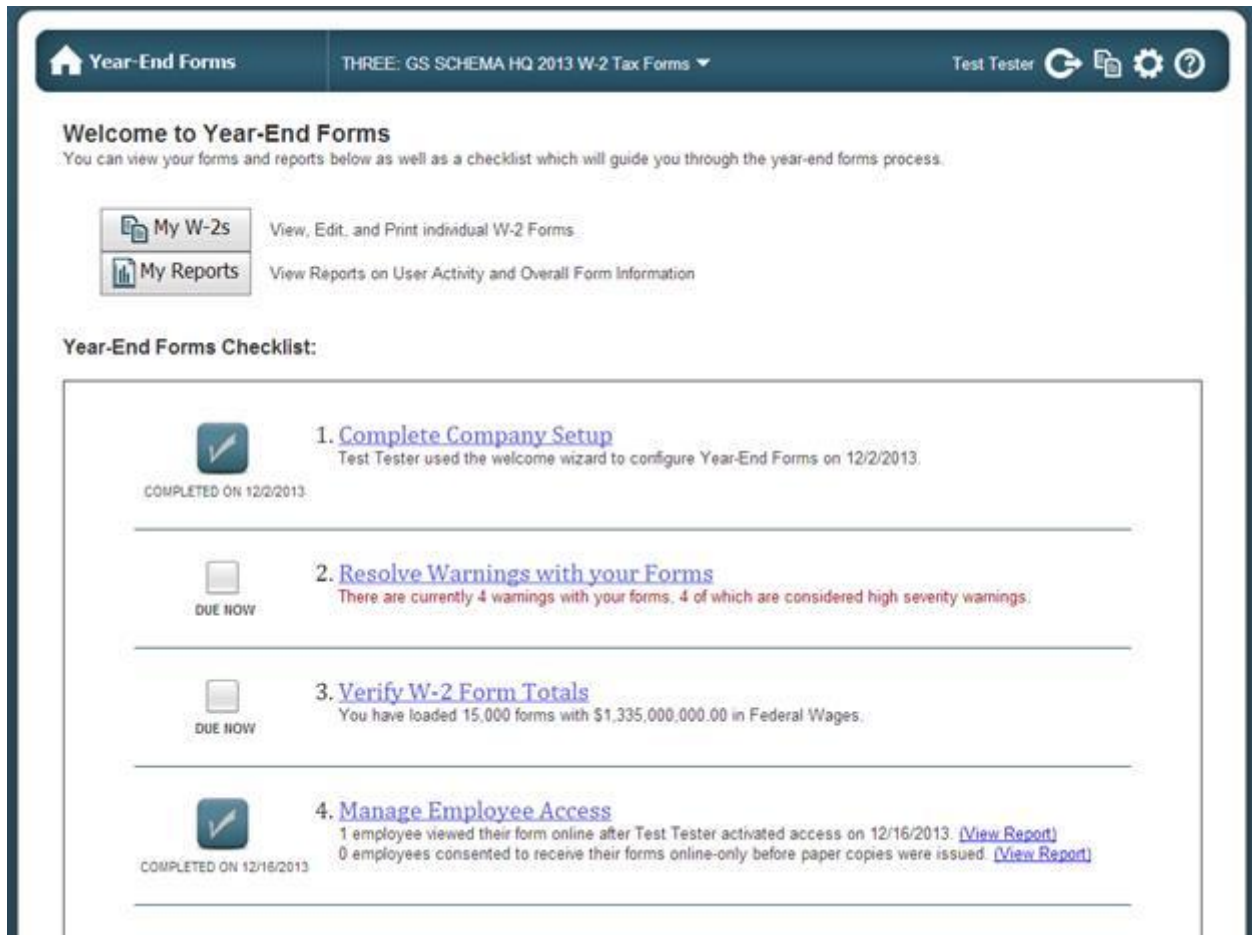
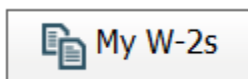


Figure 5 – W-2 Task-Driver Homepage

5.3.1 How to access forms



The task-driven homepage features a “My Forms” button (named slightly differently depending on the type of forms loaded).

Clicking on the button will take you to a page that lists all of your forms and allows you to view, edit, or print any loaded forms.

5.3.2 How to complete a task



The task-driven homepage provides a year-end forms checklist. The exact tasks within the checklist will vary slightly based on the type of forms loaded. Each task has a checkbox to indicate whether it has been completed (except for limited administrators). Clicking on the title of the task (the linked name to the right of each checkbox) will take you to a wizard or page where you can complete the task. When the task has been completed on the

website, then the check box in your checklist will automatically become checked to indicate its completion.

5.3.3 How to change to the classic view

The classic homepage may be accessed by clicking on the “Classic View” link at the bottom left of the task-driven homepage.

5.4 Classic Homepage

The classic homepage allows the administrator to complete all of the same tasks as the task-driven homepage, however the tasks are not ordered and there is no acknowledgement when all year-end processes have been completed. This homepage may be preferred for long-time YEF users who are more familiar with the classic layout. An example classic homepage is shown in Figure 3 below. To switch to the task-driven homepage simply click the link at the bottom left entitled “Task-Driven View”.

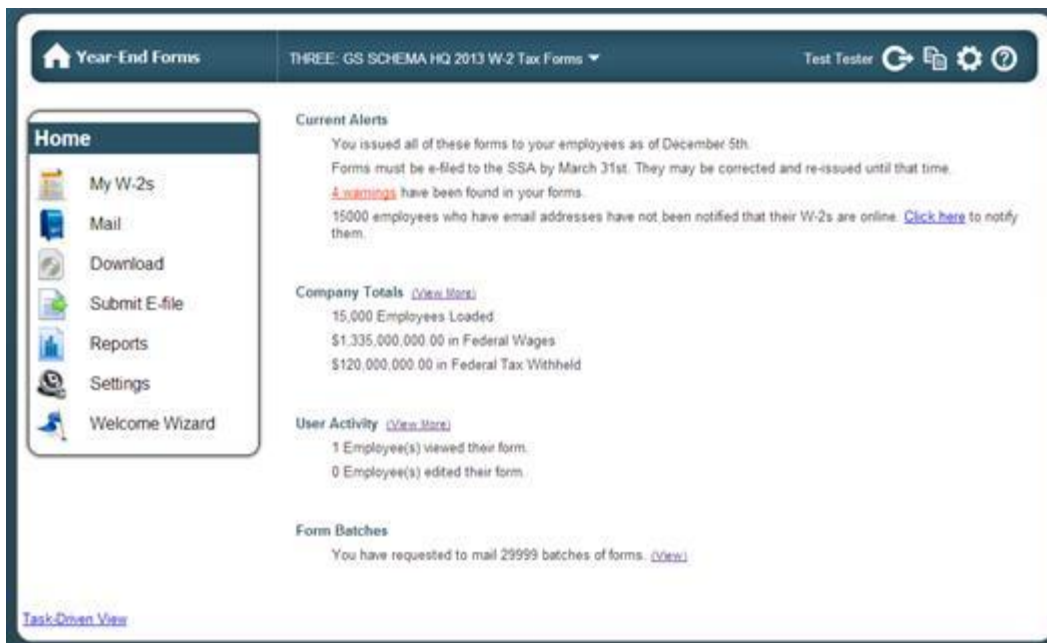


Figure 6 - W-2 Classic Homepage

5.4.1 Left Side Menu

The left side menu contains the traditional menu options supported by DMF, including:

- My W-2s (this will change based on the form type) – this menu option takes the admin to the view forms page
- Mail – this menu option will open up the Mail Service Wizard which displays all previous mail batches and allows the admin to create a new one
- Download – this menu option will open up the Download and Print Wizard which displays all previous batches and allows the admin to create a new one
- Submit E-File – this menu option launches the E-File Wizard where the admin can E-File state and federal forms
- Reports – this menu option opens the report page where the admin can generate a number of important data driven reports
- Settings – this menu option allows the admin to view and change the current settings for the workspace
- Welcome Wizard – this menu option launches the Welcome Wizard for this workspace

5.4.2 Current Alerts

Current Alerts

You issued all of these forms to your employees as of October 31st.
Forms must be e-filed to the SSA by April 2nd. They may be corrected and re-issued until that time.
3 warnings have been found in your forms.
1 employees who have email addresses have not been notified that their W-2s are online. [Click here](#) to notify them.

The current alerts section of the classic view provides critical information about important dates and tasks which have or must be completed. This section will also alert the admin to any warnings with the forms and if any recipients have not been notified that there forms are online. Based on the alert, links will be provided to allow you to access more information and/or address the alert.

5.4.3 Company Totals

Company Totals [\(View More\)](#)
13,062 Employees Loaded
\$194,088,059.26 in Federal Wages
\$195,491,058.35 in Federal Tax Withheld

This section provides the total numbers for the workspace. This may include employee/vendors loaded, total wages, total tax withheld, and other important total information. Clicking on “View More” will

take you to the full totals report.

5.4.4 User Activity

User Activity [\(View More\)](#)
1 Employee(s) viewed their form.
0 Employee(s) edited their form.

This section provides information about the latest user activity, including number of employees who have viewed their form and other activity based upon the form type. Clicking on “View More” will allow you to select from a

number of reports which provide more information.

5.4.5 Form Batches

Form Batches
You have requested to download 3 batches of forms. [\(View\)](#)
You have requested to mail 4 batches of forms. [\(View\)](#)

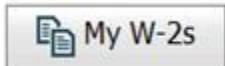
This section lists the batches of forms which an administrator has downloaded or sent to the YEF mail service. Clicking

“View” will take you to the Mail Service or Download and Print Wizards where you can view the previous batches and create a new one.

6 Managing your Forms

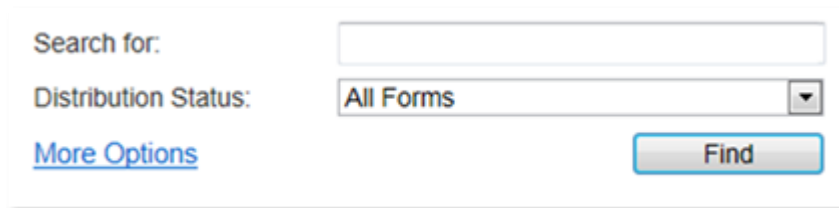
Year-End Forms allows you to view, edit, delete, and print any of your forms. This may be useful to correct forms, print individual forms, or review an employee/vendor's year-end form. You are also able to add a new form to your workspace.

6.1 Viewing Forms



You can view and search through each of your forms by going to the View Forms page. Depending on the type of forms in your current workspace, you can access this page by clicking “My Forms” (the name varies based on the form type) button on the task-driven homepage or the top bar icon.

From this page, you can search for any form using a variety of filters. Clicking “More Options” allows to you search by an expanded set of options. Clicking “Find” will return a list of each of your employees/vendors found under the search criteria. At this point, you can export the list to Excel or edit and print a single form.

A search form with a text input field for "Search for:", a dropdown menu for "Distribution Status:" set to "All Forms", a blue link for "More Options", and a "Find" button.

Search for:

Distribution Status:

[More Options](#)

| | |
|------------------------------|---|
| Search for: | <input type="text"/> |
| Distribution Status: | All Forms <input type="button" value="v"/> |
| With State Wages in: | <input type="text"/> <input type="button" value="v"/> |
| With Local Wages in: | <input type="text"/> <input type="button" value="v"/> |
| In Department: | <input type="text"/> <input type="button" value="v"/> |
| Employees from: | Everywhere <input type="button" value="v"/> |
| Employment status: | Do Not Filter <input type="button" value="v"/> |
| Correction status: | Do Not Filter <input type="button" value="v"/> |
| User Defined | <input type="text"/> <input type="button" value="v"/> |
| Location | 2b <input type="button" value="v"/> |
| Edited Since | <input type="text"/> <input type="button" value="v"/> |
| Less Options | <input type="button" value="Find"/> |

6.1.1 Print a Form

[Edit Print](#)

To print a single form, select the “Print” link next to the form you wish to print. This will open the form as a PDF document which may be printed directly or saved for printing later. This option will also let you select from the multiple form layout options which YEF supports. For the W-2, this includes B2 and BC for 2 part paper and BC22 for 4 part paper. You may find this option useful to print an employee/vendor’s corrected form as well. Separate templates are available for corrected forms, as needed.


6.1.2 Editing a Form

There are many reasons that you may wish to make edits to forms. For instance, you may know that there are fields that were wrong in your back office system, or your employee may report a problem and you have not given them access to change it themselves.

To edit a form, you must first search for it on the View Forms page as described in Section 3.1 above. Once you have found the form, click on the Edit link next to it. Your form will appear populated with the information for the employee/vendor you selected. Depending on the form type, multiple links will be provided to edit the form’s information. Any warnings for the form should be listed at the top of the screen. To edit a section of the form, find the nearest 'Edit' link that describes what

6.2 Resolving Warnings with your Forms

When you import or create forms, Year-End Forms will check them for potential problems. These potential problems are reported as warnings. From the task-driven homepage, there is a dedicated step in the checklist to review and resolve warnings. From the classic homepage, the warnings are reported in the Current Alerts section.

| | | |
|--|-----------|----------|
| Edit Print | 150100010 | grass |
|  Edit Print | 120827275 | monroe |
| Edit Print | 181857762 | bradshaw |
| Edit Print | 454247700 | ... |

Additionally, when viewing your forms as described in Section 3.1 above, you will see a red exclamation point next to any form with a warning. Hovering over the exclamation point will show you the warning

details.

To resolve the warnings, navigate to the warnings page from the task-driven or classic homepage. This page will provide a table of warnings, listing the Form, the Warning, and the Severity of each.



When editing a single form, all warning notifications will be located above the form. If you save edits and our system thinks there may have been an error in the corrected information (for example, a four number zip code instead of five) a new warning will appear at the top of the page. Likewise, if an error has been corrected, the warning will disappear.

Forms with Warnings

The following problems have been found with your forms. Click 'Edit' to make changes to a specific form.

[Download Excel](#)
[Email Report](#)

| # | Form | Warning | Severity |
|----------------------|-------------|--|----------|
| | Filter | Filter | Filter |
| Edit | Musick | Employee has Missing or Invalid Zip Code | High |
| Edit | Musick | Employee is Missing City | High |
| Edit | Musick | Employee is Missing Street Address | High |
| Edit | Musick | Invalid State in Employee Address | High |
| Edit | aaden craig | Medicare Tax is not 1.45% of Medicare Wages | High |
| Edit | aaden craig | Social Security Tax is not 6.2% of Social Security Wages | High |
| Edit | aaden dean | Medicare Tax is not 1.45% of Medicare Wages | High |

If the warning is related to a single form, the edit link takes you to the form itself and will allow you to review and correct the problem (if necessary). Otherwise, the edit link will direct you to a warning-specific page with instructions and the ability to resolve the warning. Resolving as many warnings as possible will help ensure the most correct and timely processing of your year-end forms.

While here, consider submitting your vendors TINs or your employees SSNs to the IRS for verification. Year-End Forms will submit the names and TINs of your recipients to the IRS for validation. Any discrepancies found by the IRS will be reported back through DMF as warnings. To submit your TINs, click on the “Edit” link next to the warning which says that your SSNs or TINs have not been verified.

6.3 Making Form Corrections

In the event that you need to send corrected forms to your employees/vendors, Year-End Forms has several options to support your needs.

6.3.1 Correcting a W-2

For W-2 forms, you must send corrections to your employees if you make a change to an employee's name, social security number, or any wage information. To mark an employee's form as corrected, use the employee list to search for an employee's form. This is described in Section 3.1.

View Employees
 Find a single employee by using the search below. Click 'Print' to view a PDF of a form or 'Edit' to open a form to make changes. [Download Multiple Forms](#)
[Add a new Employee](#)

Search for:
 Distribution Status:
[More Options](#)

1 2 3 4 5 6 ... Showing forms 1 to 50 of 13,062

| | SSN | LastName | FirstName | City | State | Zip | Department |
|--|-----------|-----------|-----------|--------------|-------|-------|------------|
| Edit Print | 100012012 | mcclain | sage | JACKSONVILLE | FL | 32248 | |
| Edit Print | 100014785 | proctor | madelynn | JACKSONVILLE | FL | 32265 | |
| Edit Print | 100016443 | contreras | branson | JACKSONVILLE | FL | 32263 | |
| Edit Print | 100017117 | paul | bria | JACKSONVILLE | FL | 32247 | |
| Edit Print | 100020331 | villegas | hailey | JACKSONVILLE | FL | 32267 | |
| Edit Print | 100022178 | matthews | reuben | JACKSONVILLE | FL | 32208 | |
| Edit Print | 100034028 | palmer | pranav | JACKSONVILLE | FL | 32228 | |
| Edit Print | 100046233 | tanner | ximena | JACKSONVILLE | FL | 32224 | |

Mark this form as a revised W-2 or a correction (W-2C)

Once you have found the right employee, use the “Edit” link to the left of

the row to open up the W-2 form editing screen. From this screen, you must check the box that says "Mark this form as a revised W-2 or a correction (W-2C)". YEF will process the checkbox selection automatically and provide a date for when this form was last issued.

You should now be ready to view the employee's corrected W-2. To do so, click on the “Print” link next to the employee’s name. This will take you to a prompt where you are able to select from two types of W-2 correction forms as shown below.

Print Employee W-2

Please indicate how you would like us to generate the W-2 below. Then, click on the layout you want to open it.

Include Instructions

Checking this box will attach instructions to your W-2 (if necessary).

Attach a Coupon

Checking this box will attach a coupon to your W-2.

Choose a Layout



Revised BC22 for 4 Corner Paper W2C for 1 Part Paper

If you **have not** yet sent an electronic file to the IRS, you should send the 4 Corner Revised form to your employees. If you **have** sent an electronic file to the IRS, you should send the W-2C form to your employees.

Hover and select the layout you wish and the corrected W-2 will be downloaded to your computer as a PDF.

7 Verifying Totals

Year-End Forms will calculate the totals of your forms based upon the data which was imported and any changes made to the forms. These totals are provided so that you can verify them against your accounting package totals. When you have reviewed the totals and verified that they are correct, you can select the checkbox on the Verify Total screen as shown below in Figure 4 below. Any time an action is taken which modifies a total after you have verified it, YEF will automatically reset the verification and request that you review and verify the totals again.

Totals for W-2 forms for Fabrikam, Inc. 10-1596731
 The following totals were gathered from your W-2 forms.

| | | | | | | | |
|------------------------------|------------------|-------|-------------|-----------|-----------|-------------|------------|
| Employees Loaded | 13062 | State | State Wages | State Tax | Locality | Local Wages | Local Tax |
| Forms with Wages | 13059 | GA | \$41,861.00 | \$64.00 | NYLOC7106 | \$41,234.00 | \$31.00 |
| Federal Wages | \$194,088,059.26 | IL | \$13.33 | \$11.20 | NYLOC9108 | \$161.00 | \$231.00 |
| Federal Tax Withheld | \$195,491,058.35 | OH | \$13.33 | \$11.20 | OHLOC1VET | \$0.00 | \$124.00 |
| Social Security Wages | \$196,964,058.91 | | | | OHLOC2CIT | \$4,323.00 | \$4,231.00 |
| Social Security Tax Withheld | \$196,052,256.89 | | | | | | |
| Medicare Wages | \$196,209,122.15 | | | | | | |
| Medicare Tax Withheld | \$196,441,746.94 | | | | | | |
| Social Security Tips | \$100.00 | | | | | | |
| Allocated Tips | \$0.00 | | | | | | |
| Dependent Care Benefits | \$0.00 | | | | | | |
| NonQualified Plan 457 | \$0.00 | | | | | | |
| (Box 12 Totals) | | | | | | | |
| A | \$425.00 | | | | | | |
| S | \$0.00 | | | | | | |

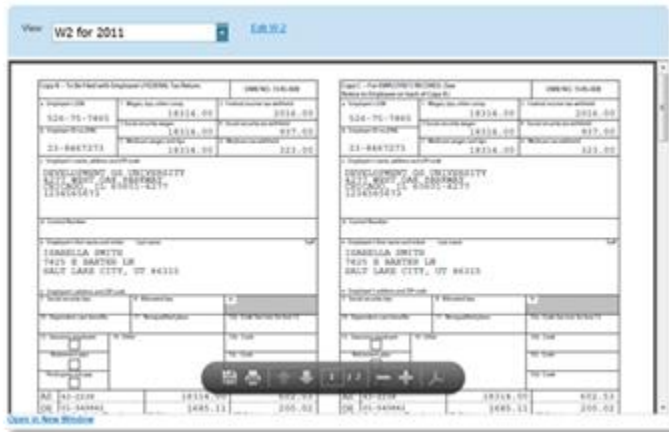
Totals Verified
 I have reviewed the totals on this screen and verify that they are correct.

Figure 7 - Verify Totals Page

Verifying totals is always presented as a step in the Year-End Forms checklist. Checking the box that you have verified the totals will mark this step complete.

8 Manage Employee Access

8.1 GreenEmployee.com Access



The screenshot displays a web application interface for managing employee access. It features two side-by-side forms, each titled "W2 for 2011". The forms contain the following information:

- Employee ID:** 526-75-7895
- Employee Name:** ISABELLA SMITH
- Address:** 7425 S BARTON LN, BALTIMORE, MD 21284
- Employer Information:** DEVELOPING OF UNIVERSITY, 8311 WOOD LAKE DRIVE, BALTIMORE, MD 21284
- Employment Status:** Full-time
- Wage Information:** Gross wages: 18314.00, Net wages: 823.00

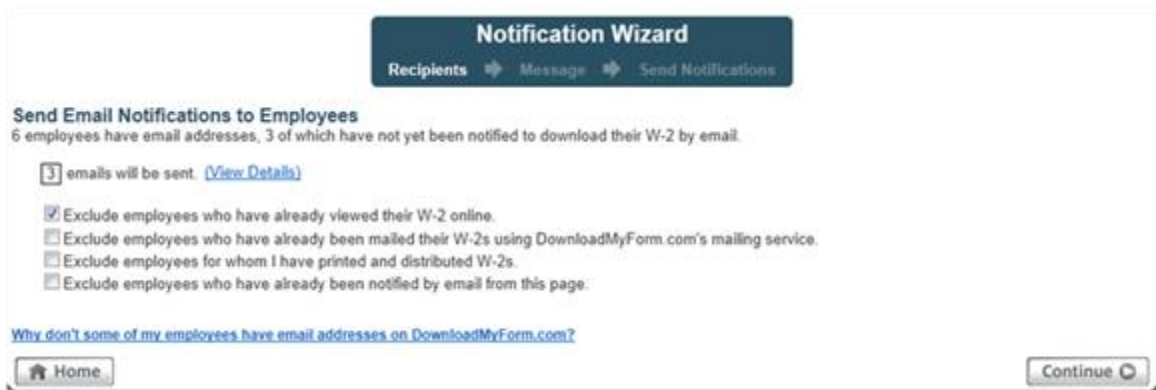
The interface includes a search bar at the top with the text "W2 for 2011" and a "Go" button. A navigation bar at the bottom contains icons for home, search, and other functions.

For your employees' year-end forms, you may enable employee electronic access through GreenEmployee.com. This service is very easy to enable through YEF and provides secure, easy access to employees (as shown in Figure 5).

9 Employee Notifications

Year-End Forms offers the ability for you to notify your employees of the online availability of their year-end form. This is helpful for garnering as many electronic consents as possible, which decreases the amount of year-end forms you are required to mail. To notify your employees, use the Notification Wizard provided as step 5 in the W-2 year-end forms checklist.

9.1 Recipients



[KJ1]

First, you will want to designate which employees should receive the email notification. Year-End Forms offers multiple options to allow you to filter the recipient list to only those employees who you want to notify. (You can see the current recipient list by clicking View Details.) To do this, you may select which employees to exclude by whether they have been notified or viewed their form already. For example, the recipient selection page allows you to

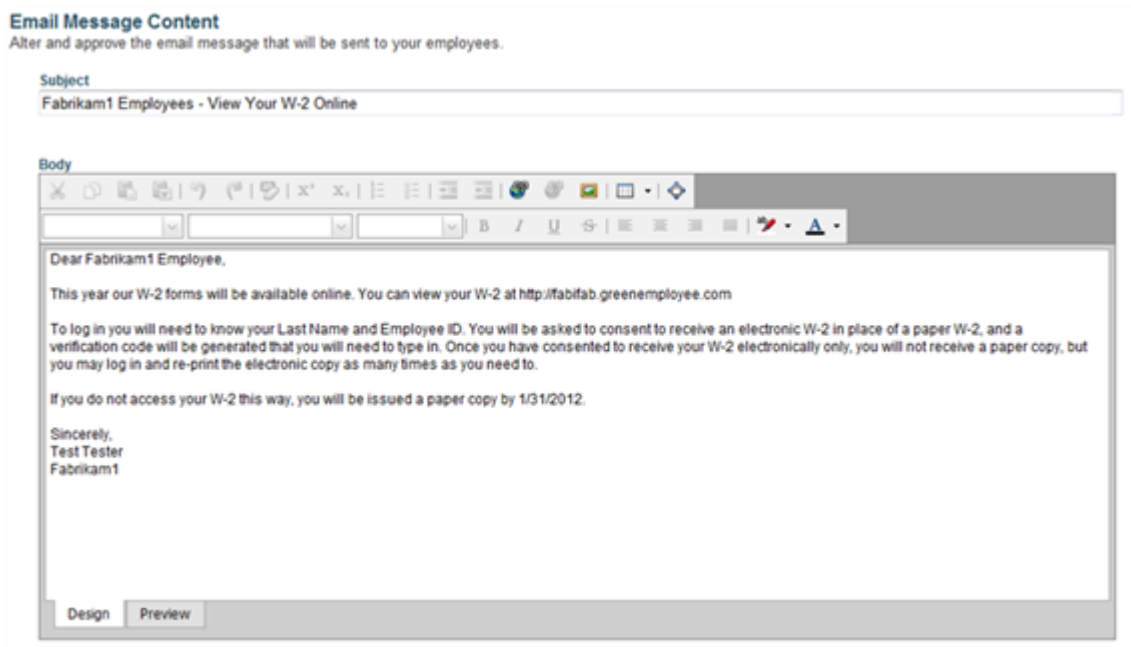
- **Exclude employees who have already viewed their W-2 online** – this is checked by default and is helpful for excluding employees who have viewed their W-2 online and do not need to be notified of its availability
- **Exclude employees who have already been mailed their W-2s using Year-End Form's mailing service** – this option may be useful to exclude employees who have already been mailed their W-2s and may not need to access their form online
- **Exclude employees for whom I have printed and distributed W-2s** – this option is useful to exclude employees you have printed and distributed W-2s using the Download and Print Wizard.

- **Exclude employees who have already been notified by email from this page** – this option will exclude employee who you have previously notified using this wizard.

9.2 Message

Once you have selected the recipients, you can designate the email message to send to your employees. Year-End Forms already provides a default email message you can use or you can change the email message. If you wish, you can insert hyperlinks or images as well as use bold, italics, and other rich text options.

Please make sure to keep the greenemployee.com webpage URL listed in order to send employees the right website.



9.3 Send Notifications

When you have completed the email message, proceed to the Send Notifications page and click Send Emails. An email report will be sent to your email address. An advanced option for sending the emails from your own mail server is also available. This may be preferred in order for your employee to receive the email from a familiar sender. To do this, click on Advanced Options and complete the information. We only recommend this option for customers who are competent with mail server administration as Greenshades cannot provide support for any failure in this circumstance.

Send Emails

You are now ready to send out emails to your employees. You will receive an email report at test@greenshades.com. If you would like to send the email from your mail servers instead of ours, please use the "Advanced Options" link below. When you are ready to proceed, click the "Send Emails" button.

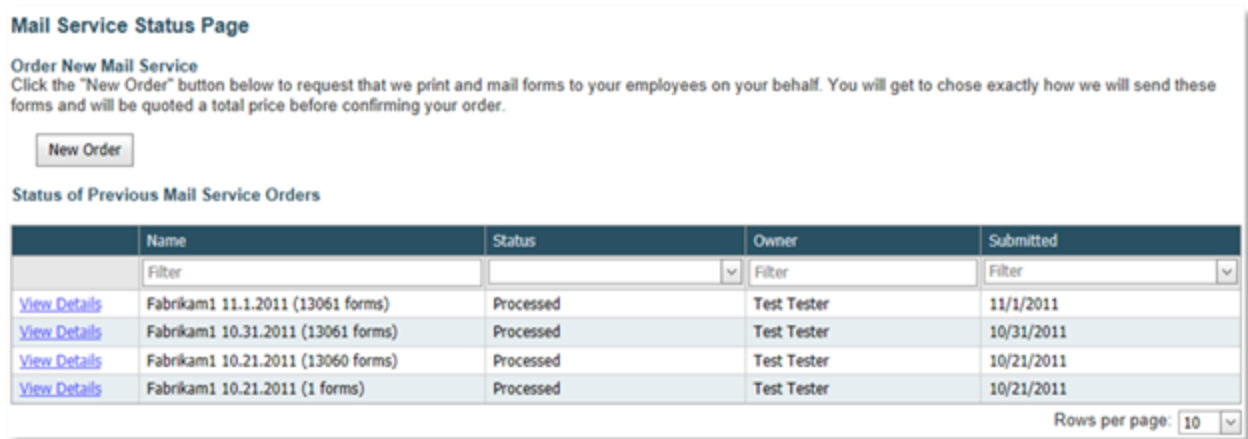
[Advanced Options](#)

10 Mailing Forms through Greenshades

Whether or not you allow your recipients to download their form electronically, at least some portion of your forms will need to be issued on paper to their recipients.

To begin the process of mailing, click on “mail” from the classic view homepage or the appropriate task link in the task-driven homepage (step 6a). This will allow you to see previous mail service orders submitted and create new ones.

In order to ensure your forms are postmarked by the appropriate deadline, please make sure to submit your mail order as soon as possible before the Greenshades deadlines which are posted in the Year-End Forms checklist.



Mail Service Status Page

Order New Mail Service
Click the “New Order” button below to request that we print and mail forms to your employees on your behalf. You will get to chose exactly how we will send these forms and will be quoted a total price before confirming your order.

Status of Previous Mail Service Orders

| | Name | Status | Owner | Submitted |
|------------------------------|------------------------------------|-----------|-------------|------------|
| | Filter | | Filter | Filter |
| View Details | Fabrikam1 11.1.2011 (13061 forms) | Processed | Test Tester | 11/1/2011 |
| View Details | Fabrikam1 10.31.2011 (13061 forms) | Processed | Test Tester | 10/31/2011 |
| View Details | Fabrikam1 10.21.2011 (13060 forms) | Processed | Test Tester | 10/21/2011 |
| View Details | Fabrikam1 10.21.2011 (1 forms) | Processed | Test Tester | 10/21/2011 |

Rows per page: 10

Figure 10 - Mail Service Status Page

10.1 Previous Mail Service Orders

To see the status and information regarding a previous order, click on the “View Details” link next to the batch you want to review.

The details page illustrated below will provide important information about the number of forms submitted, the current status, the history of the batch, and the preferences selected at the time of submission. This is most useful to track the status of your order through our mail service process.

Fabrikam1 11.1.2011 (13061 forms)
Status: Processed
Contents: 0 forms for 13,061 employees
Owner: test@greenshades.com

This batch is **0.00%** complete. See the break-down below:

Printed: 0 / 13,061 (0.00%)
Sealed: 0 / 13,061 (0.00%)
Packaged: 0 / 13,061 (0.00%)

Legend

- Submitted** Your order has been received and will be processed shortly.
- Processed** Your order has been processed and is waiting to be queued for printing.
- Queued** The forms have been added to the print queue and will begin printing soon.
- Printed** The forms are printed and are waiting to be pressure sealed or stuffed in envelopes.
- Sealed** The forms are waiting to be packaged for bulk mail.
- Packaged** The forms have been packaged and are awaiting delivery to the post-office.
- Mailed** The forms have been mailed to their recipients.
- Cancelled** You have asked us to cancel this batch.

History for this Batch

| Action | Time |
|-----------|-------------------|
| Submitted | 11/1/2011 4:55 PM |
| Processed | 11/1/2011 5:05 PM |

Preferences for this Batch

| Option | Selection |
|----------|----------------------|
| Delivery | No Preference |
| Shipping | Greenshades Shipping |
| Coupon | No Preference |

10.2 New Mail Service Order

To begin a new mail service order from the mail service status page, click on the New Order button. This will launch the Mail Service Wizard where you can request that we print and mail forms to your employees on your behalf

10.2.1 Choose Forms

On the first page, you are given the option to choose which forms you wish to mail to your recipients. You may select “All tax forms in this workspace” if you wish to get a complete set of forms for everyone in your formset. If you wish to only mail out forms that you are required to (i.e. forms that have not already been downloaded online), select the “All forms that must still be issued” option. The final option, “Let me choose specific forms” will allow you to hand pick the forms you wish to send. Click “Continue” when you are ready to proceed.

If you choose to select specific forms, the next page will provide a search feature which enables you to search by various options (select “More Options” to see all available options). If you have forms with different distribution deadlines, you will have a search option to filter the list of forms to show only forms with a specific deadline date. Once you have filtered this list of forms to the ones you wish to have distributed, select “Continue” to proceed.

10.2.2 View Totals

Based on the forms you selected, the next page will provide you the totals for this order. This will include total forms loaded, totals amounts, and other very important information. These totals represent the data which will be included on your forms and mailed to your recipients, please review the information carefully.

Totals For This Batch

Below you will find a totals from this batch of forms.

| | | | | | | | |
|------------------------------|------------------|-------|-------------|-----------|-----------|-------------|------------|
| Employees Loaded | 13061 | State | State Wages | State Tax | Locality | Local Wages | Local Tax |
| Forms with Wages | 13058 | GA | \$41,861.00 | \$64.00 | NYLOC7106 | \$41,234.00 | \$31.00 |
| Federal Wages | \$194,066,634.93 | IL | \$13.33 | \$11.20 | NYLOC9108 | \$161.00 | \$231.00 |
| Federal Tax Withheld | \$195,461,795.86 | OH | \$13.33 | \$11.20 | OHLOC1VET | \$1,240.00 | \$124.00 |
| Social Security Wages | \$196,957,302.41 | | | | OHLOC2CIT | \$4,323.00 | \$4,231.00 |
| Social Security Tax Withheld | \$196,032,723.92 | | | | | | |
| Medicare Wages | \$196,184,648.22 | | | | | | |
| Medicare Tax Withheld | \$196,417,889.04 | | | | | | |
| Social Security Tips | \$100.00 | | | | | | |
| Allocated Tips | \$0.00 | | | | | | |
| Dependent Care Benefits | \$0.00 | | | | | | |
| NonQualified Plan 457 | \$0.00 | | | | | | |
| (Box 12 Totals) | | | | | | | |
| A | \$425.00 | | | | | | |
| S | \$1.00 | | | | | | |

If you agree with the totals, click Continue to proceed.

10.2.3 Delivery Options

Greenshades provides two options when you request that we distribute your year-end forms. First, we offer to print and mail your forms for you using the Greenshades mail service. Second, we offer to print your forms and box and ship them to you for you to distribute. Select the option which you prefer on the Delivery Options page. The Greenshades mail service option is typically preferred unless you intend on distributing the forms to the recipient in person.

If you prefer for Greenshades to box and ship your forms, please provide the shipping information required when you select that option.

Delivery Options

- Have Greenshades Software print and mail these forms to your recipients.
- Have Greenshades Software print these forms, insert them into envelopes, and ship them to your location for you to distribute.

Form Layout

BC22 for 4 Corner Paper



Four copies of the W-2 located in the corners of the page: Copy B to be filed with the employee's federal tax return, Copy C for the employee's records, and two Copy 2s to be filed with state or local returns.

[\(Download W-2 Instructions\)](#)

10.2.4 Advanced Options

You are prompted to select from the available preference options. This will cover whether or not to pressure seal the forms or use paper and envelopes, and whether or not include an H&R Block [KJ2] coupon on the form for your recipient. For any option, you will always have the choice to not indicate a preference and let Greenshades determine based upon expediency.

10.2.5 Review and Mail

On the final page of the Mail Service Wizard, you are asked to choose a name to uniquely identify this batch and to agree to the [End User License Agreement](#). This page also provides a Cost Breakdown for this mail service and the estimated processing schedule. If you submit your mail order prior to our mail service deadline, your estimated processing schedule should list a date prior to the form delivery deadline. Otherwise, Greenshades will mail your forms as soon as possible. For more information about this year's mail service deadline, please contact the Greenshades support department.

Summary for this Order of Forms

Order Name
Please choose a name for this order. This is the name you will look for when checking the status of this order.

Cost Breakdown
Below is the amount you should expect to be billed for this mail service. You will not be billed until the forms have left our printhouse.

| Product | Quantity | Unit Price | Total Price |
|--|----------|------------|--------------------|
| YE 2013 Tax Form Mail Service -- January 1st through 8th | 14,999 | \$0.70 | \$10,499.30 |
| Total | | | \$10,499.30 |

Estimated Processing Schedule
We expect your forms to be postmarked within 1 business day of Friday, 1/10/2014. This estimate is based on the how many forms you are mailing and the load we are experiencing. The estimate may change as we process your order.

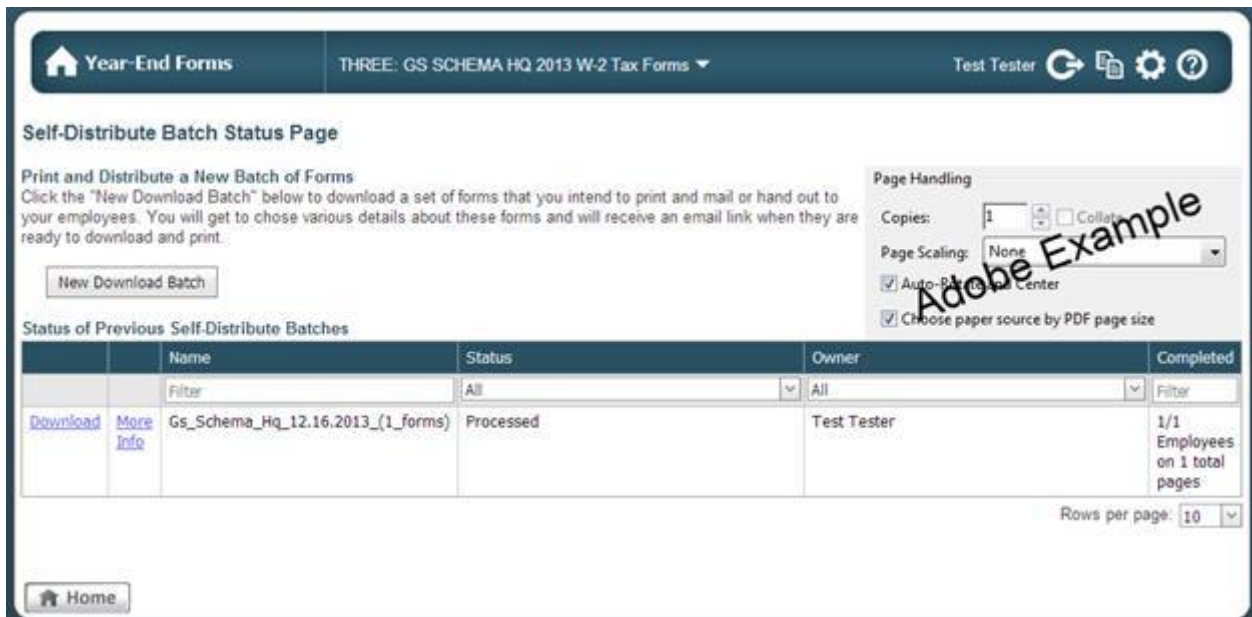
Authorization
Once you click 'Mail Forms', we will begin the process of actually printing and mailing your tax forms. Your forms may be shared with 3rd parties in order to check for move-updates for your employees and to perform the mailing. Please ensure that you agree with our [End User License Agreement](#) and type your name into the box below to authorize us to proceed.

11 Distributing Forms Yourself

Year-End Forms offers you multiple options for distributing the forms yourself. It also offers you a convenient and cost-effective way to archive your forms.

11.1 Previous Self-Distribute Batches

To view previous batches, navigate to the Self-Distribute Batch Status Page. This page is accessible from the task-driven homepage (step 6b) or from the classic homepage by clicking Download.



Self-Distribute Batch Status Page

Print and Distribute a New Batch of Forms
Click the "New Download Batch" below to download a set of forms that you intend to print and mail or hand out to your employees. You will get to chose various details about these forms and will receive an email link when they are ready to download and print.

[New Download Batch](#)

Status of Previous Self-Distribute Batches

| | Name | Status | Owner | Completed | |
|--------------------------|---------------------------|-----------------------------------|-----------|-------------|--------------------------------|
| Download | More Info | Gs_Schema_Hq_12.16.2013_(1_forms) | Processed | Test Tester | 1/1 Employees on 1 total pages |

Rows per page: 10

[Home](#)

Page Handling

Copies: 1 Collate

Page Scaling: None

Auto-Print to Center

Choose paper source by PDF page size

For previous batches generated into a PDF, a download link will appear. For CD orders, the CD was sent to the address provided.

To download a batch's PDF, click on Download next to the batch. If the batch contained a large amount of forms, the batch was split into multiple PDFs and a new page will provide you a link to download each PDF.

To view more information about a batch, click on More Info next to the batch name. This will provide you information about when the batch was requested, when it was ready, etc. This page is also useful if you wish to order a CD of the forms or download the form's instructions or coupon to print and include along with the forms.

Information about: Gs_Schema_Hq_12.16.2013_(1_forms)

This batch is currently Processed.

Owner test@greenshades.com
 Issued to employees? No ([Change](#))
 Requested at 12/16/2013 6:16:15 PM
 Ready at 12/16/2013 6:17:06 PM
 Size 1 Employees on 1 pages

Click [here](#) to download or print these forms.

Click [here](#) to order a CD of these forms to be created and mailed to you.

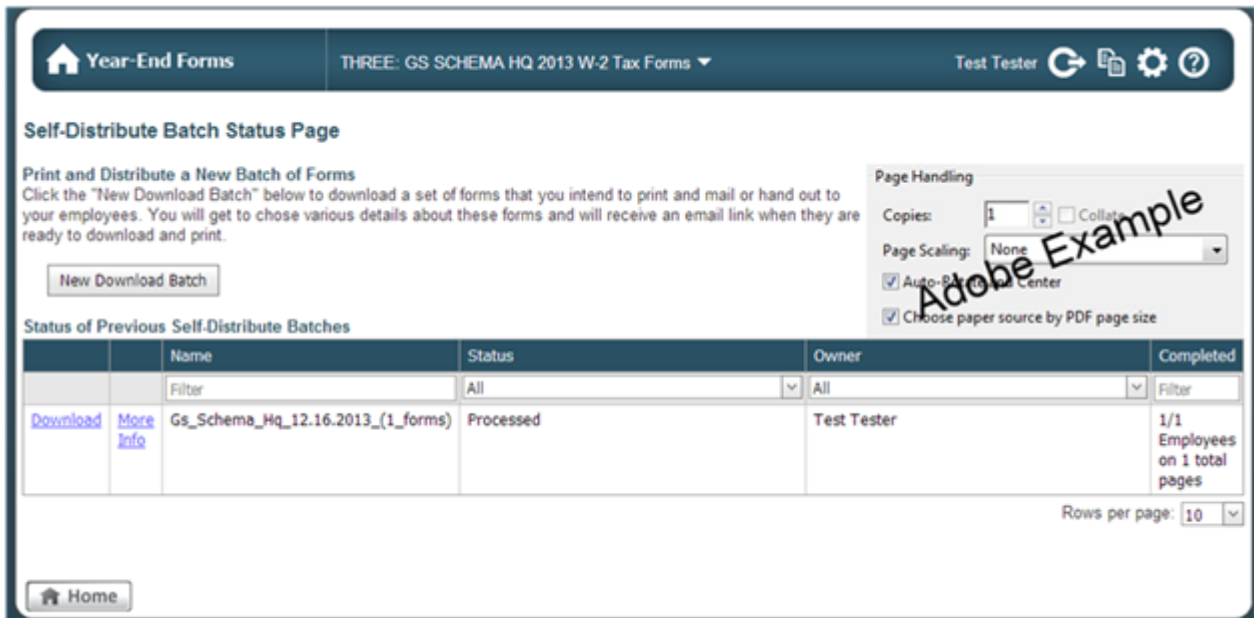
Click [here](#) here if you wish to remove this batch of PDFs from your download batches. It will no longer appear on this screen or be counted towards forms you have delivered to your employees.

[Download Instructions](#)
[Download Coupon](#)

11.2 New Download Batch

Creating a new download batch may be useful for distributing the forms yourself and/or archiving past year’s forms. This wizard will allow you to select the forms you wish to download, choose the form layout, and either order a CD of the forms or download them as a PDF. If you wish to do both, you will need to complete the wizard twice.

To create a new download batch, make sure you are working in your desired tax form and tax year workspace, and then navigate to the Self-Distribute Batch Status Page. This page is accessible from the task-driven homepage (step 6b) or from the classic homepage by clicking “Download”.



Self-Distribute Batch Status Page

Print and Distribute a New Batch of Forms
 Click the "New Download Batch" below to download a set of forms that you intend to print and mail or hand out to your employees. You will get to chose various details about these forms and will receive an email link when they are ready to download and print.

[New Download Batch](#)

Page Handling

Copies: 1 Collate

Page Scaling: None

Auto-Page Size Center

Choose paper source by PDF page size

Status of Previous Self-Distribute Batches

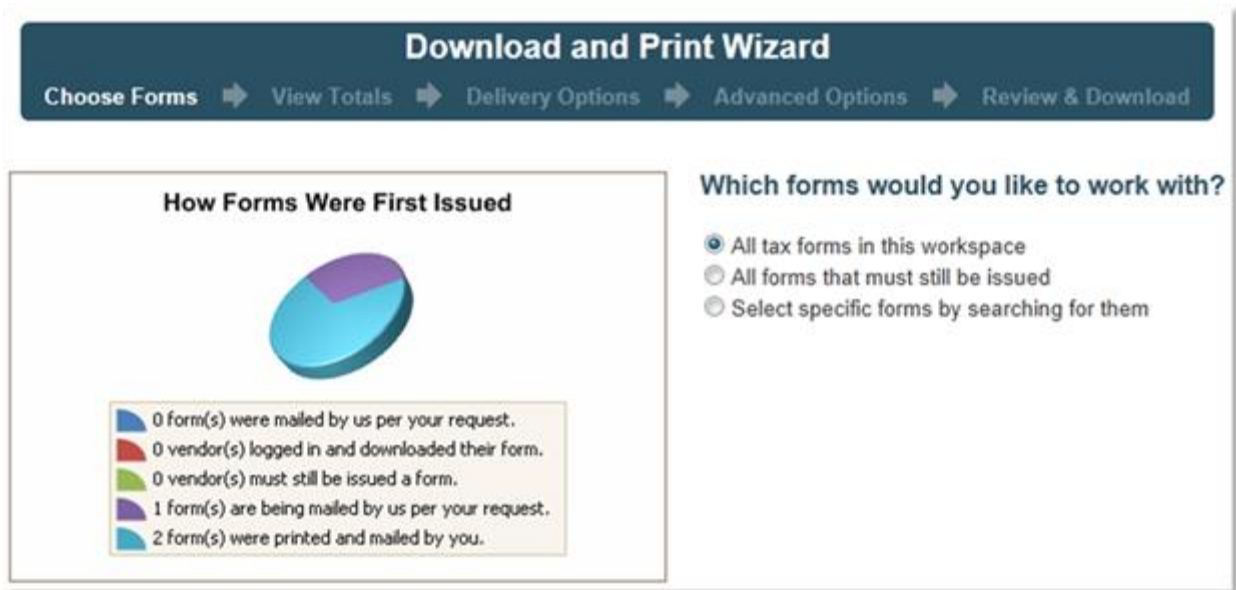
| | Name | Status | Owner | Completed |
|--|-----------------------------------|-----------|-------------|--------------------------------|
| Download More Info | Gs_Schema_Hq_12.16.2013_(1_forms) | Processed | Test Tester | 1/1 Employees on 1 total pages |

Rows per page: 10

[Home](#)

11.2.1 Choose Forms

When here, click on “New Download Batch”. The first step will ask you to select the forms by choosing to include all forms, include only forms that must still be issued, or to select specific forms. When archiving, you will likely wish to include all forms. For year-end distribution, you will likely choose to include only the forms that must still be issued.



Download and Print Wizard

Choose Forms ➔ View Totals ➔ Delivery Options ➔ Advanced Options ➔ Review & Download

How Forms Were First Issued

Which forms would you like to work with?

- All tax forms in this workspace
- All forms that must still be issued
- Select specific forms by searching for them

0 form(s) were mailed by us per your request.

0 vendor(s) logged in and downloaded their form.

0 vendor(s) must still be issued a form.

1 form(s) are being mailed by us per your request.

2 form(s) were printed and mailed by you.

11.2.2 View Totals


Next, review the totals and ensure the information provided matches the corresponding totals from your accounting package. Please review this information carefully and click “Continue” to proceed.

11.2.3 Delivery Options

Year-End Forms offers two delivery options and multiple form layouts depending on the form type. The delivery options are:

1. Download a PDF – Use this option if you wish to download a single PDF with all the forms you selected. This is useful if you wish to print each of your forms to distribute yourself. This may also be useful for archiving if you want to download and save the PDF.
2. Order a CD – Use this option if you wish to archive your forms for the current or a previous year onto a CD.

If there is more than one form layout available, you will see a drop down list with all possible form layouts. Your selection will depend on how you intend to use the forms.



11.2.4 Advanced Options

During the advanced option step, please make sure you have the proper paper and envelopes if you plan to print your forms. Greenshades has designed the forms that you will download to print properly on the types of paper we use. Therefore, Greenshades recommends using the paper and envelope codes provided in order for your forms to print and fit into the envelopes correctly.

If you do not have the proper paper and envelopes or wish to purchase more, please call the Greenshades Sales Department at 1-888-255-3815x2.

You may also use the order form to purchase additional paper or envelopes by checking the box next to 'I wish to order more paper or envelopes for my forms' and filling out the required information. Please note that orders placed this way are subject to a 48 hour processing time.

11.2.5 Review and Download

The Review & Download page allows you to review the cost breakdown, if any (there is no charge for downloading a PDF), and select a batch name for your forms. When complete, click "Continue". Your PDF may take some time to generate and DMF will



send you an email when the PDF is ready. If you ordered a CD, the CD will be mailed to the address provided.

12 E-File State Return


If you have state wages in a state or states which accept E-filing, DMF will prepare the E-File for you along with the instructions you need to E-File the form yourself.

It is important to first review all warnings and errors in your forms. If any exist, a link to the warnings and errors report is provided on the first page of the E-File process. It is important that you remove as many warnings as possible before you complete the wizard.

To E-File, access the State E-File Wizard from the task-driven homepage. The State E-Filing main page allows you to view each state for which you have wages. If you have already filed for that state, you will see a View History link which provides further details about the file submitted. If the state wages are ready to file, you are provided a File Now link which will launch the E-File Wizard.

E-File Your Forms

Use the links below to file these forms electronically with your agency or view historical information regarding one of your past filings.

 **Warning:** you have 3 high priority warnings in your W-2s. [Click here](#) to address the warnings before filing these forms.

| | Jurisdiction | Status | ID Number | Due Date | Date Submitted |
|------------------------------|---|---|-----------|---|---|
| | Show All <input type="button" value="v"/> | Show All <input type="button" value="v"/> | Filter | Filter <input type="button" value="v"/> | Filter <input type="button" value="v"/> |
| View History | Alabama | Submitted | 4020 | 2/28/2012 | 10/21/2011 |
| File Now | Colorado | Not Filed | 10 | 3/31/2012 | |
| File Now | Delaware | Not Filed | 101 | 4/2/2012 | |
| View History | Illinois | Submitted | 417 | 3/31/2012 | 10/21/2011 |
| File Now | Arizona | Not Filed | 43-2238 | 2/28/2012 | |
| File Now | Ohio | Not Filed | 01-549842 | 2/28/2012 | |

The E-File Wizard has three steps as detailed below.

12.1 Submitter Information

The first step in the E-File Wizard requires you to verify the contact name, email, and phone for the submission.

Verify Submitter Information

Take a few seconds and verify the information below.

Contact Name

Enter the name of the employee who should be contacted by the if needed.

Contact Email

Enter the email of the employee who should be contact by the if needed.

Contact Phone

Enter the phone number and extension of the employee who should be contact by the if needed.

 ext.

When finished, click “Continue” to go to the next step.

12.2 Review Totals

The Review Totals step will calculate the totals and present them for your review. If errors are present, YEF will require that you correct these errors before you can submit this filing. When you have reviewed and approve of the totals, click “Continue” to go the next step.

12.3 Downloading State-E-File

When you have completed the State E-File Wizard, you can download the E-File and the Details file by clicking the View History link next to the State.

| | Jurisdiction | Status | ID Number | Due Date | Date Submitted |
|------------------------------|---------------|-----------|------------|-----------|----------------|
| | Show All | Show All | Filter | Filter | Filter |
| View History | United States | Submitted | 23-8467273 | 3/30/2012 | 10/21/2011 |
| View History | Alabama | Submitted | 4020 | 2/28/2012 | 10/21/2011 |
| File Now | Colorado | Not Filed | 10 | 3/31/2012 | |
| File Now | Delaware | Not Filed | 101 | 4/2/2012 | |
| View History | Illinois | Submitted | 417 | 3/31/2012 | 10/21/2011 |
| File Now | Arizona | Not Filed | 43-2238 | 2/28/2012 | |
| File Now | Ohio | Not Filed | 01-549842 | 2/28/2012 | |

On the view history page, use the download links to obtain the State E-File and Details File.

EFile History

The area below contains important information about your recent filing.

E-Filing Details

Filing Name: Annual Withholding Form A-3
Jurisdiction: US-AL
Agency: [Alabama Department of Revenue](#)
Due Date: 2/28/2012
Date Filed: 10/21/2011 12:37:49 PM EDT
Current Status:
Submission Tracking #:
Download Link: [Click Here to Download The E-File](#)
Details File: [Click Here to Download The Details File](#)

Totals for this Filing:

| Total | Amount |
|--------------------|--------|
| No data to display | |

13 E-File Federal Returns

E-Filing is available for you to submit the information on your forms to the Federal government. The process of E-Filing is a 3 step process and should be used only once to file your information.

It is important to first review all warnings and errors in your forms. If any exist, a link to the warnings and errors report is provided on the first page of the E-File process. It is important that you remove as many warnings as possible before you E-File. The information will quickly transfer to the government and cannot be stopped once you submit.



To start the Federal E-File process, use the link on the task-driven homepage entitled E-File Federal Return. Next, click “File Now” next to the forms you wish to file.

| | Jurisdiction | Status | ID Number | Due Date | Date Submitted |
|--------------------------|---------------|-----------|------------|-----------|----------------|
| | United States | Show All | Filter | Filter | Filter |
| File Now | United States | Not Filed | 10-1596731 | 3/30/2012 | |

13.1 Submitter Information

You will also notice that there is E-File Information you can edit. This information is important and should be entered correctly. The information available to edit varies depending on the E-File you are creating.

Verify Submitter Information

Take a few seconds and verify the information below.

Contact Name

Enter the name of the employee who should be contacted by the if needed.

Test Tester

Contact Email

Enter the email of the employee who should be contact by the if needed.

test@greenshades.com

Contact Phone

Enter the phone number and extension of the employee who should be contact by the if needed.

9048070165 ext.

SSA Pin

Enter the eight-character PIN assigned to the employee who is attesting to the accuracy of this file.

12345678

Click Continue when you have verified this information and wish to proceed.

13.2 Review Totals

After you continue, the next screen you will allow you to view the totals. It is important to review these totals. They are the totals that are actually in the E-File, and this is the best way to insure the information you will be submitting is correct.

E-File United States W-2 report



Useful Links

- [Tax Information](#)
- [Agency Contact Information](#)

You must file a year-end return by 3/28/2014.

Year-End Forms is prepared to submit a report with employees/wages through 12/31/2013:

| Field | Value |
|------------------------------|--------------------|
| Total Employees | 15,000 |
| Federal Wages | \$1,335,000,000.00 |
| Allocated Tips | \$75,000,000.00 |
| Federal Tax Withheld | \$120,000,000.00 |
| Social Security Wages | \$330,000,000.00 |
| Social Security Tips | \$120,000,000.00 |
| Social Security Tax Withheld | \$225,000,000.00 |
| Medicare Wages | \$750,000,000.00 |
| Medicare Tax Withheld | \$225,000,000.00 |
| Total Annual Tax Withheld | \$570,000,000.00 |

[Click Here](#) to make edits to this data before filing.



If these totals match what you are expecting, click Continue to proceed.

13.3 Submit File

On the final E-File screen, you will be able to click the “Submit” button. Only click this button once. Once this button is clicked the E-File will be submitted to the government. Do not click “Submit” until you are absolutely ready to E-File. Once the file is submitted, you will be given a Submission ID on the screen.

Finally, you can return to the E-File screen at any time to get an updated status of the E-File. It will track all E-Files you have made and you will be able to ensure that it was properly accepted by the government.

14 Year-End Forms Reports

Year-End Forms support three types of reports: User Activity Reports, Change Reports, and Formset Reports. To access reports, use the classic or task-driven homepage and click on “My Reports”.

14.1 User Activity Reports

Form recipients who have consented to not receive a paper copy of their form

This report will provide you a list of form recipients who have consented to receive their form online. You will have no obligation to send a paper copy of the form to these recipients. There is an Excel version of this report if you would like to retain a local copy.

Form recipients who must still receive a paper copy of their form

This report provides a list of form recipients who have not consented to review their form online and must still receive a paper copy of the form. An Excel version of this report is available. This report may be helpful with planning to distribute the forms yourself.

Employees who have viewed their form

This is a report of which recipients viewed their form online and when they viewed it. If a recipient viewed their form more than once, a separate entry is recorded for each one.

Employees who have edited their form

If you allowed employees to edit certain fields on their form, this report provides a record of whom and when the edits were made. For further information on the changes made, see the Change made to forms Report.

Administrator activity log

This report provides a record of all administrator actions taken with the current formset. This will include entries for form edits, form prints, mail services orders, e-filing, and other activities. This report is searchable and available as an Excel file.

14.2 Change Reports

Changes made to forms

This report provides a comprehensive record of all changes made to recipient forms. This includes edits made by administrators and edits made by the recipient. You can also show only changes requiring approvals. This will list the changes made by your recipients and allow you to approve or reject them.

14.3 Formset Reports

Overall totals for your forms

This report will provide you the totals for your current workspace. This will include number of forms and the corresponding amounts for various boxes on the forms. An Excel download is available for this report if you would like to retain a local copy.

How forms were issued

This report provides a list of your recipients along with the first date (if any) that they received their form, either through an online consent, being downloaded in a batch that an administrator printed and delivered, or being present in a mail batch submitted through Year-End Forms. Recipients who have not received their form are not listed.

All form data

This report provides an Excel file with all of the forms you currently are managing inside this workspace. The Excel file will be in the same format as the Excel template used to import forms of this type. This report can be used to archive your data and store it locally.

Basic formset info

This report provides basic information about your formset in the current workspace.

User email addresses

This report provides a record of all employees who have email addresses in the system and their corresponding email address. This report is available as an Excel file as well if you wish to email the employees yourself.