



Greenshades Year-End Forms

User Guide



www.greenshades.com

7020 A C Skinner Parkway, Suite 100, Jacksonville FL 32256. Phone: (888) 255-3815

Contents

1	Getting Started with Year-End Forms.....	4
1.1	Accessing the Year-End Forms Portal.....	4
1.1.1	Existing Administrator Account Access.....	4
1.1.2	New Administrator Account Creation	4
1.1.3	Controlling Administrator Access.....	7
1.2	Uploading Forms	7
1.2.1	Uploading forms through Greenshades Tax Filing Center	8
1.2.2	Uploading using Microsoft Excel	10
1.3	Configuring a New Formset	14
1.3.1	Company Information.....	14
1.3.2	W-2 State ID Validation	15
1.3.3	Local Tax Validation.....	16
1.3.4	Local Tax Naming.....	17
2	Using Year-End Forms.....	19
2.1	Selecting a Formset	19
2.2	Top Navigation and Settings.....	20
2.2.1	Top Navigation.....	20
2.2.2	Year-End Forms Settings.....	20
2.3	Managing your Forms	24
2.3.1	Viewing Forms	25
2.3.2	Print an Individual Form.....	25
2.3.3	Edit Forms.....	26
2.3.4	Making Form Corrections	28
2.3.5	Manually Add a New Form	30
3	Completing the Year-End Process.....	31
3.1	The Task-Driven View.....	31
3.1.1	Complete Company Setup.....	33
3.1.2	Employee/Vendor/Recipient Identity Verification	33
3.1.3	Resolve Warnings with your Forms.....	33
3.1.4	Verify Form Totals.....	34
3.1.5	Manage Employee Access.....	35

3.1.6	Email Employees with Links to Tax Forms.....	38
3.1.7	Distribute any Remaining Tax Forms to your Employees.....	40
3.1.8	E-File State Return	41
3.1.9	E-File Federal Return.....	42
3.2	The Classic View	45
3.2.1	Left Side Menu	45
3.2.2	Current Alerts	46
3.2.3	Company Totals.....	46
3.2.4	User Activity	46
3.2.5	Form Batches.....	47
4	Distributing Year-End Forms.....	48
4.1	Ask Greenshades to Mail Remaining Forms	48
4.1.1	Previous Mail Service Orders	48
4.1.2	Submitting a New Mail Service Order to Greenshades	49
4.2	Distribute Remaining Forms Yourself Download and Print	53
4.2.1	Previous Self-Distribute Batches	53
4.2.2	Creating a New Download Batch.....	54
5	Year-End Forms Reports	58
5.1	User Activity Reports.....	58
5.1.1	Employees who have consented to not receive a paper copy of their form	58
5.1.2	Employees who must still receive a paper copy of their form.....	58
5.1.3	Employees who have viewed their form	58
5.1.4	Employees who have edited their form	59
5.1.5	Administrator activity log.....	59
5.2	Change Reports.....	59
5.2.1	Changes made to forms	59
5.3	Formset Reports	59
5.3.1	Overall totals for your forms.....	59
5.3.2	How forms were issued.....	59
5.3.3	All form data	59
5.3.4	Basic formset info	60
5.3.5	User email addresses	60

About the Greenshades Year-End Forms Process

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

Most administrators have W-2s, 1099s, 1095-Cs, T4s, or other forms stored in a corporate accounting package or perhaps manually tracked/recorded in Microsoft Excel. The uploaded data, through either tracking method, will be generated into digital tax forms, which can be edited, accessed electronically by employees/vendors (as form type permits), automatically printed and mailed by Greenshades, and/or E-Filed to the appropriate government agency.

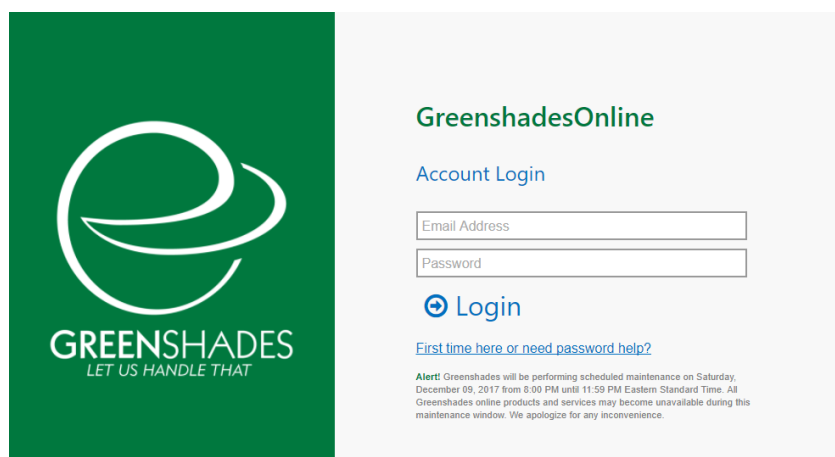
Year-End Forms is organized into formsets. A formset contains all forms of a specific form type (W-2, 1099-Misc, 1095-C, etc) for any individual company and specified year. For example, “Fabrikam 2018 W-2 forms” and “Contoso 2018 1099-MISC forms” are each an individual formset that are uploaded, accessed, and managed independently.

1 Getting Started with Year-End Forms

1.1 Accessing the Year-End Forms Portal

1.1.1 Existing Administrator Account Access

If an existing administrator is completing the 'Create Year-End Forms' wizard from the **Tax Filing Center**, they will be provided a direct link to their online formsets (either through product or through an email). The formset pages may also be bookmarked from a web browser for easy access at a later time.



If an existing administrator has completed a formset upload through Microsoft Excel or otherwise, they can access the formset(s) by signing in with their administrator credentials through GreenshadesOnline.com

1.1.2 New Administrator Account Creation



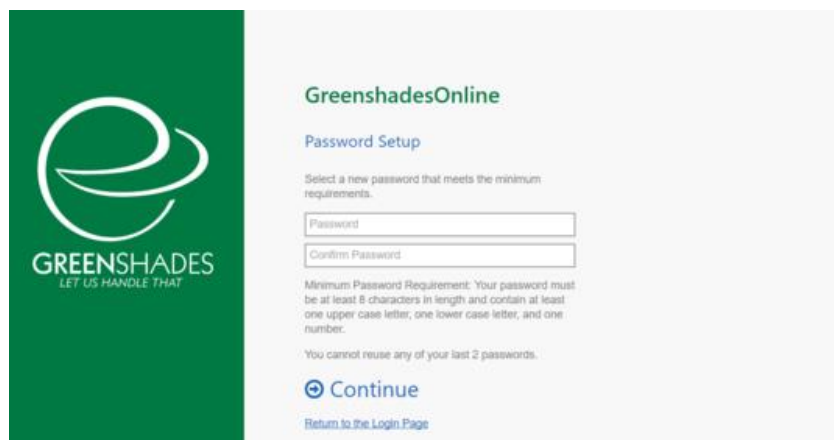
If an administrator is new and has never logged into GreenshadesOnline.com, they will need to create an account before uploading or managing accessible formsets. Administrators can create their account at GreenshadesOnline.com by clicking the blue 'First time here or need password help?' link.

Completing the steps through this link will send the administrator an email with a link to create their account. The administrator should complete the following steps to successfully create their account:

1.1.2.1 Password Setup

This is the password the administrator will use to log in to GreenshadesOnline.com in the future to access company workspaces and formsets.

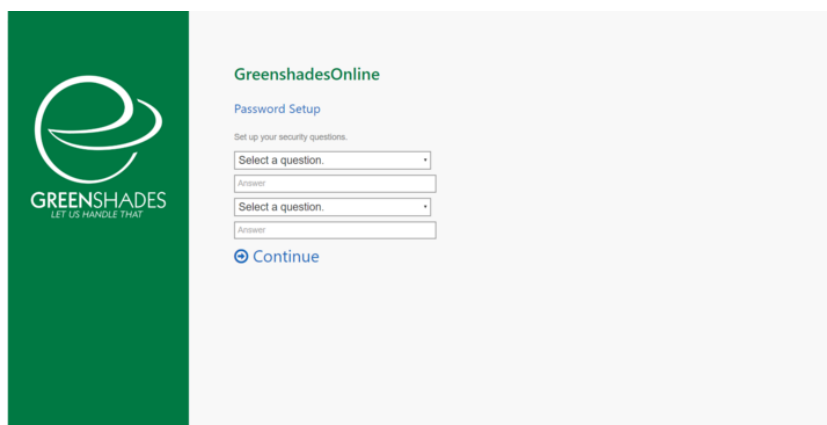
Minimum password requirements may be set up and required to comply in order to continue.



The screenshot shows the 'GreenshadesOnline' logo on the left, featuring a stylized 'e' and the text 'GREENSHADES LET US HANDLE THAT'. The main content area is titled 'Password Setup' and instructs the user to 'Select a new password that meets the minimum requirements.' It includes two input fields: 'Password' and 'Confirm Password'. Below these fields, the minimum password requirements are listed: 'Your password must be at least 8 characters in length and contain at least one upper case letter, one lower case letter, and one number. You cannot reuse any of your last 2 passwords.' At the bottom of the form, there is a blue 'Continue' button and a link to 'Return to the Login Page'.

1.1.2.2 Security Question Setup

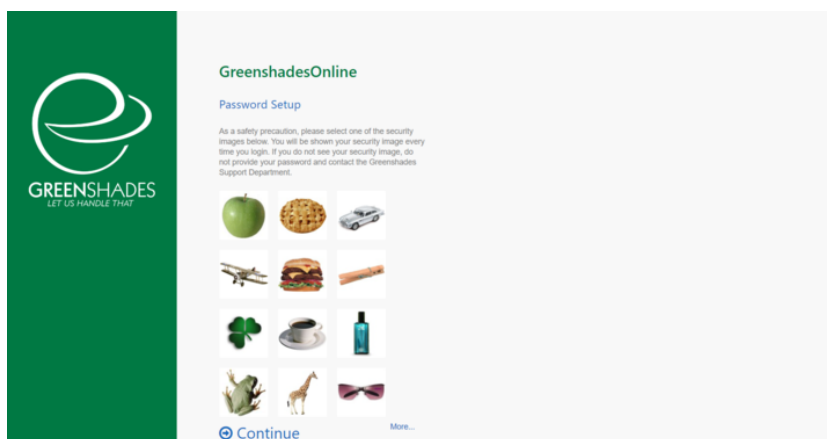
Two security questions will be required to set up and will be used if the administrator needs to reset their password in the future.



The screenshot shows the 'GreenshadesOnline' logo on the left, featuring a stylized 'e' and the text 'GREENSHADES LET US HANDLE THAT'. The main content area is titled 'Security Question Setup' and instructs the user to 'Set up your security questions.' It includes two dropdown menus for selecting questions, each followed by an 'Answer' input field. At the bottom of the form, there is a blue 'Continue' button.

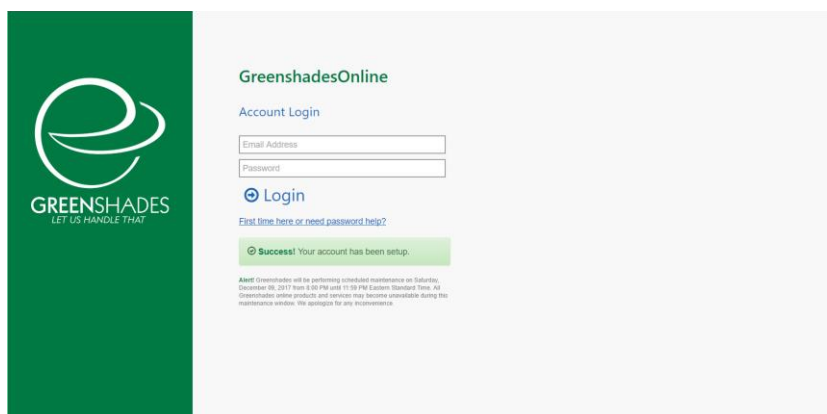
1.1.2.3 Security Image Setup

This security image chosen will be displayed when an administrator logs into GreenshadesOnline.com, so they know they are at our secure website. If the displayed security image is different and does not match the administrator selected security image, ensure you are signing in through the authentic GreenshadesOnline.com sign-in portal and your credentials are correct.



1.1.2.4 Success

Once the administrator has successfully created their account, they will log in with their email address and password.



? What happens if an administrator gets locked out of their account?

If an administrator gets locked out of their account, they will need to reset their password. The administrator will follow the steps below to reset their password.

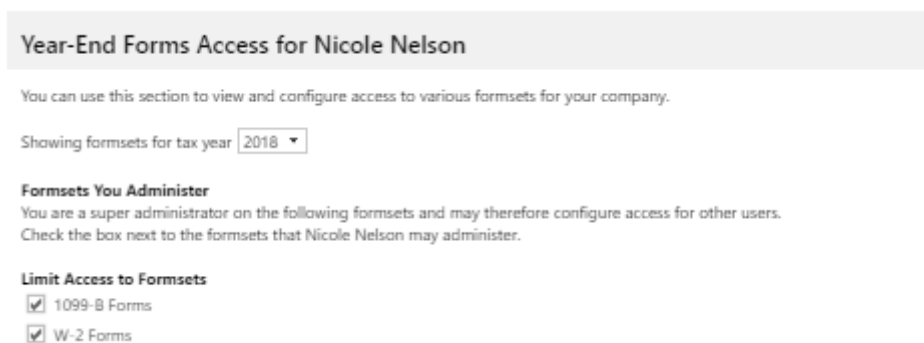
[How do administrators reset their passwords?](#)

Administrators can reset their password at any time using the same blue 'First time here or need password help?' link at GreenshadesOnline.com. An administrator's password and security questions can also be managed once logged in to GreenshadesOnline.com at the 'Account Settings' link in the top right-hand corner.

1.1.3 Controlling Administrator Access

Administrator Access settings for formsets can be managed through:
GreenshadesOnline.com → Access Settings → Administrator Access → Access Control.

Formset access may be granted at a Super Administrator level, which will allow the selected administrator to access and manage all formsets associated with the given workspace, or limited access may be set to restrict access to only specific formset types or for specific years.



Year-End Forms Access for Nicole Nelson

You can use this section to view and configure access to various formsets for your company.

Showing formsets for tax year 2018 ▼

Formsets You Administer
You are a super administrator on the following formsets and may therefore configure access for other users. Check the box next to the formsets that Nicole Nelson may administer.

Limit Access to Formsets

- ☒ 1099-B Forms
- ☒ W-2 Forms

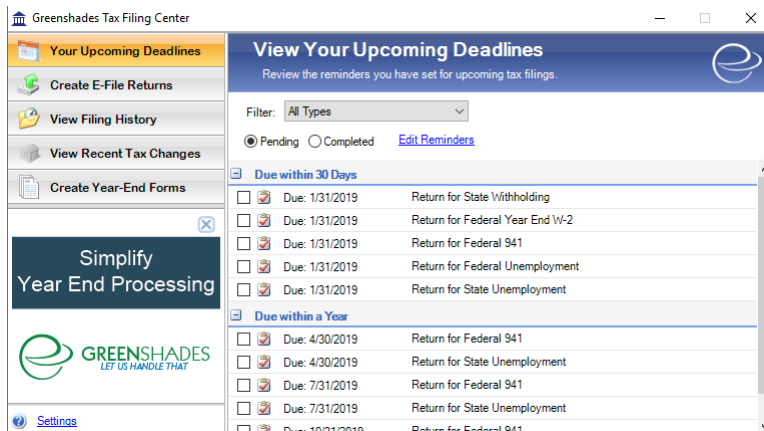
While the Access Control settings give full control to administrator access rights, during the upload formset process, either through the Tax Filing Center ([Section 1.2.1](#) – Year-End Forms Wizard → Choose Payroll Administrators step) or through Microsoft Excel ([Section 1.2.2](#) – Import Forms Wizard → Security step), you will be prompted to designate which administrator(s) should have access to the new formset once uploaded.

1.2 Uploading Forms

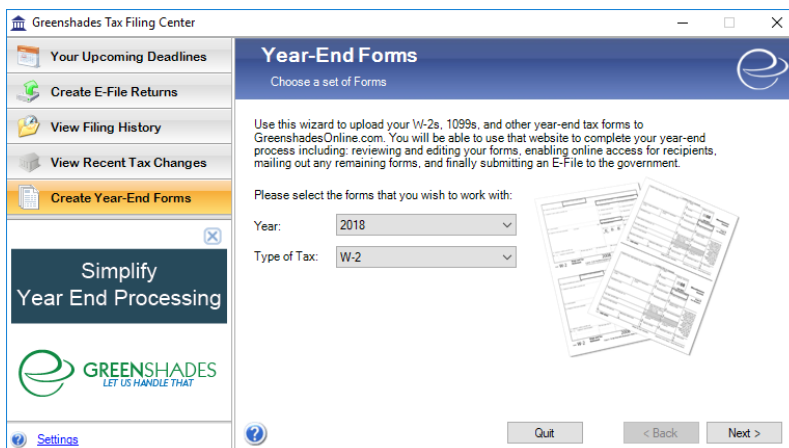
There are multiple ways to upload your forms into a Year-End Forms formset based on the accounting package you use. This guide will walk through uploading through the Greenshades Tax Filing Center ([Section 1.2.1](#)) and by using the Microsoft Excel ([Section 1.2.2](#)) option.

1.2.1 Uploading forms through Greenshades Tax Filing Center

If you already have the Greenshades Tax Filing Center installed and operating against your payroll data, you may use the Tax Filing Center to import your forms to the 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.



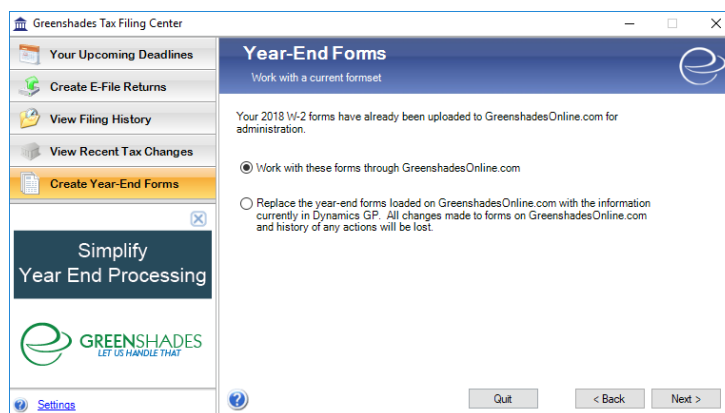
The 'Year-End Forms' wizard will ask what type of form you wish to import for and, depending on the type of form and your accounting package, may also ask you questions about how you would like your forms imported.



Once you have selected the form type you wish to import, and the appropriate year, click 'Next'.

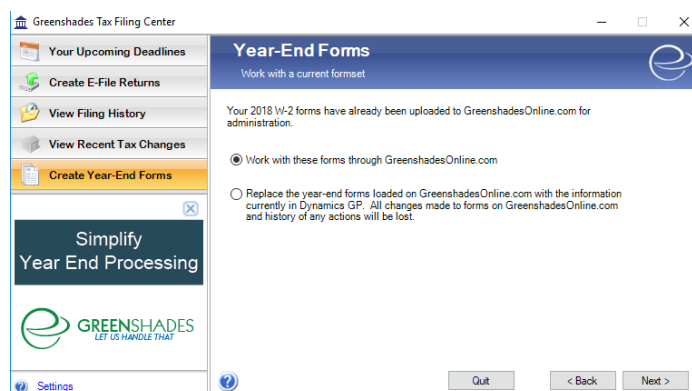
Next, you may be asked to combine multiple GP companies, if applicable. Clicking 'Yes' will provide a table of companies you may want to combine.

Year-End Forms User Guide



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

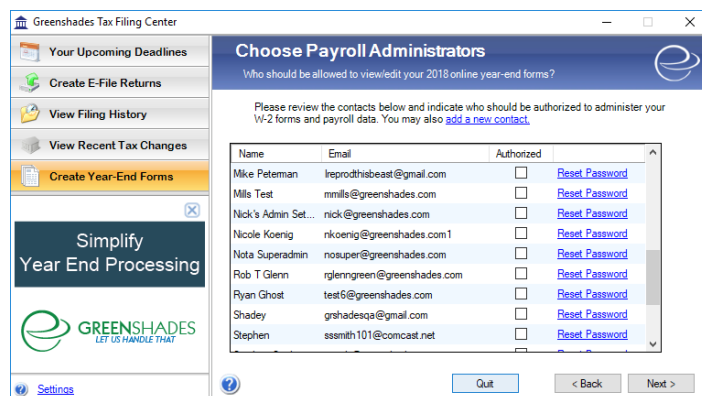
The upload process may take anywhere from 2-5 minutes based upon the amount of forms you are uploading. You may need to allow for a longer upload time based on size of file, amount of data, and internal internet connection.



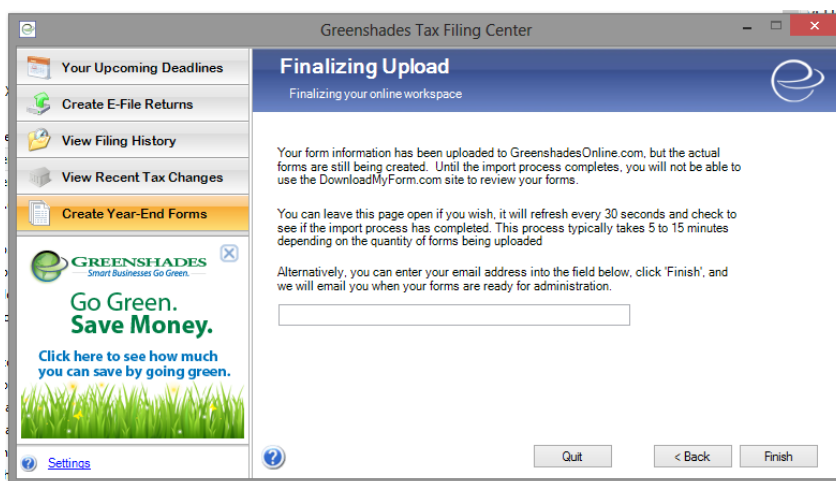
When the forms have successfully imported, you will see a confirmation and be asked to click 'Next' to continue.

Once your forms have been uploaded, you will need to grant administrator access to those forms. Check the checkbox in the 'Authorized' column next to each administrator who should have access to those forms. If an administrator needs to be added to this list, click the 'Add New Contact' link. If an existing administrator needs to reset their password, click the 'Reset Password' link to do so.

Year-End Forms User Guide



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 Tax Filing Center or, alternatively, provide an email address to receive a confirmation email when your upload has successfully completed.

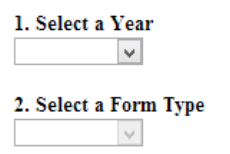


1.2.2 Uploading using Microsoft Excel

If you do not have the Greenshades Tax Filing Center installed, you may upload your forms through a Microsoft Excel format (.xls or .xlsx format). To upload your forms, download and complete the Microsoft Excel template file tailored to the type of form you want to upload.

You may click the link provided below or go online to either GreenshadesOnline.com to access the Excel templates per form type. Either way, you will finish in the Year-End Forms portal.

[Click here to download a Microsoft Excel template file](#)



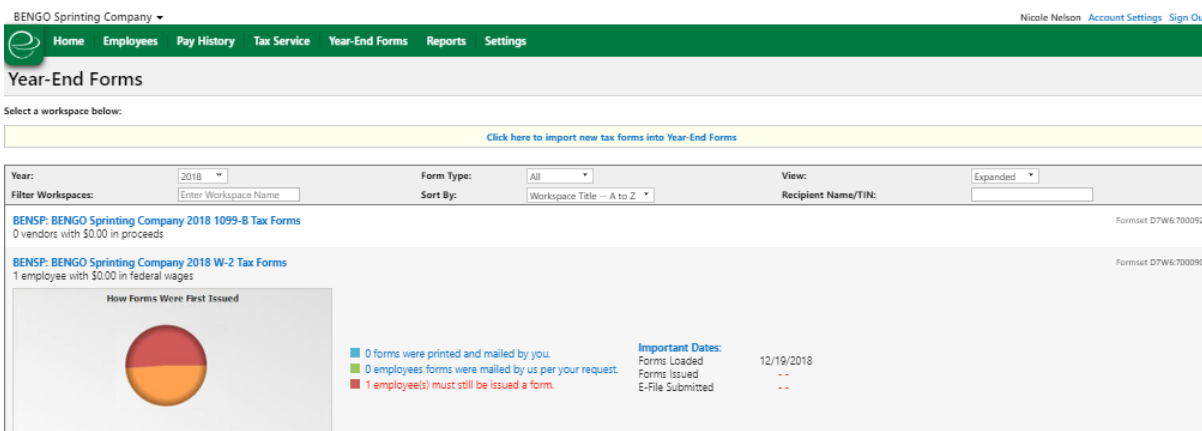
1. Select a Year

2. Select a Form Type

Enter your data into the Excel template you have downloaded. Make sure that you do not modify the columns, column headers, or formatting, as this may render the format incompatible for importing your data into the website and cause an error. Be sure to follow the instructions in the yellow boxes on *each tab* of the Excel. There are comments in each column's header cell. Hovering your mouse over them will provide the proper data format, whether it is required, and the description.

Once you have populated the Excel template with your employee/form data, navigate to the Year-End Forms import wizard by:

1. Logging into your GreenshadesOnline.com account
2. Click on the 'Year-End Forms' tab within top navigation
3. Click the 'Click here to import new tax forms into Year-End Forms' link centered at the top of the page



BENGO Sprinting Company

Nicole Nelson Account Settings Sign Out

Home Employees Pay History Tax Service Year-End Forms Reports Settings

Year-End Forms

Select a workspace below:

[Click here to import new tax forms into Year-End Forms](#)

Year: 2018 Form Type: All View: Expanded

Filter Workspaces: Enter Workspace Name Sort By: Workspace Title -- A to Z Recipient Name/TIN:

BENSP: BENGO Sprinting Company 2018 1099-8 Tax Forms Formset DTW6.7000925
0 vendors with \$0.00 in proceeds

BENSP: BENGO Sprinting Company 2018 W-2 Tax Forms Formset DTW6.7000907
1 employee with \$0.00 in federal wages

How Forms Were First Issued

0 forms were printed and mailed by you.
0 employees forms were mailed by us per your request.
1 employee(s) must still be issued a form.

Important Dates:
Forms Loaded 12/19/2018
Forms Issued --
E-File Submitted --

You will now begin the importing process. Year-End Forms will first gather information about your company. If you have previously uploaded to Year-End Forms, you may use your existing company information by selecting your company from the drop-down list.

Year-End Forms User Guide

Year-End Forms 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 Greenshades Support at 804-807-0180x1 or support@greenshades.com.

NOTICE: There will be a charge of \$0.31 per imported form.

Company Info
Your new formset will belong to the following company.

[Add New Company](#)

BENGO Sprinting Company (BENSP) ▼

Please verify the following information. Bold items are required.

Company Name **BENGO**

Company Name 2

Tax ID 12-3456789

Company ID **BENSP**

SSA User ID

Address 1

Address 2

City

State (abbrev.)

Zip Code

Zip Extension

Country Slovakia ▼

Choose the year and type for your forms.

Year 2018 ▼

Form Type W-2 ▼

Continue

WS - ©2003-2019 Green Shades Software Inc. By accessing and using this page you agree to the End User License Agreement Read our Privacy Statement

If you would like to set up a new company, click the 'Add New Company' button, complete the required information for you company, and click 'Save Company'. All bolded fields are required.

This functionality will allow you to add new companies ahead of importing, if needed.

[Add New Company](#)

▼

Please enter the following information. Bold items are required.

Company Name **New Company**

Company Name 2

Tax ID 123456789

Company ID **NEWCO**

SSA User ID 987654321

Address 1 100 Test Way

Address 2

City Jacksonville

State (abbrev.) FL

Zip Code 32258

Zip Extension

Country United States ▼

Save Company

Choose the year and type for your forms.

Year 2018 ▼

Form Type W-2 ▼

Once you have selected a company to work with, you will select the Year and Form Type for which you want to import. If you are using a company with existing forms, you

will be presented with options to either 'Replace' the existing formset or 'Append' (add to) the existing formset.

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, upload your completed Microsoft Excel template file. Click the 'Browse' button, locate your completed Excel file for import, and click 'OK'. Then click the 'Continue' button.

The screenshot shows the 'Import Forms Wizard' interface. At the top, a progress bar indicates the steps: Company Info, Upload (current), Security, and Finish. The 'Upload' section is active, with the instruction 'Click below to select the excel file containing your forms.' Below this, there is a 'Choose File' button, a 'No file chosen' status, and a link to 'Download a 2018 W-2 Excel Template'. Two radio buttons are present: 'I want to fill in forms manually using Year-End Forms.' (which is selected) and 'I am using an XML generated by my Dynamics AX accounting package'. At the bottom, there are 'Start Over' and 'Continue' buttons. A footer contains copyright information and links to the End User License Agreement and Privacy Statement.

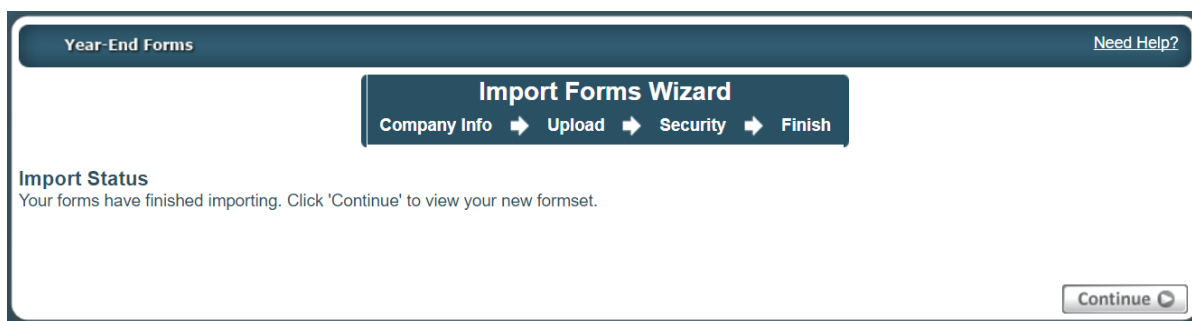
You may choose to skip the upload and fill in forms manually using Year-End Forms by checking the checkbox (as seen above), however for this guide we will continue with the uploading method.

The screenshot shows the 'Import Forms Wizard' interface at the 'Security' and 'Finish' steps. The progress bar now highlights 'Security'. The 'Security' section asks 'Who do you want to have access to the new formset?' and shows a checked checkbox for 'GS Demo (gsdemo@greenshades.com)'. The 'Finish' section instructs the user to 'Click \'Continue\' when you are finished to start the import and view the status of your forms.' At the bottom, there are 'Start Over' and 'Continue' buttons.

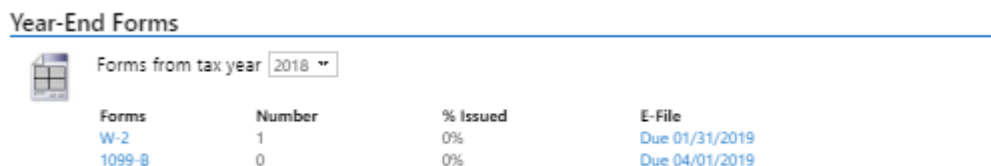
Next, you will be presented with the option to grant access to administrators within your company to the forms. If you do not already see their name and email address listed, you may add them at a later time. Any administrators selected on this page will be set as Super Administrators. See [Section 1.1.3](#) to walk through how to set limited access administrators for formsets.

Once you've selected your administrators, click 'Continue'. Year-End Forms will begin to import your forms. It may take some time to import your data and create the formset based on the size of your excel file and your position the queue.

If you remain on the current screen, you will be provided with a 'Continue' button when your forms have imported successfully. This will open the Welcome Wizard for your new W-2 formset.



If you leave the import screen, your new formset will appear on your GreenshadesOnline.com workspace homepage and will be listed as 'New' when it has completed and successfully imported. When you are ready, select the formset and complete the welcome wizard as described in [Section 1.3](#) below.



Forms	Number	% Issued	E-File
W-2	1	0%	Due 01/31/2019
1099-B	0	0%	Due 04/01/2019

1.3 Configuring a New Formset

Once your form data has been uploaded into a new formset on Year-End Forms, authorized administrators can start completing the year-end forms process.

Dependent on the form type you are uploading, the first time that you log into the new formset on Year-End Forms, you may be presented with a Welcome Wizard, which will walk you through some setup steps for your new formset. As an example, the steps for the W-2 Welcome Wizard are explained in detail below. Once completed, you can return to the Welcome Wizard at any time from the formset homepage by clicking the 'Complete Company Setup' link.

1.3.1 Company Information

For the first step of the Welcome Wizard, you must verify basic company information and designate a billing contact. This page will ask you for your Official Company Name,

Year-End Forms User Guide

EIN, and a billing contact. If the billing contact drop-down list 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 will be the point of contact regarding billable services on Year-End Forms, including:

- Form Uploads
- Mailing fees for the Greenshades Mail Service, including preference charges, additional pages, and foreign postage
- Federal E-Filing Services
- State E-Filing Services
- Form CD orders

The screenshot shows the 'Year-End Forms' interface. At the top, it says 'Welcome to your QA Test Company 1 2017 W-2 Tax Forms'. Below this, there's a 'Company Information' section where users can review and edit company details. The 'Official Company Name' is 'QATEST1'. The 'Company EIN' is '12-3456789'. There's a 'Designate a Billing Contact' section where users can choose an account payable contact from a dropdown menu. The selected contact is 'GreenshadesQA (formerly ChrisV) (TEST GO Workspace)'. Below this, there's a 'Please verify your account payable contact's information' section with fields for Name, Phone Number, and Email Address. The 'Continue' button is at the bottom right.

Year-End Forms [Need Help?](#)

Welcome to your QA Test Company 1 2017 W-2 Tax Forms
You can use this administrator portal to oversee your entire year end forms process: monitoring employee downloads, mailing the forms, making corrections, and e-filing your information to the government. For help at any time, please call Greenshades Support at 904-807-0160x1 or email support@greenshades.com.

Company Information
Please review the company information below and make any edits necessary.

Official Company Name
QATEST1
Your company's registered name that will appear on your forms

Company EIN
12-3456789
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
GreenshadesQA (formerly ChrisV) (TEST GO Workspace) ▼
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
GreenshadesQA (formerly C)
The name of your accounts payable contact

Phone Number
9045551234 ext.
A phone number where we can reach your accounts payable contact

Email Address
greenshadesqa@gmail.com
An email address where we can reach your accounts payable contact

[Continue](#)

1.3.2 W-2 State ID Validation

Only available for W-2 formsets

The screenshot shows the 'Year-End Forms' interface with a 'Welcome Wizard' overlay. The wizard has three steps: 'State W-2 ID Validation', 'Local Tax Validation', and 'Local Tax Naming'. The first step is active. Below the wizard, there's a 'State W-2 ID Validation' section where users can review state W-2 identification numbers. A table shows 'State' as 'Florida' and 'State W-2 ID Number' as '55968'. There's a 'Back' button at the bottom left and a 'Continue' button at the bottom right.

Year-End Forms [Need Help?](#)

Welcome Wizard

State W-2 ID Validation ➡ Local Tax Validation ➡ Local Tax Naming

State W-2 ID Validation
Please review your state W-2 identification numbers below. These will go into box 15 on your W-2 forms. Make any changes necessary before continuing.

State	State W-2 ID Number
Florida	55968

[Back](#) [Continue](#)

The W-2 Welcome Wizard will accept any State W-2 IDs that were included with the state wages and taxes reported on your W-2 forms from your source payroll package or excel template and will prompt you to verify them. To assist you with this, Year-End Forms will provide you a list of all the W-2 State IDs found within your data and warn you if any of these IDs are not in the proper format. Please verify each ID for accuracy. You may edit an ID by clicking the pencil icon and modify the ID in the text box provided. The State's ID will be updated on all W-2s, where applicable.

It is worth noting that if the ID is not correct, it means that the ID stored in your accounting software is also incorrect. You should ensure that you correct it at the source, as well as within this formset.

1.3.3 Local Tax Validation

Only available for W-2 formsets

Year-End Forms Need Help?

Welcome Wizard

State W-2 ID Validation ➔ **Local Tax Validation** ➔ Local Tax Naming

Validate Local Codes

We have loaded the following local tax codes from your accounting package. Oftentimes employers will classify some state-level taxes/deductions as "local taxes" within their accounting system in order to achieve the appropriate withholding. Common examples of this include:

- California Disability Withholding
- Pennsylvania or Alaska Unemployment Withholding
- Workers Benefit Funds

If you have any such local codes in your system, then you can use this screen to place the amounts into the appropriate box 12 or box 14 on your W-2 forms. If all of your local codes actually represent local taxes, then you can click "Continue" at the bottom of this page without making any changes.

Payroll Tax Code	Payroll Tax Name	Municipality	Action	Code or Label
CLRS-CLS-SM	Abngton Hts/Clrks Grn B. CLS SM		Keep as Local Tax	
ADAM-SDFL372	Adamstown (Lancaster) BW NR EIT		Keep as Local Tax	
ATHEN11	Athens (Bradford County) Res		Convert to Box 12 Amount	Code E ?
BALT99	Baltimore City Tax		Convert to Box 14 Amount	Baltimore
CLEV-CTY	Cleveland City Tax		Keep as Local Tax	
WASHDC	Washington DC Placeholder		Keep as Local Tax	
YONK009	Yonkers Resident		Keep as Local Tax	

Once you click 'continue' and move these local tax amounts to new boxes then it cannot be undone. Please be certain you have chosen the correct settings above before continuing.

Back
Continue

If your upload data contained local tax withholding information, this next step of the W-2 Welcome Wizard will be the 'Local Tax Validation' page. Sometimes payroll administrators may store state level taxes or complicated payroll deductions as local taxes within their payroll systems. Some common examples are the California Disability Withholding (SDI), Alaska or Pennsylvania Unemployment Withholding, various Worker Benefit Fund deductions, etc. Since these taxes/deductions were stored as locals in the source payroll package they will be loaded into the local boxes on your W-2 forms.

This step also allows administrators to map these deductions to their correct Box 12 and/or Box 14 locations. The figure above shows an administrator that will convert two

of the incoming local tax codes into a Box 12 and Box 14 amounts, adding in the correct codes and labels respectively. Once converted from a local code into another form, it cannot be undone. Any locals that are not converted into a Box 12 or Box 14 amount will appear in the 'Locals' section of the W-2 forms.

1.3.4 Local Tax Naming

Only available for W-2 formsets

Year-End Forms
Need Help?

Welcome Wizard

State W-2 ID Validation
Local Tax Validation
Local Tax Naming

Locality Names

Use this page to choose how your local taxes will be named on Box 20 of your W-2s. Try to choose names that your employees will recognize when completing their individual returns.

Step 1: Bulk Naming of Local Taxes
Use this section to choose Box 20 Names for your local taxes using information from your accounting system. Watch the grid below to see the "Proposed Box 20 Names" column update as you make selections from the drop-down menus below.

Default Box 20 Names for local taxes to: Greenshades Name (if tax information is recognized)

If Greenshades cannot recognize your local tax code, then use: Payroll Tax Code + Municipality

Step 2: Attempt To Add Local Tax Identifiers
Many employers wish to include numerical codes within box 20 that identify the municipality, school district, county, or tax collection district for the local tax. This code is frequently requested by local or state agencies. Those agencies often require other types of notifications to the employees if the code is not present on the Federal W-2. Check the box below if you want Greenshades to attempt to identify your local tax and place the appropriate identifier as a prefix within the proposed Box 20 Name. Please carefully review the results below to ensure that the correct code has been added in order to meet any state requests and/or requirements.

☐ Attempt to add an identifier to recognized Local Tax Codes for Pennsylvania (Act 32 Withholding), Indiana (County Withholding), or Ohio (School Districts).

Step 3: Customize Names
Click the pencil icon below to edit any individual locality names. All names must be unique and must be 26 characters or less in order to fit onto the W-2 form.

Payroll Tax Code	Payroll Tax Name	Municipality	State	Proposed Box 20 Name
CLRKS-CLS-SM	Abngton Hts/Clrks Grn B. CLS SM		Pennsylvania	CLRKS-CLS-SM
ADAM-SDFL372	Adamstown (Lancaster) BW NR EIT		Pennsylvania	ADAM-SDFL372
CLEV-CTY	Cleveland City Tax		Pennsylvania	CLEV-CTY
COLUCSD43802	Columbus Csd 43802		Pennsylvania	COLUCSD43802
FAIR43976-SDFL	Fairview Park Csd 43976		Pennsylvania	FAIR43976-SDFL
PATT-NR544	Patton (Centre Co) NR EIT		Ohio	PATT-NR544
YONK009	Yonkers Resident		Pennsylvania	YONK009

Add Locality

Back Continue

This step in the W-2 Welcome Wizard is once again specific to administrators who are uploading tax forms with local withholding information. This step allows the administrator to choose how each local withholding code should be named when appearing on the W-2 form.

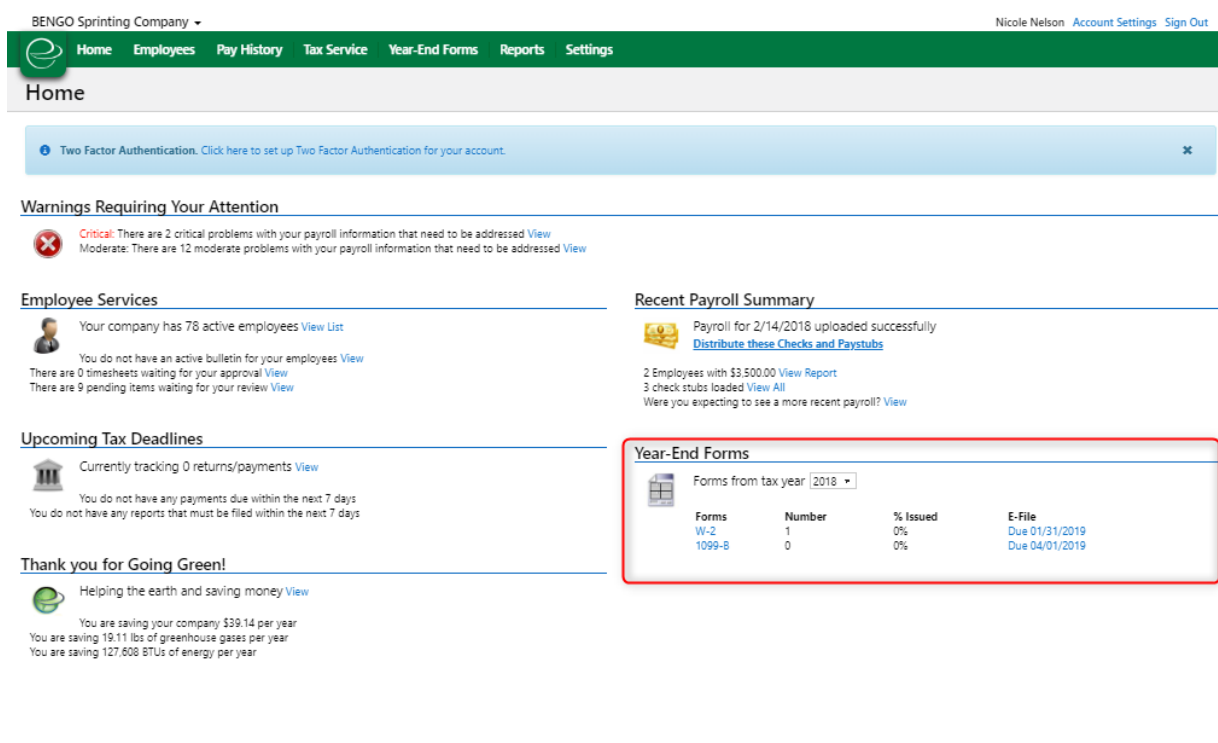
To begin, the administrator will select a bulk/default name convention for all local codes. For example, choosing 'Payroll Tax Code + Municipality' (as shown above) will label each local withholding amount with your accounting package's payroll tax code and municipality. Next, you can edit the names of any individual local tax code to any desired label. The names for local taxes are limited to 26 characters to fit onto the W-2 form and must be unique.

2 Using Year-End Forms

2.1 Selecting a Formset

At this point, an administrator has successfully imported a new formset into the Year-End Forms portal. As detailed in [Section 1.2.2](#) above, if you navigate away from the import screen or close the Year-End Forms portal, you will be able to access and select the formset you would like to work with by signing into your GreenshadesOnline.com account, as detailed in [Section 1.1](#).

From the GreenshadesOnline.com homepage, you can access your formsets from the Year-End Forms dashboard and toggle by tax year to see all formset types for the given year. Clicking on the form type will launch you into the Year-End Forms portal.



BENGO Sprinting Company

Nicole Nelson Account Settings Sign Out

Home Employees Pay History Tax Service **Year-End Forms** Reports Settings

Home

Two Factor Authentication. Click here to set up Two Factor Authentication for your account.

Warnings Requiring Your Attention

Critical: There are 2 critical problems with your payroll information that need to be addressed [View](#)
Moderate: There are 12 moderate problems with your payroll information that need to be addressed [View](#)

Employee Services

Your company has 78 active employees [View List](#)
 You do not have an active bulletin for your employees [View](#)
 There are 0 timesheets waiting for your approval [View](#)
 There are 9 pending items waiting for your review [View](#)

Recent Payroll Summary

Payroll for 2/14/2018 uploaded successfully
[Distribute these Checks and Paystubs](#)
 2 Employees with \$3,500.00 [View Report](#)
 3 check stubs loaded [View All](#)
 Were you expecting to see a more recent payroll? [View](#)

Upcoming Tax Deadlines

Currently tracking 0 returns/payments [View](#)
 You do not have any payments due within the next 7 days
 You do not have any reports that must be filed within the next 7 days

Thank you for Going Green!

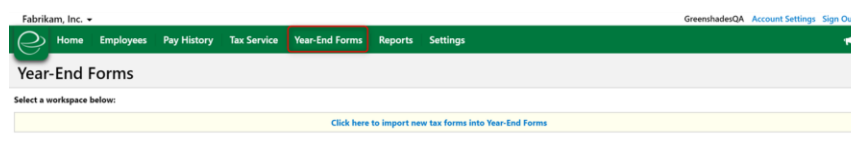
Helping the earth and saving money [View](#)
 You are saving your company \$39.14 per year
 You are saving 19.11 lbs of greenhouse gases per year
 You are saving 127,608 BTUs of energy per year

Year-End Forms

Forms from tax year 2018

Forms	Number	% Issued	E-File
W-2	1	0%	Due 01/31/2019
1099-B	0	0%	Due 04/01/2019

An alternative option to select the formset you would like to work with is by navigating to the 'Year-End Forms' tab within the top navigation of GreenshadeOnline.com. This Year-End Forms management screen allows the administrator, access permitting, to filter between form types and tax years or view all formsets from all years, as well as provides details regarding due dates, forms that must still be issued/distributed to employees, and totals.



Fabrikam, Inc.

GreenshadesQA Account Settings Sign Out

Home Employees Pay History Tax Service **Year-End Forms** Reports Settings

Year-End Forms

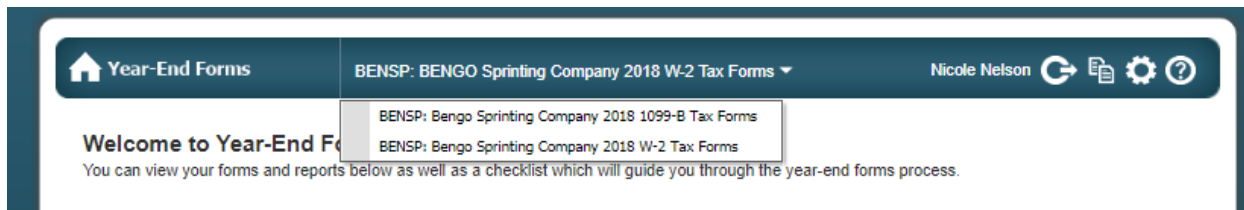
Select a workspace below:

[Click here to import new tax forms into Year-End Forms](#)

2.2 Top Navigation and Settings

After completing the Welcome Wizard, if applicable, it is recommended that the administrator reviews the Year-End Forms portal specific setting.

2.2.1 Top Navigation



The main navigation is located at the top of each formset page. This top navigation provides many convenient options that will assist in the basic usage of the Year-End Forms portal. You can return to the formset homepage at any time by clicking the 'Year-End Forms' button on the left side of the navigation bar.

If you have multiple formsets for the same company and tax year, you can use the top navigation to switch between them. Simply click the down-arrow next to the current formset name and a drop-down will appear. Clicking one of the other formset types will navigate you to that specific formset.

The icons on the right-hand side of the top navigation allow access to the Year-End Forms specific Settings, Forms, and Help content for the current formset, as well as a button to securely log/sign out from the Year-End Forms portal.



HELP: Will take you to the Year-End Forms help content and documentation



SETTINGS: Will take to the ['Settings' page](#) for the current formset



FORMS: Will take you to the ['View Forms' page](#) for the current formset



LOG OUT: Will sign/log you out of Year-End Forms portal

2.2.2 Year-End Forms Settings

2.2.2.1 Employee Access

Only available for W-2, 1095-C, and T4 formsets

For formset types (W-2s, 1095-Cs, and T4s) that allow employee access to view their tax form(s) electronically, there is an Employee Access setting. By default, the Employee Access setting will be disabled and require the administrator to enable it if they wish.

Settings for Company 2018 W-2 Tax Forms

Employee Access | Tax Preparer Sync | Forms | Formset Info | Security | Support

2018 W-2 Access for Bengo Sprinting Company

Status: Your employees can currently access the GreenEmployee.com portal.
[Full employee access settings can be managed on the Access Settings page.](#)

Allow employees to view 2018 W-2s on GreenEmployee.com

☐ Enable
☒ Disable

Save

It is important to note that you may only enable Employee Access through the Year-Ends Forms portal if the corresponding Employee Access setting in GreenshadesOnline.com is also enabled. Clicking the 'Full employee access settings can be managed on the Access Settings page.' link will navigate you to the GreenshadesOnline.com setting.

Workspace Settings

Company Info | **Employee Access** | Account Security | Identity Confirmation | Session Security | Manage Employees | Settings Changes

Employee Access

Would you like to enable employee access for your online portal?

☒ Yes
☐ No

Warning: Enabling Employee Access to your online portal introduces additional exposure to your employees' information via the internet. There are a number of settings available in this Employee Access section that will help to safeguard employee access on the internet. It is highly recommended that you configure these settings with your company's IT or Security staff's direct recommendations in order to comply with any company policies and to meet the appropriate security standards for your organization.

Once Employee Access is enabled, those employees that have pre-consented or consented to receive their tax form(s) electronically will be able to view their tax form through GreenEmployee.com → Pay History → Tax Forms.

Tax Forms

Pay Details Report
 Paystubs
 Tax Forms

View: W2 for 2017

Copy B - To Be Filed With Employer's FEDERAL Tax Return. REISSUED OMB NO. 1545-0008		Copy C - For EMPLOYEE'S RECORDS. See Notice to Employee on the back. REISSUED OMB NO. 1545-0008	
1. Wages, tips, other compensation	30000.00	1. Wages, tips, other compensation	30000.00
2. Federal income tax withheld	995.00	2. Federal income tax withheld	995.00
3. Social security wages	11.79	3. Social security wages	11.79
4. Social security tax withheld	50.00	4. Social security tax withheld	50.00
5. Medicare wages and tips	26000.00	5. Medicare wages and tips	26000.00
6. Medicare tax withheld	377.00	6. Medicare tax withheld	377.00

2.2.2.2 Turbo Tax Setup

Only available for W-2 formsets

If you would like, Greenshades will synchronize your employee year-end forms data to Turbo Tax. If you choose to synchronize your forms, your employees will then be able to download their W-2 data directly from Turbo Tax while completing their 1040. After beginning synchronization, any changes you make to your forms will automatically synchronize to Turbo Tax.

Please note that the synchronization cannot be turned off once it has been activated; please make sure your forms are ready to be viewed within Turbo Tax before you activate synchronization.

Year-End Forms | BENS0: BENG0 Sprinting Company 2018 W-2 Tax Forms | Nicole Nelson

Settings for BENG0 Sprinting Company 2018 W-2 Tax Forms

Employee Access | Tax Preparer Sync | **Forms** | Formset Info | Security | Support

Turbo Tax and H&R Block Setup
If you wish, we can synchronize your employee W-2 forms to [Turbo Tax](#) and [H&R Block](#). If you choose to synchronize your forms then your employees will then be able to import their W-2 information directly into Turbo Tax and H&R Block while completing their 1040. Any changes you make to your forms will automatically synchronize to Turbo Tax and H&R Block.

Please note that the synchronization cannot be turned off once it has been activated; please make sure your forms are ready to be viewed within Turbo Tax and H&R Block before you activate synchronization.

Turbo Tax and H&R Block is disabled for in-house formsets.

©2003-2019 Green Shades Software Inc. By accessing and using this page you agree to the [End User License Agreement](#) [Read our Privacy Statement](#)

2.2.2.3 Forms

The Forms settings allows the administrator to choose which form templates should be made available for administrators to view and create distribution batches with and for recipients to view, if applicable. Some form types offer multiple template options, while others have only one template.

All templates will be defaulted to checked on. Review these settings on import to ensure the templates you prefer are selected.

Year-End Forms | BENS0: BENG0 Sprinting Company 2018 W-2 Tax Forms | Nicole Nelson

Settings for BENG0 Sprinting Company 2018 W-2 Tax Forms

Employee Access | Tax Preparer Sync | **Forms** | Formset Info | Security | Support

Below is a listing of tax forms that may be viewed within this workspace.

Name	Administrators may view
B2 for 2 Part Paper	<input checked="" type="checkbox"/>
BC for 2 Part Paper	<input checked="" type="checkbox"/>
BC22 for 4 Corner Paper	<input checked="" type="checkbox"/>

Below is a listing of correction tax forms that may be viewed within this workspace.

Name	Administrators may view
W-2C for 1 Part Paper	<input checked="" type="checkbox"/>

Would you like to mask your employees' Social Security Numbers?
☒ Yes ☐ No

©2003-2019 Green Shades Software Inc. By accessing and using this page you agree to the [End User License Agreement](#) [Read our Privacy Statement](#)

Additionally, other form types in which the IRS allows the truncation/masking of an employee's/recipient's/covered individual's SSN/TIN will have an additional setting on the Forms settings. If 'Yes' is selected, all SSNs/TINs will be applied a mask of *****1234, which will appear on any generated PDFs of the employee/recipient's tax form, as well as when it is displayed electronically or included in a mail service batch.

If the option below is selected, only the last four digits of the TIN will be shown on forms you print or mail using this website. (ex: *****1234). Although the IRS allows for TIN truncation on paper copies, it is not allowed when recipient copies are delivered electronically. Forms provided electronically should contain the full Tax ID number per IRS regulations. Do not select this option if you intend to allow electronic distribution of your forms.

Would you like to mask your employees' Tax ID Numbers?

☐ Yes ☒ No

2.2.2.4 Formset Info

Formset Info provides the administrator with details pertaining to the selected formset. It is important to review when this formset is due to expire, as archive fees apply to retain formsets beyond 12 months from import.

This page provides a link to create a Download Batch or Request a CD as an alternative archiving method to store your forms locally.

The screenshot shows the 'Formset Info' page for 'BENSP: BENGO Sprinting Company 2018 W-2 Tax Forms'. The page has a header with a home icon, the formset name, and the user 'Nicole Nelson'. Below the header is a navigation bar with tabs: 'Employee Access', 'Tax Preparer Sync', 'Forms', 'Formset Info' (selected), 'Security', and 'Support'. The main content area contains a warning about form expiration and a link to 'creating a Download Batch'. It also displays a table of formset details:

Tax Forms Loaded	1/9/2019 2:41:59 PM EST
Formset Expiration Date	1/1/2099 12:00:00 AM EST
Workspace First Viewed	1/9/2019 2:42:53 PM EST
Workspace Configured By	NNelson@greenshades.com

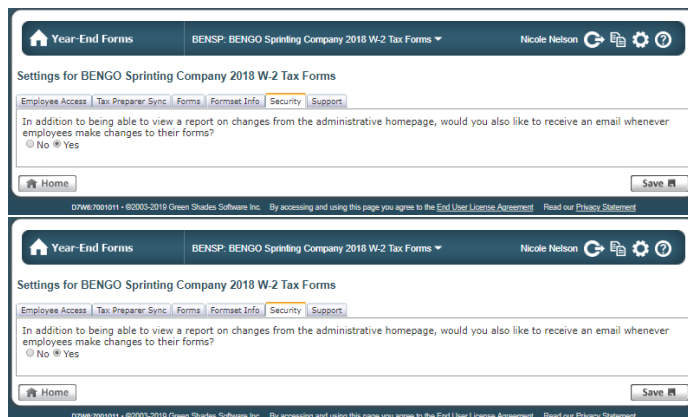
Below the table is an 'Import History' section showing 'Replaced data from BLANK on 1/9/2019 Download Not Available'. At the bottom, there are 'Home' and 'Save' buttons, and a footer with copyright information and links to the End User License Agreement and Privacy Statement.

2.2.2.5 Security

Only available for W-2, 1095-C, and T4 formsets

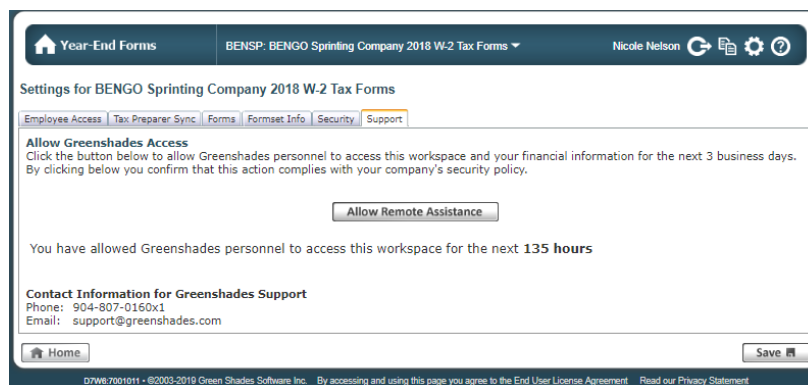
For formset types (W-2s, 1095-Cs, and T4s) that allow employee access, an additional setting allows the administrator(s) on the formset to receive an email notification when an employee makes an edit to their electronic tax form.

Further details on allowing additional employee edit options is discussed in [Section 3.1.5.3](#).



2.2.2.6 Support

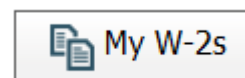
While troubleshooting an issue or question with Greenshades Support, you may be asked to Allow Greenshades Assistance from within the formset settings. This will allow our support and product teams access to your formset and data for a 3-business day period to help resolve the issue.



2.3 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/recipient's tax form. As indicated above, Forms may be accessed through the Forms icon within the navigation bar.

The Task-Driven Homepage (detailed further in [Section 2.4](#)) also features a 'My [Tax Forms]' button. This button will navigate you to the 'View Forms' page as well.



Year-End Forms User Guide

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 and Print Multiple Forms](#)

[Add a new Employee](#)


Search for:


Distribution Status:

[More Options](#)

1 2

Showing forms 1 to 50 of 58

 Excel Export

	SSN	Last Name	First Name	City	State	Zip	Department	Country Code	Domestic Status	Employment Status
 Edit Print	123115268	Ackerman	Pilar	JACKSONVILLE	FL	32256	Accounting	US	Inside the US	Active
Edit Print	986225952	Barbariol	Angela	BROOKFIELD	CO	80020	Installation	US	Inside the US	Active

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 and Print Multiple Forms](#)

[Add a new Employee](#)


Search for:


Distribution Status:

[More Options](#)

1 2

Showing forms 1 to 50 of 58

 Excel Export

	SSN	Last Name	First Name	City	State	Zip	Department	Country Code	Domestic Status	Employment Status
 Edit Print	123115268	Ackerman	Pilar	JACKSONVILLE	FL	32256	Accounting	US	Inside the US	Active
Edit Print	986225952	Barbariol	Angela	BROOKFIELD	CO	80020	Installation	US	Inside the US	Active

2.3.1 Viewing Forms

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 based on the formset type. 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.

Search for:

Distribution Status:

With State Wages in:

With Local Wages in:

In Department:

Employees from:

Employment status:


Correction status:

Location:

Edited Since:

[Less Options](#)

2.3.2 Print an Individual Form

	SSN	Last Name	First Name
 Edit Print		Ackerman	Pilar

To print an individual employee/recipient's form, select the 'Print' link next to the form you wish to print. This will generate the tax form as a PDF document, which may be printed directly or saved as a PDF document for printing later. This option will also allow you select from the multiple form layout options that Year-End Forms supports and that has been enabled within the [Forms setting](#).

For the W-2 specifically, this includes:

- B2 (two Copy Bs) for 2-part paper
- BC (one Copy B and one Copy C) for 2-part paper
- BC22 for 4-part paper (one Copy B, one Copy C, and two Copy 2s).

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.

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).

Choose a Layout



B2 for 2 Part Paper



BC for 2 Part Paper




BC22 for 4 Corner Paper

2.3.3 Edit Forms

There are many reasons that an administrator may wish to make edits to employee's tax form. For example, you may discover there are fields that were incorrect in your accounting package, 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 2.3.1](#) above. Once you have located the form, click on the 'Edit' link next to the form you wish to edit.

	SSN	Last Name	First Name
 Edit Print		Ackerman	Pilar

Your form will appear populated with the data for the employee/vendor you selected. Depending on the form type, multiple links will be provided to edit the form's information. Any warnings or validation errors for the form should be listed at the top of the screen. To edit a section of the form, depending on formset type, find the nearest 'Edit' link that describes what you want to edit or click within the text field you wish to edit.

Year-End Forms User Guide

Year-End Forms TWO: Greenshades Demo Corp... 2018 W-2 Tax Forms Test U (impersonated by: NNELSON)

Suz Que's W-2

Form State: **Original**

Filing Status: **Must be Filed as Original**

Employee and Employer Information

a Social security number 123-45-6789		1 Wages, tips, other compensation 0.00	2 Federal income tax withheld 0.00
b Employer identification number (EIN) 123456789		3 Social security wages 0.00	4 Social security tax withheld 0.00
c Employer's name, address, and ZIP code Name: TESTING Address: 123 Test Street City/Town: Jacksonville State: FL ZIP: 12345 Phone: (888) 255-3815 Note: Any updates made to box b and/or c will be applied to all forms.		5 Medicare wages and tips 0.00	6 Medicare tax withheld 0.00
d Control number		7 Social security tips 0.00	8 Allocated tips 0.00
e Employee's first and last name First: Suz Middle Initial: E Last: Que		9 Verification code	10 Dependent care benefits 0.00
f Employee's address and ZIP code Address: 100 Test Way City/Town: Jacksonville State: FL ZIP: 32258 Country: United States		11 Nonqualified plans 0.00	12 See below for box 12 and 14
		13 Statutory employee Retirement Third-party sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
		14 Other Label Amount <input type="button" value="Add"/>	12 Code Amount <input type="button" value="Add"/>

State Wages and E-filing Information

15 State Employer's state ID number <input type="button" value="Add"/>	16 State wages, tips, etc.	17 State income tax	E-Filing Information
Note: Any updates to box 15 employer's state ID number will be applied to all applicable forms.			

Local Wages

18 Local wages, tips, etc. <input type="button" value="Add"/>	19 Local income tax	20 Locality name
--	---------------------	------------------

D:\ONE\1000\078 - ©2003-2019 Green Shades Software Inc. By accessing and using this page you agree to the End User License Agreement. Read our Privacy Statement

For example, if you want to edit an employee's wages, you should click within Box 1 and edit the data. You may also edit other information, such as Login & Other Employee Information (needed for employee access) by clicking the link and editing the information within the pop-up modal.

Once an edit is saved, it will be reflected everywhere. This includes the form that you are viewing, the form that the employee may electronically view through GreenEmployee.com, and the E-File that will be submitted, once it is due. It is, however, important to note that any changes/edits made to tax forms within the Year-End Forms portal will not sync back to your accounting package.

A form may also be deleted through the 'Edit Form' page within the bottom action bar. It is important to note that on confirmation of deleting a form, it will be irreversible.

An audit of all changes made to any forms within your formset is stored by Year-End Forms. This includes tracking of changes made by recipients, as well as form edits by administrators. You can view this report by clicking on the 'Reports' button on the task-driven homepage and clicking on the '[Changes made to forms](#)' report. You may also filter this report by who made the change and export it into Excel. For more on reports, see [Section 5](#).

2.3.4 Making Form Corrections

While [Section 2.3.3](#) details how to make edits to your tax forms, this section specifically details how to make form corrections for W-2 formsets.

If you need to make corrections to a form/forms for your employee(s)/vendor(s), Year-End Forms has several options to support your needs.

2.3.4.1 W-2 Corrections

For W-2 forms, you must send a corrected form to your employees if you make a change to their form information/data post-distribution. Based on distribution and filing status of the employee and the formset, Year-End Forms will automatically determine the correction status of an employee's form and display it as such at the top of the employee's 'Edit Form' page.

On proceeding distribution through [Print an Individual Form](#), [Download and Print, Mail Service](#), or [Employee Access](#) view, the appropriate, compliant form will display/generate based on the form's status below.

There are two categories that a correction to a W-2 form may fall into:

1) **Form State:**

The screenshot shows the 'Year-End Forms' interface for 'TWO: Greenshades Demo Corp... 2018 W-2 Tax Forms'. The user is 'Test U (impersonated by: NNELSON)'. The form is for 'Suz Que's W-2'. The 'Form State' dropdown menu is open, showing 'Original' (selected), 'Corrected', and 'as Original'. The 'Filing Status' dropdown is also open, showing 'Corrected' and 'as Original'. Below this is the 'Employee and Employer Information' section with a table of fields:

Employee and Employer Information		
a Social security number	1 Wages, tips, other compensation	2 Federal income tax withheld
999-55-1424	0.00	0.00
b Employer identification number (EIN)	3 Social security wages	4 Social security tax withheld
123456789	0.00	0.00
c Employer's name, address, and ZIP code	5 Medicare wages and tips	6 Medicare tax withheld

- **Form State Original:** No significant changes have been made to an employee form that the IRS would identify as needing a correction form prior to distribution.

- **Form State Corrected:** A change is made to an employee's form that the IRS has identified as a significant change that the employee should have accurately reflected on their W-2 form as to accurately report on their 1040 return.

Example: Employee SSN, Employer EIN, Box 1-20 data

2) **Filing Status:**

The screenshot shows the 'Suz Que's W-2' form in the GreenShades system. The 'Filing Status' dropdown menu is open, showing three options: 'Must be Filed as Original' (highlighted), 'Must be Filed as Correction', and 'Already Filed to the SSA'. The form fields include Social Security number (999-55-1424), Employer identification number (123456789), and various tax amounts (all 0.00).

- **Must be Filed as Original** – This form will be included in the next original filing created and sent to the SSA.
- **Must be Filed as Correction**- This form has detected a change made to an employee's form, post-filing, that the IRS has identified as a significant change that the employee now requires a correction filing to detail what was Previously Reported on the originally distributed form and what the Correct Information is that will be re-E-filed and reported to the SSA. *Example: Employee SSN, Employer EIN, Box 1-20 data.* This form will be included in the next correction filing created and sent to the SSA.
- **Already Filed to the SSA:** This form has already been included in a filing. This form will **not** be included in any future filings.

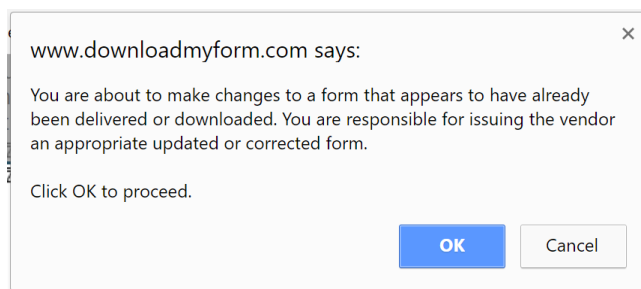
2.3.4.2 1099-Misc Corrections

For 1099-MISC forms, you must send corrections to your vendors if you make a change to a vendor's TIN or any wage information. When an edit is made to a vendor's form, mark the form as Corrected using the checkbox in the bottom right-hand corner. If the form has previously been distributed and/or filed, thus requiring the correction, this section will display when the form was last issued/distributed.

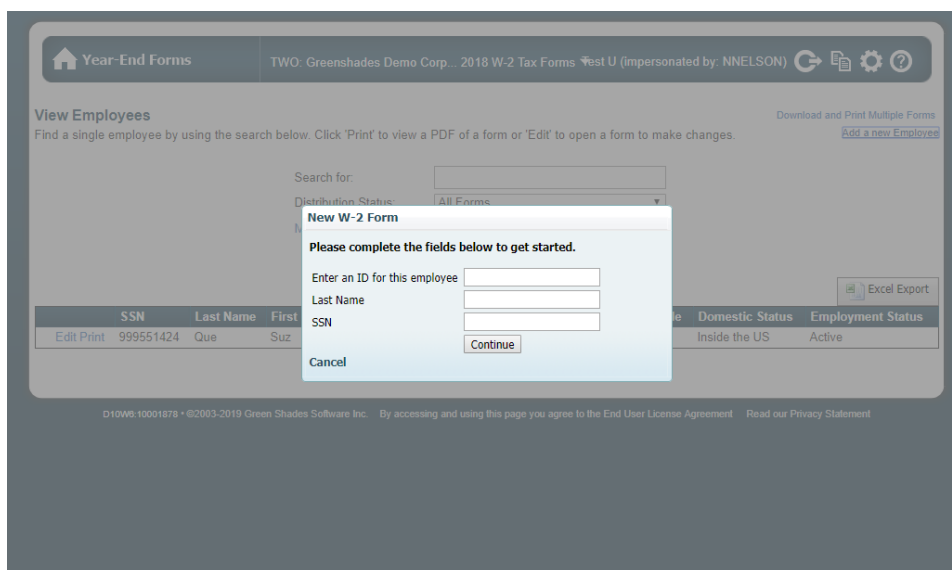
Our records indicate this form was last issued: 12/11/2017

☒ Mark this form as a corrected 1099-MISC

Year-End Forms recognizes if the form has been previously distributed and on 'Save' will display a confirmation modal to indicate to the administrator is responsible for redistributing the corrected form.



2.3.5 Manually Add a New Form



You may manually add a new employee/recipient to this formset by clicking the 'Add a new Employee' link from the 'View Forms' page. The 'New W-2 Form' modal will capture the employee ID, Last Name, and SSN. Click 'Continue' to create the new tax form and manually enter the employee's personal and reportable tax information.

This new form will now be included in formset totals, distribution batches (if selected), and original E-File.

3 Completing the Year-End Process

After ensuring the settings are accurate, the administrator is presented with a homepage that then assists the administrator in navigating through and completing the year-end process.

When viewing the formset homepage, there are two different views:

- [The Task-Driven View](#)
- [The Classic View](#)

3.1 The Task-Driven View

By default, on completion of the Welcome Wizard, the Task-Driven Homepage is displayed and guides the administrator through the different steps/tasks that are recommended, in succession, while providing real-time updates as a checklist.

Year-End Forms User Guide

Year-End Forms | TWO: Greenshades Demo Corp. - 2018 W-2 Tax Forms

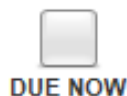
Welcome to Year-End Forms
You can view your forms and reports below as well as a checklist which will guide you through the year-end forms process.

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**
COMPLETED ON 12/21/2018 | Test U used the welcome wizard to configure Year-End Forms on 12/21/2018.
- 2. Employee Identity Verification**
DUE NOW | There is 1 identity that needs to be verified.
- 3. Resolve Warnings with your Forms**
DUE NOW | There are currently 1 warning with your forms, 0 of which are considered high severity warnings.
- 4. Verify W-2 Form Totals**
DUE NOW | You have loaded 1 form with \$0.00 in Federal Wages.
- 5. Manage Employee Access**
COMPLETED ON 1/4/2019 | 0 employees viewed their forms online after Test U activated access on 1/4/2019. (View Report)
0 employees consented to receive their forms online-only before paper copies were issued. (View Report)
- 6. Email Employees with links to W-2 Forms**
COMPLETE | 0 employees have email addresses.
- 7. Distribute any remaining W-2s to your Employees**
DEPENDS ON METHOD | 1 employee must still be issued a paper form.
0 employees consented to receive their form online-only, 0 employees first received or will receive their form through our Print and Mail Service, and 0 employees first received their paper form from you.
You have two options to distribute your forms: use our Print and Mail service or distribute yourself. Deadlines vary and are listed below.
7a. Ask us to Mail Remaining W-2s
Place your order today for just \$1.46 per form
The price increases to \$1.88 on 1/16/2019. Order your forms on 1/26/2019 for guaranteed postmark by 1/31/2019.
OR
7b. Distribute Remaining W-2s Yourself by 1/31/2019
You may download and print the remaining W-2s to mail or hand out to your employees by 1/31/2019.
- 8. E-File Federal W-2 Return**
COMPLETED ON 1/10/2019 | NNELSON E-Filed your Federal W-2 return on 1/10/2019.



The exact tasks within the checklist will vary based on the form type loaded. Each task has a checkbox to indicate whether it has been completed (except for limited administrators). Clicking on the title of the task will take you to a wizard or page where you can complete the task. When the task has been completed on the website, the checkbox in your checklist will automatically become checked, with completed date and administrator who completed the task, to indicate its completion.

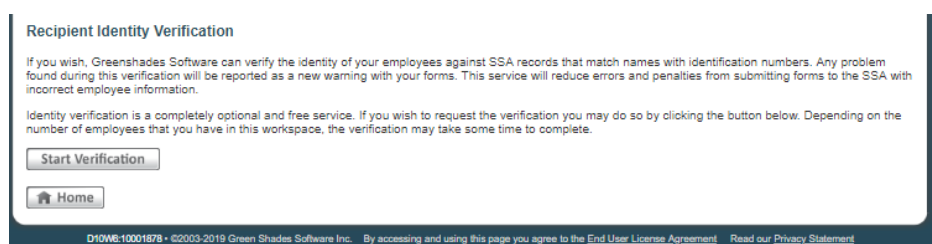


It is important to note that limited access administrators may see the checklist for all tasks, however without full access to fully complete they may not be able to complete tasks themselves and the checklist may not show as completed as a result.

3.1.1 Complete Company Setup

The Complete Company Setup task will be checked and indicated as completed once you have completed the Welcome Wizard on import. If you need to make any changes or updates to the information within the [Welcome Wizard](#), click the 'Complete Company Setup' link to do so.

3.1.2 Employee/Vendor/Recipient Identity Verification



Recipient Identity Verification

If you wish, Greenshades Software can verify the identity of your employees against SSA records that match names with identification numbers. Any problem found during this verification will be reported as a new warning with your forms. This service will reduce errors and penalties from submitting forms to the SSA with incorrect employee information.

Identity verification is a completely optional and free service. If you wish to request the verification you may do so by clicking the button below. Depending on the number of employees that you have in this workspace, the verification may take some time to complete.

[Start Verification](#)

[Home](#)

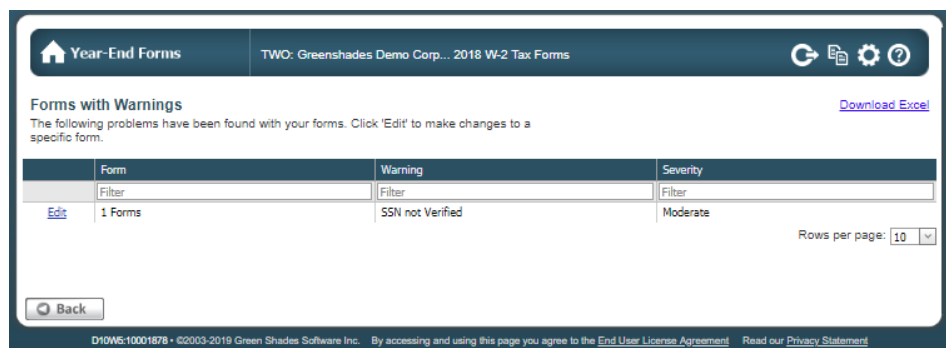
D10W6:10001878 • ©2003-2019 Green Shades Software Inc. By accessing and using this page you agree to the [End User License Agreement](#) [Read our Privacy Statement](#)

It is recommended that you consider submitting your vendors TINs or your employees' SSNs to the IRS for verification. Year-End Forms will submit the names and SSNs/TINs of your recipients to the IRS for validation.

To submit your SSNs/TINs, click the 'Start Verification' button. Depending on the number of employees in the formset, the verification may take some time process and complete. The status of your Identify Verification batch will be displayed with the Status of Requested Verification grid.

Any discrepancies found by the SSA will be reported back through Year-End Forms as warnings and display within the 'Employee's Identities to be Fixed' grid.

3.1.3 Resolve Warnings with your Forms



Year-End Forms TWO: Greenshades Demo Corp... 2018 W-2 Tax Forms

Forms with Warnings [Download Excel](#)

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

	Form	Warning	Severity
Filter	Filter	Filter	Filter
Edit	1 Forms	SSN not Verified	Moderate

Rows per page: 10

[Back](#)

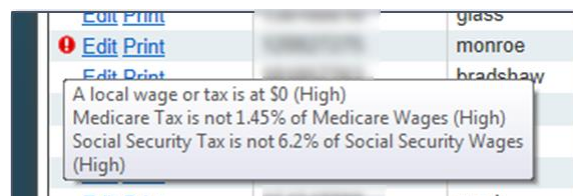
D10W6:10001878 • ©2003-2019 Green Shades Software Inc. By accessing and using this page you agree to the [End User License Agreement](#) [Read our Privacy Statement](#)

When you import or create forms, Year-End Forms will validate for potential issues. These potential issues are reported as warnings. Click 'Resolve Warnings with your

Forms' within the checklist to review and resolve warnings. This page will provide a table of warnings, listing the Form, the Warning, and the Severity of each.

If the warning is related to a single form, the 'Edit' link takes you to the individual form 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 and ultimately your E-File submission.

Additionally, when viewing your forms as described in [Section 2.3.1](#) 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.



3.1.4 Verify Form Totals

Year-End Forms will calculate the totals of your tax forms based on the data that was imported and includes any changes made to the forms prior to verifying said totals. These totals are provided so that you can verify them against your accounting package totals.

Once you have reviewed the totals and verified that they are correct, you can select the checkbox on the 'Verify Totals' page as shown below. Clicking the 'Finish' button will mark the step as complete within the checklist. Any time an action is taken that modifies a total after you have verified it, Year-End Forms will automatically reset the checklist task, verification checkbox, and request that you review and re-verify the totals again.

Totals for W-2 forms for Greenshades Demo

The following totals were gathered from your W-2 forms. Please review the totals and verify they are correct.

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

Employees Loaded	59	State	State Wages	State Tax	Locality	Local Wages	Local Tax
Forms with Wages	58	FL	\$35,955.00	\$4,743.00	Abngton Hts/Cliks Gm B. C	\$10,201.70	\$175.05
Federal Wages	\$3,567,000.00	KY	\$8,855.00	\$1,133.00	Adamstown (Lancaster) BW N	\$20,803.48	\$358.14
Federal Tax Withheld	\$59,247.00	MN	\$8,035.00	\$1,015.00	Athens (Bradford County) R	\$21,353.42	\$354.21
Social Security Wages	\$1,250.29	NV	\$8,065.00	\$1,045.00	Baltimore City Tax	\$11,601.98	\$203.19
Social Security Tax Withheld	\$18,270.00	NY	\$595,000.00	\$1,025.00	Cleveland City Tax	\$10,601.78	\$183.09
Medicare Wages	\$3,045,256.00	VA	\$8,055.00	\$1,035.00	Columbus Csd 43802	\$10,801.82	\$187.11
Medicare Tax Withheld	\$44,152.50				Fairview Park Csd 43976	\$3,150.46	\$48.33
Social Security Tips	\$7,435.00				Fredick Count Tax	\$3,750.58	\$60.39
Allocated Tips	\$1,828.00				Generic Local Test	\$29,604.90	\$505.05
Dependent Care Benefits	\$4,147.00				Mount Carmel/Centralia Com	\$18,473.52	\$768.30
NonQualified Plan 457	\$2,610.00				New York City Resident	\$12,701.86	\$195.33
(Box 12 Totals)					Patton (Centre Co) NR EIT	\$17,763.00	\$738.75
A	\$91,312.00				Phildpha City/Phildpha Com	\$1,450.12	\$14.16
AA	\$238,850.00				Portland Placeholder	\$11,601.64	\$173.22
B	\$91,325.00				San Francisco Placeholder	\$1,950.22	\$24.21
(Box 14 Totals)					Scranton (Lackawanna Co) N	\$4,150.66	\$68.43
Stuff	\$94,457.95				State College/Patton T. C	\$11,001.86	\$191.13
Stuff #2	\$17,017.00				Wapeconeta City Tax	\$2,450.32	\$34.26
Things	\$111,458.29				Washington DC Placeholder	\$5,250.54	\$60.57

Verify these totals

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

[Back](#)
[Finish](#)

3.1.5 Manage Employee Access

Only available for W-2, 1095-C, and T4 formsets

For formset types (W-2s, 1095-Cs, and T4s) that allow employee access to view their tax form(s) electronically, there is a 'Manage Employee Access' checklist task. By default, the Employee Access setting will be disabled and require the admin to enable through the [Employee Access setting \(previously discussed in Section 2.2.2.1\)](#) or through the Manage Employee Access checklist task that will launch the administrator into the Employee Access Wizard.

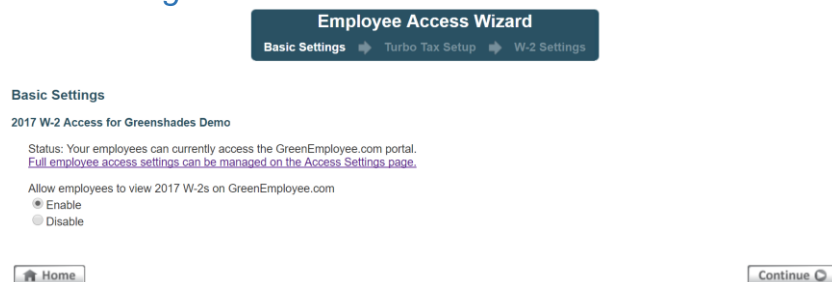
If Employee Access has already been enabled through the formset settings, it will carry-over and display as such within this task.

GreenEmployee.com will track employee access, manage all electronic pre-consents/consents, and provide employees the ability to view and print their tax form(s). For a report of how many employees have consented to receive electronic forms or have viewed their form electronically, see [Section 5.1](#) to review 'User Activity' reports available through Year-End Forms.

Note: Greenshades also supports a web service that enables companies to integrate their own websites, or a new website, with the Year-End Forms portal to allow recipients of any form type to receive their form electronically. Contact sales@greenshades.com for more information.

Year-End Forms User Guide

3.1.5.1 Basic Settings



Employee Access Wizard

Basic Settings Turbo Tax Setup W-2 Settings

Basic Settings

2017 W-2 Access for Greenshades Demo

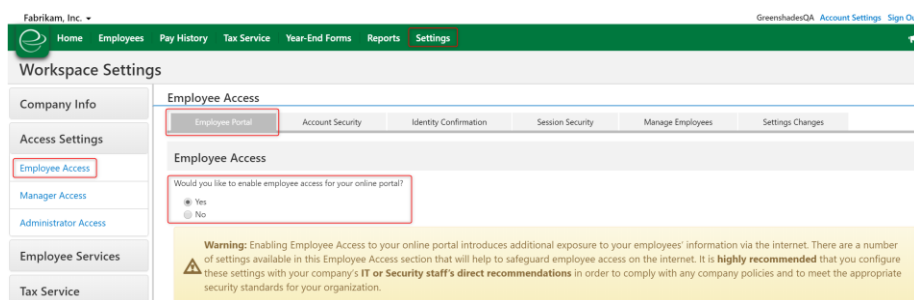
Status: Your employees can currently access the GreenEmployee.com portal.
[Full employee access settings can be managed on the Access Settings page.](#)

Allow employees to view 2017 W-2s on GreenEmployee.com

☒ Enable
☐ Disable

[Home](#) [Continue](#)

It is important to note that you may only enable Employee Access through the Year-Ends Forms portal if the corresponding Employee Access setting in GreenshadesOnline.com is also enabled. Clicking the 'Full employee access settings can be managed on the Access Settings page.' link will navigate you to the GreenshadesOnline.com setting.



Fabrikam, Inc. GreenshadesOnline Account Settings Sign Out

Home Employees Pay History Tax Service Year-End Forms Reports **Settings**

Workspace Settings

Company Info Access Settings **Employee Access** Manager Access Administrator Access Employee Services Tax Service

Employee Access

Employee Portal Account Security Identity Confirmation Session Security Manage Employees Settings Changes

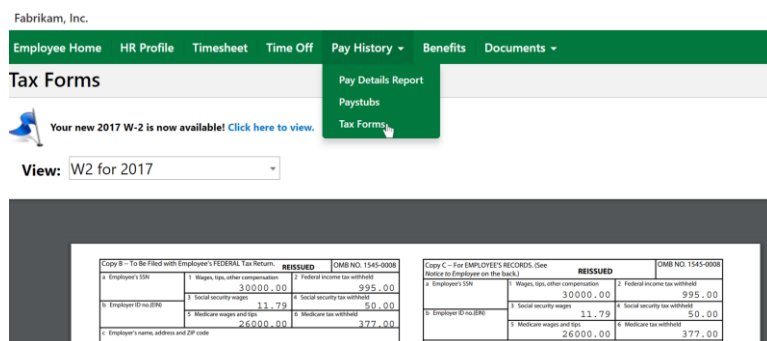
Employee Access

Would you like to enable employee access for your online portal?

☒ Yes
☐ No

Warning: Enabling Employee Access to your online portal introduces additional exposure to your employees' information via the internet. There are a number of settings available in this Employee Access section that will help to safeguard employee access on the internet. It is **highly recommended** that you configure these settings with your company's IT or Security staff's direct recommendations in order to comply with any company policies and to meet the appropriate security standards for your organization.

Once Employee Access is enabled, those employees that have pre-consented or consented to receive their tax form(s) electronically will be able to view their tax form through GreenEmployee.com → Pay History → Tax Forms.



Fabrikam, Inc.

Employee Home HR Profile Timesheet Time Off Pay History Benefits Documents

Tax Forms

Pay Details Report
Paystubs
Tax Forms

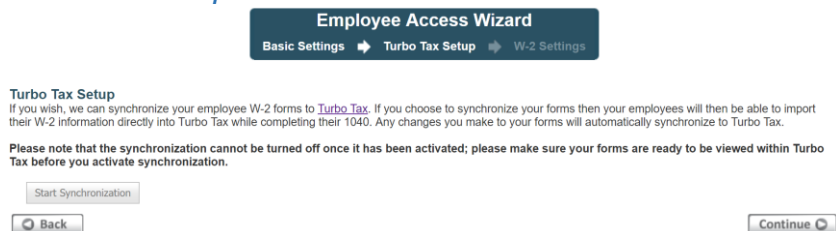
Your new 2017 W-2 is now available! [Click here to view.](#)

View: W2 for 2017

Copy B - To Be Filed with Employer's FEDERAL Tax Return. REISSUED OMB NO. 1545-0008			
1. Wages, tips, other compensation		2. Federal income tax withheld	
Employee's SSN	30,000.00	995.00	
3. Social security wages	11.79	50.00	
4. Medicare wages and tips	26,000.00	377.00	
5. Employer's name, address and ZIP code			

Copy C - For EMPLOYEE'S RECORDS. See Notice to Employee on the back. REISSUED OMB NO. 1545-0008			
1. Wages, tips, other compensation		2. Federal income tax withheld	
Employee's SSN	30,000.00	995.00	
3. Social security wages	11.79	50.00	
4. Medicare wages and tips	26,000.00	377.00	
5. Employer's name, address and ZIP code			

3.1.5.2 Turbo Tax Setup



Employee Access Wizard

Basic Settings Turbo Tax Setup W-2 Settings

Turbo Tax Setup

If you wish, we can synchronize your employee W-2 forms to [Turbo Tax](#). If you choose to synchronize your forms then your employees will then be able to import their W-2 information directly into Turbo Tax while completing their 1040. Any changes you make to your forms will automatically synchronize to Turbo Tax.

Please note that the synchronization cannot be turned off once it has been activated; please make sure your forms are ready to be viewed within Turbo Tax before you activate synchronization.

[Start Synchronization](#)

[Back](#) [Continue](#)

If you would like, Greenshades will synchronize your employee year-end forms data to Turbo Tax. If you choose to synchronize your forms, your employees will then be able to download their W-2 data directly from Turbo Tax while completing their 1040. After beginning synchronization, any changes you make to your forms will automatically synchronize to Turbo Tax.

Please note that the synchronization cannot be turned off once it has been activated; please make sure your forms are ready to be viewed within Turbo Tax before you activate synchronization.


3.1.5.3 W-2/1095-C/T4 Settings

Employee Access Wizard
Basic Settings ➔ Turbo Tax Setup ➔ W-2 Settings

W-2 Settings

What layout should we use for Employee W-2s?

W-2 Layout
B2 for 2 Part Paper ▼



Two copies of the W-2 split horizontally:
Copy B for the employee's federal return
and a Copy 2 to file with a state or local
return.

[Preview](#)

Additional Employee Options

Check the options you wish to enable

- ☒ Provide tax preparation [coupon group headed by H&R Block](#)
- ☒ Employees are allowed to edit their addresses
- ☒ Employees are allowed to edit their names
- ☒ Employees are allowed to edit their social security numbers
- ☒ Approval is required for any employee edits

[Back](#)

Select which admins will receive employee change emails

Administrators that are selected below will receive a notification email informing them that an employee made an edit to a form.

Name	Email
<input checked="" type="checkbox"/> GreenshadesQA	

[Finish](#)

Form specific settings within the Employee Access Wizard allow the administrator to choose which template layout will display when employee's electronically view their form.

There are also additional options to:

- Include a tax preparation coupon sheet with the electronic tax form (with a preview of included vendor coupons)
 - Included coupons vary based on tax form
- Allow employees to edit their address, name, and/or SSN
- Require administrator approval on employee edits
- Elect to receive administrator notifications when an employee edit is made

3.1.6 Email Employees with Links to Tax Forms

Only available for W-2, 1095-C, and T4 formsets

Once Employee Access is enabled, Year-End Forms offers the ability for you to notify your employees of the online/electronic availability of their tax form(s). This is helpful for garnering as many electronic consents as possible, which decreases the amount of year-end forms you are required to distribute by paper. To notify your employees, use the Notification Wizard provided this step within the checklist.

3.1.6.1 Recipients

Notification Wizard

Recipients ➔ Message ➔ Send Notifications

Send Email Notifications to Employees

58 employees have email addresses, 58 of which still need to be emailed about downloading their W-2.

☐ 58 emails will be sent. [Download Recipient List](#)

☒ Exclude employees who have already viewed their W-2 online.

☐ Exclude employees who have already been mailed their W-2s using the Year-End Forms mailing service.

☐ Exclude employees for whom I have printed and distributed W-2s.

☐ Exclude employees who have already been notified by email from this page.

[Why don't some of my employees have email addresses on Year-End Forms?](#)

[Home](#) [Continue](#)

Designate which employees should receive the email notification. Year-End Forms offers multiple options to allow filtering the recipient list to only those employees who you want to notify. You can see the current recipient list in Excel by clicking 'Download Recipient List'. 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 already 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 Forms 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 already 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 employees who you have previously notified using this Notification Wizard.

It is important to note that at least one employee must have an email that was imported from Great Plains, their GreenEmployee profile, imported through the Excel template, or manually added to the employee's 'Login & Other Employee Information' section to use this feature. The link at the bottom of this page will answer why your employees may not have email addresses on Year-End Forms.

3.1.6.1 Message

Notification Wizard

Recipients ➔ Message ➔ Send Notifications

Email Message Content
Alter and approve the email message that will be sent to your employees.

Subject
Greenshades Demo Employees - View Your W-2 Online

Body

Dear Greenshades Demo Employee,

This year our W-2 forms will be available online. You can view your W-2 at <http://faben.greenemployee.com>

To log in you will need to know your Last Name and your custom password OR your Social Security Number. You will be asked to consent to receive an electronic W-2 in place of a paper W-2, and a verification code will be generated that you will need to type in. Once you have consented to receive your W-2 electronically only, you will not receive a paper copy, but you may log in and re-print the electronic copy as many times as you need to.

If you do not access your W-2 this way, you will be issued a paper copy by 1/31/2018.

Sincerely,
GreenshadesQA
Greenshades Demo

Once you have selected the recipients, you can compose the email message to send to your employees. Year-End Forms provides a default message you may use or you edit. 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 to link employees the correct login website.

3.1.6.2 *Send Notifications*

The screenshot shows the 'Notification Wizard' interface with three steps: 'Recipients', 'Message', and 'Send Notifications'. The 'Send Emails' step is active. It contains the following text and form elements:

- Send Emails**
You are now ready to send out emails to your employees. You will receive an email report at greenshadesqa@gmail.com. If you would like to send the email from your mail server instead of ours, please use the "Advanced Options" link below. When you are ready to proceed, click the "Send Emails" button.
- [Hide Advanced Options](#)
Use this section if you wish to send the email notifications from your mail server instead of ours. We do not recommend this approach and cannot provide any support for failures.
- Custom SMTP Server**
mail.greenshades.com
- SMTP Port (Default 25)**
25
- SSL Enabled**
☐ Check this box if SSL is enabled on your SMTP Server
- Credentials**
Domain:
Username:
Password:
- Send the emails from:**
 - ☒ greenshadesqa@gmail.com
 - ☐ NoReply@GreenEmployee.com
 - ☐ Custom Email Address:
-

When you have completed the email message, proceed to 'Send Notifications' and click the 'Send Emails' button. An email report will be sent to the administrator's email address.

An advanced option for sending the emails from your own mail server is also available. This may be preferred for your employee to receive the email from a familiar sender. To do this, click on 'Advanced Options' and complete the information. This option is only recommended for clients who are knowledgeable and experienced with mail server administration, as Greenshades cannot provide support for any failure in this circumstance.

3.1.7 *Distribute any Remaining Tax Forms to your Employees*

Whether you allow your recipients to view their tax form(s) electronically through GreenEmployee.com, at least some portion of your forms may need to be issued on paper to their recipients.

Greenshades offers two methods by which to distribute your tax forms by paper:

- 1) Ask Greenshades to Mail Remaining Forms
- 2) Distribute Remaining Forms Yourself (Download and Print)

Both distribution methods are discussed in greater detail and walkthrough in [Section 4](#).

3.1.8 E-File State Return

Only available for W-2 formsets

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	Show All	Filter	Filter	Filter
View History	Alabama	Submitted	4020	2/28/2018	
File Now	Colorado	Not Filed	10	1/31/2018	
File Now	Delaware	Not Filed	101	4/2/2018	
View History	Illinois	Submitted	417	1/31/2018	
File Now	Arizona	Not Filed	43-2238	2/28/2018	
File Now	Ohio	Not Filed	01-549842	1/31/2018	

If you have state wages in a state or states that accept electronic filings, Year-End Forms 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 with 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 checklist. 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 that 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.

3.1.8.1 State E-File Wizard: Submitter Information

The first step of the State E-File Wizard requires you to verify the Contact Name, Email, and Phone for the submission.

E-File Wizard

Submitter Information ➤ Review Totals ➤ Submit File

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 SSA if needed.

Contact Email
Enter the email of the employee who should be contacted by the SSA if needed.

Contact Phone
Enter the phone number and extension of the employee who should be contacted by the SSA if needed.
 (904) 555-1234 ext.

3.1.8.2 State E-File Wizard: Review Totals

The 'Review Totals' step will calculate the totals and present them for your review. If errors are present, Year-End Forms will require that you correct these


errors before you can submit this filing. When you have reviewed and approved the totals, click 'Continue' to continue to submitting.

3.1.8.3 Downloading State E-File

You may download the E-File and the details file by clicking the 'View History' link next to the State.

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	Show All	Filter	Filter	Filter
View History	Alabama	Submitted	4020	2/28/2018	
File Now	Colorado	Not Filed	10	1/31/2018	
File Now	Delaware	Not Filed	101	4/2/2018	
View History	Illinois	Submitted	417	1/31/2018	
File Now	Arizona	Not Filed	43-2238	2/28/2018	
File Now	Ohio	Not Filed	01-549842	1/31/2018	

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

3.1.9 E-File Federal Return

E-Filing is available for you to submit the information on your forms to the Federal government. The process has 3-steps that should be used only once to file your information.

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. You will want to remove as many warnings as possible before e-filing. The information will quickly transfer to the government and cannot be stopped once you submit.

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

To start the Federal E-File process, use the link on the task-driven homepage checklist. 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	

3.1.9.1 E-File Wizard: Submitter Information

You will also notice that there is e-file information you can edit. This information should be entered correctly. The ability to edit it varies depending on the E-File you are creating.

Year-End Forms User Guide

E-File Wizard
Submitter Information ➔ Review Totals ➔ Submit File

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 SSA if needed.

Contact Email
Enter the email of the employee who should be contacted by the SSA if needed.

Contact Phone
Enter the phone number and extension of the employee who should be contacted by the SSA if needed.
 ext.

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

Notice: Your company will be automatically billed for this tax return unless you have paid in advance.

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

3.1.9.2 Review Totals

The next screen will allow you to view the totals. It is important to review them as they are the 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 1/31/2018

Year-End Forms is prepared to submit a report with employees/wages through 12/31/2017:

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 to submission.

3.1.9.3 *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 ready to E-File. Once the file is submitted, you will be given a Submission ID on the screen. Please keep your submission ID, as it is important to track your E-File with our support department.

Finally, you can return to the e-file screen at any time to get an updated status of your submission. It will track all submissions you have made so you can ensure that it was properly accepted by the government.

EFile History

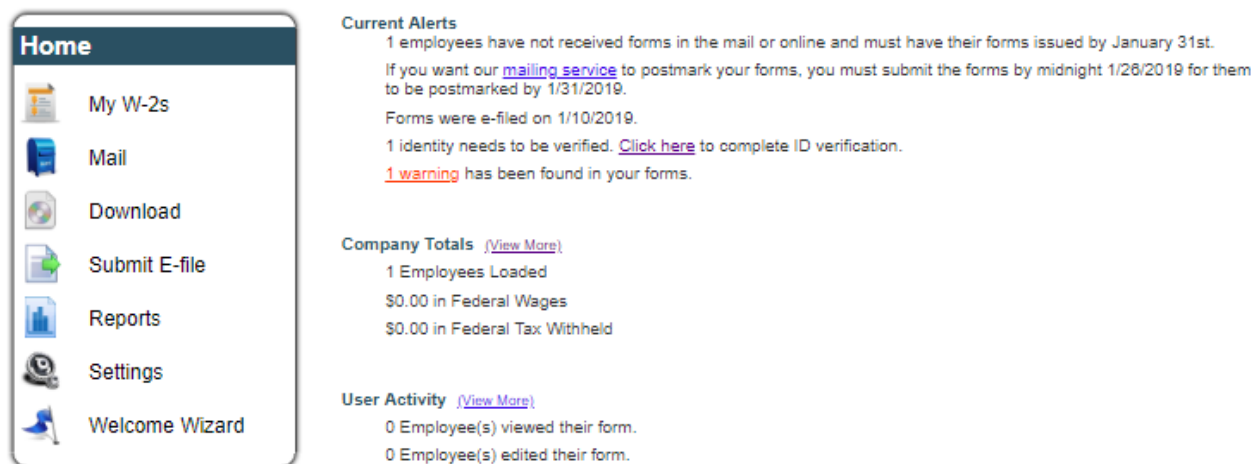
This page contains information about your recent filing.

Summary and Status	
Filing Name:	W-2 Report
Jurisdiction:	US
Agency:	Social Security Administration
Due Date:	1/31/2018
Date Filed:	12/13/2017 3:58:19 PM EDT
Current Status:	Submitting
Submission Tracking #:	FDM00803353
Download Link:	Click to Download E-File
Details File:	Click to Download Details File

Totals from this Return	
Total	Amount
Allocated Tips	\$1,827.00
Federal Tax Withheld	\$59,247.00
Federal Wages	\$3,277,000.00
Medicare Tax Withheld	\$44,152.50
Medicare Wages	\$3,045,000.00
Social Security Tax Withheld	\$18,270.00
Social Security Tips	\$7,435.00
Social Security Wages	\$1,250.34
Total Annual Tax Withheld	\$121,669.50
Total Employees	58

3.2 The Classic View

Administrators who are accustomed to older versions the year-end forms portal, may prefer using the Classic Homepage. To switch to the Classic View, click the link in the bottom left-hand corner of the homepage. While the Classic view allows the administrator to complete all necessary year-end tasks, it does not provide a checklist, so please ensure you are completing all year-end steps.



3.2.1 Left Side Menu

The left-side menu contains the traditional menu options supported by Year-End Forms, including:

- [My \[Tax Forms\]](#) – This menu option takes navigates to the 'View Forms' page.
- [Mail](#) – This menu option will navigate to the Mail Service Wizard, which displays all previous mail batches and allows the administrator to create a new one.
- [Download](#) – This menu option will navigate to the Download and Print Wizard, which displays all previous batches and allows the administrator to create a new one.
- [Submit E-File](#) – This menu option launches the E-File Wizard where the administrator can E-File State and Federal forms.
- [Reports](#) – This menu option opens the reports page where the administrator can generate several important data driven reports.
- [Settings](#) – This menu option allows the administrator to view and change the current settings for the formset.

- [Welcome Wizard](#) – This menu option launches the Welcome Wizard for this formset.

3.2.2 Current Alerts

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 administrator to any warnings with the forms and if any recipients have not been notified that their forms are available electronically through GreenEmployee.com. Based on the alert, links will be provided to allow you to access more information and/or address the alert.

Current Alerts

34 employees have not received forms in the mail or online and must have their forms issued by January 31st.

If you want our [mailing service](#) to postmark your forms, you must submit the forms by midnight January 24 for them to be postmarked by 1/31/2018.

Forms were e-filed on 12/13/2017.

3 SSNs are invalid (according to SSA) and need to be fixed. [Click here](#) to complete ID verification.

[15 warnings](#) have been found in your forms.

You currently have one or more unpaid invoices for services ordered on this website. [Click here](#) to view them.

58 employees who have email addresses have not been notified that their W-2s are online. [Click here](#) to notify them.

[1 employee](#) has submitted change requests for your review.

3.2.3 Company Totals

This section provides the total numbers for the formset. 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.

Company Totals [\(View More\)](#)

59 Employees Loaded

\$3,567,000.00 in Federal Wages

\$59,247.00 in Federal Tax Withheld

3.2.4 User Activity

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 several reports which provide more information.

User Activity [\(View More\)](#)

0 Employee(s) viewed their form.

0 Employee(s) edited their form.

3.2.5 *Form Batches*

This section lists the batches of forms that an administrator has downloaded or sent to the Greenshades 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 new ones.

Form Batches

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

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

4 Distributing Year-End Forms

To begin the process of mailing, click the appropriate task link in the task-driven homepage checklist or on 'Mail' from the classic view homepage. This will allow you to see previous mail service orders submitted and create new ones.

To ensure your forms are postmarked by the appropriate deadline, please make sure to submit your mail order as soon as possible and before the Greenshades deadlines. These dates are posted in the Year-End Forms distribution checklist step.



7. Distribute any remaining W-2s to your Employees

1 employee must still be issued a paper form.

0 employees consented to receive their form online-only, 0 employees first received or will receive their form through our Print and Mail Service, and 0 employees first received their paper form from you.

You have two options to distribute your forms: use our Print and Mail service or distribute yourself. Deadlines vary and are listed below.

7a. Ask us to Mail Remaining W-2s

Place your order today for just \$1.46 per form
The price increases to \$1.88 on 1/16/2019. Order your forms on 1/26/2019 for guaranteed postmark by 1/31/2019.

OR

7b. Distribute Remaining W-2s Yourself by 1/31/2019

You may download and print the remaining W-2s to mail or hand out to your employees by 1/31/2019.

4.1 Ask Greenshades to Mail Remaining Forms

Mail Service Status Page

Order New Mail Service

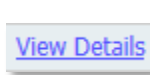
Click the "New Order" button below to request that we print and mail forms to your employees on your behalf. You will get to choose exactly how we will send these forms and will be quoted a total price before confirming your order.

[New Order](#)

Status of Previous Mail Service Orders

Name	Status	Owner	Submitted
<input type="text" value="Filter"/>	<input type="text" value="All"/>	<input type="text" value="All"/>	<input type="text" value="Filter"/>

4.1.1 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 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.

According to our initial estimate, these forms should be postmarked within 1 business day of **Monday, 12/18/2017**

Original - Corrected - Nancy Buchanan

Status: Queued
Contents: 31 forms for 31 employees
Owner: greenshadesqa@gmail.com

This batch has been broken down into smaller parts to provide detailed tracking information

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

Printed: 0 / 31 (0.00%)
Sealed: 0 / 31 (0.00%)
Packaged: 0 / 31 (0.00%)

History for this Batch

Action	Time
Submitted	12/12/2017 8:50 PM
Processed	12/12/2017 8:55 PM
Queued	12/12/2017 8:59 PM

Legend

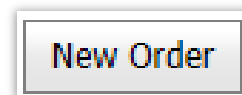
Submitted Your order has been received and will be processed shortly.
Processed Your order has been processed and is waiting to be queued for printing.
Queued The forms have been added to the print queue and will begin printing soon.
Printed The forms are printed and are waiting to be pressure sealed 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.

Preferences for this Batch

Option	Selection
Shipping	Greenshades Shipping
Coupon	No Preference

4.1.2 Submitting a New Mail Service Order to Greenshades

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



4.1.2.1 Choose Forms

Mail Service Wizard

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

How Forms Were First Issued

0 form(s) were mailed by us per your request.
 0 form(s) were printed and mailed by you.
 27 employee(s) were not issued forms by any method above
 32 employee(s) consented to receive their form online only.

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

[Back](#) [Continue](#)

Choose which forms you wish to mail to your recipients.

- **All tax forms in this workspace** – Creates a complete set of forms for all employees in your formset
 - If any forms within the formset have been edited/corrected and marked as such, you will receive an additional option to indicate if

this batch should include the corrected forms or non-corrected forms.

- If you require to distribute for both, you will need to submit two different orders.

Mixed Batch

You selected some forms that are marked as needing corrections along with other forms that do not need corrections. You may only include one of these kinds of forms in a single order.

Please make your selection below and click 'Continue'.

- ☒ Only include original forms **not** in need of any corrections (1 forms)
- ☐ Only include forms needing a Reissued Statement or Corrected W-2 (58 forms)

- **All forms that must still be issued** - Mail forms that you are required to still distribute (i.e. forms that have not already been downloaded online or included in a Mail Service or Download and Print batch)
- **Let me choose specific forms** – Allows the administrator individually select the employee forms that they wish to send

Choose the Forms to Mail

Use the filters below to indicate which forms you want to mail. Click 'Continue' when done.

<input type="checkbox"/> Unselect All <input checked="" type="checkbox"/> Select All <input type="button" value="Excel Export"/> <input type="button" value="Add Columns"/>							
Select	SSN	Last Name	First Name	City	State	Zip	Country Code
<input type="checkbox"/>	Filter	Filter	Filter	Filter	Filter	Filter	Filter
<input checked="" type="checkbox"/>		Ackerman	Pilar	JACKSONVILLE	FL	32256	US
<input checked="" type="checkbox"/>		Barbariol	Angela	BROOKFIELD	CO	80020	US
<input type="checkbox"/>		BARR	Adam	RANTOUL	IL	61866	US

Page 1 of 6 (59 items) < [1] 2 3 4 5 6 >

Rows per page: 10

If you choose to select specific forms, this page will provide a search/filtering feature, which allows the administrator to search by various options/columns. If you have forms with different distribution deadlines (such as the 1099-Misc), 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.

4.1.2.2 View Totals

Based on the forms you selected, the next page will provide you with the totals for this order. This will include total forms loaded, totals amounts, and other important information. These totals represent the data that will be included on your forms and mailed to your recipients. Please review this information carefully to ensure accuracy before submitting the batch for Mail Service processing.

Year-End Forms User Guide

Mail Service Wizard

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

Totals For This order

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

Employees Loaded	58	state	State Wages	State Tax	Locality	Local Wages	Local Tax
Forms with Wages	58	FL	\$35,955.00	\$4,743.00	Abngton Hts/Cirke Grm B. C	\$10,201.70	\$175.05
Federal Wages	\$3,567,000.00	KY	\$8,855.00	\$1,133.00	Adamstown (Lancaster) BW N	\$20,803.48	\$358.14
Federal Tax Withheld	\$59,247.00	MN	\$8,035.00	\$1,015.00	Athens (Bradford County) R	\$21,353.42	\$354.21
Social Security Wages	\$1,250.29	NV	\$8,065.00	\$1,045.00	Baltimore City Tax	\$11,601.98	\$203.19
Social Security Tax Withheld	\$18,270.00	NY	\$595,000.00	\$1,025.00	Cleveland City Tax	\$10,601.78	\$183.09
Medicare Wages	\$3,045,256.00	VA	\$8,055.00	\$1,035.00	Columbus Csd 43802	\$10,801.82	\$187.11
Medicare Tax Withheld	\$44,152.50				Fairview Park Csd 43976	\$3,150.46	\$48.33
Social Security Tips	\$7,435.00				Fredrick Count Tax	\$3,750.58	\$60.39
Allocated Tips	\$1,828.00				Generic Local Test	\$29,604.90	\$505.05
Dependent Care Benefits	\$4,147.00				Mount Carmel/Centralia Com	\$18,473.52	\$768.30
NonQualified Plan 457	\$2,610.00				New York City Resident	\$12,701.86	\$195.33
(Box 12 Totals)					Patton (Centre Co) NR EIT	\$17,763.00	\$738.75
A	\$91,312.00				Phildipa City/Phildipa Com	\$1,450.12	\$14.16
AA	\$238,850.00				Portland Placeholder	\$11,601.64	\$173.22
B	\$91,325.00				San Francisco Placeholder	\$1,950.22	\$24.21
BB	\$102,425.00				San Francisco Placeholder1	\$6,450.78	\$84.69
C	\$91,338.00				Scranton (Lackawanna Co) N	\$4,150.66	\$68.43
CC	\$96,437.00				Scranton SD/Scranton CLS B	\$5,400.74	\$78.57
D	\$84,300.00				Seattle Local Placeholder	\$8,851.26	\$132.93
DD	\$136,408.00				State College/Patton T. C	\$11,001.86	\$191.13
EE	\$136,425.00				Wapakoneta City Tax	\$2,450.32	\$34.26
G	\$153,408.00				Washington DC Placeholder	\$5,250.54	\$60.57
H	\$153,425.00				Yonkers Resident	\$3,250.48	\$50.34
J	\$153,442.00						
R	\$6,005.00						
(Box 14 Totals)							
And	\$102,431.12						
And #2	\$9,010.00						
Stuff	\$94,457.95						
Stuff #2	\$17,017.00						
Things	\$111,458.29						

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

4.1.2.3 Delivery Options

Mail Service Wizard

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


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.

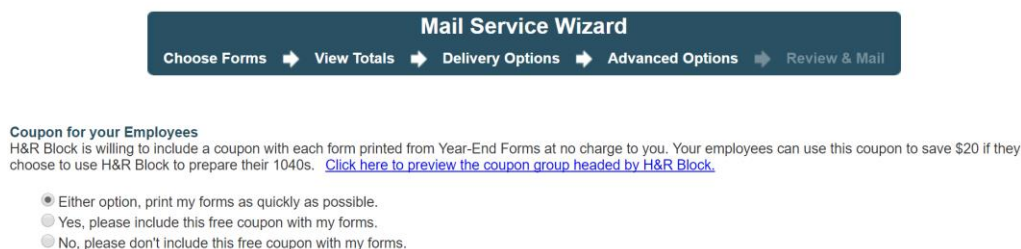
[\(Download W-2 Instructions\)](#)

Greenshades Mail Service provides two options when you request that we distribute your tax forms:

- 1) Have Greenshades Software Print and Mail these forms to your recipients
 - This is typically the preferred option unless you intend on distributing the forms to recipients in person.

- 2) Have Greenshades Software print these forms and ship them to your location for you to distribute.
 - If you prefer for Greenshades to box and ship your forms through this option, please provide the shipping and contact information required.

4.1.2.4 *Advanced Options*



The screenshot shows the 'Mail Service Wizard' interface. At the top, a dark blue header bar contains the title 'Mail Service Wizard' and a navigation menu with five items: 'Choose Forms', 'View Totals', 'Delivery Options', 'Advanced Options' (which is highlighted with a right-pointing arrow), and 'Review & Mail'. Below the header, the section is titled 'Coupon for your Employees'. The text explains that H&R Block is willing to include a coupon with each form printed from Year-End Forms at no charge to the user, and that employees can use this coupon to save \$20 if they choose to use H&R Block to prepare their 1040s. A link is provided to 'Click here to preview the coupon group headed by H&R Block.' Below this text are three radio button options: 'Either option, print my forms as quickly as possible.' (which is selected), 'Yes, please include this free coupon with my forms.', and 'No, please don't include this free coupon with my forms.'

The 'Advanced Options' page of the Mail Service Wizard is provided when there are additional options to review for your current forms. This page may not always appear, depending on form type.

For W-2s and 1099-MISCs, you are prompted to select from the available preference options. This will cover whether to use pressure-seal forms or paper and envelopes. Also, whether to include a coupon on the form for your recipient. For any option, you will always have the choice to not indicate a preference and allow Greenshades to process forms as quickly as possible for expediency.

4.1.2.5 *Review and Mail*

On the final page of the Mail Service Wizard, enter a uniquely identifiable name for this batch, review the cost breakdown, and to agree to the End User License Agreement. An estimated processing schedule will display as well to indicate when you can expect your tax forms to be postmarked by.

If you submit your mail service order prior to the Greenshades 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 Greenshades Support.

Year-End Forms User Guide

Mail Service Wizard
Choose Forms ➔ View Totals ➔ Delivery Options ➔ Advanced Options ➔ Review & Mail

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.

Greenshades Demo Corp 1.10.2019 (1 for

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 2018 Tax Form Mail Service -- January 10th through January 15th	1	\$1.46	\$1.46
Total			\$1.46

Estimated Processing Schedule
We estimate that your forms will be postmarked no later than **Tuesday January 15, 2019**. This estimate is based on 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 printing and mailing your tax forms. All recipient addresses are processed through the [United States Postal Service MOVE Update](#) system. This may change the address if the recipient has filed a MOVE Update form in the last 18 months.

You are responsible for reviewing your W-2 forms and ensuring they are correct prior to requesting their mailing. You may view the forms [here](#). Please review our [End User License Agreement](#) and type your name into the box below to agree and authorize us to proceed.

4.2 Distribute Remaining Forms Yourself Download and Print

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.

Pages to Print
☒ All
☐ Current page
☐ Pages

Page Sizing & Handling

☐ Fit
☐ Actual size
☐ Shrink oversized pages
☐ Custom Scale: %

Recommended settings when printing from Adobe Acrobat
Use "Actual Size" on most printers. Some printers may need "Fit" Test a single page with your envelopes

Status of Previous Self-Distribute Batches

		Name	Status	Owner	Completed
		Filter	All	All	Filter
Download	More Info	Test_for_New_Employee_-_Michelle_Newbie	Processed	GreenshadesQA (formerly ChrisV)	25/25 Employees on 25 total pages
Download	More Info	W-2C_template_test_-_2_forms	Processed	GreenshadesQA (formerly ChrisV)	2/2 Employees on 2 total pages
Download	More Info	W-2C_batch,_but_should_be_Corrected	Processed	GreenshadesQA (formerly ChrisV)	30/30 Employees on 30 total pages

Rows per page:

4.2.1 Previous Self-Distribute Batches

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

[Download](#)

To download a PDF batch, click the 'Download' link 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 the 'More Info' link next to the batch name. This will provide 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.

[More Info](#)

Information about: **Test_for_New_Employee_-_Michelle_Newbie**
This batch is currently Processed.

Owner	greenshadesqa@gmail.com
Issued to employees?	No (Change)
Requested at	12/13/2017 1:32:45 PM
Ready at	12/13/2017 1:34:10 PM
Size	25 employees on 25 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](#)

4.2.2 Creating a New Download Batch

Creating a new download batch may be useful for distributing the tax forms yourself and/or archiving prior year 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 document. If you wish to do both, you will need to complete the wizard twice.

[New Download Batch](#)

To create a new download batch, make sure you are working in your desired tax form and tax year formset, then navigate to the 'Self-Distribute Batch Status Page'.

4.2.2.1 Choose Forms

Download and Print Wizard

[Choose Forms](#) ➔ [View Totals](#) ➔ [Delivery Options](#) ➔ [Advanced Options](#) ➔ [Review & Download](#)

How Forms Were First Issued

0 form(s) were mailed by us per your request.
0 form(s) were printed and mailed by you.
27 employee(s) were not issued forms by any method above
32 employee(s) consented to receive their form online only.

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

Choose which forms you wish to mail to your recipients.

- **All tax forms in this workspace** – Creates a complete set of forms for all employees in your formset

- If any forms within the formset have been edited/corrected and marked as such, you will receive an additional option to indicate if this batch should include the corrected forms or non-corrected forms.
 - If you require to distribute for both, you will need to submit two different batches.

Mixed Batch

You selected some forms that are marked as needing corrections along with other forms that do not need corrections. You may only include one of these kinds of forms in a single order.

Please make your selection below and click 'Continue'.

- ☒ Only include original forms **not** in need of any corrections (1 forms)
- ☐ Only include forms needing a Reissued Statement or Corrected W-2 (58 forms)

- **All forms that must still be issued** – Include forms in the batch that you are required to still distribute (i.e. forms that have not already been downloaded online or included in a Mail Service or Download and Print batch)
- **Let me choose specific forms** – Allows the administrator individually select the employee forms that they wish to include

Download and Print Wizard

[Choose Forms](#) ➔ [View Totals](#) ➔ [Delivery Options](#) ➔ [Advanced Options](#) ➔ [Review & Download](#)

Choose the Forms to Download
Use the filters below to indicate which forms you want to download. Click 'Continue' when done.

Select	SSN	Last Name	First Name	City	State	Zip	Country Code
<input type="checkbox"/>	Filter	Filter	Filter	Filter	Filter	Filter	Filter
<input checked="" type="checkbox"/>		Ackerman	Pilar	JACKSONVILLE	FL	32256	US
<input checked="" type="checkbox"/>		Barbariol	Angela	BROOKFIELD	CO	80020	US
<input checked="" type="checkbox"/>		BARR	Adam	RANTOUL	IL	61866	US
<input type="checkbox"/>		Bonifaz	Luis	Isle of Smlap	SC	29451	US

Page 1 of 6 (59 items) Rows per page: 10

If you choose to select specific forms, this page will provide a search/filtering feature, which allows the administrator to search by various options/columns. If you have forms with different distribution deadlines (such as the 1099-Misc), 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.

4.2.2.2 View Totals

Based on the forms you selected, the next page will provide you with the totals for this batch. This will include total forms loaded, totals amounts, and other important information. These totals represent the data that will be included on

your forms to distribute to your recipients. Please review this information carefully to ensure accuracy before submitting the batch for PDF generation or CD order.

Download and Print Wizard

[Choose Forms](#) ➔ [View Totals](#) ➔ [Delivery Options](#) ➔ [Advanced Options](#) ➔ [Review & Download](#)

Totals For This batch
Below you will find the totals from this batch of forms.

Employees Loaded	3		state	State Wages	State Tax		Locality	Local Wages	Local Tax
Forms with Wages	3								
Federal Wages	\$377,000.00								
Federal Tax Withheld	\$2,982.00								
Social Security Wages	\$34.25								
Social Security Tax Withheld	\$120.00								
Medicare Wages	\$75,256.00								
Medicare Tax Withheld	\$1,087.50								
Social Security Tips	\$6.00								
Allocated Tips	\$12.00								
Dependent Care Benefits	\$132.00								
NonQualified Plan 457	(\$30.00)								

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

4.2.2.3 Delivery Options

Download and Print Wizard

[Choose Forms](#) ➔ [View Totals](#) ➔ [Delivery Options](#) ➔ [Advanced Options](#) ➔ [Review & Download](#)

Delivery Options

☒ Download a PDF of these forms to your computer for you to distribute
☐ Order a CD of these forms for you to distribute

Sort Forms by:

Last Name ▼

Form Layout

B2 for 2 Part Paper ▼



Two copies of the W-2 split horizontally: Copy B for the employee's federal return and a Copy 2 to file with a state or local return.
[\(Download W-2 Instructions\)](#)

Greenshades Download and Print provides two options when you request to self-distribute your tax forms:

- 1) Download a PDF of these forms to your computer for you to distribute
- 2) Order a CD of these forms for you to distribute

4.2.2.4 Advanced Options

Download and Print Wizard
Choose Forms ➔ View Totals ➔ Delivery Options ➔ **Advanced Options** ➔ Review & Download

Paper and Envelopes
The forms you are going to receive are designed to fit properly on the perforated paper and envelopes used by Greenshades Software. Please match the codes on the bottom of your perforated paper and on the inside flap of your envelopes to the codes below to ensure that the forms will fit properly when printed.

Paper Code: WONEPERF05* **OR**
WONEPERFI05
Envelope Code: DWENV05

* Paper Code that will be sent if ordered from Greenshades.

Click [here](#) to order more paper or envelopes for my forms.

The 'Advanced Options' page of the Download and Print Wizard is provided to allow the administrator to order paper and envelopes. Click 'here' to navigate to a third-party vendor to order printing supplies from directly. Please reference the Paper and Envelope Codes provided on this page when ordering to ensure proper fit with the chosen template chosen in the previous step.

4.2.2.5 Review and Mail

Download and Print Wizard
Choose Forms ➔ View Totals ➔ Delivery Options ➔ Advanced Options ➔ **Review & Download**

Review & Download
Depending on the number of forms you wish to download, it may take some time to prepare them. In order to allow you to continue to work on this site without waiting, Year-End Forms will process them and send you an email when this batch of forms is ready for download.

Intent to Deliver
☒ Please check this box if you intend to print this batch of forms and then deliver them to your employees. We will consider them delivered and will not prompt you to issue them again.

Batch Name
Please choose a name for this batch. We will use this name to notify you when the batch has processed.

On the final page of the Download and Print Wizard, enter a uniquely identifiable name for this batch. Check the 'Intent to Deliver' checkbox if you intend to print this batch and distribute to your employees' recipients. Greenshades will consider the form(s) distributed and will no longer prompt to issue/distribute them.

5 Year-End Forms Reports

Year-End Forms supports three types of reports:

- 1) User Activity Reports
- 2) Change Reports
- 3) Formset Reports

To access reports, click 'My Reports' from the task-driven or classic views.

Year-End Forms Reports

The reports below will give you insight into your recipients' actions as well as information about the forms you have loaded.

User Activity Reports

[Employees who have consented to not receive a paper copy of their form](#)

[Employees who must still receive a paper copy of their form](#)

[Employees who have viewed their form](#)

[Employees who have edited their form](#)

[Administrator activity log](#)

Change Reports

[Changes made to forms](#)

Formset Reports

[Overall totals for your forms](#)

[How forms were issued](#)

[All form data](#)

[Basic formset info](#)

[User email addresses](#)

5.1 User Activity Reports

5.1.1 *Employees who have consented to not receive a paper copy of their form*

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

5.1.2 *Employees who must still receive a paper copy of their form*

This report provides a list of employees who have not consented to review their form electronically through GreenEmployee.com and must still receive a paper copy. An Excel version of this report is available. This report may be helpful when determining which forms to distribute.

5.1.3 *Employees who have viewed their form*

This is a report of which employees viewed their form electronically through GreenEmployee.com and when they viewed it. If a recipient viewed their form more than once, a separate entry is recorded for each view.

5.1.4 Employees who have edited their form

If you [enabled employees to edit certain fields on their form](#), this report provides a record of when edits were made and by whom. For further information on changes made, see the [‘Change made to forms’ report](#).

5.1.5 Administrator activity log

This report provides a record of all administrator actions taken within 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.

5.2 Change Reports

5.2.1 Changes made to forms

This report provides a comprehensive record of all changes made to recipients' 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.

5.3 Formset Reports

5.3.1 Overall totals for your forms

This report will provide you the totals for your current formset. This will include the 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.

5.3.2 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 will not be included in this report.

5.3.3 All form data

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

5.3.4 Basic formset info

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

5.3.5 User email addresses

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

For additional support please contact us.

(888) 255-3815 ext.1

support@greenshades.com

www.greenshades.com