

Greenshades Payroll Tax Service

TIPS & FREQUENTLY ASKED QUESTIONS



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Tax Service Home Page

The Tax Service home page consists of two parts: the Upcoming Returns and Payments, and the Historical Returns and Payments.

Upcoming Returns and Payments

The Upcoming Returns and Payments screen is a great way to track all of your filings and payments. The Greenshades Due Date is always one business day prior to the jurisdiction's due date. Submissions made on Greenshades Online must be made by 11 a.m. EST that day to be considered "on time." If you submit your filing/payment "on time," Greenshades guarantees that we will submit the filing or payment on time to the relevant jurisdiction.

Did You Know: Depending on the jurisdiction, your filing or payment will be submitted one of several ways. Many jurisdictions allow a direct file transfer from Greenshades. For others, we may run a script that "crawls" their submission web page to upload and submit your filing or payment. In some cases, your Tax Service Representative will manually submit the filing by mail. This is why we show a Greenshades Due Date one day before the jurisdiction's due date.

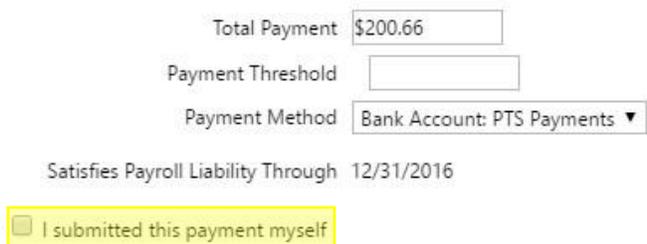
Greenshades will only show one Payment or Return at a time. Once you make a payment for a certain jurisdiction, the next payment will show up when we see new amounts from your accounting package. If multiple payrolls are present, we will only show the next due payment.

Additional payments are shown as "Future Payments" on the screen of the currently due payment.

Pay Now

There are a few important things to remember when on the Pay Now screen.

You have an option that says "I submitted this payment/filing myself" meaning that you have made the submission yourself, and do not want Greenshades to submit it for you. When you click Submit, we will track the payment in the Historical section so that your quarterly/annual returns will be accurate.



The screenshot shows a form with the following fields and values:

- Total Payment: \$200.66
- Payment Threshold: (empty)
- Payment Method: Bank Account: PTS Payments (dropdown menu)
- Satisfies Payroll Liability Through: 12/31/2016
- I submitted this payment myself (checkbox highlighted in yellow)

If you made a few payments manually without marking them on Greenshades Online, and do not want to go through the steps for all of them to correct your tracking, you can ask your Tax Service Representative to import all payments for you.

Tip: Some jurisdictions require the filing and payment be submitted together; Greenshades refers to these as "married" submissions. If you check a married filing as "I submitted this filing myself," make sure that you mark the payment as also manually submitted.

Did You Know: At the top of each “Pay Now” screen, we show you the amount you owe, and the payroll date to which it corresponds. If you click on the “Explain Why” link, we will elaborate further on why Greenshades calculated that amount.

You owe \$200.66 by 1/30/17 11:00 AM EST for payroll run through 12/31/16. [Explain Why](#)

\$200.66 was accrued from taxable wages of \$1,976.56 on 12/31/2016 and is due on 1/30/2017.

- You chose a payment frequency of 'Quarterly' when you set up GreenshadesOnline.com to track this tax liability.
- Quarterly payments must be made by the last day of the month following the end of the quarter.
- You must submit payment to Greenshades by 11AM EST the day before the payment is due to the government agency.

Payment Amount	<input type="text" value="\$200.66"/>
Total Payment	<input type="text" value="\$200.66"/>
Payment Threshold	<input type="text"/>
Payment Method	<input type="text" value="Bank Account: PTS Payments ▼"/>

Tip: You cannot edit the Total Payment box. If you need to change this amount, make your edits in the Payment Amount box, and then click outside all boxes. After a few seconds, the Total Payment box will repopulate with the new amount.

On each “Pay Now” screen, there is a Year-To-Date Reconciliation section. This feature will show you your YTD liability, YTD payments, and your current payment. If there is a difference, Greenshades Online will display the amount in red if it is underpaid, or green if it is overpaid. Differences typically occur when there was a voided check in a previous period.

Year-To-Date Reconciliation

For the 2016 calendar year, your total Employer and amount paid is:

Employer

YTD Liability: \$4,456.75
YTD Payment: \$4,256.09
Current Payment: \$200.66
Difference: \$0.00

[Update current amounts](#) to reconcile with YTD amounts.

Tip: If you click on the link under Year-To-Date Reconciliation to “update current amounts,” we will update the Payment Amount and Total Payment to reflect that difference.

File Return

Clicking “File Return” will show you the details Greenshades has prepared for the filing in question.

Tip: You can always edit the information in the return by through “Click Here to make edits to this data.” This takes you to the Filing Editor, where you will see a drop down field at the top of your screen to choose what you need to edit.

Summary of Return



You must file a 2016 return by 1/27/2017 at 11:00 AM EST. Greenshades Online is prepared to submit this return on your behalf with employees and wages through 12/31/2016.

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

Greenshades Online will show any errors detected in the Warnings and Errors section. Click the “Filing Editor” link to correct those errors.

Warnings and Errors

The following errors must be corrected before you can submit this tax return:

	Who	Message
Fix	GS PTS Sales	The required field 'MMREFPin' is missing.

[Use the Filing Editor to fix these errors before proceeding.](#)

Historical Returns and Payments

This section shows you everything that you’ve submitted, whether through Greenshades or something you marked as submitted manually. If you click on “View” next to a submission, you will be able to see the totals that were submitted.

Did You Know: When you view any historical payment, we provide a receipt of the payment. Just click on the “Click here to download your submission receipt,” link.

Submission Tracking #: FGG00647816

Submission Method: GreenshadesOnline Submission

Details File: [Click Here to Download The Details File](#)

Tip: If you aren't sure if something was submitted manually or if Greenshades submitted it, you can look at the Submission Status. If it says "GreenshadesOnline Submission" then Greenshades submitted it. If it says "Client Submission", you marked it as manually submitted.

Submission Tracking #: PGG00653475

Submission Tracking #: FGG00647816

Submission Method: Client Submission

Submission Method: GreenshadesOnline Submission

Go To Tracking Information

Tracking your jurisdictions properly is the most important part of Greenshades Tax Services. Once you enable tracking for a certain state/locality, you can add required information, and set up options.

Tip: Greenshades Online calculates what we believe is the appropriate submission frequency, based on the jurisdiction's guidelines. This is not always accurate, as it can vary by company. The best way to confirm your payment frequency is to check with your jurisdiction.

Current Tracking Options

New Mexico Withholding

Tracking Enabled (I have read and agree to the [Terms of Use for this Submission.](#))

All payments have been made for paychecks through a checkdate of .

I am currently remitting these payments on a basis.



The Semi-Annual payment schedule selected above appears to be correct for NM Withholding. Your liability over the last semi-annual period (July-December of 2016) was \$0.00. An employer whose semi-annual liability is less than \$1,200 is a Semi-Annual payer.

At the bottom of the page, there are fields to provide credentials needed for Greenshades to submit your filings and payments. Depending on jurisdiction, there may also be some optional fields.

Tip: The "Default Payment Threshold" is optional, but very useful. At times, Greenshades Online may round amounts in a different way than the jurisdiction rounds, and the totals differ by a few cents. If you enter a small amount (e.g. \$1) and the rounding difference is within that amount, then Greenshades will submit the return with the state's number. If this is blank and the amounts differ, then we will reject the payment and open a ticket with your Tax Service Representative.

Enter your username for the New Mexico TAP website

Enter your password for the New Mexico TAP website

(Optional) Default Payment Threshold for this payment type

Enter your New Mexico Withholding Account Number

Frequently Asked Questions

How do I get my SUTA or 941 information to show up accurately?

If you do not see any SUTA info, or it is incorrect, re-run the Period-End Report in your accounting package for the entire quarter, and then re-run the sync. Make sure you run the report on the same computer as the connector is installed, so that we can capture the data.

If you get a warning saying there is no 941 Data, then re-run the Quarter-End Report (941 and Schedule B) for the entire quarter, then run the sync. This is the same concept as SUTA reports; make sure you run the report on the same computer as the connector is installed.

Where is the payment for my most recent payroll?

If you do not see a current payment, make sure the connector has ran after your most recent payroll. If so, it is possible that your tracking is all up to date. Go to your tracking information, and see if your “paid through” date is caught up. If you still do not see a payment, contact your Tax Service Representative.

I have a new state filing or payment that I'd like to track, but it isn't showing up in the list of states available for tracking. How can I track this state?

The most likely reason for the jurisdiction not being available is that Greenshades has not seen any transactions in your accounting package for this jurisdiction. The withholding tracking information will show up once we see a pay check for an employee that has withholding for that jurisdiction. The unemployment tracking information will show up once we see a SUTA report from your accounting package with entries for the state in question.

I have overpaid/underpaid a tax payment. How do I correct this?

If you have underpaid a payroll tax payment and it is too late to cancel the submission, you will want to be sure to submit the difference as soon as possible. If this was due to additional checks that needed to be run, you can set the paid through date in the tracking setup back to what it was before the original payment. The payment displayed will now be the original payment made plus the new check amounts. You will need to edit the payment to show only the new amount needing to be paid. If another issue caused the underpayment, we recommend making the payment directly on the agency's website and letting your representative know so Greenshades can have the correct historical information.

If you have overpaid a payroll tax, you likely have a credit with the jurisdiction. The easiest way to correct this is to reduce your next payroll tax payment by the amount of the overpayment. Then

when you make your next return, the agency will compare the total liabilities with the total payments to determine that you have indeed submitted the correct amounts.

I need to correct payroll amounts with either a voided or negative check. How can I make sure my totals will be correct?

Greenshades now has multiple options to deal with negative payroll amounts. You can set up options on how you would like us to handle your negative checks in the Negative Payroll Check Options page under Tax Service Settings. From this page you can set whether to treat these as re-issued checks, adjustments, or neither. For adjustments, you can also choose settings on what we should look for to recognize the previous check it is meant to adjust. Additionally, if you have some negative checks that do not fit any of these settings, you can use the Review Negative Checks page to let us know whether individual checks should be included, and what liability date they should apply to.

Can I cancel a payment or return made on Greenshades?

When you submit a payment or return through Greenshades Tax Service, we will hold onto the submission for a short time to allow you to cancel anything made by mistake. The time we hold onto the submission depends on when it is due. To cancel a submission you have made, you will want to navigate to the historical section of the Tax Service page and find the submission in question. You can then click View to see the details of the submission, and if it is still in the Cancellation Window, you will see a Cancel option.

I need to make edits to my return before submitting, how do I do this?

When on the page to review your totals, you can click the link that says, "Click here to view and/or edit the information contained within this return." If you need to edit a 941 or 940 filing, this will take you to a fillable editor that will look like the paper version of the form you are working on. If this is for any other return, you will be taken to a page with a grid showing all the information contained in your return, as well as an Edit Return Information section. In this section, you will first want to press the Export Information button, which will give you an output of the data in excel form. You can make all your edits right on this excel, and save it when you are done. Then you will want to hit Browse, find the excel you saved, and then hit Import Information to bring those changes over. Lastly, hit Save and Finish.