

Checklist for Quarter/Year End Preparation

Following is a list of Avionté Standard quarter end and year end reports which will assist you in balancing the figures in Greenshades reports.

- **Taxes Summary:** A summary of all the EE/ER taxes – This is the number one most important report to run at quarter end and year end. Several parameters are variable, allowing you to customize the report output.
- **Taxes Summary Lite:** This is the same as above, but with standard non-variable parameters – allowing for a report that generates faster.
- **State Tax WH:** This report will assist you in filing your state withholding return – This is something that Greenshades does not provide, therefore Avionté has made this AQ available.
- **Avionté Cash Requirement:** This report displays the liability for the time frame supplied and is used typically for your weekly deposits as well as a monthly summary of payroll costs. It allows you to track the payroll cost and the amount needed to cover the payroll taxes.
- **Get PA EIT Details:** This report was designed for our PA clients. The report may be exported to excel and uploaded directly to the state of PA website.

The following reports are driven from the Greenshades tables created after you generate the Feed and XML.

- **Get Employee SUI Wage Detail:** This supplemental report displays SUI wages and tax amount by employee on a quarterly basis. You will need to enter the date range and the appropriate state.
- **Get W2 Details:** This report displays all of the W2s that you have created for a given year. This can also provide a summary of all W2s (in other words a W3). This report also provides a total employee count, useful when ordering your W2 forms.
- Depending on your version, your Employee W2 report may be either of the following:
W2 Report 4 up blank or **W2Report_4up_NotPreprintedEdit:** We recommend that you run a test copy for alignment as well as check for missing information.
- **Get Employee Fed W2:** Federal W2 information is displayed once you run the Greenshades Feed for 4th quarter. This will have Federal, FICA, and Medicare taxable wages and tax amounts.
- **Get Employee State W2:** State W2 information is displayed once you run the Greenshades Feed for 4th quarter. This will display the State gross and taxable wages by employee and state.
- **Get Employee Local W2:** Local W2 information is displayed once you run the Greenshades Feed for 4th quarter. This will display the Local gross and taxable wages by employee, state and locality.

SUI Rate Changes in Avionté for the New Year

1. Log in to the Avionté interface.
2. From the Start Page, select either the Admin Tools shortcut button or select Admin Tools from the Actions menu. The Admin Tools window opens.
3. From the left panel select Employer.
4. In the right panel double-click your company/supplier name.
5. From the Supplier Administration window select the Tax tab. See graphic below.

Detail	Branch	User	Wc Code	Bank	Tax	Locality/Country	Accrual Plan	Config Year	Email														
<div> <div>Tax Rate</div> <div>Tax EIN</div> <div>Tax Reciprocal Treatment</div> <div>Tax Staffing Supplier</div> <div>Tax Master</div> </div>																							
Filter By 12/04/2015																							
<table border="1"> <thead> <tr> <th>Tax</th> <th>TaxName</th> <th>TaxPercentage</th> <th>StartDate</th> <th>EndDate</th> <th>GeoCode</th> <th>VertexTax</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>CA SUI ER</td> <td>6.2</td> <td>01/01/2015</td> <td>12/31/2015</td> <td>050000000</td> <td>459</td> </tr> </tbody> </table>										Tax	TaxName	TaxPercentage	StartDate	EndDate	GeoCode	VertexTax	<input checked="" type="checkbox"/>	CA SUI ER	6.2	01/01/2015	12/31/2015	050000000	459
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<div> <div>Add your new rates and end date last year's rates as shown.</div> <div>Note: Year to year historical data is pulled from this section.</div> </div>																							
<div> <div>Add New</div> <div>Cancel</div> </div>																							
<div> <div> <div>Tax Rate Details</div> <div> <div>Tax Name</div> <div>CA SUI ER</div> </div> <div> <div>Tax Percentage</div> <div>5.4%</div> </div> <div> <div>Start Date</div> <div>01/01/2016</div> </div> <div> <div>End Date</div> <div>12/31/2065</div> </div> </div> <div> <div>Recalculate Tax Amounts</div> <div>Save</div> </div> </div>																							
<div> <div>Tax Recalculation History</div> <table border="1"> <thead> <tr> <th>User Name</th> <th>Date Recalculated</th> <th>Rate Start Date</th> <th>Rate End Date</th> <th>Rate Percentage</th> </tr> </thead> <tbody> </tbody> </table> </div>										User Name	Date Recalculated	Rate Start Date	Rate End Date	Rate Percentage									
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<div> <div>Click the Add New button. Type the Tax Name in the text field to locate the tax.</div> <div>Add the new rate and the date range. Avionté defaults the end date to 50 years out, however we recommend using the end date 12/31 of the current year.</div> </div>																							