GREENSHADES & AVIONTÉ

Setup and Filing with Greenshades

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Greenshades & Avionté

Avionté partner, Greenshades, handles the Quarter End and Year End formatting of the files needed to upload to the Federal and State websites on a quarterly basis. Greenshades uses a third party to maintain the specifications from the agencies. With our feed in Avionté, you will create an XML which passes the raw data to Greenshades so that they can create your returns. Greenshades does have limited power of attorney which allows them to file the 941, 940, and Federal W2 for your convenience.

Be prepared to complete your Form 941, Schedule B and State SUI during one Greenshades session.
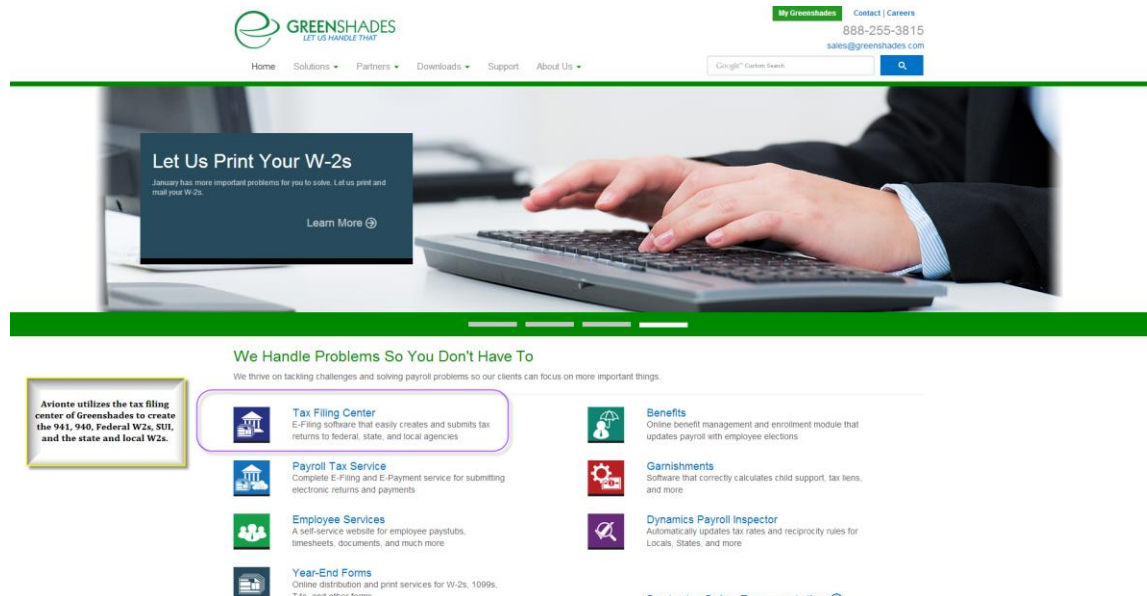
Supported Forms

Greenshades supports the following forms:
940/941
Federal W2 State
SUTA Returns
State W2
Local W2

An additional fee is incurred for the following:
State New Hire
Employee Verification
Employee W2s (through Downloadmyforms.com)

Self-Hosted Clients

If Avionté hosts your database, you can skip the following steps and jump to Section 3, Greenshades Properties.

Greenshades offers a download for self-hosted Avionté clients. This will be your gateway to file through Greenshades.

Download Greenshades Center

1. Open the URL in your web browser
   https://www.greenshades.com/

2. From the Greenshades page, click the Downloads option.

3. Select Tax Filing Center from the drop down.
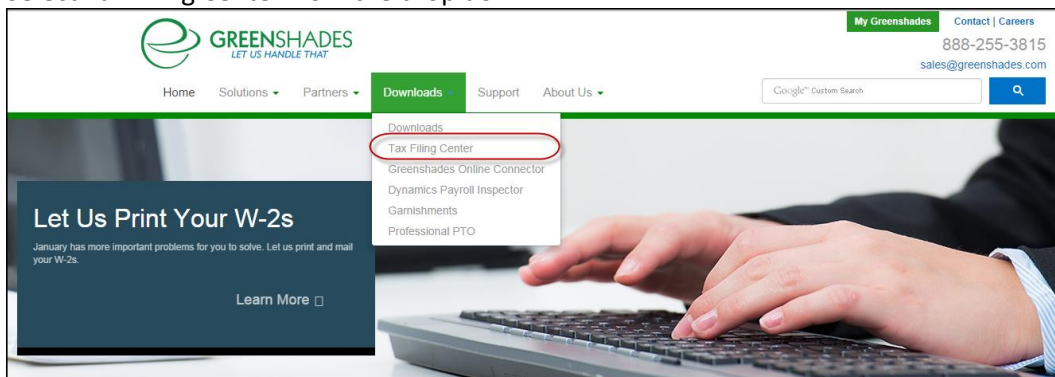
4. From the download screen, select Avionté to automatically start the download.
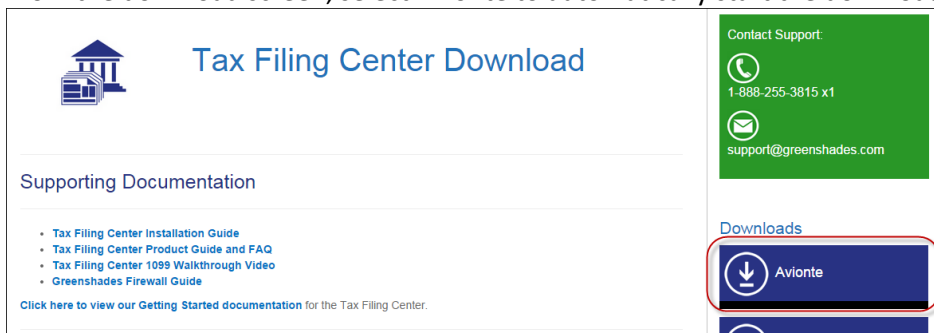
5. A Security Warning pop up will load. To begin the install, click Run.
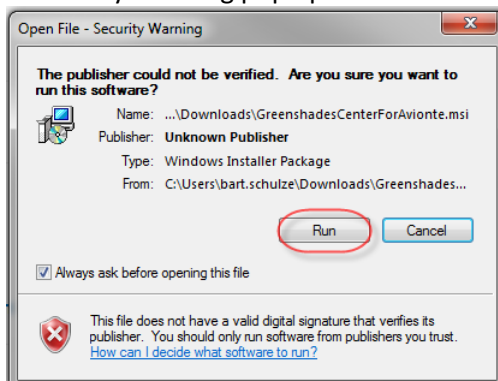
6. In the following screen select Next.

7. Allow the software to install in the default folder, we do not recommend changing the file location. Click Next to continue.

8. Again, select Next.

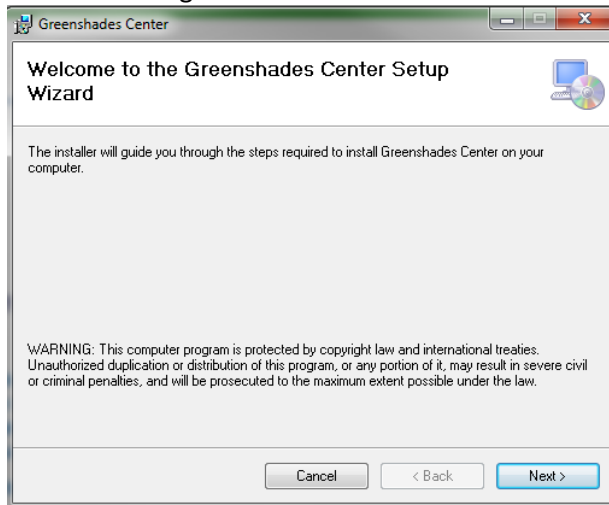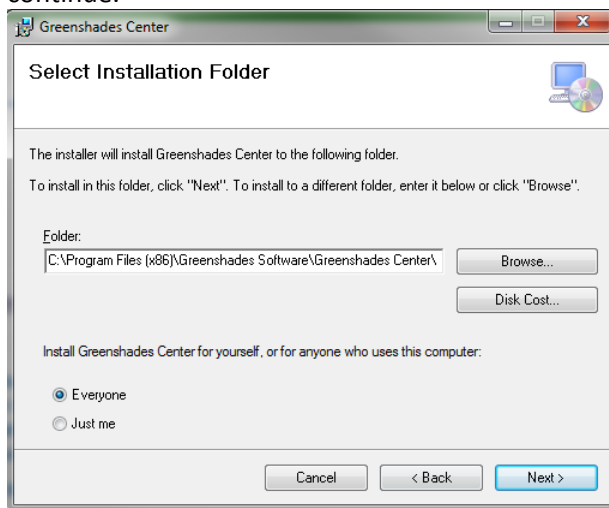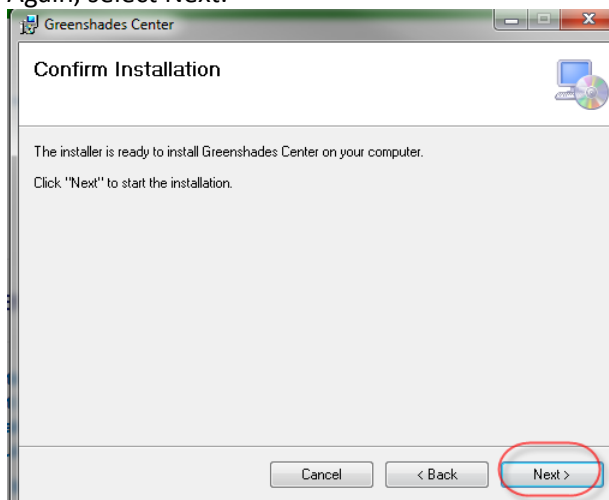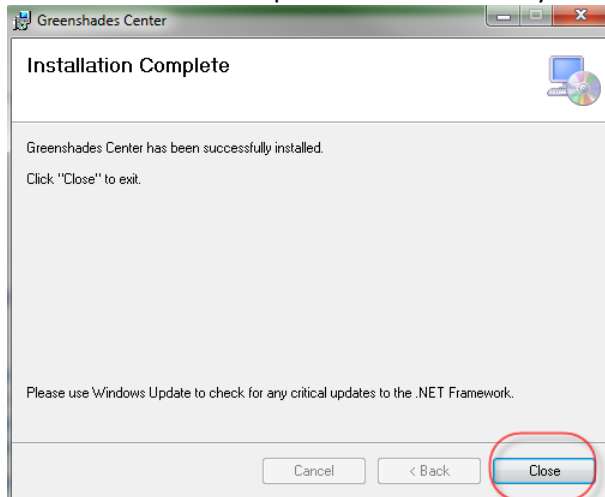9. The installation is complete. You can finish by clicking Close.

A folder titled Greenshades Center will be created on your shared location, or locally if a user is accessing it remotely. Please make sure that the folder has the proper permissions for all users, with full read and write ability.

If you have installed Greenshades and have problems, we recommend that you go to https://www.greenshades.com/ to update your information by installing the updater patch, or the .NET Framework. Greenshades updates their files regularly in addition to each quarter end so you will see updates when launching Greenshades. Always allow the updates to run so that you have the most current version.

NOTE: If there are updates to Greenshades, you should always select Update Now when asked.
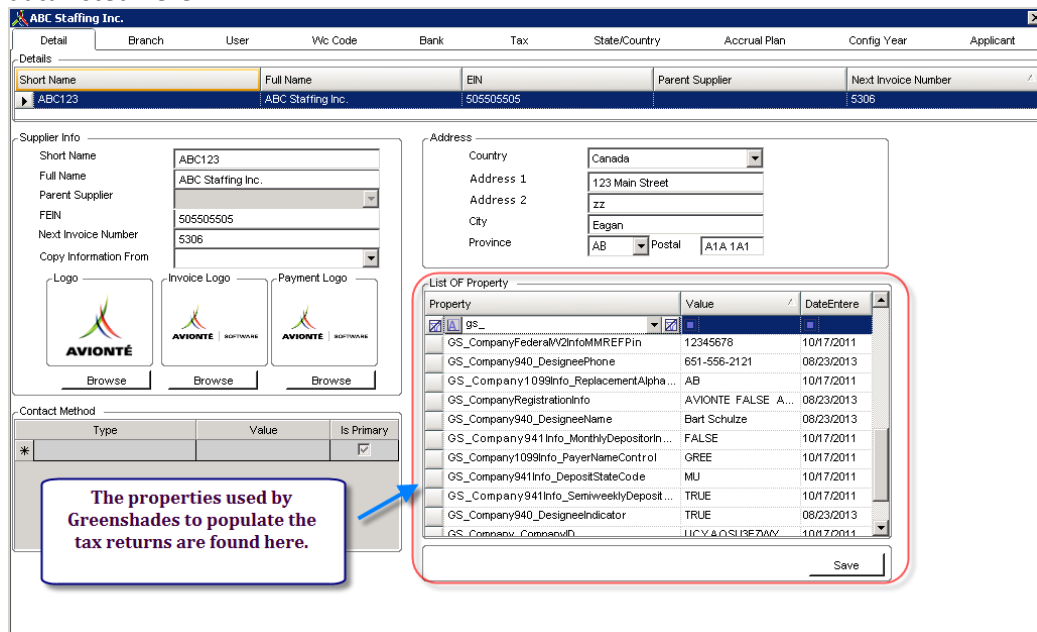
Greenshades in Avionté

Both hosted and self-hosted users should always allow Greenshades to run updates if asked.

If this is your first time using Greenshades, we will happily walk you through the process and answer all of your questions. Contact the Avionté support team to set up an appointment.

Greenshades properties are housed in AdminTools of the Avionté core application. There are a few properties that will require special formatting.

Greenshades Properties

1. From the Start Page select the AdminTools shortcut.
2. In the AdminTools window click Employer in the left panel
3. Double-click your company name in the right panel.
4. Select the Detail tab.
5. In the List of Property, select the Starts With filter option.
6. Type GS in the text field. The listed properties tell Greenshades that you are an Avionté customer and provide the data needed to populate the static information on your tax returns. You may make any corrections to the data listed here.

The properties used by Greenshades to populate the tax returns are found here.

You may notice that a number of the values are intentionally blank; some are items which you may not use, while others are properties intended for future use.
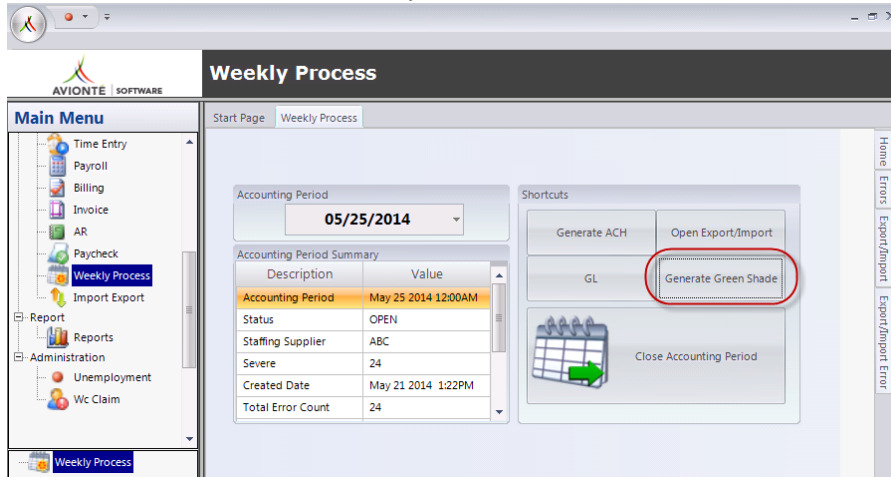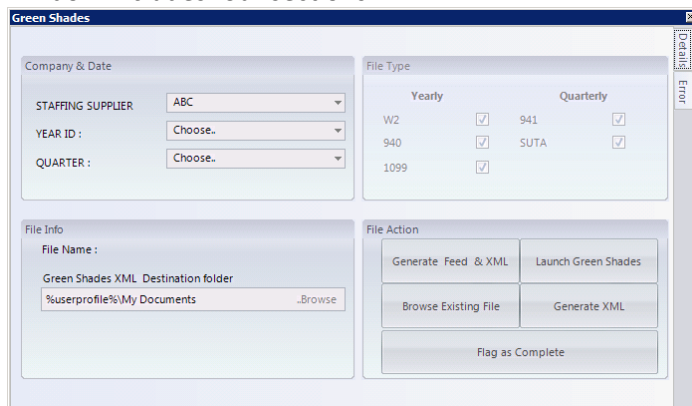
QUARTER END

Generate the Greenshades Feed and XML

Greenshades is accessed through your normal Avionté core application login.

1. From the Main tree, select Weekly Process.

2. Click on the Generate Green Shade shortcut button. The Green Shades window will load. The Green Shades window includes four sections.

3. Choose the proper Company & Date Information.

Property	Definition
Staffing Supplier	Company name by Federal ID
Year ID	Select the current year. Historically, you will have as many years as you have been with Avionté.
Quarter	Select the quarter for which the XML should be created. Historically, the four most recent quarters will be listed. However, if this is your first year with Avionté, you will see only the quarters which occurred within this calendar year.

4. In the File Type section, select the yearly and/or quarterly files, that you wish to submit via Greenshades at this time.

5. In the File Info section choose your designated folder to store the XML on your local machine. You are able to delete this folder once the quarter end process has been completed.

6. From the shortcuts, select the Generate Feed & XML button.
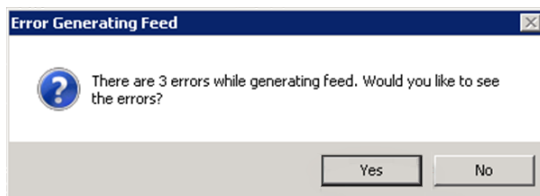
When the feed and XML have been successfully generated, the File Generated message is loaded. This message informs you that your file has been generated and is ready to be sent to Greenshades to build all of the year end returns. The XML file has been sent to the location that you designated.

7. Click OK. Next you will launch Greenshades from the Green Shades window.

Note: The XML format is not easy to review and it houses all of the raw data to build your returns. If you attempt to open this file, keep in mind that it is very large and will take time to open.
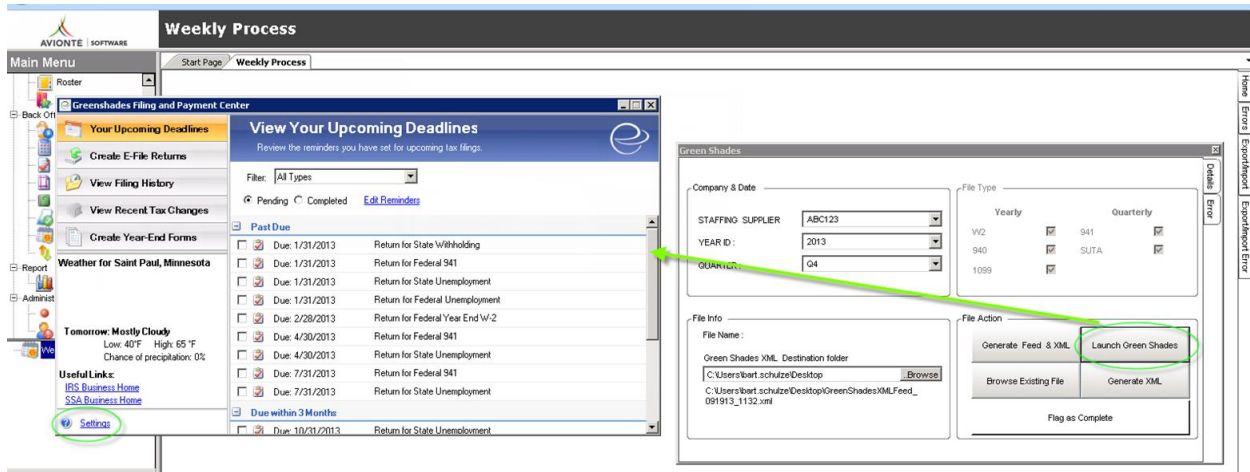
Error Generating Feed

If you received a message stating errors occurred, turn to **Error Messages: When Generating the Feed and XML** on page ___. Common errors and their solutions are discussed here.
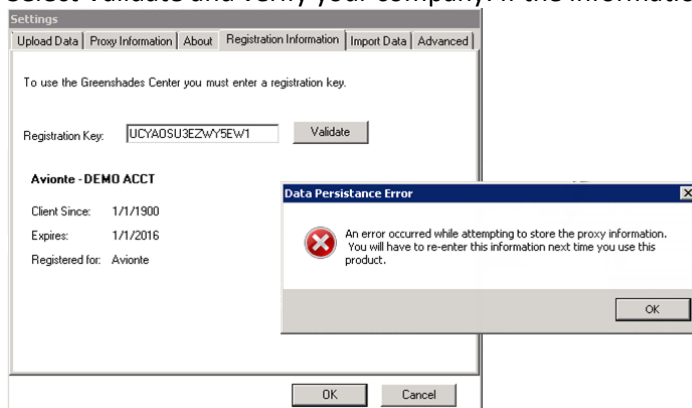
E-File with Greenshades

When you select Launch Greenshades, you will be leaving Avionté and entering into Greenshades. As you can see in the figure below, Greenshades opens within Avionté but it is a separate window. When you launch Greenshades, you will transfer the data to Greenshades.

1. From the Green Shades window, select the Launch Green Shades shortcut button. The Greenshades Tax Filing Center window will be loaded.

2. You may be asked for your Registration Key before entering Greenshades.

    If you do not see a state in which you do business, there may be an issue with your registration key or you have not added this state to your list. If you need to add a state, contact Malik or Bart at Avionté.

3. If you have not been asked for your Registration Key, click Settings in the Greenshades window.

4. In the pop up, enter your registration key. Your registration key identifies your company as a client of Avionté and displays which state returns that you have registered.

5. Select Validate and verify your company. If the information is incorrect, call Avionté support for assistance.

6. Once you have validated the Registration Key, click OK. The Data Persistence Error message will appear.

7. Click OK. This message is normal. It states that you will need to re-enter your registration key each log in.
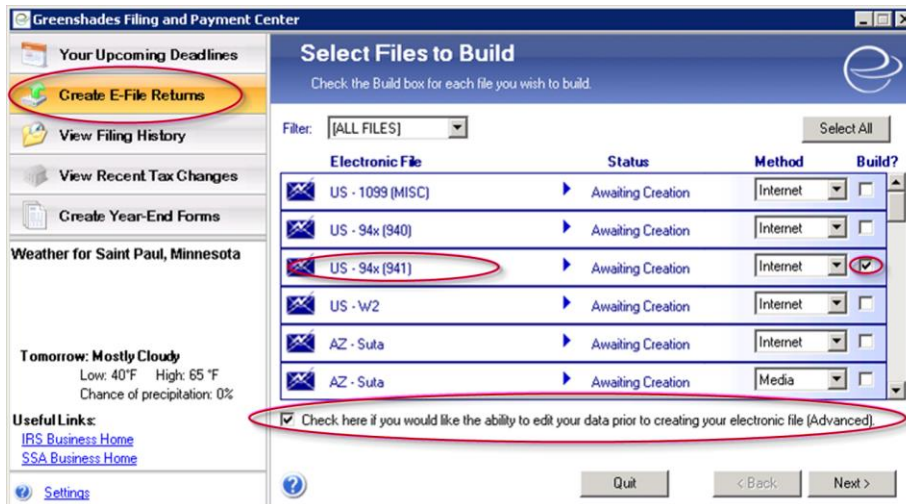
Building the 941 Return

We will begin with the 941 return.

Form 941

1. In the Greenshades Tax Filing Center window, select the Create E-file Returns from the menu. The Greenshades Filing and Payment Center window loads.

2. The Select Files to Build table displays the available forms to choose from. Locate the 941 and select the Build check box.

3. Select the check box below the table. This gives you the ability to edit your information.

4. Select Next. This will bring up the 941 form pre-populated with your data. You will be able to edit the information and add your deposits for the quarter.

The 941 Editor

The 941 will load in full screen. You will notice that you have a message stating one or more errors have occurred. This is due to rounding from the calculation on the front page of the form. The amount does not match the liability from Schedule B.

1. Select OK in the message pop up.

2. At the bottom of the form you can click the Next Page button to move ahead.

3. Schedule B can also be reached by clicking Form 941 at the top of the page.

4. Select Schedule B from the drop down.

Form 941 Schedule B

On Schedule B, the liability from the check dates in Avionté are shown.

1. Edit the numbers as needed to match line 10 of the front page. Any remaining differences occurring from the fraction of cents rounding, will be shown on line 7 of the first page.

2. Combine or change these numbers as needed to make sure you are reporting the correct figures.

3. When finished making any needed corrections, return to Form 941 using the drop down at the top of the page. Your changes will be reflected on Form 941.

Finalized Form 941

Your updates have been included in Form 941.

1. Account for the rounding amounts on line 7. This allows you to tie out line 10 with the total on Schedule B.

2. Make sure that you have entered the deposits for the quarter in line 11. If you have over/under deposited then lines 14 and/or 15 will automatically be updated.

3. Click Save as PDF. This saves the form as a PDF to your local computer.

4. After saving the PDF, select Save and Close and this will save the information with Greenshades and allow you to complete the filing process. The editor will close at this point.

Filing the 941

You have completed the building process; the next step is to file Form 941.

1. Click on the Click to Begin Filing link. This will bring you to the totals page.

2. From the Totals window you are able to Print Totals or Save Totals.

3. Click on the Next button to continue with the filing process. The Contact Information screen loads.

4. Enter the Business Name Control (BNC) in all caps. The IRS recognizes you by both the FEIN and the BNC. The BNC is the first four letters of your company name as listed with the IRS.

5. Click the Next button.

6. Review the contact information. If contact information is changed in this screen it will only be changed for this session. To change this information permanently, make the change in the Greenshades Properties within Avionté. This information will be provided to Greenshades.

7. Click the Next button to file your return via Greenshades. This screen will close, however you are still in Greenshades and should continue with the State SUI filing.

   When Greenshades receives confirmation that your return has been filed, they will send a notification to the email address provided.

State SUI Return

The SUI (Suta) return is an internet file and is approved by all fifty states according to their specifications.

1. Return to the Create E-Files Returns screen.

2. The Select Files to Build table displays the available forms to choose from. Locate the Suta and select the Build check box. You will not need to use the editor.

3. Select the Next button to build the SUI return. After building the file you are able to review the totals and determine if there are differences.

4. Select the Click to Begin Filing link.

5. Review the data. If the data differs, you will need to locate the data in Avionté, find those differences and fix them.

   After any corrections are made, generate the feed again and pass it back to Greenshades to build the files.

Greenshades SUI Reports and Saving the E-File

Once you have made any needed corrections in Avionté and regenerated the file, you may wish to save or print Greenshades reports for reference.

1. Select the View Details link, the report will load an excel spreadsheet of all of your employees and wages.
2. The totals on this page can be printed or saved using the two available links.
3. Finally, select the Save E-File link. You must save the file to your local machine with exactly the same name and file extension. This saves the upload file for this particular SUI state.

   NOTE: Greenshades has given these files a specific name that can NOT be changed prior to uploading it to the state website. If renamed, or the file extension is changed, an error will occur during the transfer.

4. Select the Next button. The Filing Instructions screen loads.

State SUI Filing Instructions

The instructions screen usually includes a key word link to the appropriate state website. The E-File that was saved in step 3 of **Greenshades SUI Reports and Saving the E-File** is the file that should be uploaded to the state website.

NOTE: The Filing Instructions may differ from the past. Please read the instructions carefully.

YEAR END

Generate the Greenshades Feed and XML

Greenshades is accessed through your normal Avionté core application login.

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3. Choose the proper Company & Date Information.

Property	Definition
Staffing Supplier	Company name by Federal ID
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Quarter	Select the quarter for which the XML should be created. Historically, the four most recent quarters will be listed. However, if this is your first year with Avionté, you will see only the quarters which occurred within this calendar year.

4. In the File Type section, select the yearly and/or quarterly files, that you wish to submit via Greenshades at this time.

5. In the File Info section choose your designated folder to store the XML on your local machine. You are able to delete this folder once the quarter end process has been completed.

6. From the shortcuts, select the Generate Feed & XML button.

   When the feed and XML have been successfully generated, the File Generated message is loaded. This message informs you that your file has been generated and is ready to be sent to Greenshades to build all of the year end returns. The XML file has been sent to the location that you designated.

7. Click OK. Next you will launch Greenshades from the Green Shades window.

Note: The XML format is not easy to review and it houses all of the raw data to build your returns. If you attempt to open this file, keep in mind that it is very large and will take time to open.

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3. If you have not been asked for your Registration Key, click Settings in the Greenshades window.

4. In the pop up, enter your registration key. Your registration key identifies your company as a client of Avionté and displays which state returns that you have registered.

5. Select Validate and verify your company. If the information is incorrect, call Avionté support for assistance.

6. Once you have validated the Registration Key, click OK. The Data Persistence Error message will appear.

7. Click OK. This message is normal. It states that you will need to re-enter your registration key each log in.

Building the 941 Return

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Form 941

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2. The Select Files to Build table displays the available forms to choose from. Locate the 941 and select the Build check box.

3. Select the check box below the table. This gives you the ability to edit your information.

4. Select Next. This will bring up the 941 form pre-populated with your data. You will be able to edit the information and add your deposits for the quarter.

The 941 Editor

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1. Select OK in the message pop up.

2. At the bottom of the form you can click the Next Page button to move ahead.

3. Schedule B can also be reached by clicking Form 941 at the top of the page.

4. Select Schedule B from the drop down.

Form 941 Schedule B

On Schedule B, the liability from the check dates in Avionté are shown.

1. Edit the numbers as needed to match line 10 of the front page. Any remaining differences occurring from the fraction of cents rounding, will be shown on line 7 of the first page.

2. Combine or change these numbers as needed to make sure you are reporting the correct figures.

3. When finished making any needed corrections, return to Form 941 using the drop down at the top of the page. Your changes will be reflected on Form 941.

Finalized Form 941

Your updates have been included in Form 941.

1. Account for the rounding amounts on line 7. This allows you to tie out line 10 with the total on Schedule B.
2. Make sure that you have entered the deposits for the quarter in line 11. If you have over/under deposited then lines 14 and/or 15 will automatically be updated.

3. Click Save as PDF. This saves the form as a PDF to your local computer.
4. After saving the PDF, select Save and Close and this will save the information with Greenshades and allow you to complete the filing process. The editor will close.

Filing the 941

You have completed the building process; the next step is to file Form 941.

1. Click on the Click to Begin Filing link. This will bring you to the totals page.

2. From the Totals window you are able to Print Totals or Save Totals.

3. Click on the Next button to continue with the filing process. The Business Name Control (BNC) Information screen loads.

4. Enter the Business Name Control (BNC) in all caps. The IRS recognizes you by both the FEIN and the BNC. The BNC is the first four letters of your company name as listed with the IRS.

5. Click the Next button. The Contact Information screen loads.

6. Review the contact information. If contact information is changed in this screen it will only be changed for this session. To change this information permanently, make the change in the Greenshades Properties within Avionté. This information will be provided to Greenshades.

7. Click the Next button to file your return via Greenshades. This screen will close, however you are still in Greenshades and should continue with the State SUI filing.

When Greenshades receives confirmation that your return has been filed, they will send a notification to the email address provided.

Building the 940 Return

When building the Form 940, it will be very much like the 941 we have just discussed.

Form 940

1. In the Select Files to Build table locate the 940 and select the Build check box.

2. Select the check box below the table, as you will need to edit the 940 and update the deposits that were made throughout the year.
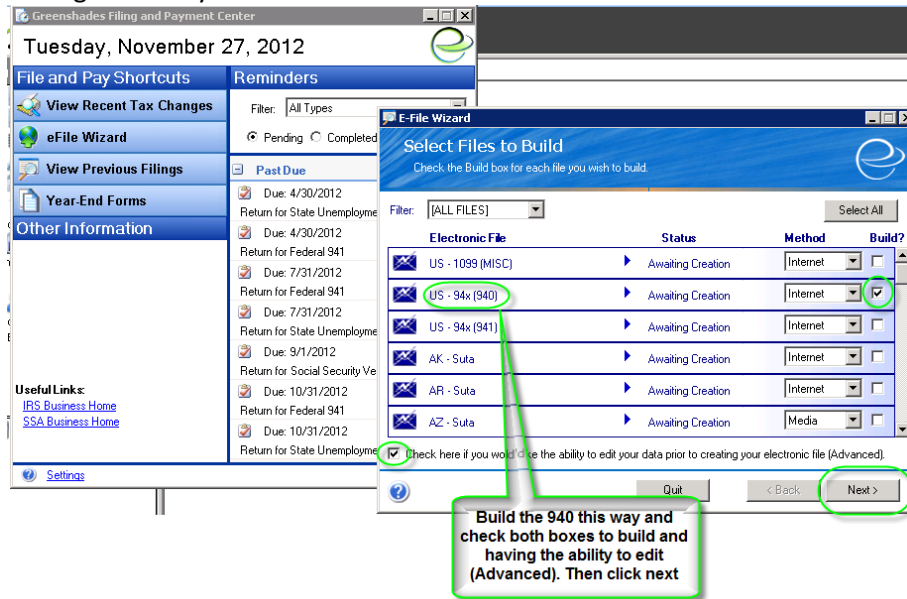
3. Select Next.

4. In the editor view, you will be able to verify the data and update the Form 940.

    NOTE: Avionté stores the liability but not the deposits for FUTA throughout the year. You will need to update this manually on the form using the editor.

The 940 Editor

Form 940 for 2012: Employer's Annual Federal Unemployment (FUTA) Tax Return

850112

Department of the Treasury — Internal Revenue Service

OMB No. 1545-0028

1 errors ▼   Form 940   Save & Exit   Cancel & Exit

Employer identification number (EIN) 50 – 5505505

Name (not your trade name) ABC Staffing Inc.

Trade name (if any)

Address 123 Main Street

Number   Street   Suite or room number

Eagan   AB   11-1

City   State   ZIP code

Type of Return
(Check all that apply.)
- a. Amended
- b. Successor employer
- c. No payments to employees in 2012
- d. Final: Business closed or stopped paying wages

Instructions and prior-year forms are available at www.irs.gov/form940.

Read the separate instructions before you complete this form. Please type or print within the boxes.

Part 1:   Tell us about your return. If any line does NOT apply, leave it blank.

1a If you had to pay state unemployment tax in one state only, enter the state abbreviation .   1a

1b If you had to pay state unemployment tax in more than one state, you are a multi-state employer . . . .   1b ☑ Check here. Complete Schedule A (Form 940).

2 If you paid wages in a state that is subject to CREDIT REDUCTION . . . .   2 ☐ Check here. Complete Schedule A (Form 940).

Part 2:   Determine your FUTA tax before adjustments for 2012. If any line does NOT apply, leave it blank.

3 Total payments to all employees   3   487105.25

4 Payments exempt from FUTA tax   4   330.00

Check all that apply: 4a ☑ Fringe benefits   4c ☐ Retirement/Pension   4e ☐ Other
4b ☐ Group-term life insurance   4d ☐ Dependent care

5 Total of payments made to each employee in excess of $7,000   5   135375.25

6 Subtotal (line 4 + line 5 = line 6)   6   135705.25

7 Total taxable FUTA wages (line 3 – line 6 = line 7) (see instructions)   7   351400.00

8 FUTA tax before adjustments (line 7 x .006 = line 8)   8   2108.40

Part 3:   Determine your adjustments. If any line does NOT apply, leave it blank.

9 If ALL of the taxable FUTA wages you paid were excluded from state unemployment tax, multiply line 7 by .054 (line 7 x .054 = line 9). Go to line 12   9

10 If SOME of the taxable FUTA wages you paid were excluded from state unemployment tax, OR you paid ANY state unemployment tax late (after the due date for filing Form 940), complete the worksheet in the instructions. Enter the amount from line 7 of the worksheet . .   10

11 If credit reduction applies, enter the total from Schedule A (Form 940)   11   321.99

Part 4:   Determine your FUTA tax and balance due or overpayment for 2012. If any line does NOT apply, leave it blank.

12 Total FUTA tax after adjustments (lines 8 + 9 + 10 + 11 = line 12)   12   2430.39

13 FUTA tax deposited for the year, including any overpayment applied from a prior year .   13   2430.39

14 Balance due (If line 12 is more than line 13, enter the excess on line 14.)
• If line 14 is more than $500, you must deposit your tax.
• If line 14 is $500 or less, you may pay with this return. (see instructions)   14

15 Overpayment (If line 13 is more than line 12, enter the excess on line 15 and check a box below.)   15

▶ You MUST complete both pages of this form and SIGN it.   Check one: ☐ Apply to next return.   ☐ Send a refund.

Next ▶

For Privacy Act and Paperwork Reduction Act Notice, see the back of Form 940-V, Payment Voucher.   Cat. No. 11234O   Form 940 (2012)

850212

ABC Staffing Inc.   50-5505505   850212

Part 5:   Report your FUTA tax liability by quarter only if line 12 is more than $500. If not, go to Part 6.

16 Report the amount of your FUTA tax liability for each quarter; do NOT enter the amount you deposited. If you had no liability for a quarter, leave the line blank.

16a 1st quarter (January 1 – March 31) 16a   597.84

16b 2nd quarter (April 1 – June 30) 16b   242.72

16c 3rd quarter (July 1 – September 30) 16c   459.95

16d 4th quarter (October 1 – December 31) 16d   1129.88

17 Total tax liability for the year (lines 16a + 16b + 16c + 16d = line 17) 17   2430.39   Total must equal line 12.

Part 6:   May we speak with your third-party designee?

Do you want to allow an employee, a paid tax preparer, or another person to discuss this return with the IRS? See the instructions for details.

☑ Yes.   Designee's name and phone number   Bart Schulze   651-556-2121 0

Select a 5-digit Personal Identification Number (PIN) to use when talking to IRS   00000

☐ No.

Part 7:   Sign here. You MUST complete both pages of this form and SIGN it.

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that no part of any payment made to a state unemployment fund claimed as a credit was, or is to be, deducted from the payments made to employees. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

✗ Sign your name here

Print your name here

Print your title here

Date   /   /

Best daytime phone

Paid Preparer Use Only   Check if you are self-employed   . . . ☐

Form 940 Schedule A

1. Load the Form 940 Schedule A from the drop down.

   The Form 940 Schedule A will display all states. From the data we are passing, the Schedule A will display all state taxable wages. If there is an additional tax rate for that state you will see an amount due.

   These rates are updated in November by the Federal agency so they may differ from what you saw on the Avionté reports. The total from Schedule A will be due when this form 940 is due. You can make the payment online like your other 940 payments.

Schedule A (Form 940) for 2012:

Multi-State Employer and Credit Reduction Information
Department of the Treasury — Internal Revenue Service

OMB No. 1545-0028

Employer identification number (EIN) 50 – 5505505

Name (not your trade name) ABC Staffing Inc.

See the instructions on page 2. File this schedule with Form 940.

Place an "X" in the box of EVERY state in which you were required to pay state unemployment tax this year. For states with a credit reduction rate greater than zero, enter the FUTA taxable wages, multiply by the reduction rate, and then enter the credit reduction amount for that state. If any states do not apply to you, leave them blank.

Postal Abbreviation	FUTA Taxable Wages	Reduction Rate	Credit Reduction	Postal Abbreviation	FUTA Taxable Wages	Reduction Rate	Credit Reduction
✔ AK	9861.25	0.000	0.00	NC		0.006	
AL		0.000		ND		0.000	
AR		0.006		NE		0.000	
✔ AZ	7000.00	0.003	21.00	NH		0.000	
✔ CA	2300.00	0.006	13.80	NJ		0.006	
CO		0.000		NM		0.000	
✔ CT	7000.00	0.006	42.00	NV		0.006	
DC		0.000		✔ NY	14000.00	0.006	84.00
DE		0.003		✔ OH	26865.00	0.006	161.19
FL		0.006		OK		0.000	
GA		0.006		✔ OR	27112.00	0.000	0.00
HI		0.000		PA		0.000	
IA		0.000		RI		0.006	
ID		0.000		SC		0.000	
IL		0.000		SD		0.000	
IN		0.009		TN		0.000	
KS		0.000		TX		0.000	
KY		0.006		UT		0.000	
LA		0.000		VA		0.000	
MA		0.000		VT		0.003	
MD		0.000		WA		0.000	
ME		0.000		WI		0.006	
MI		0.000		WV		0.000	
✔ MN	250770.50	0.000	0.00	WY		0.000	

2. Return to the Form 940.
3. Click Save as PDF. This saves the form as a PDF to your local computer.
4. After saving the PDF, select Save and Close and this will save the information with Greenshades and allow you to complete the filing process. The editor will close.

Filing the 940

You have completed the building process; the next step is to file Form 940.

1. Click on the Click to Begin Filing link. This will bring you to the totals page.

2. From the Totals window you are able to Print Totals or Save Totals.

3. Click on the Next button to continue with the filing process. The Business Name Control (BNC) Information screen loads.

4. Enter the BNC in all caps. The IRS recognizes you by both the FEIN and the BNC. The BNC is the first four letters of your company name as listed with the IRS.

5. Click the Next button. The Contact Information screen loads.
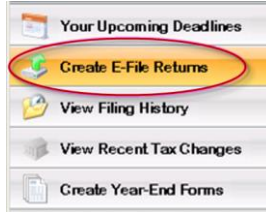
6. Review the contact information. If contact information is changed in this screen it will only be changed for this session. To change this information permanently, make the change in the Greenshades Properties within Avionté. This information will be provided to Greenshades.

7. Click the Next button to file your return via Greenshades.

When Greenshades receives confirmation that your return has been filed, they will send a notification to the email address provided. This screen will close, however you are still in Greenshades and should continue with the State SUI filing

State SUI Return

The SUI (Suta) return is an internet file and is approved by all fifty states according to their specifications.

1. Return to the Create E-Files Returns screen.

2. The Select Files to Build table displays the available forms to choose from. Locate the Suta and select the Build check box. You will not need to use the editor.

3. Select the Next button to build the SUI return. After building the file you are able to review the totals and determine if there are differences.

4. Select the Click to Begin Filing link.

5. Review the data. If the data differs, you will need to locate the data in Avionté, find those differences and fix them.

   After any corrections are made, generate the feed again and pass it back to Greenshades to build the files.

Greenshades SUI Reports and Saving the E-File

Once you have made any needed corrections in Avionté and regenerated the file, you may wish to save or print Greenshades reports for reference.

1. Select the View Details link, the report will load an excel spreadsheet of all of your employees and wages.
2. The totals on this page can be printed or saved using the two available links.
3. Finally, select the Save E-File link. You must save the file to your local machine with exactly the same name and file extension. This saves the upload file for this particular SUI state.

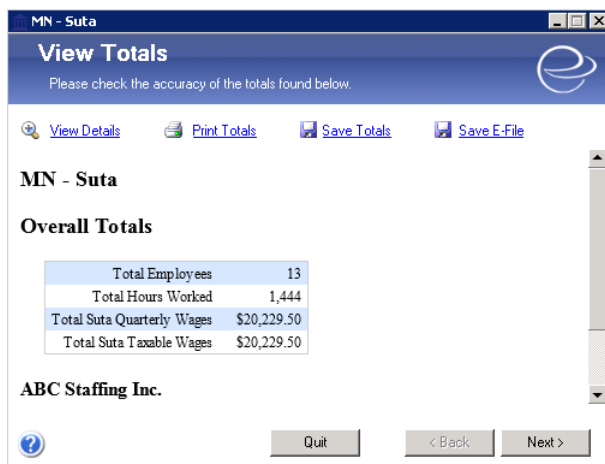   **NOTE: Greenshades has given these files a specific name that can NOT be changed prior to uploading to the state website. If renamed, or the file extension is changed, an error will occur during the transfer.**

4. Select the Next button. The Filing Instructions screen loads.

State SUI Filing Instructions

The instructions screen usually includes a key word link to the appropriate state website. The E-File that was saved in step 3 of **Greenshades SUI Reports and Saving the E-File** is the file that should be uploaded to the state website.

NOTE: The Filing Instructions may differ from past years. Please read the instructions carefully.

Building the W2

The Federal W2s are created for you. Greenshades has limited power of attorney to submit them to the SSA.

Federal W2

1. To start building the file, select the Build checkbox
2. Click the Next button. This builds the file.

3. In the next screen, select the Click to Begin Filing link.

4. Select the View Details link, the details of all W2s will load in an excel spreadsheet.
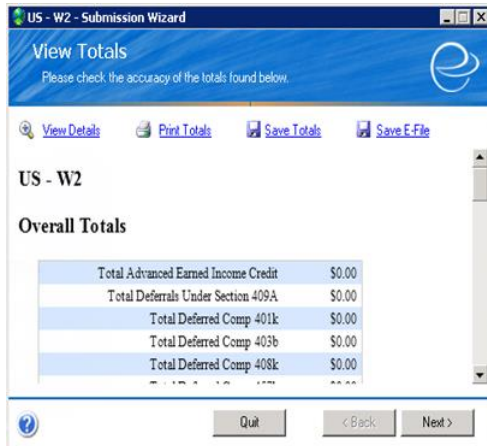
5. We recommend that the Totals be saved or printed for future reference using the available links.
Notice that these totals include your W3. However, since you will be filing electronically, filing of the W3 is not required.

6. You may prefer to manually upload the file to the Social Security Administration (SSA) instead of using Greenshades. In this case, select the Save E-File link. You must save the file to your local machine with exactly the same name and file extension as the default.

   NOTE: Greenshades has given these files a specific name that can NOT be changed prior to uploading to the website. If renamed, or the file extension is changed, an error will occur during the transfer.

7. Select the Next button to continue.

Filing the W2

1. If you plan to manually submit the W2, select the Manual Submission radio button. If you did not saved the E-File from the previous screen, click the Back button and save the E-File.

2. Click Next to follow the instructions which Greenshades provides. The same information is filed whether you choose to submit manually or automatically through Greenshades. The manual submission does not provide an email from Greenshades; however the SSA will let you know when your W2 is filed.

3. If you are choosing to have Greenshades file the W2 electronically, you will select Automatic Submission.

4. Select the Next button.

5. Greenshades will ask for your contact information, including email and phone number, prior to submitting the file.

6. Click on next to submit the W2 file to the SSA. Greenshades will send your W2(s) to the SSA. You will receive an email confirming the submission.

Please note that once you have successfully submitted any return in Greenshades any changes must be made by amending the original submission.

Form W2 Reporting Of Employer-Sponsored Health

Since 2012, the IRS requires that employee contributions for health insurance, found on the W2 in Box 12 labeled DD, are reported. Employer contributions made on behalf of the employee must also be reported. The IRS website provides additional detail:

http://www.irs.gov/uac/Form-W-2-Reporting-of-Employer-Sponsored-Health-Coverage

Please check with your accountant to determine if you fall into this category.

Set Up an Employee Payroll Contribution

Within the Payroll section of Avionté, company-provided benefits (employer contributions) can be set up for an employee. Items that appear as contributions in this section must first be setup and defined as contributions in the Transaction Type section of Admin Tools.

1. In the Employee section, search for and select the employee for which you are setting up contributions.

2. Expand the Payroll option in the Employee sub-menu and select the Contribution tab.

3. Click the New Contribution button. This will clear the fields for new data entry.

4. Click the Type dropdown and select the contribution type from the list.

5. For Amount/Percentage, choose one of the following options:

    Fixed Amount: Choose this when a fixed dollar amount is contributed by the employer, then enter that amount in the Amount field.

    Percentage: Choose this when a percentage contribution amount is to be used. When this option is selected, additional options appear to indicate whether the percentage is applied to Gross pay or Net pay. Enter the percentage to apply in the Percent field.

6. Check the Flag During Payroll checkbox if the benefit should be flagged during payroll processing. If checked, a warning will appear for this employee, allowing you to verify, and if needed, modify the benefit when the payroll batch is processed.

7. The Active checkbox (checked by default), when checked, makes the contribution immediately active for the employee once the contribution is saved. If the contribution is made inactive, then the contribution is not included in calculating payroll for the employee.

8. In the Limits options, enter amounts as needed:

    Pay Period Limit: The maximum amount that can be contributed to the employee for this contribution. This may be useful when a percentage value is entered for the benefit, but there are regulations around the total benefit amounts that can be provided per employee.

    Yearly Limit: The maximum amount that an employer can contribute to this employee in a yearly cycle.

    Life Time Limit: The maximum amount that an employer can contribute to this employee throughout their lifetime.

9. In the Date options, enter dates as follows:

    Start Date: Enter the date that the contribution is to become effective by entering the date in MM/DD/YYYY format or by clicking the down arrow and selecting the date from the calendar.

    End Date: Enter the date the contribution is to end. Typically, this would apply in the case where an insurance benefit is offered on an annual basis, thus this date would indicate the final day the current policy is effective. If the benefit is open ended, then leave this field blank.

10. In the Authority Info options, enter the following if applicable:

    Agency: Enter the name directly related to the benefit, such as insurance company or 401K provider.

    Reference Number: Enter the number associated to the employee's benefit account.

11. Click Save Contribution when finished entering contribution information.

NOTE: If the contribution created is based on a transaction type that also has a deduction defined to it, a red icon will appear to the left of the contribution in the grid. This indicates that a deduction also needs to be set up. An example of this is where an employee has money deducted for 401K (deduction) and the employer contributes matching funds (contribution) towards that 401K.

For additional details please visit our Support Center Knowledgebase:

https://support.avionte.com/hc/en-us/articles/206848027-Employee-Payroll-Contribution

Posting the W2s to the Employee Portal

Once all payroll corrections have been finalized, you may follow the steps below to allow your employees the ability to view their W2s on the employee portal:

1. After the Greenshades Feed and XML has been generated, click on the 'Flag as Complete' button as shown in the screenshot below.

NOTE: This will stop the Greenshades feed from generating and modifying W2 and filing data.

2. And click 'Yes' on the warning below:

To remove the W2s from the Employee Portal temporarily, please follow the steps below:

- Navigate to Admin Tools > Config Year and select the appropriate year

- Once the year is selected, the 'DateCompleted' field will need to be cleared to pull the W2s from the portal. Click save to finalize the changes. NOTE: You will have to follow the steps on page 41 to post the portals back up to the employee portal.

Checklist for Quarter/Year End Preparation

Following is a list of Avionté Standard quarter end and year end reports. These reports 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 that are 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.

Please note that if you need a report in addition to the list of reports, we can customize one to your exact specifications. This is a onetime billable item, however you will then have the report available at any time. Please ask your Client Manager for details.

Greenshades FAQs

How does Avionté come up with the number of employees who worked on the 12th of the month?

Avionté uses the accounting period with the week of the 12th to determine the number of employees paid. This means that they have worked in the week of the 12th.

What is the BNC?

It stands for Business Name Control. Typically, it is the first four letters of your company name in upper case, without spaces.

Can I verify my business name control before e-filing?

Yes, you may call the Business & Specialty Help Line at 1-800-829-4933 for additional assistance.

Why do I have negative numbers on my 941 schedule B?

If there are negative numbers on this schedule, they are reflecting any check(s) that were voided when there was no other payroll. You will need to combine the negative values with the positive values to reflect the total liability from the check date that you paid the IRS.

Why is there an amount on Box 7 on my 941?

The amount is an adjustment for fractions of cents due to rounding relating to the employee share of social security and Medicare taxes withheld. The employee share of amounts shown in column 2 of lines 5a-td may differ slightly from amounts actually withheld from employee's pay due to the rounding of social security and Medicare taxes based on current rates.

How can I verify my file has been successfully filed to the IRS?

If you used the automatic website submission method, you will receive a confirmation email from Greenshades Software. This email contains your E-File ID, which you can use to track your submission status. If you used the manual website submission method, Greenshades is unable to track your submission. When you submit your file to the IRS site, you will receive a confirmation number from their website.

My computer doesn't have a floppy drive, how do I save my media file?

Save the file to your computer and then either burn a CD or find a computer with a floppy drive to copy the file. Many states have gotten away from this format and you should be able to upload using the internet.

How can I review my SUTA / W2 / 941, etc. totals after I've submitted them?

Make sure that you save a copy of the totals prior to submitting the files. You are able to build the file in Avionté and Launch Greenshades again but this will be a new file. You will want to keep a folder for the totals and a separate one for the E-files that you upload to the State and Federal Government.

NOTE: The E-file file name cannot be changed. The government will reject the file if the name is changed.

How do I know when the returns are due?

The 941 return, State unemployment, and State Withholding return are all due on April 30th, July 31st, September 30th, and January 31st.

Form 940 is due to the IRS January 31st. The W2s will need to be issued to your employees by January 31st. The Federal government due date is February 28th and March 31st if you are electronically filing.

What happens to the accruing deductions like Health Insurance or 401k from year to year?

Avionté will clear out all deductions with the new check in the New Year to start over for you automatically. This makes the process seamless. Any accrual you have set up will run the way you set it up, like vacation or PTO, and those will not clear out.

How do I correct a return that was already submitted?

If you have submitted a return to an agency and find you need to make a change, then you will need to amend that return with the agency. Greenshades will not be able to file your amended returns. Many states will allow you to amend only the changes that need to be made online. You will have to wait until the return has processed through their system before you can amend that return.
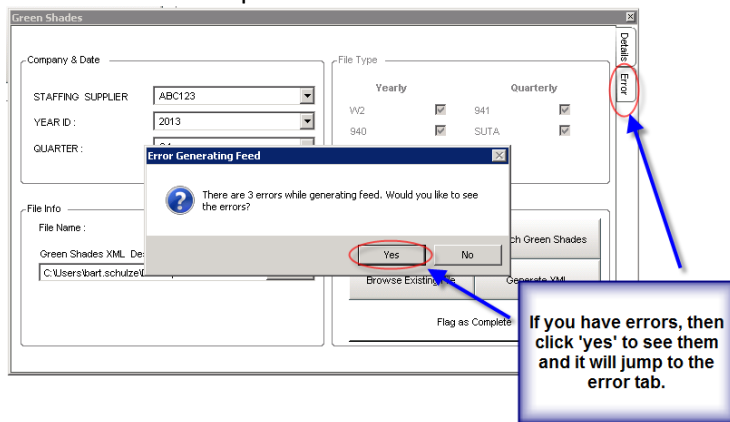
Common Errors
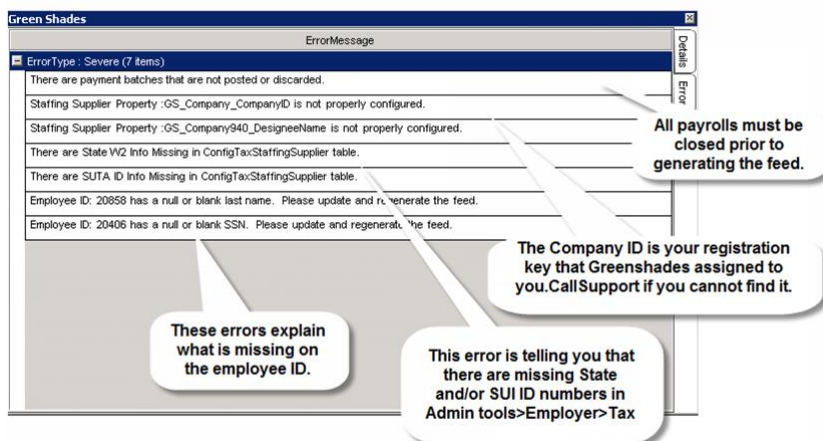
When I generate the feed and XML, I get this message:
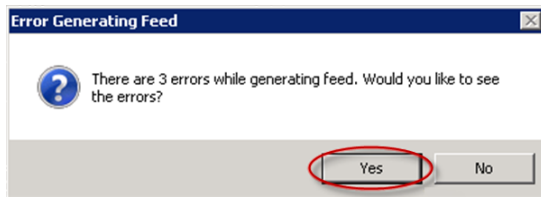
Select Yes.

The Error side tab opens.

If you have errors, then click 'yes' to see them and it will jump to the error tab.

A brief description of errors is listed. The description provides enough detail to enable you to fix the error.

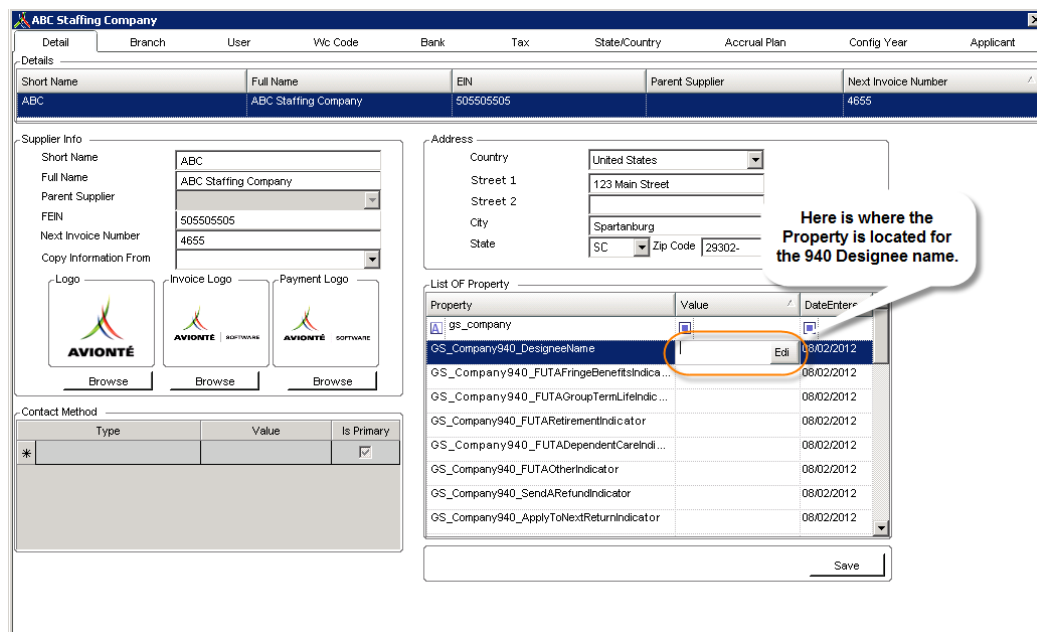**All payrolls must be closed prior to generating the feed.**

The Company ID is your registration key that Greenshades assigned to you. Call Support if you cannot find it.

These errors explain what is missing on the employee ID.

This error is telling you that there are missing State and/or SUI ID numbers in Admin tools>Employer>Tax

Missing Address

If an employee is shown as missing an address (city, zip, state) it may be partly because the employee address does not have the 'IsResident' box checked under **Employee > Detail > See All** on the address type.

Payment Batches

Make sure all Payroll Batches are closed prior to generating the feed and XML.

GS_ Properties

Go to **AdminTools > Employer > Detail**. In the property section you may edit the Greenshades properties. All of the 'GS_' properties in this section are designed to be part of the feed. It will populate when the file is complete and is, in turn, sent to Greenshades. Many are codes, and Greenshades has informed us as to how they should be set up in order to be properly submitted. If you have any questions regarding a property, please feel free to call support.

It is important to remember to save after you enter the values.

Missing State ID or SUTA ID

If you are missing a State and/or SUTA identification the Greenshades feed will generate an error.

Most of your state IDs should be complete, but the Greenshades feed goes through the process of checking to see if any new states have been added.

This screen is located in **AdminTools > Employer > Tax** in the Tax EIN Details area.

Missing Employee Information

If you are missing an employee last name Greenshades will generate an error.

If you receive this error, it most likely means there is a converted employee because Avionté does not allow you to add an employee without a last name.

Update the last name in **Employee > Detail** and tab off, it will save. This will eliminate the error.

Correcting the Missing SSN

If a Social Security Number is missing from an employee the Greenshades feed will generate an error.

When adding new employees in Avionté, you will notice that you cannot enter an employee without having a SSN. This is by design to protect you from having this error.

Correct the SSN in **Employee > Detail** and tab off, to save. This will correct the error in Greenshades.