Greenshades Online

Year End Forms Quick Start Guide

Welcome to Greenshades Online Year-End services! This guide will provide information on Year-End tax filing processes through Greenshades Online. If you need additional assistance with the filing process, Greenshades' Support team is available to help. The support team can be reached by phone at 888-255-3815 ext: 1 or by email at support@greenshades.com

Account Setup

Invoicing

For first time Greenshades users, Year-End filing services must be paid prior to uploading tax data and filing. Greenshades' sales team can provide Year-End pricing information and generate invoices for Year-End services. The sales team can be reached via email at sales@greenshades.com or by phone at 888-255-3815 ext: 2.

Once a Year-End invoice has been generated, users can setup an administrator account here: My Greenshades Administrator Account Login. After selecting the setup account option and providing their Greenshades-registered email address, users will be led through a short wizard to configure their login credentials.

After login credentials have been setup, users can access the administrator portal to review and pay their Year-End invoice. Invoices may be paid via credit card or ACH payment. For any questions about your invoice or payment options, please reach out to ar@greenshades.com.

Account Configuration

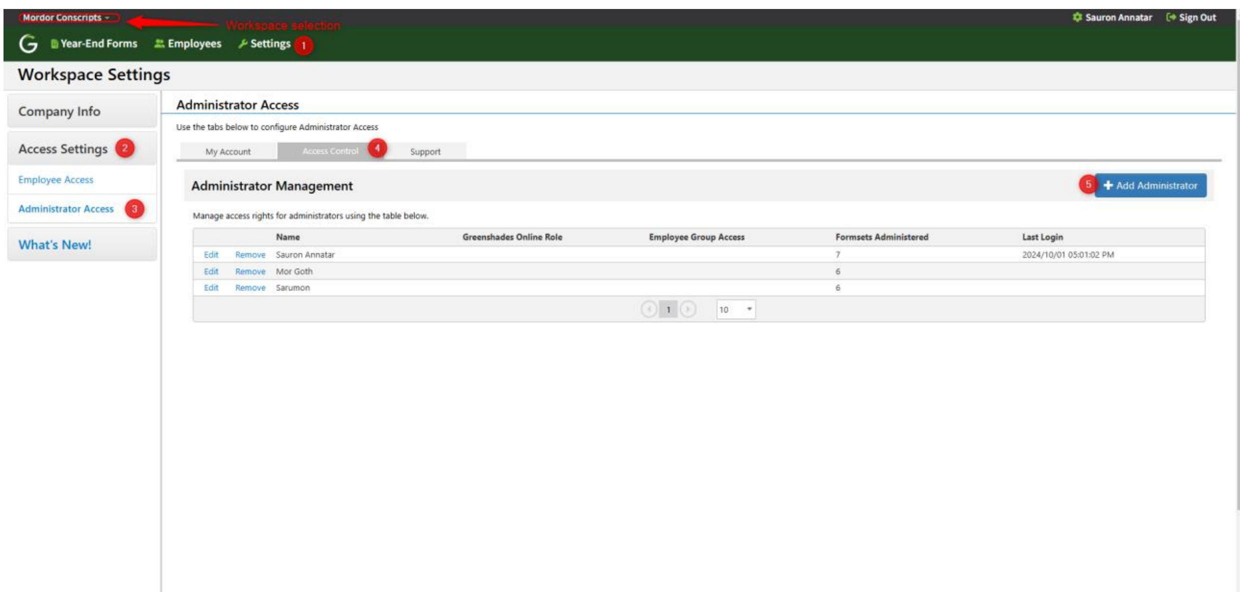
For returning users, Year-End invoices may be paid after service. Returning users can access their GreenshadesOnline account using their current login credentials. If needed, users can use the 'reset password' option, which will prompt them to answer security questions to reset their account password. If additional assistance is needed gaining access to the portal, returning users may reach out to support. Support can be reached by phone at 888-255-3815 ext: 1 or by email at support@greenshades.com

First-time users may log into GreenshadesOnline using the same login credentials they set for the administrator portal.

Adding New Users

New users can be added to the MyGreenshades Admin portal by logging in, accessing the contacts tab, and selecting the link, "Click Here to Add a New Contact." At minimum, a name and email address is required to add a new contact. Once the contact is added, they can use the setup account option on the login page to configure their login credentials.

To add a new administrator to a workspace, users must access the appropriate GreenshadesOnline workspace. Information on workspace creation is included in the next section of this document. If there are multiple workspaces set up, users can switch between workspaces using the drop-down menu in the upper left corner of the portal. Once in the correct workspace, users can access the administrator settings by selecting 'Settings' in the upper menu bar and navigating to 'Administrator Access' under the Access Settings option in the side menu. From the Administrator Access landing page, users can switch to the 'Access Control' tab, click the '+ Add Administrator' button, and add a new administrator by providing the new administrator's full name and email address. If the administrator has already been added to the admin portal, their name will be available to select from a drop-down menu. New users can then setup their own login credentials for GreenshadesOnline by using the 'Setup Account' option. Users who already have active logins for the admin portal may login to GreenshadesOnline using the same credentials.



Upload Options

The sections below will provide detailed instructions on how to upload Year-End filing data to Greenshades' DownloadMyForm site. The Sync Portal may be used to upload Year-End data directly from Dynamics GP. The Excel Import option is available for all clients. Please follow the instructions that apply to your upload method.

Sync Portal

Greenshades offers a seamless integration to upload your forms for **Dynamics GP** clients via the Sync Portal. To install the Sync Portal click here.

When installing the Sync Portal, it is important to note that you are installing both the Greenshades Sync Configuration Utility and the Client Sync Service. The Greenshades Sync Configuration Utility will allow you to configure the database where we will pull the information to populate the forms. The Client Sync Service allows us to make that connection to the configured database and to your workspace on Greenshades Online. Please note that to upload 1099 data via the Sync portal, you must be using GP2018 R2 or a more recent version.

Greenshades Sync Configuration Utility – Data Source Setup

After installing, login to the Greenshades Sync Configuration Utility using your Greenshades Online credentials. Once connected, select the Add Data Source button in the upper right hand. The Data Source Setup screen will have several options for Data Source Type, however for our Year End Only integration we currently only support Dynamics GP via the Sync Portal. Select Dynamics GP for Data Source Type and enter the Server and Database Name. When entering the Username and Password for the Authentication Type, please enter a user with unrestricted access and a “sysadmin” role, as the user will need permissions beyond just READ, WRITE, and EXECUTE. Once finished, click the Test button to confirm we are able to access the database before continuing to the Data Source Administrators screen. The final step of the data source creation is selecting who will be able to assign this data source to a workspace. This does not control access for the workspace itself, only for workspace setup. After selecting the administrators, click the Save button and your data source is now configured. Repeat the same steps if you have multiple data sources in which you plan to upload forms from.

Workspace Creation

Now that the database has been configured, you will need to create a workspace in Greenshades Online to connect the data source. To create a workspace, log in to Greenshades Online with one of the data source administrators selected from the data source configuration and navigate to Syncs – Workspace Sync Setup. Then select the Add Workspace button at the top of the screen. After being redirected to the Syncing Workspace Setup screen, please enter the company information. All fields on this screen except Company ID will be editable in the future, it is recommended that the database name be entered as the Company ID.

Once all required fields are entered, click the Connect Data Source button. Select the data source that you set up in the Greenshades Sync Configuration Utility and click Save. Do not enable automatic syncs or scheduled syncs, as you will not be syncing your entire dataset for our Year End Only integration. After saving the data source you will be redirected back to the Syncing Workspace Setup screen, please confirm the information and that you selected the correct data source if you have set up more than one before saving one last time.

Data Import Option

Once a workspace has been created, it will be accessible from the drop-down menu in the upper left corner of the portal. To upload forms, access the desired workspace and select 'Year-End Forms' from the upper bar menu. Once on the Year-End Forms landing page, choose the tax year and form type of the forms you would like to upload and select 'Import Your Forms.' A pop-up menu will appear confirming the form type and tax year, as well as information on pricing for form uploads. Clients will only be charged for uploading forms they have not pre-paid to upload.

After confirming form type and tax year, users must select the data option for their forms. To upload from GP, select the "Dynamics GP" option.

Immediately after forms have been uploaded, you'll be prompted to complete a short welcome wizard to finish the company setup. The information requested in the welcome wizard will vary based on what type of forms are being uploaded. After completing the welcome wizard, you will be routed to the Download My Form portal, where you can review your filing information and complete the form distribution and filing process. More information on the filing process can be found in the 'DownloadMyForm Portal' section of this document.

Excel Import

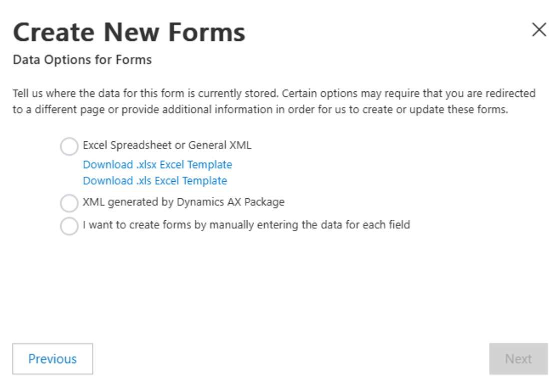
If you do not use Dynamics GP and intend to enter data manually, Greenshades offers the option to upload Year-End forms data via excel import. To import forms via the excel method, you must download the appropriate import template from [GreenshadesOnline](), populate it with your filing information, and import it to the appropriate workspace in GreenshadesOnline.

Workspace Creation

To begin the upload process, you must login to [GreenshadesOnline]() to create your workspaces. Each company with a unique FEIN should have its own workspace. After logging into the portal, use the 'Companies' drop-down menu to select 'Year-end-only Companies.' New companies can be added by providing a Company Name and Company ID. Once you select 'Save Company,' a new workspace will be created, and you'll be directed to the Year-End Forms landing page for your new company. You can then use the drop-down menu in the upper left corner of the portal to navigate back to the System Dashboard, where additional companies can be added if needed.

Uploading Tax Data

To upload forms, access the desired company from the drop-down menu in the upper right corner of the screen. Then, navigate to the Year-End Forms landing page using the upper bar menu. Choose the tax year and form type for the filing you would like to upload data for and select 'Import Your Forms.' A pop-up menu will appear confirming the form type and tax year, as well as information on pricing for form uploads. You will only be charged for uploading forms that you have not previously pre-paid to upload. After hitting next, you will be prompted to select your data option for the upload. On this screen you can download the excel template that will be used to import forms.



The excel template will include instructions for completion. Hovering over the column headers will provide additional information on the data being requested. After populating the template with the requested information, delete the instructions and save the updated template. The completed template can now be uploaded in the next step of the Data Import Wizard.

Immediately after forms have been uploaded, you'll be prompted to complete a short welcome wizard to finish the company setup. The information requested in the welcome wizard will vary based on what type of forms are being uploaded. After completing the welcome wizard, you will be routed to the Download My Form portal, where you can review your filing information and complete the form distribution and filing process. The section below will provide information on the Download My Form portal.

DownloadMyForm Portal

Once forms have been uploaded to GreenshadesOnline, users can view their forms and reports through the DownloadMyForm site. The site will also provide a checklist to guide users through the year-end forms process. The contents of the checklist will vary slightly based on the form type.

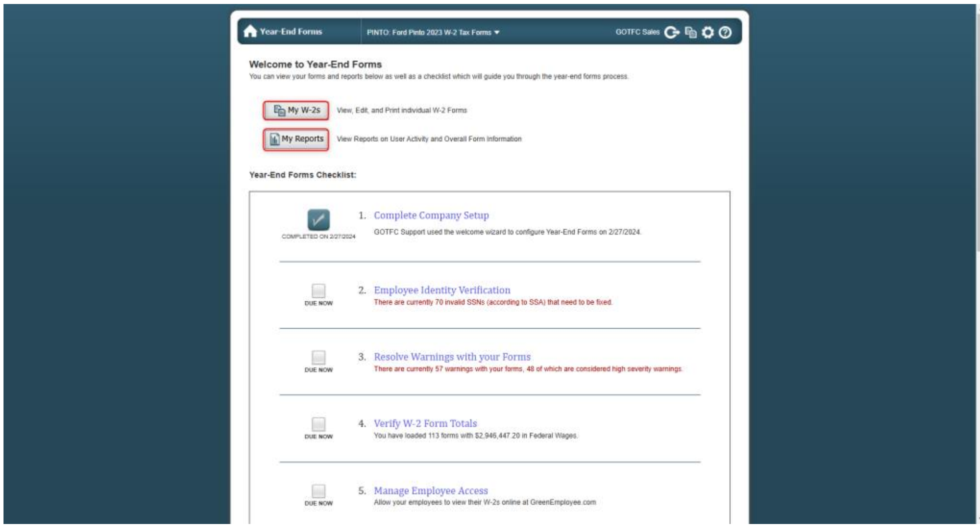
Welcome Wizard

Before accessing the Year-End checklist, you must complete a short welcome wizard to complete company setup. The steps of the welcome wizard will vary based on what type of forms are being worked with. For example, for W-2 forms, the welcome wizard includes a state W-2 ID Validation, a local tax validation, and local tax naming.

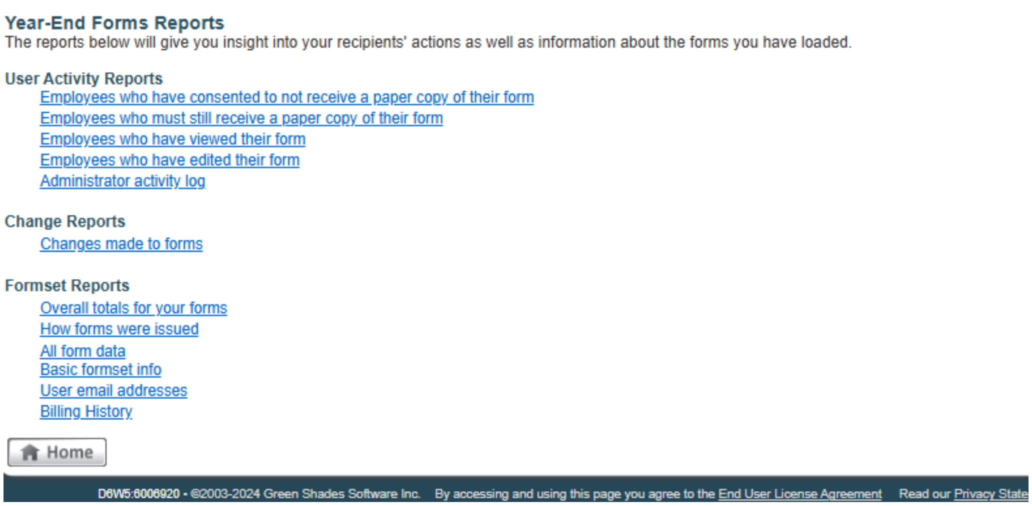
During the welcome wizard, users will also configure their payment method and select their preference for formset archiving. Formset archiving extends the expiration date of Year-End forms on Greenshades' online platform. Typically, forms expire at the end of the year following the filing year. For example, 2024 tax forms will expire on December 31, 2025. Archiving services can extend the expiration date of forms for up to 7 years. The archiving option in the welcome wizard will opt to archive the forms for the full 7 years, but archiving may be purchased for any duration between 1 and 7 years. The sales team can assist with generating an invoice if archiving is wanted for less than 7 years.

My Forms & My Reports

After completing the welcome wizard, you will be automatically routed to the Year-End Forms landing page. Above the Year-End Forms checklist, there are two buttons, one that will route you to your forms and one that will bring you to a reports page.



Forms will be accessible in a list format, and each individual form may be edited or accessed in a printable format. You can also add new forms by using the ‘Add a new _____,’ button in the upper right corner of the My Forms view. In the reports section, you can access a variety of reports and download them in an excel format.



Complete Company Setup

The first step of the Year-End Checklist is to complete company setup. This step is completed as soon as forms are uploaded to GreenshadesOnline, but adjustments can be made after the initial upload process if needed. The information requested during company setup will vary based on form type.

Verification

For certain form types, a complimentary verification process is available. For W-2 and 1095-C forms, an Employee Identity Verification with the SSA is available to validate SSNs. For 1099 forms, TIN or Identity verification is available, depending on the 1099 type. Verification takes place outside of Greenshades and may take up to 3 days to complete.

Resolve Warnings with Your Forms

In step 3 of the checklist, you will have the opportunity to resolve warnings with your forms. If there are any issues detected with the forms, a warning will provide information on what form was affected, what issue was found, and a severity status. Warnings will be categorized as low, moderate, or high in severity. Low and moderate severity warnings do not need to be resolved before filing but are designed to bring attention to anything that may need to be adjusted before completing the filing process. High and critical severity warnings must be corrected before filing to prevent the e-file from being rejected.

Verify Formset Totals

The next step of the Year-End checklist allows you to verify their totals for the formset. If any changes are made to the information in the formset, the totals will recalculate accordingly and can be re-verified. This report can be downloaded in an excel format.

Manage Employee Access

After totals have been verified, users who utilize the GreenEmployee portal may release W-2 and 1095-C forms to their employees electronically by completing the Employee Access Wizard. When enabling employee access to W-2 forms, you can also sync forms to TurboTax and H&R Block. If you choose to sync forms, employees will be able to import their W-2 information directly into Turbo Tax and H&R Block while completing their 940.

In the final step of the employee access wizard, you may allow employees to edit select fields on their forms. During this step you can also indicate which admins should be notified of any changes made to employee forms.

Email Employees with links to Forms

Employees may also be notified of W-2 and 1095-C forms via email. You can send emails to employees by completing the Notification Wizard. Emails may be sent out to all employees who have email addresses in the system, or certain groups of employees may be excluded. The notification message to employees may be modified as needed. In the last step of the Notification Wizard, you may use the advanced options to send email notifications from your personal mail server rather than Greenshades.

Distribute Remaining Forms

The distribute remaining forms step can be used to distribute any paper forms that need to be distributed to their recipients. For most form types, print and mail service is available through Greenshades. You can complete a short mail service wizard to indicate which forms you would like to distribute through Greenshades' print and mail service. Forms may be sent to a central work location for in-house distribution, or they can be routed directly to their recipients.

You may also opt to self-distribute paper forms. For self-distribution, you will create a download batch, indicate what forms you would like to include in the batch, and provide the download batch with a name. You may create as many download batches as needed.

E-file State and Federal Returns

The final steps of the Year-End checklist will prompt you to e-file. During the state filing step, all states with filing requirements will appear in a list format. You can select 'file now' to be led through a short E-file Wizard. Greenshades will provide the state e-file, but state filings must be submitted outside of Greenshades. The last step of the E-File Wizard will provide detailed filing instructions and the E-File for download. After submission, you can update the filing status of state filings in Greenshades Online by accessing the filing page again and selecting the 'View History' option next to the appropriate state. Then you can indicate if the state filing was accepted or rejected.

Greenshades does not support state 1099 filings. If the state you are filing 1099s for is part of the Combined Federal/State Filing program, submitting a federal return will result in the IRS filing what is needed to the state agency. More information on the Combined Federal/State Filing program can be found on irs.gov.

For Federal Filings, you will have the option to submit their filing to the agency yourself, or you may have Greenshades submit the filing on your behalf. If you opt to submit to the agency yourself, you will be routed to a page where you can download the e-file and review detailed filing instructions. If you choose to have Greenshades file on your behalf, Submission ID and filing status will automatically be updated in the DownloadMyForm portal.

Frequently Asked Questions

Uploading Forms

- What are the system requirements for uploading forms using the Sync V2 Connector?
  - Hardware: The host computer is required to have a minimum of 4GB RAM. More may be required depending on the size of your company and type of integration. The computer should also have an internet connection with a recommended 15mb upstream bandwidth.
  - Software:
    - Microsoft Operating System: The sync application is currently supported on Microsoft Desktop and Server operating systems. Desktop and Server versions are supported up to the extended Microsoft support dates.
    - Microsoft .NET Framework 4.7: Microsoft .NET Framework adds an extra layer of functionality to your version of Microsoft Windows that Greenshades solutions utilize. The following link will take you to a Microsoft webpage. Please follow all instructions for downloading and installing the .NET framework before continuing.

  Download Microsft .NET Framework
- I'm receiving the error message: "Year-End Forms was unable to import your forms."
  - This error message may be caused by several factors. If using the excel import method, ensure none of the template formatting was changed and that no equations or special characters are included in the template. If issues persist, contact support for additional assistance.
- The Year-End forms tab is not loading as expected.
  - If the Year-End forms tab is not loading, clear the cache of the browser you're using. If possible, try a second browser. If the issue persists, contact support for additional assistance.
- I would like to remove forms I've uploaded. How do I delete a formset?
  - Greenshades' support team will need to assist with removing uploaded forms. Please reach out to support for assistance.

DownloadMyForm Portal

- I'm not able to edit my forms.
  - If forms are included in a mail service batch, you will not be able to edit the forms. You are also not able to edit forms if you've recently e-filed. Once the IRS approves/rejects the forms, you should be able to edit them. If forms were not included in a print and

mail batch or recently filed, delete your browsers cache and cookies. If issues persist, try using a different browser. If you're still unable to edit forms, reach out to support for assistance.

- My forms from last Year-End are not accessible. How do I get access to them?
    - Tax forms for the 2023 filing year will automatically expire on December 31, 2024 if archiving was not purchased. Greenshades may still have access to forms that have expired. If access is needed, reach out to the Greenshades support team to confirm your data has not been purged from Greenshades' records. If forms are still in Greenshades' system, the sales team can assist with purchasing archiving.
- Where can I find the W-3 for my W-2 forms or the 1096 for my 1099 forms?
    - The W-3 is a paper summary of W-2 information. There is no W-3 when filing W-2s electronically to the SSA. All information needed for filing will be included in the W-2 e-file. The 1096 is also only required for paper 1099 filings. All information needed for
- I'm receiving an error message, but I've already validated my filing information.
    - Our system flags inconsistent or abnormal data with warnings to ensure that admins are aware of potential discrepancies or abnormalities. These warnings are a safe guard for admins to encourage due diligence and attention to detail. High and critical severity warnings must be resolved before filing because they will cause the e-file to be rejected.
- When do I need to distribute forms by to guarantee they are postmarked on or before January 31, 2025?
    - Mail service orders must be placed by January 26, 2025 for a guaranteed postmark on or before January 31, 2024.

Filing

- I'm receiving the error message, "Your previous e-file has not been processed yet." What do I do?
  - The DownloadMyForm site does not generate corrected state filings. Because of this, clients must wait until their federal filing is processed before filing their state e-files. This is to ensure that any rejections are caught during the federal filing process which saves clients from having to do a manual state correction.
- My state W-2 e-file was rejected by the state. What do I do now?
  - If you've received a rejection letter, email the letter to support@greenshades.com or fax it to 904-807-0165. The Greenshades support team will assist with identifying and resolving any issues with your e-file.