

---

User Reference

# CMiC - Greenshades v10x

By CMiC

**CMiC**  
*Computer Methods*  
*international Corp.*

---

# Proprietary Notice

The contents of the CMiC software product, including both this manual and the program components, are proprietary to Computer Methods International Corp. (CMiC), are copyright protected and are considered Confidential Information by CMiC. All rights are reserved by CMiC. A copy of the manual and the program has been provided to the original licensee under license with CMiC strictly for their own use under the terms of the license. All copies of this manual whether in print or electronic format must contain a copy of this Proprietary Notice. Any selling, licensing or other distribution of the contents of either this manual or the program components, whether for profit or not, is unlawful and may subject the violator and the original licensee to termination of license, criminal charges, civil action, or any combination of these.

Copyright © 2017

**Computer Methods International Corp.**  
4850 Keele Street  
Toronto, Ontario M3J 3K1  
Canada

# Risk of Use Notice

The CMiC software product, including both this manual and the program components, is licensed on an “AS IS” basis. The entire risk as to the results of its use is with the licensee. Except in those jurisdictions which impose certain warranties by statute which may not be waived by one or more of the parties, and only to that extent, Computer Methods International Corp. (CMiC) makes no warranties whatsoever, either expressed or implied, with respect to the quality, performance, merchantability or fitness for any particular purpose of any or all components of this software product, except as provided in the licensee’s license agreement. The licensee (and not CMiC or its agents) will be solely responsible for the costs of all service, or of any defect in this software product and any incidental or consequential damages caused or alleged to be caused either directly or indirectly by the software product to the licensee or any other person, including, but not limited to, any interruption of service, or loss of business or anticipatory profits, even if CMiC has been advised of the possibility of such damages.

“Computer Methods International Corp” and “CMiC” are registered trademarks of Computer Methods International Corp. Oracle, Oracle9i™, Oracle Application Server11g™, Oracle Database 11g™, Oracle® Discoverer™ are trademarks or registered trademarks of Oracle Corporation.

# Contents

<b>GREENSHADES TAX FILING CENTER.....</b>	<b>1</b>
OVERVIEW – GREENSHADES .....	1
SECURITY – PHISHING ATTACKS .....	2
<b>INTEGRATING CMiC WITH GREENSHADES.....</b>	<b>3</b>
STEP 1: ACQUISITION AND SUPPORT .....	3
STEP 2: INSTALLING GREENSHADES .....	3
STEP 3: CMiC SETUP FOR INTEGRATION WITH GREENSHADES .....	3
<i>Set Greenshades Installed Flag</i> .....	4
<i>General Setup Procedures for Government Reporting (W-2, SUTA/SUI, New Hire, 401K)</i> .....	5
Ensure State Employer Account IDs Entered for Each State.....	5
<i>W-2 Reporting Setup</i> .....	6
Reminder: Ensure State Employer Account IDs Entered for Each State.....	6
W-2 Parameters Mapping .....	6
Greenshades Locality Options.....	8
Create W-2 Export File for Greenshades .....	13
<i>SUTA/SUI Reporting Setup</i> .....	15
Create SUTA Export File for Greenshades .....	15
<i>New Hire Reporting Setup</i> .....	17
Reminder: Ensure State Employer Account IDs Entered for Each State.....	17
Create New Hire Export File for Greenshades .....	18
<i>401K Reporting Setup</i> .....	21
<i>1099 Reporting Setup</i> .....	24
Create 1099 Export File.....	25
<i>941 Reporting Setup</i> .....	25
Create 941 Export File.....	26
<i>940 Reporting</i> .....	27
<i>ACA Compliance (1095-C, 1094-C) Reporting Setup</i> .....	32
Overview – ACA Compliance Reporting.....	32
Security Setup .....	32
Required Employee Information for Lines 14, 15, & 16 of Form 1095-C.....	33
Part 1 of Form 1095-C (Lines 1 - 13) .....	33
Part 2 of Form 1095-C (Lines 14-16) .....	33
Part 3 of Form 1095-C (Lines 17-34) .....	39
Monthly Builds of ACA Compliance Data & Screens to View/Edit Data.....	42
Employee Self Service – Enrolling Dependents .....	47
Convert Health Care Plan from Payroll to HR .....	47
Create 1095 Export File.....	50
STEP 4: ICON SETUP FOR GREENSHADES .....	52
STEP 5: REGISTERING GREENSHADES .....	54
Updating Greenshades .....	54
<b>REPORTING VIA GREENSHADES .....</b>	<b>55</b>
W-2 REPORTING .....	55
<i>My W-2s</i> .....	67
<i>Mail</i> .....	68
<i>E-File</i> .....	73
<i>Reports</i> .....	74

<i>Settings</i> .....	75
SUTA/SUI REPORTING.....	79
401K REPORTING .....	84
NEW HIRE REPORTING.....	86
1099 REPORTING .....	87
941 REPORTING.....	100
1095 REPORTING .....	102
<b>INDEX .....</b>	<b>107</b>

# Greenshades Tax Filing Center

---

## Overview – Greenshades

Greenshades Tax Filing Center is a third party software package that can be integrated with CMiC's Payroll system to provide e-filing solutions. Currently, CMiC can be integrated with Greenshades for filing SUTA/SUI, W-2, 401K, New Hire, 941, 1099, and 1095-C forms.

With Greenshades, raw year-end tax data can be uploaded to their secure website for the following services:

1. Format raw year-end tax data into state, province, or federal specific formats for filing tax forms.
2. Allow online access to tax forms (e.g. W-2, 1099-MISC) for recipients to receive, verify, and print via DownloadMyForm.com.
3. Administration of tax forms, such as: run reports against uploaded year-end tax data to view which forms have been printed/received by recipients and which forms need to be mailed out, print out forms in-house, or to make changes to individual forms.
4. Outsource printing, enveloping, stamping, and mailing of tax forms (optional service).
5. E-file tax forms: securely transmit tax forms to required government(s).

---

## Security – Phishing Attacks

The following is a notice from Greenshades, warning clients to watch out for phishing attacks, and asking clients to report any phishing attacks to them:

Dear Greenshades Clients and Partners,

We have reports this morning (Feb. 6, 2017) of an email phishing campaign targeting users of our online sites. The email appears to come from GreenEmployee, but is actually being sent from the spoofed email address "**noreply\_notification@decesente.com**." The email claims that our services are undergoing system maintenance and "implores" you to log in to protect yourself from phishing activities. If you receive this email or one like it, please do not click on the link(s) and report it to us immediately. This gives us a chance to notify our users and try to get phishing sites like this taken down.

As we reported in our "Keep an eye out for phishers" blog post earlier this year, these types of phishing attacks are on the rise and are trying to trick you and your employees into giving away your password and other personal information. Please remember, Greenshades only sends emails from our domains and only sends links to websites on our own domains - Greenshades.com, GreenshadesOnline.com, GreenEmployee.com, and DownloadMyForm.com – or our service partners' domains like ConstantContact.com, GoToMeeting.com and StartControl.com. If the email address or any link in the email does not use one of these domains and is pretending to be Greenshades, please treat it as fraudulent and report it to us. We will keep our blog updated with any new phishing attempts reported to us.

Last, please take proactive measures to protect yourself and your information when you can. Please create strong passwords that you never share and please enable 2nd-factor authentication on your Greenshades account. For more information on how to do this and how to use other Greenshades security features, please check out our recent blog posts on security.

As always, please contact [security@greenshades.com](mailto:security@greenshades.com) or [support@greenshades.com](mailto:support@greenshades.com) if you have questions or need assistance.

Sincerely,

Greenshades Security

# Integrating CMiC with Greenshades

---

## Step 1: Acquisition and Support

To acquire and integrate Greenshades Tax Filing Center with CMiC's Payroll system, please contact CMiC. CMiC will register your company with Greenshades and provide them with information about your company's particular needs. After Greenshades has prepared a customized version of their software, CMiC will provide you with a registration key, a link to download the software, and installation instructions.

Any help needed during any of these steps is asked to be directed at CMiC, not at Greenshades, as CMiC has exclusive knowledge about integrating Greenshades with CMiC's Payroll system.

---

## Step 2: Installing Greenshades

**NOTE:** It is recommended that this step is performed by IT/network personnel.

---

There are two options for where to install Greenshades' software. It may be installed on an individual payroll administrator's computer or on a server, however, CMiC recommends installing Greenshades on an administrator's computer due to the confidentiality of payroll information.

For installing Greenshades, including firewall and proxy server settings, please refer to the following installation document provided by Greenshades and to their online support:

<http://Greenshades.com/pub/downloads/documentation/FilingCenterInstallation.pdf>

<http://Greenshades.com/download-tax-filing-center.php>

---

## Step 3: CMiC Setup for Integration with Greenshades

**NOTE:** This step is intended to be completed by a payroll administrator.

---

## Set Greenshades Installed Flag

System Tables Maintenance - TEST2006 System Options

System Options

General Database Options Reports Financials Projects Assets Payroll Human Resource

Default 1099 Code 8 1099 Misc Sub of payment

Default Vendor Class OTH Other/Misc

Priority From To

Generate Timesheet Utility for E-Timesheet

Payroll/HR Auto Numbering  Add Hourly Premium to Zero Amount/Not Found Rate

Apply Company Security In Payroll  JSP Position ID Auto Numbering

E-Time: Restrict Access Codes By Company  JSP Requisition ID Auto Numbering

**Greenshades Installed**  Check Processing And Printing By Check Location

Mandatory Approver Priority Flag  Auto Calculate Seniority

Preferred Rate: Check Employee Profile Days to Retain Seniority

Union  Trade  Oracle Time Import: Mandatory Acct/Dept for G-Line

Oracle Time Import: Apply Employee Security

Payroll Control Defaults  Ascii File Time Import: Determine Rate If Rate Is Blank

Allow Shift Selection:  Assign New Check/EFT Number By Bank/Branch/Account

"All Shifts"

Day

Evening

Night

Default Shift

Evening

System Options: *System > Setup > System Options > Payroll tab (highlighted in green, above)*

To integrate CMiC's software with Greenshades, CMiC exports year-end tax data, such as that for 1099 reporting, into an XML file for importing into Greenshades.

To enable this functionality, a flag in CMiC's system must be set to indicate this request. This flag is set by checking the box labeled **Greenshades Installed** on the **Payroll** tab of the **System Options** screen (*flag framed by red rectangle in above screenshot*).

**NOTE:** If the checkbox is disabled, not allowing you to check or uncheck it, please contact CMiC for a script to enable this checkbox.

# General Setup Procedures for Government Reporting (W-2, SUTA/SUI, New Hire, 401K)

## Ensure State Employer Account IDs Entered for Each State

The screenshot displays the 'SUI Magnetic Media Maintenance' screen in the CMiC Enterprise application. The form contains the following data:

FEIN	885993441	Chris's A Company
State	AZ	ARIZONA
Employer Account	885774116	Transmitter Account
Company Name	CHRIS'S A COMPANY	
Street	54 BROWNS LINE	
City	PHOENIX	
State	AZ	ARIZONA
Contact Title		
Contact Name		
Zip Code	85055	Zip Code Extension
Contact Phone		Phone Extension
Suffix Code		State Plan S
Path and File Name	C:\CM32\2004\4zmm\Y1234567890123456789012345678901234567890	

*SUI Magnetic Media Maintenance: Payroll (US) > Setup > Local Maintenance > SUI Magnetic Media*

Before creating the W-2, SUTA/SUI, New Hire, or 401K export file for importing into Greenshades, ensure that for each state in which an employee works, the state-supplied **Employer Account ID** (for SUI/SUTA reporting) has been assigned to the company's Federal Employer Identification Number (**FEIN**). This is done through the **SUI Magnetic Media Maintenance** screen (not to be confused with the **SUI Magnetic Media Creation** screen).

To generate the export file for Greenshades, the only fields requiring entry on this screen are:

### FEIN

Enter the company's FEIN number.

### State

Enter the State Code for the state to report to.

### Employer Account

Enter the company's state-supplied Employer Account number.

## W-2 Reporting Setup

### Reminder: Ensure State Employer Account IDs Entered for Each State

As with other types of reporting, before creating the W-2 export file for Greenshades, ensure that for each state in which an employee works, the state-supplied **Employer Account ID** (for SUI/SUTA reporting) has been assigned to the company's Federal Employer Identification Number (**FEIN**). For details, refer to the *Ensure State Employer Account IDs Entered for Each State* subsection.

### W-2 Parameters Mapping

Box Code	Tran Type	Tran Code	Amount Type	Employer's Contr. Flag	Factor Number	ADP Tax Level	Include Rec.
	BN	3520	Employee Amount	All	1		<input checked="" type="checkbox"/>
1	BN	BEN3	Employee Amount	All	1		<input checked="" type="checkbox"/>
1	BN	BLF2	Employee Amount	All	1		<input checked="" type="checkbox"/>
1	BN	BNSB	Employee Amount	All	1		<input checked="" type="checkbox"/>
1	BN	BON	Employee Amount	All	1		<input checked="" type="checkbox"/>
1	BN	BON1	Employee Amount	All	1		<input checked="" type="checkbox"/>
1	BN	BON3	Employee Amount	All	1		<input checked="" type="checkbox"/>
1	BN	CAR	Employee Amount	All	1		<input checked="" type="checkbox"/>
1	BN	GAR1	Employee Amount	All	1		<input checked="" type="checkbox"/>
1	BN	MED	Employee Amount	All	1		<input checked="" type="checkbox"/>
1	BN	PEN	Employee Amount	All	1		<input checked="" type="checkbox"/>
1	BN	VEH	Employee Amount	All	1		<input checked="" type="checkbox"/>

Payroll Mapping Maintenance: Payroll (US) > Utilities > W2 Mapping Parameters

This screen is used to map fields on W-2 forms to details from CMiC's Payroll system, and it allows for the grouping of as many fields per W-2 box number as required. It is also used to indicate what information gets printed on the W-2 forms.

#### [W2 Default Setup] – Button

If this form has not been set up, or you wish to reset the mapping setup, click this button to recreate the mappings according to the rules defined for each of the transaction codes in the Payroll system. If you press the **[W2 Default Setup]** button again, the mappings will once more be recreated based on the Payroll setup. You must then make any modifications and additions to any non-standard detail.

The parameters for each column are explained below:

**Box Code**

Enter the W-2 Box Code required. The system will allow for Box Codes 1 thru 12, plus 13A – Z and 14 A to Z for Federal Returns. Each line entered against a box code, starting with 14, will print 2 lines on the W2: one text line and one dollar value line.

For State Returns, boxes 17, 18, 20, and 21 must be setup.

**Tran Type**

Select the required transaction type from the list of values, the list contains the following types: Basic Wages, Expenses, Leaves, Benefits, Deductions, Taxes, Loan Advances, Loan Interest, Workers Compensation, and Public Liability.

**Tran Code**

This field will display the available Transaction Codes for the Transaction Type entered in the previous field.

**Amount Type**

Select the required amount type. This type can be Employee Amount, Calculated Amount, Gross Earnings or Employer Amount.

---

**NOTE:** Do not select “**Calculated Amount**” unless advised by a CMiC Consultant

---

**Employer Contr. Flag**

This field indicates if ‘Employer Contributions’ are to be included in the amount reported. Valid values are “**All**”, “**Yes**” and “**No**”.

---

**NOTE:** Set to “**All**” unless advised by a CMiC Consultant

---

**Factor Number**

This field allows for the changing of a negative amount into a positive amount (where Amount Type is Employee Amount) for reporting purposes. This should be used to change the sign on Employee Taxes Paid, Loan Payments, Loan Interest Payments and Deductions.

**ADP Tax Level**

This field is not required for the definition of W2s

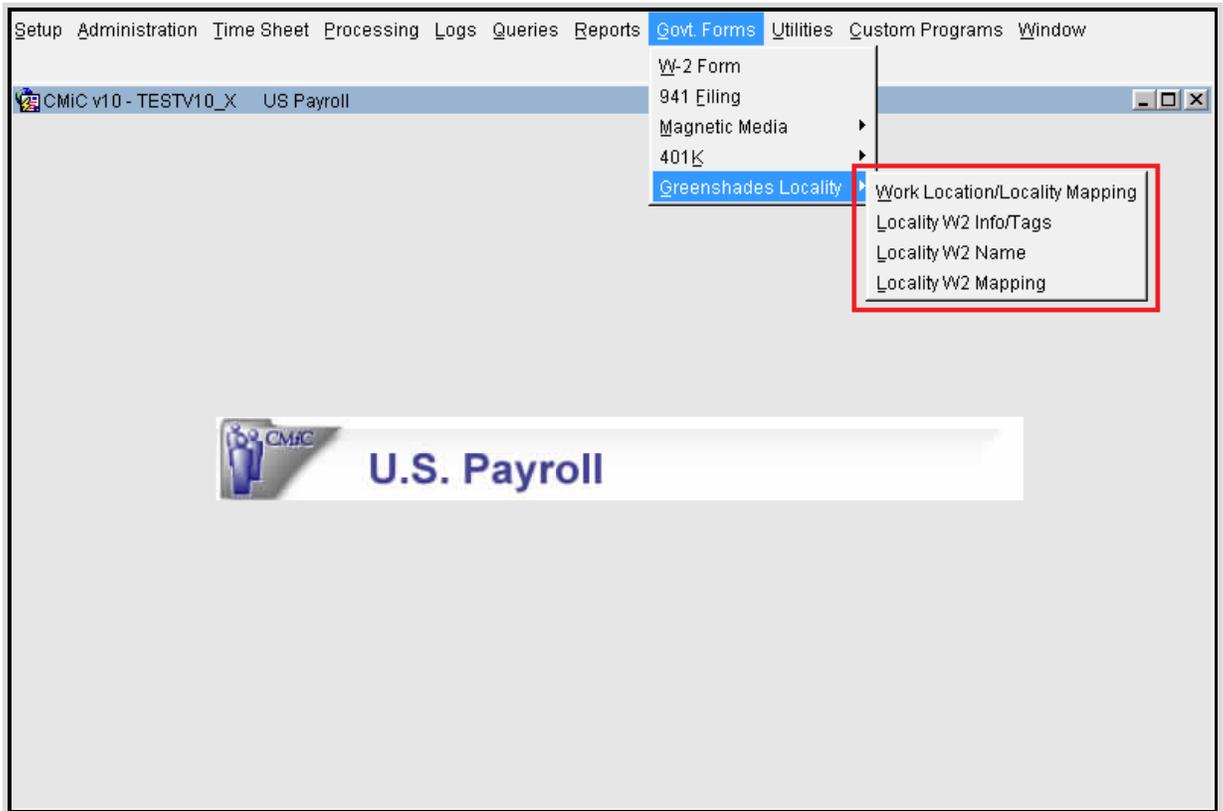
**Description**

This field is only used in conjunction with box 14; the description entered will be printed on one line and the amount below it on the W2. If there is a need to sum amounts to create a box 14 amount, please ensure that the identical description is on each line being summed.

**Include Rec.**

If the transaction type shown is not to include the amount for this box code, uncheck this flag.

## Greenshades Locality Options



*Greenshades Locality options: Payroll (US) > Government Forms > Greenshades Locality*

4 options to customize fields on W-2 forms, and to establish relations and mappings between **Work Locations**, **Locality Codes** and **Municipality Codes** already defined in Payroll (*for state reports*). Framed by the above red rectangle, the 4 Greenshades Locality setup screens are:

### **Work Location/Locality Mapping**

Local Tax filing through Greenshades is set up in the Work Location to Greenshades Locality Mapping Maintenance screen, where Work Locations are mapped to Locality Codes and Municipality Codes already defined in Payroll.

### **Locality W2 Info/Tags**

For a FEIN, specify a State, Locality Code, Municipality Code, and then assign this relation a W2 tag.

### **Locality W2 Name**

For each Locality Code of a State, specify the name of its W-2 form (*overrides default W-2 name printed on a state's W-2 forms*).

### **Locality W2 Mapping**

For a Locality Code of a State, override its W-2 parameters mappings (*overrides the standard W-2 mappings for multi-localities*).



## Locality W2 Info/Tags

Payroll - TEST2006    Locality W2 Info/Tags by FEIN

**Select FEIN/State**

FEIN: 4444444    SS Construct & Company

State: ALL    All States     Retrieve All Work Location/Locality Mapping

**Locality W2 Info/Tags**

State	Locality Code	Municipality Code	Tag Name	Tag Value			
IN	Indiana	INDCON	Indiana County	06	Boone	LocaW2ID	2525
IN	Indiana	INDCON	Indiana County	08	Carroll	LocaW2ID	3879
IN	Indiana	MARION	Marion			LocaW2ID	2312
MD	Maryland	MDCON	Maryland Counties	BL	Baltimore County	LocaW2ID	6832
NY	New York	NYC	New York City			LocaW2ID	4521
OH	Ohio	OHSB	Ohio School Board	6502	Logan Elm (Hocking)	LocaW2ID	9858
OH	Ohio	TOLEDO	Toledo			LocaW2ID	3654
PA	Pennsylvania	ABNGTN	Abington			LocaW2ID	6547

Locality W2 Info/Tags by FEIN: Payroll (US) > Government Forms > Greenshades Locality > Locality W2 Info/Tags

For a specified **FEIN**, specify a mapping for each state and each location within the state requiring reporting. For each mapping, specify the state and its relevant **Locality Code** and **Municipality Code**, and then assign the relation to the relevant **W2 Tag**, as shown in the above screenshot.



## Locality W2 Mapping

Payroll - TEST2006    Locality W2 Mapping Maintenance

**Select State**

State IN Indiana

**Locality**

State	Locality Code	Municipality Code	W2 Default Setup
IN	Indiana	INDCON    Indiana County    06    Boone	W2 Default Setup
IN	Indiana	INDCON    Indiana County    08    Carroll	W2 Default Setup
IN	Indiana	INDCON    Indiana County    09    Cass	W2 Default Setup
IN	Indiana	MARION    Marion	W2 Default Setup

**W2 Setup**

State	Locality	Municipality	Box Code	Tran Type	Tran Code	Amount Type	Employer's Contr. Flag	Factor Number	Include Rec.
IN	INDCON	06	18	BWV	NWHR	Employee Amount	All	1	<input checked="" type="checkbox"/>
IN	INDCON	06	18	DE	401K	Employee Amount	All	-1	<input checked="" type="checkbox"/>
IN	INDCON	06	19	TX	CITY	Employee Amount	All	-1	<input checked="" type="checkbox"/>
IN	INDCON	06	19	TX	COUT	Employee Amount	All	-1	<input checked="" type="checkbox"/>
IN	INDCON	06	19	TX	SDT	Employee Amount	All	-1	<input checked="" type="checkbox"/>
									<input type="checkbox"/>
									<input type="checkbox"/>
									<input type="checkbox"/>
									<input type="checkbox"/>

Locality W2 Mapping Maintenance: Payroll (US) > Government Forms > Greenshades Locality > Locality W2 Mapping

For a state's **Locality Code**, override its W-2 parameters mappings (*overrides the standard W-2 mappings for multi-localities*).

---

**NOTE:** A separate W2 mapping might be required for each locality.

---

## Create W-2 Export File for Greenshades

The screenshot shows the 'W2/T4 Parameter Screen' in the Greenshades software. The window title is 'Payroll - TESTV10\_X W2/T4 Parameter Screen'. The interface includes a menu bar (Action, Edit, Block, Field, Record, Query, Utility, Help, Window) and a toolbar with various icons. The main area is titled 'Parameters Selection' and contains the following fields:

- Export File? Export File (dropdown)
- Federal Jurisdiction All Jurisdictions Combined (dropdown)
- Report Based On Payroll Year/Qtr Setup on Pay Period Screen (dropdown)
- Report Year 2012 (text)
- FEIN Number 03-0279465 (text)
- Company CCC (text)
- Pay Run CCOW (text)
- From Quarter 1 (text) To Quarter 1 (text)
- State Code From (text)
- State Code To (text)
- Start Employee (text)
- End Employee (text)
- Sort Employees by Last Name (dropdown) City City Code on Employee Address (dropdown)
- Information Federal and State (dropdown)
- Output Type Annual W2 Transactions File (dropdown)
- ASCII File C:\TEMP\W2\_2012.XML (text)

On the right side, there are sections for 'User Extensions' (User Extension1 through User Extension7, More Extensions ...) and 'Related Screens' (Related Screen 2 through Related Screen 7, More Related ...). A 'Print' button is located at the bottom right of the form area. Below the form, a status bar displays 'Record: 1/1' and '<OSC>'.

W2/T4 Parameter Screen: Payroll (US) > Government Forms > W-2 Form

## Enter Parameters to Specify W-2 Data for Export to Greenshades

### Export File

There are four options to export the file: Export File, Export File by State, State Wages Report by State and State Wages Report by Employee.

### Federal Jurisdiction

Select Federal Jurisdiction from pull down list. The options are All Jurisdictions Combined, United States, Guam and Puerto Rico.

### Report Based On

Select the option by which the report will be created. Running the report by **Calendar Year/Qtr of Check Date** will process employees' checks issued in that calendar year regardless of the payroll year. Running the report by **Payroll Year/Qtr Setup on Pay Period Screen** processes checks issued in the payroll year specified.

### Report Year

Enter the Report Year.

### FEIN Number/Company

Enter company's FEIN number or code.

**Company**

Enter company's name

**Pay Run**

Enter the Pay Run. This field is optional.

**From Quarter/To Quarter**

Enter the range of quarters. If creating quarterly file for Greenshades, only one quarter at a time can be selected.

**State Code From/State Code To**

Enter the State range.

**Start Employee/End Employee**

Enter the employee range.

**Sort Employees By**

Select the method of sorting employees when generating the output file.

**City**

Select where to pull the text from that identifies the city on the W-2 forms.

**Information**

Select the information to be printed on the W2 forms.

**Output Type**

Select the file output type. If using Greenshades, the user can generate an Annual W2 Transactions File, Quarterly SUTA and W2 file, or New Hire file. If generating a New Hire file, the Hire Date range is required.

When printing the New Hire File, there are three options for Employee State. The selection made will determine the state in the "State Employed Value" node of the New Hire File. If Employee Residence State is selected, then the state of the mailing address on the employee profile is printed in the file. If Employee Work Location State is selected, then the state of the work location on the employee profile is printed. If Employee Company State is selected, then the state of the Payroll Company on the employee profile is printed.

**ASCII File**

Enter the file name and path for the export file of W-2 data to be exported by CMiC's Payroll system, as specified by the above parameters.

---

**NOTES:** I) Greenshades' interface files will display the company legal name from GL. If there is more than one company in the FEIN, the first company legal name found that is not null will be used. If no company legal names are found, the W2s will be printed with the FEIN legal name.

II) The export file's name and path specified in the **ASCII File** field must match the import file name and path specified by the Greenshades shortcut icon created in the next corresponding step to launch Greenshades (*7<sup>th</sup> parameter of the **Target** field of the icon*). Greenshades needs to know where to find the XML file for importing W-2 data.

---

## Create W-2 Export File

To create the W-2 export file, as specified by the parameters above, click the **Print** button. This process will print/export the data into an XML file, with the file name and location specified by ASCII File parameter.

Now that the W-2 export file has been created through CMiC's software, the next step is to specify the file's name and location to Greenshades. This is done by passing the name and location of the exported file to Greenshades during its launching. This information is passed to Greenshades through the desktop icon used to launch Greenshades. For details, refer to the *Step 4: Icon Setup for Greenshades* section in this guide.

## SUTA/SUI Reporting Setup

### Reminder: Ensure State Employer Account IDs Entered for Each State

As with other types of reporting, before creating the SUTA/SUI export file for Greenshades, ensure that for each state in which an employee works, the state-supplied **Employer Account ID** (for SUI/SUTA reporting) has been assigned to the company's Federal Employer Identification Number (*FEIN*). For details, refer to the *Ensure State Employer Account IDs Entered for Each State* subsection.

### Create SUTA Export File for Greenshades

The screenshot shows a software interface titled "roll - CONSULT1 W2/T4 Parameter Screen". Under the "Parameters Selection" heading, there are several input fields and dropdown menus. The "Export File?" dropdown is set to "Export File". "Report Based On" is set to "Payroll Year/Qtr Setup on Pay Period Screen". "Report Year" is "2009". "FEIN Number" is "55-777777". "Company" is "Terri's Companies". "Pay Run" is empty. "From Quarter" and "To Quarter" are both set to "3" and are highlighted with a red box. "State Code From" and "State Code To" are empty. "Start Employee" and "End Employee" are empty. "Sort Employees by" is "Last Name" and "City" is "Address Line 3". "Information" is "Federal and State". "Output Type" is "Quarterly SUTA and W2 File". "ASCII File" is "C:\TEMP\SUI\_2009Q3.XML". A "Print" button is located at the bottom right.

*W2/T4 Parameter Screen: Payroll (US) > Government Forms > W-2 Form*

This screen is also used to create the SUTA export file for Greenshades.

### Enter Parameters to Specify SUTA Data for Export to Greenshades:

#### Export File

Of the four options available, select **Export File**.

**Federal Jurisdiction**

Select All Jurisdictions Combined.

**Report Based On**

Select **Payroll Year/Qtr Setup on Pay Period Screen** to process checks issued in the payroll year specified.

**Report Year**

Enter the Report Year.

**FEIN Number/Company**

Enter company's FEIN number or code.

**Company**

Enter company's name.

**Pay Run**

Enter the Pay Run. (*Optional*).

**From Quarter/To Quarter**

Specify the quarter for reporting.

**State Code From/State Code To**

Enter the range of States. (*Optional*)

**Start Employee/End Employee**

Enter the employee range. (*Optional*)

**Sort Employees By**

Select the method of sorting employees when generating the export file.

**City**

Select where to pull the text from that identifies the city on the forms.

**Information**

Select the information to be printed on forms.

**Output Type**

Select Quarterly SUTA and W2 File.

**ASCII File**

Enter the file name and path for the export file of SUTA data to be exported by CMiC's Payroll system, as specified by the above parameters.

---

**NOTES:** I) Greenshades' interface files will display the company legal name from GL. If there is more than one company in the FEIN, the first company legal name found that is not null will be used. If no company legal names are found, the forms will be printed with the FEIN legal name. II) The export file's name and path specified in the **ASCII File** field must match the import file name and path specified by the Greenshades shortcut icon created in the next corresponding step to launch Greenshades (*7<sup>th</sup> parameter of the **Target** field of the icon*). Greenshades needs to know where to find the XML file for importing SUTA/SUI data.

---

## Create SUTA Export File

The screenshot shows a software interface titled "Payroll - CONSULT1 W2/T4 Parameter Screen". The main section is "Parameters Selection". The parameters are as follows:

Export File?	Export File
Report Based On	Payroll Year/Qtr Setup on Pay Period Screen
Report Year	2009
FEIN Number	55-7777777
Company	Terri's Companies
Pay Run	
From Quarter	3
To Quarter	3
State Code From	
State Code To	
Start Employee	
End Employee	
Sort Employees by	Last Name
City	Address Line 3
Information	Federal and State
Output Type	Quarterly SUTA and W2 File
ASCII File	C:\TEMP\SUI_2009Q3.XML

A "Print" button is located at the bottom right. A status bar at the bottom of the window displays the message: "Quarter 3 ASCII file created ... 21 employees processed."

W2/T4 Parameter Screen: Payroll (US) > Government Forms > W-2 Form

To create the SUTA export file, as specified by the parameters above, click the **[Print]** button. This process will print/export the data into an XML file, with the file name and location specified by ASCII File parameter.

Now that the SUTA export file has been created through CMiC's software, the next step is to specify this file's name and location to Greenshades. This is done by passing the name and location of the exported file to Greenshades during its launching. This information is passed to Greenshades through the desktop icon used to launch Greenshades. For details, refer to the *Step 4: Icon Setup for Greenshades* section in this guide.

## New Hire Reporting Setup

**New Hire Reporting** uses the same screen used to create the export files for W-2 and SUTA/SUI data.

### **Reminder: Ensure State Employer Account IDs Entered for Each State**

As with other types of reporting, before creating the **New Hire** export file for Greenshades, ensure that for each state in which an employee works, the state-supplied **Employer Account ID** (for SUI/SUTA reporting) has been assigned to the company's Federal Employer Identification Number (**FEIN**). For details, refer to the *Ensure State Employer Account IDs Entered for Each State* subsection.

## Create New Hire Export File for Greenshades

Payroll - CONSULT1 W2/T4 Parameter Screen

**Parameters Selection**

Export File? Export File

Report Based On Payroll Year/Qtr Setup on Pay Period Screen

Report Year 2009

FEIN Number 55-7777777

Company Terri's Companies

Pay Run

From Quarter To Quarter

State Code From

State Code To

Start Employee

End Employee

Sort Employees by Last Name City Address Line 3

Information Federal and State

Output Type New Hire File

ASCII File C:\TEMP\NEWHIRE\_2009.XML

Print

W2/T4 Parameter Screen: Payroll (US) > Government Forms > W-2 Form

## Enter Parameters to Specify New Hire Data for Export to Greenshades

### Export File

Of the four options available, select **Export File**.

### Federal Jurisdiction

Select All Jurisdictions Combined.

### Report Based On

Select **Payroll Year/Qtr Setup on Pay Period Screen** to process data in the payroll year specified.

### Report Year

Enter the Report Year.

### FEIN Number/Company

Enter company's FEIN number or code.

### Company

Enter company's name. (*Optional*)

**Pay Run**

Enter the Pay Run. *(Optional)*.

**From Quarter/To Quarter**

Specify the quarter for reporting.

**State Code From/State Code To**

Enter the range of States. *(Optional)*

**Start Employee/End Employee**

Enter the employee range. *(Optional)*

**Sort Employees By**

Select the method of sorting employees when generating the export file.

**City**

Select where to pull the text from that identifies the city on the forms.

**Information**

Select the information to be printed on forms.

**Output Type**

Select New Hire File.

**ASCII File**

Enter the file name and path for the export file of New Hire data to be exported by CMiC's Payroll system, as specified by the above parameters.

---

**NOTES:** I) Greenshades' interface files will display the company legal name from GL. If there is more than one company in the FEIN, the first company legal name found that is not null will be used. If no company legal names are found, the forms will be printed with the FEIN legal name. II) The export file's name and path specified in the **ASCII File** field must match the import file name and path specified by the Greenshades shortcut icon created in the next corresponding step to launch Greenshades (*7<sup>th</sup> parameter of the **Target** field of the icon*). Greenshades needs to know where to find the XML file for importing New Hire data.

---

To continue New Hire reporting, click **[Print]** to bring up the secondary screen shown for the next step.

## Create New Hire Export File

The screenshot shows a software window titled "Payroll - TESTV10\_X W2/T4 Parameter Screen". The main area is titled "Parameters Selection" and contains the following fields:

- Federal Submitter PIN Number: 12345 (MMRefPin)
- Contact Title: Human Resources
- Contact Name: Terri Edington
- Contact Phone: 432 1235432 Ext. 211
- Contact Fax: 5555555555
- Contact Email: terri.edington@cmic.ca
- Preferred Notification Method: E-Mail
- New Hire section:
  - From Hire Date: 01/JAN/2009
  - To Hire Date: 31/DEC/2009
  - Batch Number: (empty)
  - Iowa EIN Suffix: (empty)
  - Employee State: Employee Residenc... (dropdown)

Buttons for "Previous" and "Process" are located at the bottom right of the form area. On the right side of the window, there are sections for "User Extensions" (listing User Extension1 through User Extension7 and More Extensions ...) and "Related Screens" (listing SUI Magnetic Media, SUI Magnetic Media, Related Screen 4, Related Screen 5, Related Screen 6, Related Screen 7, and More Related ...).

At the bottom of the window, a note reads: "Required By Certain States, Enter A Sequential Number To Identify The File. This Number Should Never Be Repeated." Below this is a record indicator: "Record: 1/1" and a navigation button "<OSC>".

W2/T4 Parameter Screen for New Hire Reporting (secondary screen, unique to New Hire)

On this secondary screen, enter the **Federal Submitter PIN Number**, the contact information, and specify the range of dates for processing. If necessary, enter a Batch Number and Iowa EIN Suffix (*parameters explained below*). This process will print/export the data into an XML file, with the file name and location specified by ASCII File parameter.

### Federal Submitter PIN Number

Enter the PIN number obtained from SSA for electronic filling.

### Batch Number

Required by some states. Enter a sequential number to identify the file (*this number cannot be reused*).

### Iowa EIN Suffix

For Iowa New Hire reporting. Enter the 3-digit EIN suffix.

### Employee State

Select which employee-location relation to report (*Employee Residence State, Employee Work Location State, Employee Company State*).

Click the **Process** button to create the XML export file. After the New Hire export file has been created, the next step is to specify this file's name and location to Greenshades. This is done by passing the name and location of the exported file to Greenshades during its launching. This information is passed to Greenshades

through the desktop icon used to launch Greenshades. For details, refer to the *Step 4: Icon Setup for Greenshades* section in this guide.

## 401K Reporting Setup

You have the option to use Greenshades to upload a file to your 401k provider with the data from CMiC's system. To initially use this function, please notify CMiC as you will be required to fill out a questionnaire about your 401k provider. CMiC will give that information to Greenshades so that they may build the proper format for your 401k provider.

### Reminder: Ensure State Employer Account IDs Entered for Each State

As with other types of reporting, before creating the **401K** export file for Greenshades, ensure that for each state in which an employee works, the state-supplied **Employer Account ID** (for *SUI/SUTA reporting*) has been assigned to the company's Federal Employer Identification Number (*FEIN*). For details, refer to the *Ensure State Employer Account IDs Entered for Each State* subsection.

### Ensure 401K Plans Details Entered for Each 401K Plan

The screenshot displays the '401K Plan Maintenance' window. The main area is titled '401K Plan Details' and contains several input fields: Plan Code (401K DEFAULT), Description (Default 401K Plan), Plan Administrator (V. Henry), Plan Number (09876), and Greenshades Type (TRCN). Below these fields is a table with the following data:

Company	
CAN	Canadian Constructions
JD00	JD Demolition
SUS	SB Urban Systems

The right sidebar includes sections for 'User Extensions' (listing User Extension1 through User Extension7 and More Extensions ...), 'Related Screens' (listing Related Screen 4 through Related Screen 7 and More Related ...), and 'New Payroll' (listing SUI Magnetic Media and Related Screen 4 through Related Screen 7 and More Related ...).

At the bottom of the window, there is a status bar with the text 'Enter Greenshades Assigned 401K Type' and 'Record: 1/1'.

*401K Plan Maintenance: Payroll (US) > Government Forms > 401K > 401K Plans*

This screen is for setting up 401K plan codes. For the **Greenshades Type** field, the code is provided by Greenshades to the customer, and it determines the layout of the 401K Plan file.

## Ensure 401K Mapping

Payroll - TESTV10\_X 401K Mapping Maintenance

**Mapping Screen**

401K Plan Code: 401KDEFAULT 401K Plan

Box Code	Tran Type	Tran Code	Amount Type	Employer's Contr. Flag	Factor Number	Description	Enrollment Indicator	YrEnd Only	Include Rec.
CONTR1	DE	401K	Employee Amount	All	-1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
GRCOMP	BW	NWHR	Employee Amount	All	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
GRCOMP	BW	OVHR	Employee Amount	All	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
GRCOMP	BW	DTHR	Employee Amount	All	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MATCH	DE	401K	Calculated Amount	All	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter Box Description If Required

Record: 4/5 ... <OSC>

401K Plan Maintenance: Payroll (US) > Government Forms > 401K > 401K Mapping

The 401K Mapping Maintenance screen allows the user to map a form's **Box Codes** to CMiC's **Transaction Codes**.

### Flags Explained

#### Enrollment Indicator

If checked, employees will be included in the export file, if there is a non-zero value in that category.

#### YrEnd Only

If checked, this category will include year-end results for the transaction, if the **Year End Run** flag is checked in the **401K Filing** screen (*Payroll (US) > Government Forms > 401K > 401K Filing*).

#### Include Rec.

If checked, the row's data will be included in the 401K export file.

## Create 401K Export File for Greenshades

The screenshot shows the '401K Parameter Screen' with the following fields and values:

- 401K Plan Code: MERCER 401K (selected), Mercer 401K Plan
- FEIN: (empty)
- Company: CCC (selected), CMIC Test Construction Co
- Pay Run: CCCW (selected), CCC Weekly Pay Run
- Report Date By: Pay Period (selected)
- Year: 2016
- Pay Period, From: 1 (selected), 01-01-2016; To: 1 (selected), 07-01-2016
- Monthly, From: (empty); To: (empty)
- Date, From: (empty); To: (empty)
- From Pay Group: (empty)
- To Pay Group: (empty)
- City: City Code on Employee Address (selected)
- ASCII File: C:\CCC\_COMPANY\GOVERNMENT\_FORMS\401K.XML
- Year End Run
- Proceed button

Status bar: Checked: This Is A Year-End Run, Record: 1/1, <OSC>

401K Parameter Screen: Payroll (US) > Government Forms > 401K > 401K Filing

The 401K Parameter screen allows the user to create the 401K file based on the pay run, year, period range, plan code and pay group entered. The XML export file is created in the path specified by the **ASCII File** field. Greenshades must be installed and the **Greenshades Installed** flag must be checked in System Options in order to access this screen.

### FEIN

Enter or select from the **FEIN** from the LOV.

### Company

Enter or select the **Company** code from the LOV.

### Report Date By

Select **Pay Period** or **Monthly** from the **Report Date By** drop-down.

### Pay Run

Select the **Pay Run** to be used when generating the 401K file.

### Year, From Pay Period, To Pay Period

Select the year, and period range to be used when generating the 401K file.

### **From Month, To Month**

If the **Report Date By** field is set to **Monthly**, then the fields **From Month** and **To Month** are available to enter the range of months.

### **401K Plan Code**

Select the 401K Plan Code for generating the 401K file.

### **From Pay Group, To Pay Group**

Select the Pay Group range.

### **City**

Select the City code option from the drop-down.

### **ASCII File**

Enter the path including the name of the XML file to be created for exporting.

### **Year End Run**

Check the **Year End Run** flag if generating the file at year end.

To create the 401K export file, as specified by the parameters above, click the **Proceed** button. This process will print/export the data into an XML file, with the file name and location specified by ASCII File parameter.

Now that the 401K export file has been created through CMiC's software, the next step is to specify this file's name and location to Greenshades. This is done by passing the name and location of the exported file to Greenshades during its launching. This information is passed to Greenshades through the desktop icon used to launch Greenshades. For details, refer to the *Step 4: Icon Setup for Greenshades* section in this guide.

## **1099 Reporting Setup**

---

The 1099 Reporting system supports the accumulation of multiple different types of 1099 forms, but it only supports the printing and media creation for Miscellaneous 1099's. This module is fully integrated to the Accounts Payable system and accumulates data each time a payment from a vendor is received.

For further information about setting up CMiC's system for 1099 reporting, please refer to the **1099 Reporting** help document or contact CMiC.

## Create 1099 Export File

Accounts Payable - TESTV10\_X Create 1099 Media Files

**Taxpayer Info**

Taxpayer ID Number: 123456789 TCC Code: [ ]

Transmitter Name: CMiC, CANADA

Contact Name: MIKE PARRAT Title: Mr.

Contact Phone & Ext.: 4167360123 Country: CA

Contact Email Address: MIKE.PARRAT@CMiC.CA

Media Code: FILE Electronic File Local Type: F

Path and File Name: C:\1099\1099 Size: 100

Year: 2013

Test/Correct:  Replacement Code: [ ] Reporting for Prior Year:  Include Zero Lines:

**Form Selection**

Type		Sel
1099-MISC	Miscellaneous Income	<input checked="" type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Create XML file:

This option is only applicable for Greenshades filing center

Record: 1/1 ... <OSC>

**User Extensions** +

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

**Related Screens** +

**AP Main Menu**

- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Create 1099 Media Files: 1099 > Create 1099 > Create 1099 Media Files

This screen is used to export 1099 data from CMiC's system into an XML file for importing into Greenshades for further processing, formatting, printing and government reporting. By default, the **Create XML file** flag is un-checked. Check this flag as Greenshades requires the 1099 data to be of an XML format.

After entering the required information, specify the 1099 export file's name and path in the **Path and File Name** field (*highlighted in green above*). To create the export file, click the **Create Media File** button.

Now that the 1099 export file has been created through CMiC's software, the next step is to specify this file's name and location to Greenshades. This is done by passing the name and location of the exported file to Greenshades during its launching. This information is passed to Greenshades through the desktop icon used to launch Greenshades. For details, refer to the *Step 4: Icon Setup for Greenshades* section in this guide.

## 941 Reporting Setup

CMiC's software does not print 941 forms; however, it can create an XML file for importing data into a third party program such as Greenshades.

**NOTE:** Ensure proper W-2 mappings before creating the 941 XML export file, as the mappings are relevant to processing 941 data.

## Create 941 Export File

**Parameters Selection**

Federal Jurisdiction: All Jurisdictions Combined  
Report Based On: Payroll Year/Qtr Setup on Pay Period Screen  
Report Year: 2010  
Quarter: 1  
FEIN Number: 03-0259784  
Company: SWC Construction Corp  
Pay Run:  
Start Employee:  
End Employee:  
Deposit Frequency: Semi-weekly  
Deposit State: PA  
ASCI File: C:\TEMP\PY941\_2010Q1.XML

**User Extensions**

- User Extension1
- User Extension2
- User Extension3
- User Extension4
- User Extension5
- User Extension6
- User Extension7
- More Extensions ...

**Related Screens**

- Related Screen 1
- Related Screen 2
- Related Screen 3
- Related Screen 4
- Related Screen 5
- Related Screen 6
- Related Screen 7
- More Related ...

Quarter 1 ASCII file created.

Enter Company

Record: 1/1 ... List of Valu... <OSC>

941 Parameter Screen: Payroll (US) > Government Forms > 941 Filing

This screen allows the user to create the 941 export file based on the parameters specified on this screen. This screen's parameters are explained below:

### Federal Jurisdiction

Select Federal Jurisdiction from pull down list. The options are All Jurisdictions Combined, United States, Guam and Puerto Rico.

### Report Based On

Select the option by which the report will be created. Running the report by Calendar Year/Qtr of Check Date will process employees' checks issued in that calendar year regardless of the payroll year. Running the report by Payroll Year/Qtr Setup on Pay Period screen processes checks issued in the payroll year specified.

### Report Year

Enter the Report Year.

### Quarter

Enter the Quarter.

### FEIN Number

Enter the FEIN Number. The report can be run by either FEIN or by Company.

## Company

Enter the Company Code.

## Pay Run

Enter the Pay Run.

## Start Employee/End Employee

Enter the employee range.

## Deposit Frequency

Enter Semi-weekly if you are a semi-weekly schedule depositor or Monthly if you are a monthly schedule depositor.

## Deposit State

Enter the state where the deposits were made or enter "MU" if the deposits were made in multiple states.

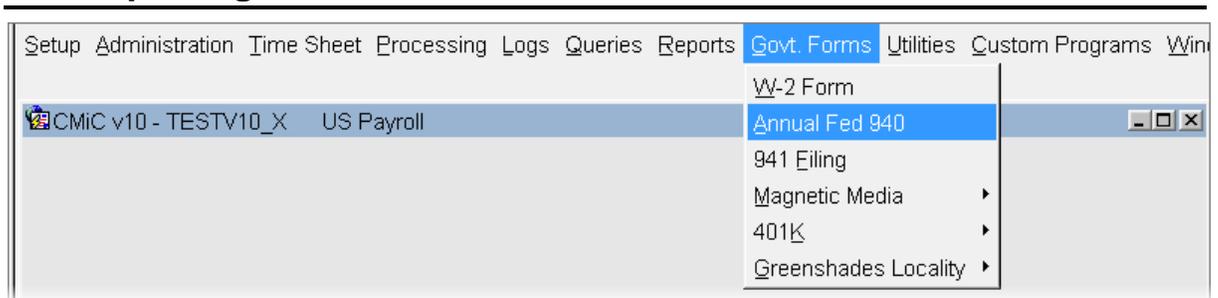
## ASCII File

Enter the file name and path for the 941 export file to be created by CMiC's Payroll system, as specified by the above parameters.

To create the 941 export file, as specified by the parameters above, click the **Process** button. This process will export the data into an XML file, with the file name and location specified by **ASCII File** parameter.

With the 941 export file created, the next step is to specify this file's name and location to Greenshades. This is done by passing the name and location of the exported file to Greenshades during its launching. This information is passed to Greenshades through the desktop icon used to launch Greenshades. For details, refer to the *Step 4: Icon Setup for Greenshades* section in this guide.

## 940 Reporting



This program is used to compile and export data for Federal Form 940 reporting. The raw exported data, in XML format, can then be uploaded to Greenshades for proper formatting and e-filing.

Payroll - TESTV10\_X Fed 940 Report

**Enter Parameters**

Report Based On: Payroll Year Setup on Pay Period Scr...  
 Report Year: 2016  
 FEIN Number: MD14799001 | Marjan LOFT Construction USA  
 Company: PYUS | Marjan LOFT Construction USA  
 Start Employee: |  
 End Employee: |  
 Contact Title: Payroll Admin  
 Contact Name: MDE  
 Contact Phone: 416 | 7360123 | Ext. |  
 Contact Fax: |  
 Contact Email Preferred: marjan.d@.us  
 Notification Method: E-Mail  
 ASCII File: C:\TEMP\PY940\_2016.XML

**User Extensions** +  
 User Extension1  
 User Extension2  
 User Extension3  
 User Extension4  
 User Extension5  
 User Extension6  
 User Extension7  
 More Extensions ...

**Related Screens** +  
 Related Screen 1  
 Related Screen 2  
 Related Screen 3  
 Related Screen 4  
 Related Screen 5  
 Related Screen 6  
 Related Screen 7  
 More Related ...

**Process**

In progress...

*Pgm: PY940 – Fed 940 Report*

Enter the relevant parameters, and provide a **Contact Email** and select the **Preferred Notification Method**.

To create the 940 export file, as specified by the parameters, click the **[Process]** button. This process will export the data into an XML file, with the file name and location specified by **ASCII File** parameter.

With the 940 export file created, the next step is to specify this file's name and location to Greenshades. This is done by passing the name and location of the exported file to Greenshades during its launching. This information is passed to Greenshades through the desktop icon used to launch Greenshades. For details, please refer to the *Step 4: Icon Setup for Greenshades* section.

## Sample XML File

---

**NOTE:** Tags with values are mapped to specific transactions in CMiC.

---

```
<?xml version="1.0" encoding="us-ascii" ?>
<NewDataSet>
  <Company CompanyID="PYUS" IsSubmitter="1">
    <EIN Value="MD14799001" />
    <CompanyName Value="LOFT Construction USA" />
    <cAddress1 Value="22400 Viva Drive" />
    <cCity Value="Irvine" />
    <cState Value="CA" />
    <cZip Value="92618" />
    <CreationDate Value="2017-02-02" />
    <CreatorName Value="MARJAN" />
    <Company940Info>
      <FUTAAmendedIndicator Value="False" />
      <FUTASuccessorEmployerIndicator Value="False" />
      <FUTANoPaymentsIndicator Value="False" />
      <TotalPayments Value="64073.15" />
      <PaymentsMoreThan7000 Value="3785" />
    </Company940Info>
  </Company>
  <Contact>
    <ContactName Value="MDE" />
    <ContactTitle Value="Payroll Admin" />
    <ContactPhone Value="416 7360123" />
    <PreferredNotification Value="E-Mail" />
  </Contact>
```

Sample of Fed 940 Report XML File with Complete Tags and Nodes:

```
<NewDataSet>
  <Company CompanyID="PYUS" IsSubmitter="1">
    <EIN Value="MD14799001"/>
    <ReadOnlyFormsIndicator Value="False"/>
    <CompanyName Value="LOFT Construction USA"/>
    <CompanyName2 Value=""/>
    <cAddress1 Value="22400 Viva Drive"/>
    <cAddress2 Value=""/>
    <cCity Value="Irvine"/>
    <cState Value="CA"/>
    <cZip Value="92618"/>
    <cZipExtension Value=""/>
    <cCountyCode Value="DU PAGE"/>
    <cCountryCode Value="US"/>
    <ReportingDate Value="12/31/2016"/>
    <CreationDate Value="2017-02-02"/>
    <TerminatingBusinessIndicator Value="False"/>
    <Company940Info>
      <FUTAAmendedIndicator Value="False"/>
      <FUTASuccessorEmployerIndicator Value="False"/>
      <FUTANoPaymentsIndicator Value="False"/>
      <TotalPayments Value="11893456.17"/>
      <ExemptPayments Value="0"/>
      <FUTAFringeBenefitsIndicator Value="False"/>
      <FUTAGroupTermLifeIndicator Value="False"/>
      <FUTARetirementIndicator Value="False"/>
      <FUTADependentCareIndicator Value="False"/>
      <FUTAOtherIndicator Value="False"/>
      <PaymentsMoreThan7000 Value="10841725.14"/>
      <FUTATaxAllIncrease Value="0"/>
      <FUTATaxSomeIncrease Value="0"/>
      <TotalDeposits Value="0"/>
      <SendARefundIndicator Value="False"/>
      <ApplyToNextReturnIndicator Value="True"/>
      <QuarterFUTALiability1 Value="5932.21"/>
      <QuarterFUTALiability2 Value="219.37"/>
      <QuarterFUTALiability3 Value="116.81"/>
      <QuarterFUTALiability4 Value="105"/>
      <DesigneeIndicator Value="False"/>
    </Company940Info>
  </Company>
</NewDataSet>
```

```

    <ApplyToNextReturnIndicator Value="True"/>
    <QuarterFUTALiability1 Value="5932.21"/>
    <QuarterFUTALiability2 Value="219.37"/>
    <QuarterFUTALiability3 Value="116.81"/>
    <QuarterFUTALiability4 Value="105"/>
    <DesigneeIndicator Value="False"/>
    <DesigneeName Value=""/>
    <DesigneePin Value=""/>
    <DesigneePhone Value=""/>
    <DesigneePhoneExt Value=""/>
    <FutaWagesBeforeJuly Value="0"/>
    <FutaWagesAfterJune Value="0"/>
    <Company940StateCreditReductions>
      <Company940StateCreditReduction State="CA">
        <FutaTaxableWages Value="5250"/>
        <ReductionRate Value="0.003"/>
        <CreditReduction Value="63.00"/>
      </Company940StateCreditReduction>
    </Company940StateCreditReductions>
  </Company940Info>
  <Contact>
    <ContactName Value="MDE"/>
    <ContactTitle Value="Payroll Administrator"/>
    <ContactPhone Value="4167360123"/>
    <ContactPhoneExt Value="256"/>
    <ContactEmail Value="marjan.d@us"/>
    <PreferredNotification Value="2"/>
    <PreparerCode Value=""/>
  </Contact>
  <CompanySutaInfo State="CA">
    <StateSutaID Value="123-4444-9"/>
    <SutaTaxRate Value="0"/>
  </CompanySutaInfo>
  <CompanySutaInfo State="IL">
    <StateSutaID Value="20-3393333"/>
    <SutaTaxRate Value="0"/>
  </CompanySutaInfo>
</Company>
</NewDataSet>

```

# ACA Compliance (1095-C, 1094-C) Reporting Setup

## Overview – ACA Compliance Reporting

Form 1095-C is how the IRS wants employers to report on benefits that employees were eligible for in a calendar year. By January 31 of each year, an employer must provide a Form 1095-C to each of its full-time employees. The following is the basic definition of a full-time employee, as per the IRS's *Instructions for Forms 1094-C and 1095-C (2016)* information sheet ([www.irs.gov/instructions/i109495c/ar01.html](http://www.irs.gov/instructions/i109495c/ar01.html)):

**Full-time employee:** A full-time employee is an employee who, for a calendar month, is employed an average of at least 30 hours of service per week with the employer. For this purpose, 130 service hours in a calendar month is treated as the monthly equivalent of at least 30 hours per week. An employer must complete information for all twelve months of the calendar year for any of its employees who were full-time employees for one or more months of the calendar year.

Also, a single Form 1094-C must be filed, providing company totals to the IRS.

## Security Setup

The screenshot shows the 'Assign Role to Programs' screen. The 'Applications' section has 'HR' selected. The 'Programs' section lists several programs, with 'HRACA\_BLDDATA' highlighted in red. The 'Roles' section lists several roles, including 'IRINA2', 'LUDMILA', 'MARJANR', 'MASTER', and 'MIKE'. The 'User Extensions' and 'Related Screens' sections are also visible on the right side.

Sample of Assign Role to Programs screen; standard Treeview path: System > Security > Roles > Assign Roles to Programs

To set up a user's security rights for ACA related programs, use the Assign Role to Programs screen to set up the rights for these programs for the Security Role to which the user belongs.

In the **Application** field, enter "HR". Then, under the **Programs** section, scroll down to the ACA related programs, framed in red in the above screenshot, and select a program. The Roles assigned to the program will be listed under the **Roles** section. Next, navigate to the **Roles** section and click the menu bar's Insert button. In the **Role** field of the new row, press the F9 keyboard key and select the user's Role via the popup. Then, use the **Insert**, **Update**, and **Delete** checkboxes to set the Insert, Update, and Delete privileges.

## Required Employee Information for Lines 14, 15, & 16 of Form 1095-C

For the system to correctly produce ACA compliance data for lines 14 to 16, administrators must accurately maintain the following information:

- Health Plan's start and end dates each year
- Employee start and end dates within each year
- Administrators **MUST** not change rates for Plans without ending and re-starting the Benefits
- Employee hire, termination and other dates relevant to ACA compliance, such as those tied to spouses and dependents
- Union status and union status change dates
- Administrators must properly maintain eligibility rules for Benefits (available in HR module), in order for system to correctly generate monthly ACA compliance data for Employees

The system uses the above employee information to automatically generate ACA compliance data for employees, on a monthly basis. For details, please refer to the section *Monthly Builds of ACA Compliance Data & Screens to View Built Data*.

### Part 1 of Form 1095-C (Lines 1 - 13)

Part I Employee			Applicable Large Employer Member (Employer)			
1 Name of employee		2 Social security number (SSN)	7 Name of employer		8 Employer identification number (EIN)	
3 Street address (including apartment no.)			9 Street address (including room or suite no.)		10 Contact telephone number	
4 City or town	5 State or province	6 Country and ZIP or foreign postal code	11 City or town	12 State or province	13 Country and ZIP or foreign postal code	

The first part of Form 1095-C is basic information about the employee and the employee's employer. This information is already in the Enterprise system, thus no modifications were required in Enterprise to account for this part of the form, and no additional data entry is required for these fields.

### Part 2 of Form 1095-C (Lines 14-16)

Part II Employee Offer of Coverage	Plan Start Month (Enter 2-digit number):												
	All 12 Months	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
14 Offer of Coverage (enter required code)													
15 Employee Required Contribution (see instructions)	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
16 Section 4980H Safe Harbor and Other Relief (enter code, if applicable)													

The second part of the form requires companies to report information for every full-time employee, for each of the following lines:

#### Line 14 – Offer of Coverage

For each full-time employee, employers have to designate, by month, whether coverage was OFFERED. Notice, what is asked is not whether it was elected, but simply if they were eligible.

To report the **Offer of Coverage** for each month, the IRS has provided a set of 9 possible codes referred to as **Code Series 1**. These codes tell the IRS not only whether coverage was offered, but also if dependents were eligible, whether it met minimum coverage requirements, etc.

#### Code Series 1: Offer of Coverage

The Code Series 1 indicator codes specify the type of coverage, if any, offered to an employee, the employee's spouse, and the employee's dependents. In regards to an employee's dependents, an offer of coverage is treated as made to an employee's dependents only if the offer of coverage is made to an

unlimited number of dependents regardless of the actual number of dependents, if any, an employee has during any particular calendar month.

The following lists the **Code Series 1** indicator codes and their descriptions, as of 2016, from the following IRS webpage: [www.irs.gov/instructions/i109495c/ar01.html#d0e365](http://www.irs.gov/instructions/i109495c/ar01.html#d0e365).

- **1A.** Qualifying Offer: Minimum essential coverage providing minimum value offered to full-time employee with Employee Required Contribution equal to or less than 9.5% (as adjusted) of mainland single federal poverty line and at least minimum essential coverage offered to spouse and dependent(s).



This code may be used to report for specific months for which a Qualifying Offer was made, even if the employee did not receive a Qualifying Offer for all 12 months of the calendar year. However, an ALE Member may not use the Alternative Furnishing Method for an employee who did not receive a Qualifying Offer for all 12 calendar months.

- **1B.** Minimum essential coverage providing minimum value offered to employee only.
- **1C.** Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to dependent(s) (not spouse).
- **1D.** Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to spouse (not dependent(s)). Do not use code 1D if the coverage for the spouse was offered conditionally. Instead use code 1J.
- **1E.** Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage offered to dependent(s) and spouse. Do not use code 1E if the coverage for the spouse was offered conditionally. Instead use code 1K.
- **1F.** Minimum essential coverage NOT providing minimum value offered to employee; employee and spouse or dependent(s); or employee, spouse and dependents.
- **1G.** Offer of coverage for at least one month of the calendar year to an individual who was not an employee for any month of the calendar year or to an employee who was not a full-time employee for any month of the calendar year (which may include one or more months in which the individual was not an employee) and who enrolled in self-insured coverage for one or more months of the calendar year.  
**Note.**  
Code 1G applies for the entire year or not at all. Therefore, if code 1G applies, an ALE Member must enter code 1G on line 14 in the "All 12 Months" column or in each separate monthly box (for all 12 months).
- **1H.** No offer of coverage (employee not offered any health coverage or employee offered coverage that is not minimum essential coverage, which may include one or more months in which the individual was not an employee).
- **1I.** Reserved.
- **1J.** Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage conditionally offered to spouse; minimum essential coverage not offered to dependent(s). (See *Conditional offer of spousal coverage*, above, for an additional description of conditional offers.)
- **1K.** Minimum essential coverage providing minimum value offered to employee; at least minimum essential coverage offered to dependents; and at least minimum essential coverage conditionally offered to spouse. (See *Conditional offer of spousal coverage*, above, for an additional description of conditional offers.)

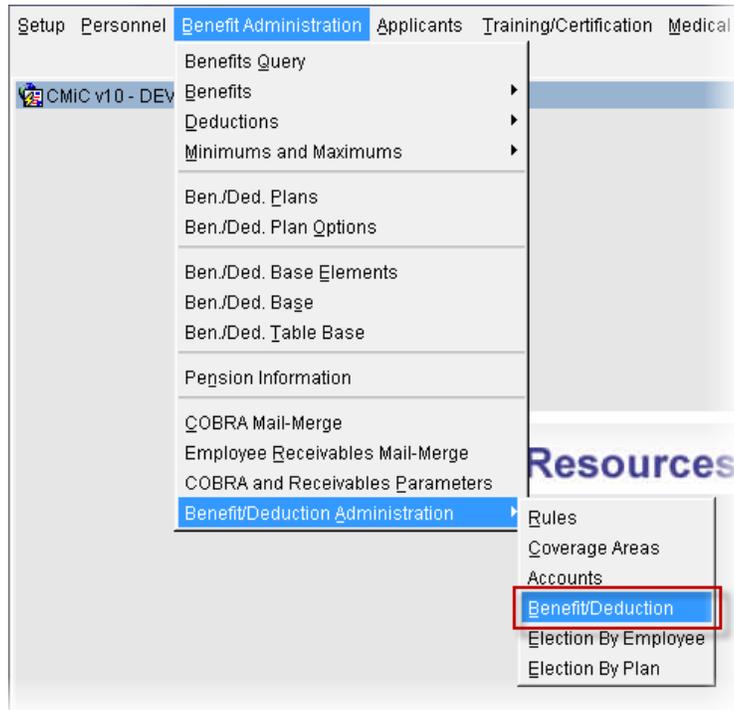
**Line 15.** Complete line 15 only if code 1B, 1C, 1D, 1E, 1J, or 1K is entered on line 14 either in the "All 12 Months" box or in any of the monthly boxes. Enter the amount of the Employee Required Contribution, which is, generally, the employee share of the monthly cost for the lowest-cost self-only minimum essential coverage providing minimum value that is offered to the employee. For additional details on how to determine the Employee Required Contribution, see the *Definitions* section, later. Enter the amount including any cents. If the employee is offered coverage but the Employee Required Contribution is zero, enter "0.00" (do not leave blank). If the Employee Required Contribution was the same amount for all 12 calendar months, you may enter that monthly amount in the "All 12 Months" box and not complete the monthly boxes. If the Employee Required Contribution was not the same for all 12 months (for instance, if an ALE Member has a non-calendar year plan and the employee share of the premium changes with the new plan year that starts in 2016), enter the amount in each calendar month for which the employee was offered minimum value coverage. See the definition of *Employee Required Contribution* in the *Definitions* section, for more information, including on how to determine the monthly required contribution from annual data.



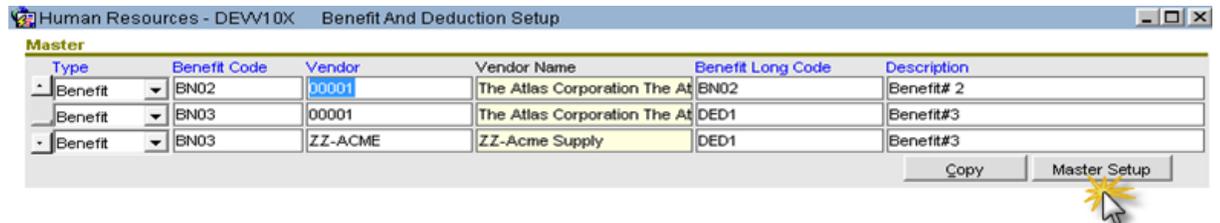
For line 15, the amount entered might not be the amount the employee is paying for the coverage, for example, if the employee chose to enroll in more expensive coverage such as family coverage or if the employee is eligible for certain other healthcare arrangements.

**Line 16.** For each calendar month, enter the applicable code, if any, from Code Series 2. Enter only one code from Code Series 2 per calendar month. The instructions below address which code to use for a month if more than one code from Series 2 could apply. If the same code applies for all 12 calendar months, you may enter the code in the "All 12 Months" box and not complete the monthly boxes. If none of the codes apply for a calendar month, leave the line blank for that month.

**CMiC Modification for Affordable Care Act Reporting**



The Benefit And Deduction Setup screen has been modified to allow users to assign Code Series 1 codes to each plan options offered for Health Care benefits. The screen’s standard Treeview path is: **Human Resources > Benefit Administration > Benefit/Deduction Administration > Benefit/Deduction.**



Sample of top section (**Master**) of Benefit And Deduction Setup screen (program: HRBDADM)

In the Benefit And Deduction Setup screen, click [**Master Setup**], as shown in the above screenshot, to launch the following screen:

Human Resources - DEW10X Benefit/Deduction Master Setup

Code: 401K  
 Long Description: 401k  
 Short Description: 401K  
 Type: Lump Sum  
 Calculation Sequence: 300067  
 Print Order: 1

Job Allocation  
 Work Location Allocation  
 Dependent Enrollment Allowed  
 Create Voucher For Accounts Payable  
 Include In PY Forecast Burden Calculation  
 Health Care Insurance

Deduction | Open Enrollment

Mandatory

In the Benefit/Deduction Master Setup screen, shown above, check the **Health Care Insurance** checkbox.

This causes the **Health Care** tab to appear in the **Detail** section of the Benefit and Deduction Setup screen (program: HRBDADM), for users to assign Code Series 1 codes to a Health Care Benefit's Plans, and to indicate if the employer provides self-insured health coverage for a Plan by checking its corresponding **Employer Provides Self-Insured Health Coverage** checkbox.

Human Resources - TESTV10\_X Benefit And Deduction Setup

**Master**

Type	Deduction Code	Vendor	Vendor Name	Deduction Long Code	Description
Deduction	ZZ10	ZZ-BCBS	Blue Cross Blue Shield	ZZ10-HMO	Employee Group HMO
Benefit	ZZ15	ZZ-CGRP	Citigroup	ZZ15	Group Term Life
Benefit	ZZ16	ZZ-BCBS	Blue Cross Blue Shield	ZZ-16 GTL	Imputed Group Term Life

Copy | Master Setup

**Detail**

Setup | Advance | AP Setup | **Health Care**

Affordable Care Act (ACA) | Employer provides Self-Insured Health Coverage

Plan Code	Plan Option	Health Care Coverage Type	Employer provides Self-Insured Health Coverage
SINGLE	T-FREE	1B	<input checked="" type="checkbox"/>
SINGLE	T-SMOKE		<input checked="" type="checkbox"/>
			<input type="checkbox"/>

Affordable Care Act (ACA) Health Care Coverage Types

**Rules Detail**

Find: 1%

Rule ID	Rule	Covera...	Description
DEFAULT	Def	1A	Affordable minimum essential minimum value for employee, spouse and dependents.
SWC-EMPS	SWV	1B	Minimum essential with minimum value for employee.
		1C	Minimum essential with minimum value for employee and dependents.
		1D	Minimum essential with minimum value for employee and spouse.
		1E	Minimum essential with minimum value for employee, spouse and dependents.
		1F	Minimum essential NOT minimum value for employee and/or spouse and/or dependents.
		1H	Health care that is NOT minimum essential coverage.
		1J	Minimum essential with minimum value for employee and spouse (conditionally).
		1K	Minimum essential with minimum value for employee, spouse (conditionally) and dependents.

Plan Option: Tobacco f  
 Plan Code: Single

## Line 15 – Employee Share of Lowest Cost Monthly Premium, for Self-Only Minimum Value Coverage

Line 15 is only completed if code 1B, 1C, 1D, or 1E is entered on line 14 either in the “All 12 Months” box or in any of the monthly boxes. It is used to enter the amount of the employee share of the lowest-cost monthly premium for self-only minimum essential coverage providing minimum value that is offered to the employee. If the employee is offered coverage, but is not required to contribute any amount towards the premium, “0.00” is to be entered (do not leave blank).

The screenshot shows the 'Eligible Plan(s)' section of the HR system. The employee is identified as Bill Gustaw with ID 1002. The table below lists various plans with their respective details and employee share amounts.

Code	Vendor	Comp.	Pay Run	Pay GRP.	Type	Eligibility Date	Plan Code	Plan Option	Remittance Frequency	Eligible Amount	Employee Amount
401K	10-001	10	SM	SAL	DE	01/JAN/2010	401K	401K 1%	Bi-Weekly		1.00
401K	10-001	10	SM	SAL	DE	01/JAN/2010	401K	401K 2-5%	Bi-Weekly		2.00
AD&D	ZURICH	10	SM	SAL	BN	01/JAN/2014	DEFAULT	CHILD	Bi-Weekly		15.00
AD&D	ZURICH	10	SM	SAL	BN	01/JAN/2014	DEFAULT	SPOUSE	Bi-Weekly		20.00
AD&D	ZURICH	10	SM	SAL	BN	01/JAN/2010	DEFAULT	DEFAULT	Bi-Weekly		
BLIF	LIBERTY	10	SM	SAL	BN	01/JAN/2010	DEFAULT	DEFAULT	Bi-Weekly		0.00

Below the table, the description for the selected plan is '401K Deduction' and the type is 'Percentage'. There is a green checkmark next to the 0.00 amount in the BLIF row.

Sample of Eligibility Administration screen (program: HRELGADM)

Enterprise records an employee’s current and past eligibility for all benefits and will produce data for Line 15 based on the employee’s eligibility for the entire year. No setup is required for Line 15, as the Enterprise system will automatically fill-in the dollar value based on CRA descriptions and information found in employee records.

For the system to correctly produced data for Line 15, administrators must maintain the correct start and end dates for an employee’s eligibility record, along with the other dates and information, as outlined in the previous section, *Required Employee Information for Lines 14, 15, & 16 of Form 1095-C*.

### **Enterprise Requirements for Line 14, 15, & 16**

- Users must record a Health Care plan’s start and end dates each year.
- Users must record an employee’s start and end date within each year.
- Users **MUST** not change rates for plans without ending and re-starting the benefits.
- Users must record correct employees hire, termination and other relevant dates, such as Plan Start and Plan End dates.
- Users must properly modify any rule changes in order for system to record an employee’s Eligibility history.

## Line 16 – Applicable Section 4980H Safe Harbor

Line 16 is used to enter an applicable **Code Series 2** indicator code, if any, to report for one or more months of the calendar year that one of the following situations applied to the employee:

- Employee was not employed or was not a full-time employee.
- Employee enrolled in the minimum essential coverage offered.
- Employee was in a Limited Non-Assessment Period with respect to section 4980H(b).
- Non-calendar year transition relief applied to the employee.

- V) Employer met one of the section 4980H affordability safe harbors with respect to this employee, or the employer was eligible for multiemployer interim rule relief for this employee.

In some circumstances, more than one situation could apply to the same employee in the same month. For example, an employee could be enrolled in health coverage for a particular month during which he or she is not a full-time employee. However, only one code may be used for a particular calendar month. For any month in which an employee enrolled in minimum essential coverage, indicator code 2C reporting enrollment is used instead of any other indicator code that could also apply. For an employee who did not enroll in health coverage, there are some specific ordering rules for which code to use. For details, see the descriptions of the **Code Series 2** indicator codes in the following table, as of 2016, from the following IRS webpage: [www.irs.gov/instructions/i109495c/ar01.html#d0e365](http://www.irs.gov/instructions/i109495c/ar01.html#d0e365):

- **2A.** Employee not employed during the month. Enter code 2A if the employee was not employed on any day of the calendar month. Do not use code 2A for a month if the individual was an employee of the ALE Member on any day of the calendar month. Do not use code 2A for the month during which an employee terminates employment with the ALE Member.
  - **2B.** Employee not a full-time employee. Enter code 2B if the employee is not a full-time employee for the month and did not enroll in minimum essential coverage, if offered for the month. Enter code 2B also if the employee is a full-time employee for the month and whose offer of coverage (or coverage if the employee was enrolled) ended before the last day of the month solely because the employee terminated employment during the month (so that the offer of coverage or coverage would have continued if the employee had not terminated employment during the month).
  - **2C.** Employee enrolled in health coverage offered. Enter code 2C for any month in which the employee enrolled for each day of the month in health coverage offered by the ALE Member, regardless of whether any other code in Code Series 2 might also apply (for example, the code for a section 4980H affordability safe harbor) except as provided below. Do not enter code 2C in line 16 for any month in which the multiemployer interim rule relief applies (enter code 2E). Do not enter code 2C in line 16 if code 1G is entered in line 14. Do not enter code 2C in line 16 for any month in which a terminated employee is enrolled in COBRA continuation coverage or other post-employment coverage (enter code 2A). Do not enter code 2C in line 16 for any month in which the employee enrolled in coverage that was not minimum essential coverage.
  - **2D.** Employee in a section 4980H(b) Limited Non-Assessment Period. Enter code 2D for any month during which an employee is in a section 4980H(b) Limited Non-Assessment Period. If an employee is in an initial measurement period, enter code 2D (employee in a section 4980H(b) Limited Non-Assessment Period) for the month, and not code 2B (employee not a full-time employee). For an employee in a section 4980H(b) Limited Non-Assessment Period for whom the ALE Member is also eligible for the multiemployer interim rule relief for the month, enter code 2E (multiemployer interim rule relief) and not code 2D (employee in a section 4980H(b) Limited Non-Assessment Period).
  - **2E.** Multiemployer interim rule relief. Enter code 2E for any month for which the multiemployer arrangement interim guidance applies for that employee, regardless of whether any other code in Code Series 2 (including code 2C) might also apply. This relief is described under *Offer of Health Coverage* in the *Definitions* section of these instructions.  
  
Note. Although ALE Members may use the section 4980H affordability safe harbors to determine affordability for purposes of the multiemployer arrangement interim guidance, an ALE Member eligible for the relief provided in the multiemployer arrangement interim guidance for a month for an employee should enter code 2E (multiemployer interim rule relief), and not codes 2F, 2G, or 2H (codes for section 4980H affordability safe harbors).
  - **2F.** Section 4980H affordability Form W-2 safe harbor. Enter code 2F if the ALE Member used the section 4980H Form W-2 safe harbor to determine affordability for purposes of section 4980H(b) for this employee for the year. If an ALE Member uses this safe harbor for an employee, it must be used for all months of the calendar year for which the employee is offered health coverage.
  - **2G.** Section 4980H affordability federal poverty line safe harbor. Enter code 2G if the ALE Member used the section 4980H federal poverty line safe harbor to determine affordability for purposes of section 4980H(b) for this employee for any month(s).
  - **2H.** Section 4980H affordability rate of pay safe harbor. Enter code 2H if the ALE Member used the section 4980H rate of pay safe harbor to determine affordability for purposes of section 4980H(b) for this employee for any month(s).
- Note.**  
An affordability safe harbor code should not be entered on line 16 for any month that the ALE member did not offer minimum essential coverage to at least 95% of its full-time employees and their dependents (that is, any month for which the ALE member checked the "No" box on Form 1094-C, Part III, column (a)). For more information, see the instructions for Form 1094-C, Part III, column (a).
- **2I.** Reserved.

**Note.**

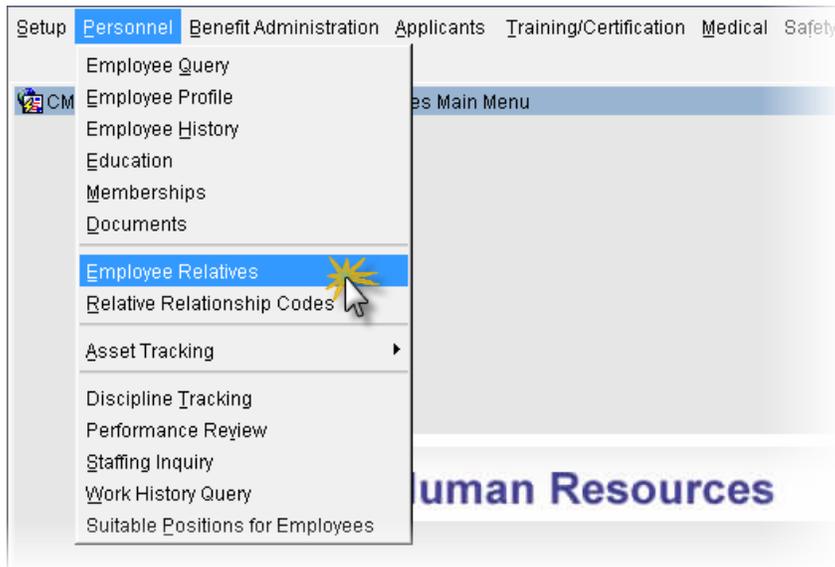
References to 9.5% in the section 4980H affordability safe harbors and Qualifying Offer Method are applied based on the percentage as indexed for purposes of applying the affordability thresholds under section 36B (the premium tax credit). The percentage, as adjusted, is 9.56% for plan years beginning in 2015, and 9.66% for plan years beginning in 2016. See Notice 2015-87, Q&A 12, at [www.irs.gov/irb/2015-52\\_IRB/ar11.html](http://www.irs.gov/irb/2015-52_IRB/ar11.html).

Line 16 also does not require a special setup, as the Enterprise system will automatically determine the Code Series 2 code for each month, for each employee, based on each employee’s start and end dates of employment, number of hours worked per month, and health coverage information (outline in previous section: *Enterprise Requirements for Line 14, 15, & 16*).

### Part 3 of Form 1095-C (Lines 17-34)

Part III Covered Individuals																
If Employer provided self-insured coverage, check the box and enter the information for each individual enrolled in coverage, including the employee. <input type="checkbox"/>																
(a) Name of covered individual(s)	(b) SSN or other TIN	(c) DOB (if SSN or other TIN is not available)	(d) Covered all 12 months	(e) Months of Coverage												
				Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	
17			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The last section of ACA reporting is required by companies who are self-insured. If you are self-insured, you will also need to report information about your employees’ dependents that were actually covered by the plan.



Human Resources - PROD Employee Relatives

---

**Employee**

Number 1002 Last Name Gustaw First Name Bill  
 SSN [redacted] Status Active Date of Birth [redacted]

---

**Relative**

Last Gustaw First Nicole Middle [redacted]

Address Contact Info. Personal Info. Benefits

Primary Life Insurance Percent 100.0000  Living  
 Secondary Life Insurance Percent 100.0000  Beneficiary  
 Medical Support  
 Student  
 Dependent

Sample of Employee Relatives screen (program: HREMPREL)

Enterprise's functionality allows administrators to track an employee's relatives. For instance, the Employee Relatives program, shown above, allows users to store a relative's address, contact information, personal information and basic benefit information.

Also, there are different screens which either administrators or employees themselves can use to enroll employees' dependents for specific plans. The forms versions allows HR personnel to enroll dependents to specific plans, and Employee Self Service allows employees to enroll their dependents themselves.

HR personnel can use either the Dependent Deductions or the Dependent Benefits screen. Both screens are found through the following standard Treeview path: **Human Resources > Benefit Administration**. The Dependent Deductions screen is shown below:

Human Resources - PROD Dependent Deductions

**Employee and Plan**

Company: 10 CMiC Construction Inc. Plan:   
 Employee: 1002 Bill Gustaw Max Age no School:   
 Deduction Code: MED Medical Max Age in School:

**Dependents**

Name: Last: Gustaw First: Nicole Middle:   
 Male  Female  Dependent   
 Place of Birth: Toronto Date of Birth:   In School   
 Working As:     
 SSN:  Priority: Highest   
 Relationship: SPOUSE   Emergency Contact

**Coverage**

Effective Date: 01/JAN/2013 End Date:   Out of Area   
 Covered under another Policy   
 Carrier:     
 Policy Number:    
 Policy Holder:    
 Effective Date:

Sample of the Dependent Deductions screen (program: HRDEPDED).

HR personnel can also use the Eligibility Administration screen, shown below, found through the following standard Treeview path: **Human Resources > Benefit Administration > Benefit/Deduction Administration > Election by Employee**.

Human Resources - PROD Eligibility Administration

**Employee**

Employee: 1002 Bill Gustaw

**Eligible Plan(s)**

Code	Vendor	Comp.	Pay Run	Pay	GRP.	Type	Eligibility Date	Plan Code	Plan Option	Remittance Frequency	Eligible Amount	Employee Amount
401K	10-001	10	SM	SAL	DE	DE	01/JAN/2010	401K	401K 1%	Bi-Weekly		1.00
401K	10-001	10	SM	SAL	DE	DE	01/JAN/2010	401K	401K 2-5%	Bi-Weekly		2.00
AD&D	ZURICH	10	SM	SAL	BN	BN	01/JAN/2014	DEFAULT	CHILD	Bi-Weekly		15.00
AD&D	ZURICH	10	SM	SAL	BN	BN	01/JAN/2014	DEFAULT	SPOUSE	Bi-Weekly		20.00
AD&D	ZURICH	10	SM	SAL	BN	BN	01/JAN/2010	DEFAULT	DEFAULT	Bi-Weekly		
BLIF	LIBERTY	10	SM	SAL	BN	BN	01/JAN/2010	DEFAULT	DEFAULT	Bi-Weekly		0.00

Description: Basic Life Insurance Type: Percentage Show Eligible History Elect

**Elected Plan(s)**

Code	Vendor	Description	Plan Code	Plan Option	Effective Date	Eligible Amount	Amount
401K	10-001	401K Deduction	401K	401K 1%	2010/01/01		1.00
401K	10-001	401K Deduction	401K	401K 2-5%	2010/01/01		2.00
MED	ZURICH	Medical	FAMILY	PREMIUM	2010/01/01		70.00

Type: Lump Sum Enroll Dependents [Click Here](#)

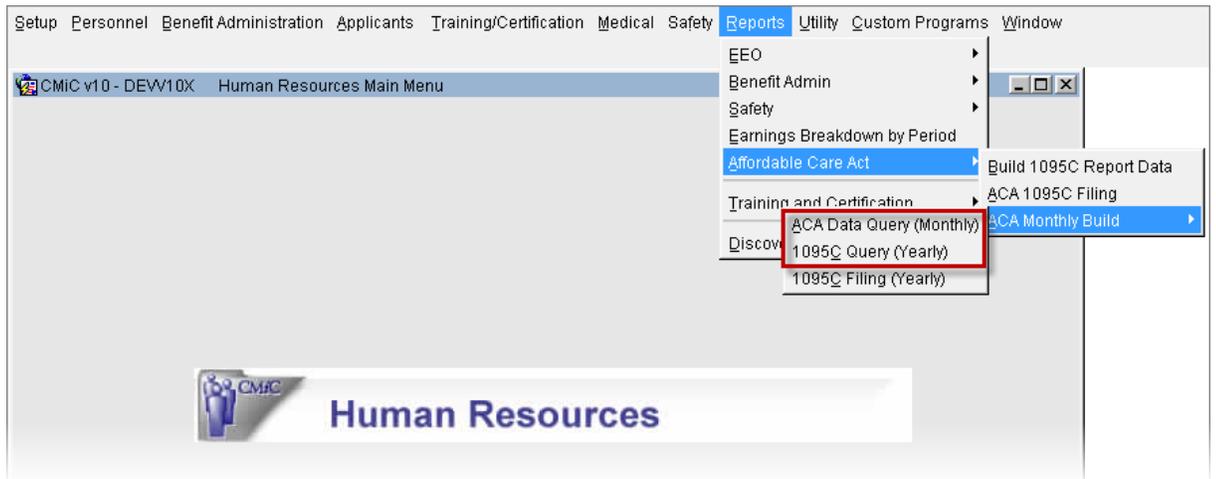
Sample of Eligibility Administration screen (program: HRELGADM)

## Monthly Builds of ACA Compliance Data & Screens to View/Edit Data

### Overview – Monthly Builds of ACA Compliance Data & Screens to View/Edit Data

An automatic process has been added to CMiC Enterprise to build ACA compliance data for each employee, for the previous month, using the employee information outlined in the previous section, *Required Employee Information for Lines 14, 15, & 16 of Form 1095-C*.

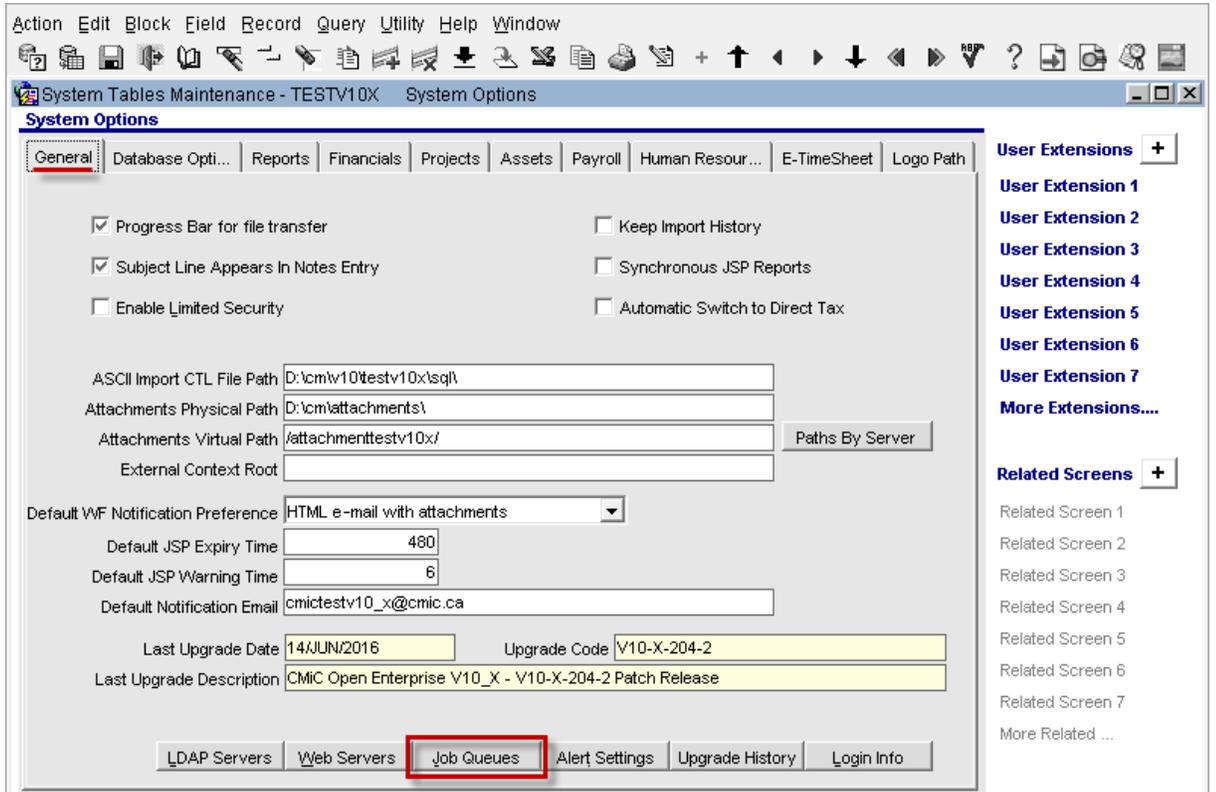
To view or edit this generated ACA compliance data for the months it has been built, the following two screens have been added to the standard menu of the Human Resources module: ACA Monthly Built Data Query, and View/Update ACA 1095-C Form, shown in the below screenshot. The standard Treeview path to these new screens is as follows: **HR > Reports > Affordable Care Act > ACA Monthly Build > ACA Data Query (Monthly), 1095C Query (Yearly)**.



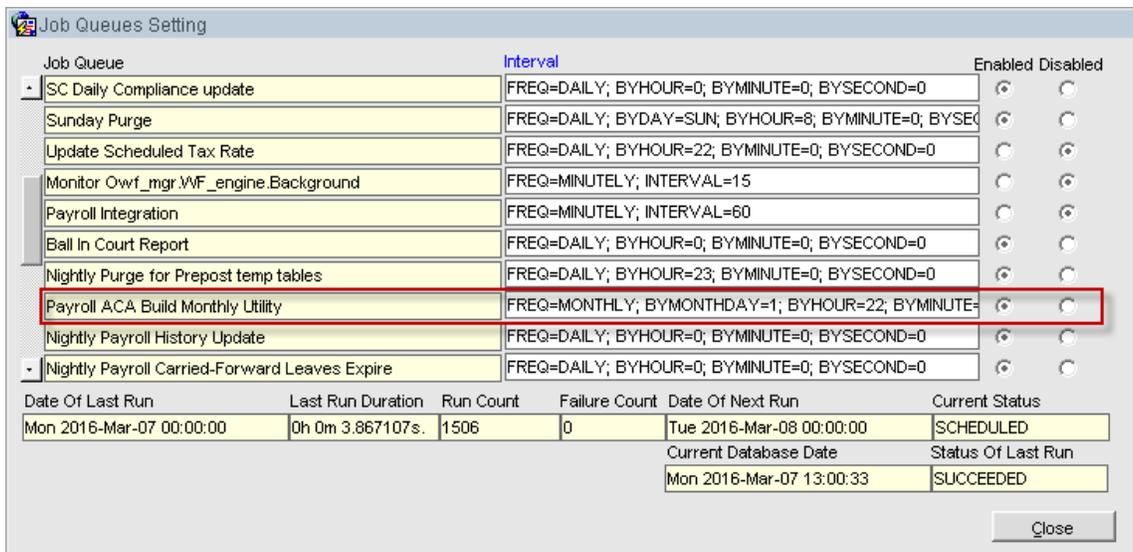
Sample of HR screen with the two new screens added to the **Reports** menu.

## Enable Monthly ACA Process to Automatically Build ACA Compliance Data

In order for the system to automatically build ACA compliance data, the process that builds it must be enabled. To do so, launch the System Options screen (standard Treeview path: **System > Setup > System Options**), shown below, and on the **General** tab, click the **[Job Queues]** button.



In the launched pop-up, shown below, search for the **Payroll ACA Build Monthly Utility** option (framed in red) and ensure that it is enabled.



## ACA Monthly Built Data Query – Screen

**Selection Parameters**

FEIN Number: GL-8CHARACTER (8 Character Company code) Re-Build Monthly Data

Report Year: 2016

Employee:

Enter Month:

**Employee Status History**

Employee#	Month	Payroll Status	Hire/Re-Hire Date	Termination/Retire/Deceased Date	Full / Part Time	Full / Part Status Change Date	Union Flag	Union Status Change Date	Working Hours
EMP04	1				F		N	01/JAN/2016	168.00
EMP04	2	TM		14/FEB/2016	F		Y		80.00
EMP04	3				F		Y		
EMP04	4				F		Y		
EMP04	5				F		Y		
EMP05	1				F		N		
EMP05	2				F		N		
EMP05	3				F		N		
EMP05	4				F		N		
EMP05	5				F		N		
EMP22-GL123456	1				F		N		
EMP22-GL123456	2				F		N		

Name:  Coverage Offered Coverage Elected

Program: HRACA\_BLDDATA\_MONTHLY\_QRY; standard Treeview path: **HR > Reports > Affordable Care Act > ACA Monthly Build > ACA Data Query**

This screen is used to view all changes to an employee's information that is relevant to ACA compliance reporting, as this could impact what gets reported for the employee. Every change that is relevant to ACA compliance will result in an entry in this screen's table.

### Selection Parameters – Section

Field	Description
<b>FEIN Number</b>	Company to which Employees belong
<b>Report Year</b>	Reporting year for ACA compliance reporting
<b>Employee</b>	press F9 and select an Employee, or leave this field blank to indicate all Employees
<b>Enter Month</b>	enter/select a month for which ACA compliance data has been built, or leave this field blank to indicate all month's with built data

### [Re-Build Monthly Data] – Button

Click this button to run the Payroll ACA Build Monthly utility to rebuild the ACA compliance data for the specified parameters. On the popup, enter the month to rebuild the data for and click [**Build Data**].

### Employee Status History – Section

The following provides details about the columns of the table under the **Employee Status History** section:

Column	Description
<b>Employee#</b>	Employee's number
<b>Month</b>	number in this column represents a calendar month
<b>Payroll Status</b>	entries appear in this column only if the employee's payroll status changed, in which case the new status will be displayed
<b>Hire/Re-Hire Date</b>	entries appear in this column only if the employee was hired/re-hired
<b>Termination Date/Retire Date/Deceased Date</b>	entries appear in this column only if the employee's was terminated, retired or deceased, in which case the date will be displayed for month in which the event occurred
<b>Full/Part Time</b>	this column indicates whether the employee was full-time (F) or part-time (P) for the month
<b>Full/Part Change Date</b>	entries appear in this column only if the employee's full-time or part-time status changed, in which case the date of the change will be displayed for month in which the change occurred
<b>Union Flag</b>	this column indicates whether the Union flag for the employee was checked or not for the corresponding month
<b>Union Status Change Date</b>	entries appear in this column only if the employee's union status changed, in which case the date of the change will be displayed for the month in which the change occurred
<b>Working Hours</b>	Hourly Employees: displays the number of all wage hours worked for the corresponding month, as per the employee's timesheets. Salaried Employees: the system does not include any timesheet hours posted against Normal hours worked.

**[Coverage Offered] – Button**

The screenshot shows a window titled 'Human Resources - SUPPORTV10\_X ACA - Employee Coverage Offers- Monthly'. It contains a table with the following columns: Month, Coverage Elig. Rule Eff. Date Used, Tran. Type, Tran. Code, Plan Code, Plan Option Code, ACA Cov. Type, Plan Start Date, and Plan End Date. The table lists coverage offers for months 1 and 3, with various plan codes and ACA coverage types.

Month	Coverage Elig. Rule Eff. Date Used	Tran. Type	Tran. Code	Plan Code	Plan Option Code	ACA Cov. Type	Plan Start Date	Plan End Date
1	20150801 PYEF	BN	HCC	FAMILY	FAMILY	1E	20150101	
1	20150801 PYEF	BN	HCC	EMP+ONE	EMP DEPEND	1C	20150101	
1	20150801 PYEF	BN	HCC	EE SPOUSE	EMP+SPOUSE	1D	20150101	
1	20150801 PYWS	BN	HCC	SINGLE	SINGLE	1B	20150101	
1	20150801 PYWY	DE	CCH	FAMILY	3+FAMILY	1E	20130101	
1	20150801 PYWY	DE	CCH	EE SPOUSE	EMP+SPOUSE	1D	20130101	
1	20150801 PYWY	DE	CCH	SINGLE	SINGLE	1B	20130101	
1	20150801 PYWY	DE	CCH	EMP+ONE	EMP DEPEND	1C	20130101	
3	20150801 PYEF	BN	HCC	EE SPOUSE	EMP+SPOUSE	1D	20150101	
3	20150801 PYEF	BN	HCC	EMP+ONE	EMP DEPEND	1C	20150101	
3	20150801 PYEF	BN	HCC	FAMILY	FAMILY	1E	20150101	
3	20150801 PYWS	BN	HCC	SINGLE	SINGLE	1B	20150101	

This button launches the Coverage Offered pop-up (shown above), which displays all of the plans the Employee was eligible for, for each month, as automatically determined by the Payroll ACA Build Monthly utility.

**[Coverage Elected] – Button**

Employee/ Month	Employee/ Dependent	Name	Coverage Elected Effective Date	Ind. Coverage End Date	Tran. Type	Tran Code	Plan Code	Plan Option Code
1	E	Miller Randy S	20150801		BN	HCC	FAMILY	FAMILY
1	E	Miller Randy S	20150801		DE	CCH	FAMILY	3+FAMILY
1	D	Miller SUsan	20150801		BN	HCC		
1	D	Miller SUsan	20150901		DE	CCH		
1	D	Miller Kyle	20150801	20401207	BN	HCC		
1	D	Miller Kyle	20150801	20401207	DE	CCH		
1	D	Miller Rose	20150801	20280106	BN	HCC		
1	D	Miller Rose	20150801	20280106	DE	CCH		
3	E	Miller Randy S	20150801		BN	HCC	FAMILY	FAMILY
3	E	Miller Randy S	20150801		DE	CCH	FAMILY	3+FAMILY
3	D	Miller SUsan	20150801		BN	HCC		
3	D	Miller SUsan	20150901		DE	CCH		

This button launches the Coverage Elected pop-up (shown above), which displays information, such as effective coverage start and end dates, about the elected plan(s) for the employee and the employee’s dependents, by month.

**View/Update ACA 1095-C Form – Screen**

**Selection Parameters**

FEIN Number: PYMJ12345678 | PYMJ PAYROLL  
 Report Year: 2016  
 Employee: PYMJ-PYWY-004 | Randy S Miller

**Employee Offer and Coverage**

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
14.	1E	1E	1E	1E	1E	1H	1H	1H	1H	1H	1H	1H
15.												
16.	2C	2C	2C	2C	2C	2A	2A	2A	2A	2A	2A	2A

**Covered Individuals**

Name of Covered Individuals	SSN	DOB	Months of Coverage											
			Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Miller Randy S	153-63-6363	19700101	Y	N	Y	N	N	N	N	N	N	N	N	N
Miller SUsan	258-96-3568	19710303	Y	N	Y	N	N							
Miller Kyle	895-64-7158	20141207	Y	N	Y	N	N							
Miller Rose	526-35-6989	20020106	Y	N	Y	N	N							

Program: HRACA\_BLDATA\_MONTHLY; standard Treeview path: HR > Reports > Affordable Care Act > ACA Monthly Build > 1095C Query (Yearly)

This screen is used to view and edit an Employee’s generated ACA compliance data for lines 14 to 16, under the **Employee Offer and Coverage** section. Only data from previous months is editable.

This screen is also used to view and edit ACA compliance data for the covered individuals under the Employee’s plan, under the **Covered Individuals** section. Again, only data from previous months is editable.

## Employee Self Service – Enrolling Dependents

**Welcome to CMiC Benefits Enrollment**

**Please Note:**

- All premiums shown are per pay period amounts and will not reflect any additional discounts you might receive for tobacco free status or the CMiC Wellness participation. There may be necessary adjustments for missed pay periods.
- You may be required to provide documentation regarding Dependents.
- If you have benefit plan questions, please reference Benefits Home Page or send an email to [benefits@cmicglobal.com](mailto:benefits@cmicglobal.com)
- If you have technical issues, send an email to [helpdesk@cmicglobal.com](mailto:helpdesk@cmicglobal.com)
- [Link to Qualifying Event Instructions](#)
- [Link to New Hire/Rehire Instructions](#)

**Mr. Demo Enrollment**

#	Status	Start Date	End Date	Days Left	Description	Action
323	Pending	2015-02-01	2015-12-31	72	General	Enroll Now

**Enrollment Links**

[Add/Review Dependent](#)

**Qualifying Event**

[Report/Review Qualifying Event](#)

Employees can use Employee Self Service to enroll their dependents themselves. On the main Employee Self Service screen, an employee would click **Add/Review Dependent**, as shown above, and then enroll their dependents through the following screen:

**Benefits Enrollment** Notes Show Comparison Submit Changes Back

Enrollment Status	Benefit Description	Current Plan	Option	Employee Amount	Employer Amount	Total Amount	Action
No Change	401K Deduction	401K	401K 1%	50	50	100	Change
New Enrollment	Dental	Family	BRONZE	40	0	40	Change
First Name Last Name Relation Effective Date End Date Currently Elected <input type="checkbox"/> Olivia Demo Child <input type="checkbox"/>							
New Enrollment	Medical	Family	SILVER	50	15	65	Change
First Name Last Name Relation Effective Date End Date Currently Elected <input type="checkbox"/> Olivia Demo Child <input type="checkbox"/>							
Not Enrolled	Accid Death & Dismemberment	No Coverage					Change

## Convert Health Care Plan from Payroll to HR

Enterprise’s HR module has functionality to convert the Payroll module’s Benefit/Deduction setup into HR’s setup. First, the following must be completed:

- D) User must prepare existing payroll data for HR prior to running utility.

- II) All plans requiring conversion must have a Vendor Code setup at the Company Level, using the Company Benefits Maintenance screen (standard Treeview path: **Human Resources > Benefit Administration > Benefits > Company**):

Sample of Company Benefits Maintenance screen (program: PYCOMBEN)

- III) Rule ID for plans must be set up using the Rules Administration screen (standard Treeview path: **Human Resources > Benefit Administration > Benefit/Deduction Administration > Rules**):

Sample of Rules Administration screen (program: HRRULADM )

IV) Eligible IDs must be set up for plans using the Benefit/Deduction Table Base screen (standard Treeview path: **Human Resources > Benefit Administration > Benefit/Deduction Administration > Rules**):

**Ben./Ded. Table Base**

Table Code: ONHIRE      Table Description: Eligible on Hire

Table Type: HR Eligibility      Effective Date: 01/JAN/2010

Based on: Years Of Service      Term: Months

Retrieve: Single Row      Apply To Base: [ ]

---

**Ben./Ded. Table Rows**

From	To	Effective Days	Direction	Round To	Eligible
0	999	1	None	Not Applicable	<input checked="" type="checkbox"/>

Benefit Eligibility on Hire.

Sample of Benefit/Deduction Table Base screen (program: PYBDTAB).

**Utility: Plans Conversion from Payroll to Human Capital**

With the preceding complete, the following utility can be run to convert the Payroll module’s Benefit/Deduction setup into HR’s setup (standard Treeview path: **Human Resources > Utilities > Plans Conversion From Payroll to Human Capital**):

**Conversion**

This Utility will copy all Payroll setup into HR Benefit/Deduction Administration

Type: Benefit

To Code: HIX      Health Insurance

From Code: HIX      Health Insurance

Rule ID: DEFAULT      Default

Eligible ID: ONHIRE      3 Month Waiting

Message: [ ]      [Click Here](#)      Process

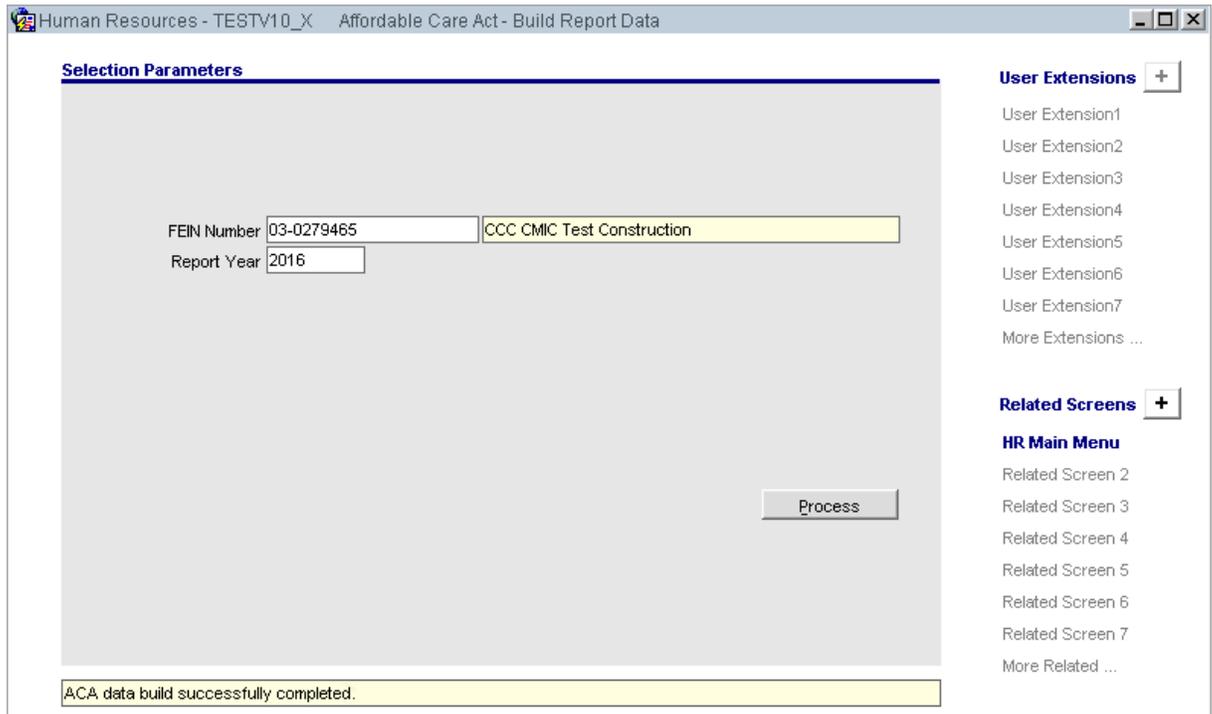
Sample of Conversion to HR screen (program: PYBDCONV).

## Create 1095 Export File



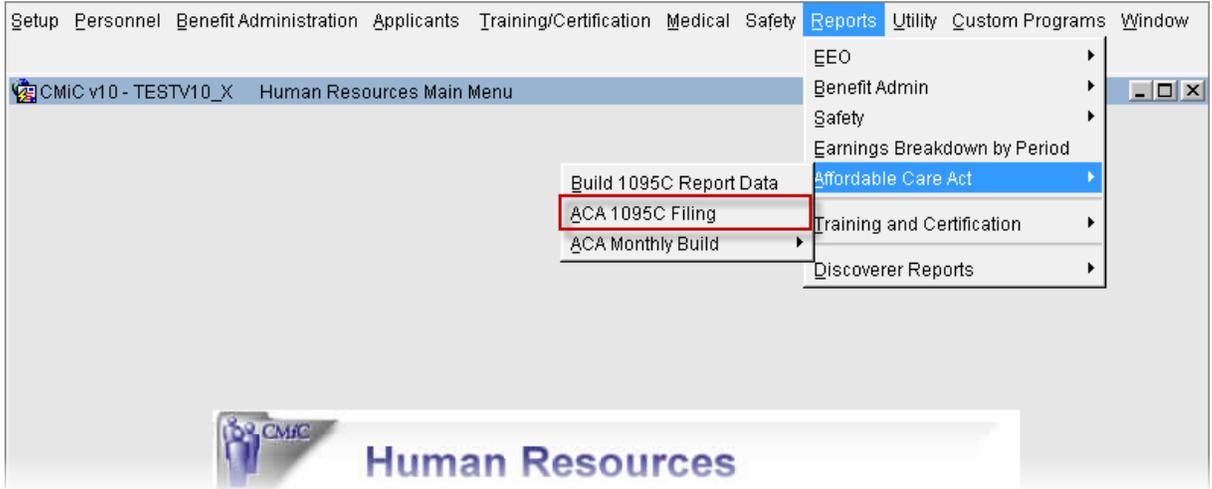
Sample of HR module's main menu.

The first step in creating the 1095 export file, to import into Greenshades, is building its ACA data using an HR module's utility. The utility's screen is titled Affordable Care Act – Build Report Data, and its standard Treeview path is as follows: **Human Resources > Reports > Affordable Care Act > Build 1095 Report Data.**

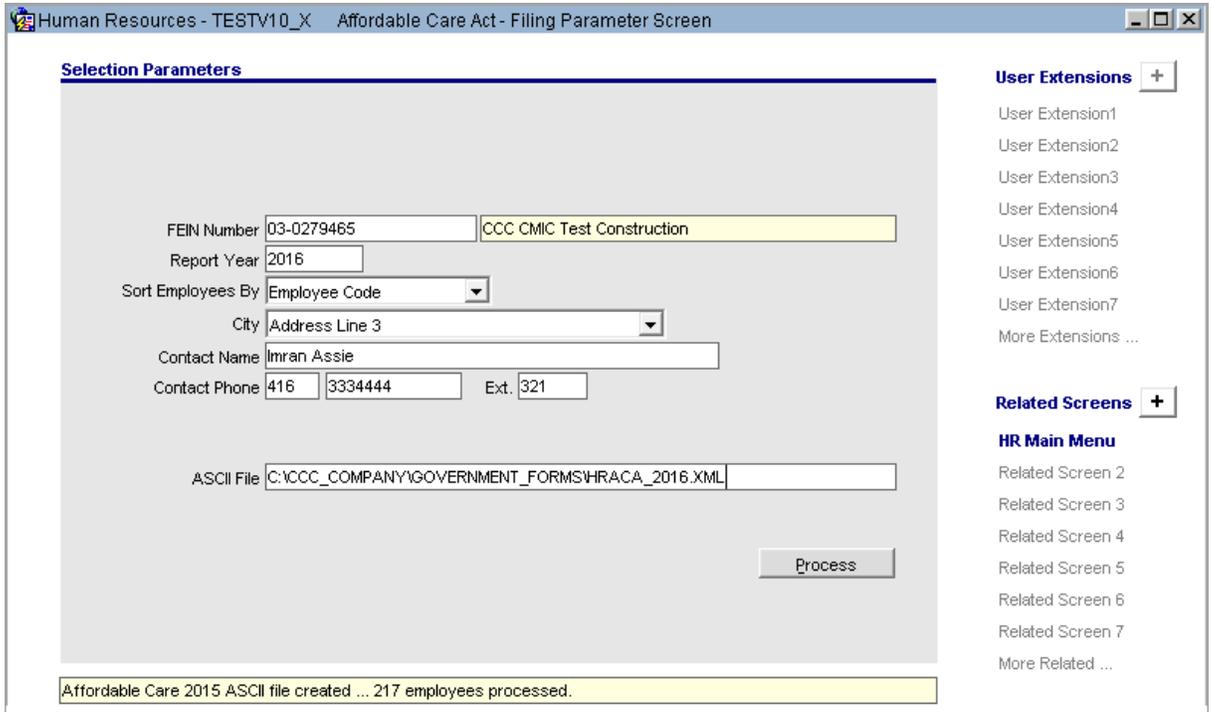


The utility, shown above, runs based on an FEIN number. The utility will process relevant data for all employees, for a specified year, including data from all subsidiaries under the FEIN number for which employees worked. The resulting ACA data will be stored into a separate table, by year, for audit history.

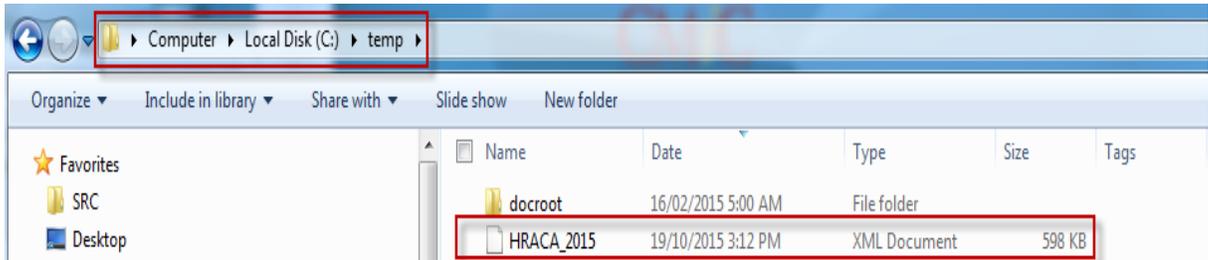
The next step is to export the ADA data into an XML file for Greenshades. This is done through the Affordable Care Act – Filing Parameter screen, and its standard Treeview path is as follows: **Human Resources > Reports > Affordable Care Act > ACA 1095C Filing**.



In the Affordable Care Act – Filing Parameter screen, shown below, enter the parameters, including the file path and file name for the XML file, then click **[Process]** to create the file.

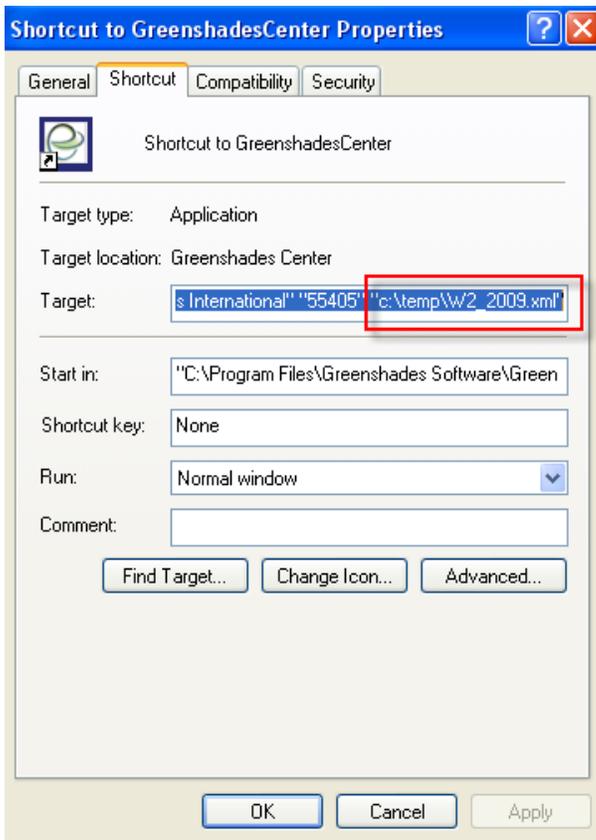


The file will be created using the specified name and file path, as shown below:



This concludes the work necessary in Enterprise for Form 1095-C reporting. The next step is to use Greenshades to import the created XML file of ACA data. For details about this next step, please refer to the *1095 Reporting* sub-section under this user guide's *Reporting via Greenshades* section.

## Step 4: Icon Setup for Greenshades



*Properties of shortcut to lunch Greenshades for a particular type of reporting. Last parameter of the Target field, highlighted in red in the image above, specifies where Greenshades can find the XML file for importing.*

In this step, a desktop icon (*shortcut*) is created and configured to launch Greenshades for a particular type of government report. For each type of data to upload to Greenshades, a separate desktop icon must be created to specify where Greenshades can find the XML file exported by CMiC's Payroll system.

For instance, if W-2, 1099, and SUTA tax data from CMiC's system is to be uploaded to Greenshades for processing, then 3 different icons must be created for launching Greenshades. One icon would be set to

launch Greenshades to upload W-2 tax data, the second would be set to launch Greenshades to upload 1099 data, and the third would be set to upload SUTA data.

To create and configure a desktop icon to launch Greenshades for the uploading of data for a particular type of government report, follow these steps (*steps redone for each new icon required*):

1. Create a new icon by right-clicking on the Windows desktop area and choosing **New** from the list of options that pop up, and select **Shortcut** from the sub-menu that pops up.

\* If a **Create Shortcut** window pops up, click **Browse...** and select the executable file **GreenshadesCenter.exe** from the following installation location:

C:\Program Files\Greenshades Software\Greenshades Center\GreenshadesCenter.exe

2. Configure the newly created icon by right-clicking it and selecting the **Properties** option from the menu that pops up. In the icon's properties window, select the **Shortcut** tab, and for the **Target** field of that tab, enter the following information, including the quotation marks around each of the 7 parameters (*parameters are explained below*):

"C:\Program Files\Greenshades Software\Greenshades Center\GreenshadesCenter.exe" "cmic" "false"  
"<company name>" "<company name as registered with Greenshades>" "<your company zip code>" "<path to export file from CMiC for uploading to Greenshades>"

#### **Target Parameters Explained**

<company name>your company's name

<company name as registered with Greenshades> name of your company, exactly as it is registered with Greenshades. If unknown how it was registered, contact CMiC for assistance.

<your company zip code> company's zip code, as registered with Greenshades

<path to export file from CMiC for uploading to Greenshades> path to XML file exported by CMiC, for uploading to Greenshades for processing. *\*path and file name must match that which was specified in the previous corresponding step in which the export file name and location was specified (ex. **W-2 Export File Name and Location**)*

Example:

If running Greenshades to process **W-2** tax data, and your company's name is **Acme**, its registered name is **Acme, Inc.**, its Zip Code is **12345**, and the path to the XML file exported by CMiC for uploading is **G:\Greenshades\W2xml.xml**, then you would set the "Target" property of the desktop icon to:

"C:\Program Files\Greenshades Software\Greenshades Center\GreenshadesCenter.exe" "cmic"  
"false" "Acme" "Acme, Inc." "12345" "G:\Greenshades\W2xml.xml"

You could name the icon to launch Greenshades for the uploading of W-2 data something like "Greenshades W2".

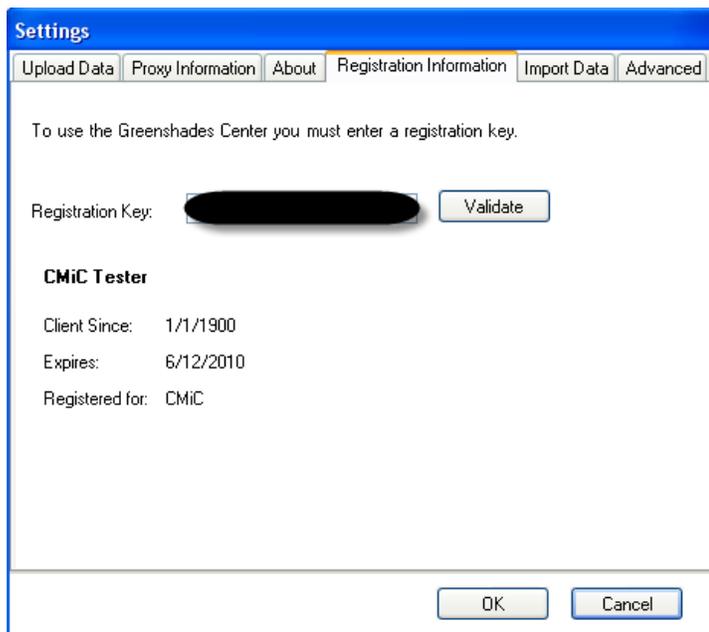
If the following step, Step 5, has already been completed, click the icon to launch Greenshades for a specific type of filing, and continue to the corresponding sub-section under *Reporting via Greenshades* to continue.

---

## Step 5: Registering Greenshades



Open the Greenshades Center by using any of the newly created and configured Greenshades shortcuts. As shown above, you will be prompted with a message stating that a valid registration key must be entered.



On the **Registration Information** tab, enter the registration key given by CMiC. Click [**Validate**] once you have entered the registration key, and your company information will appear. Click [**OK**].

### ***Updating Greenshades***

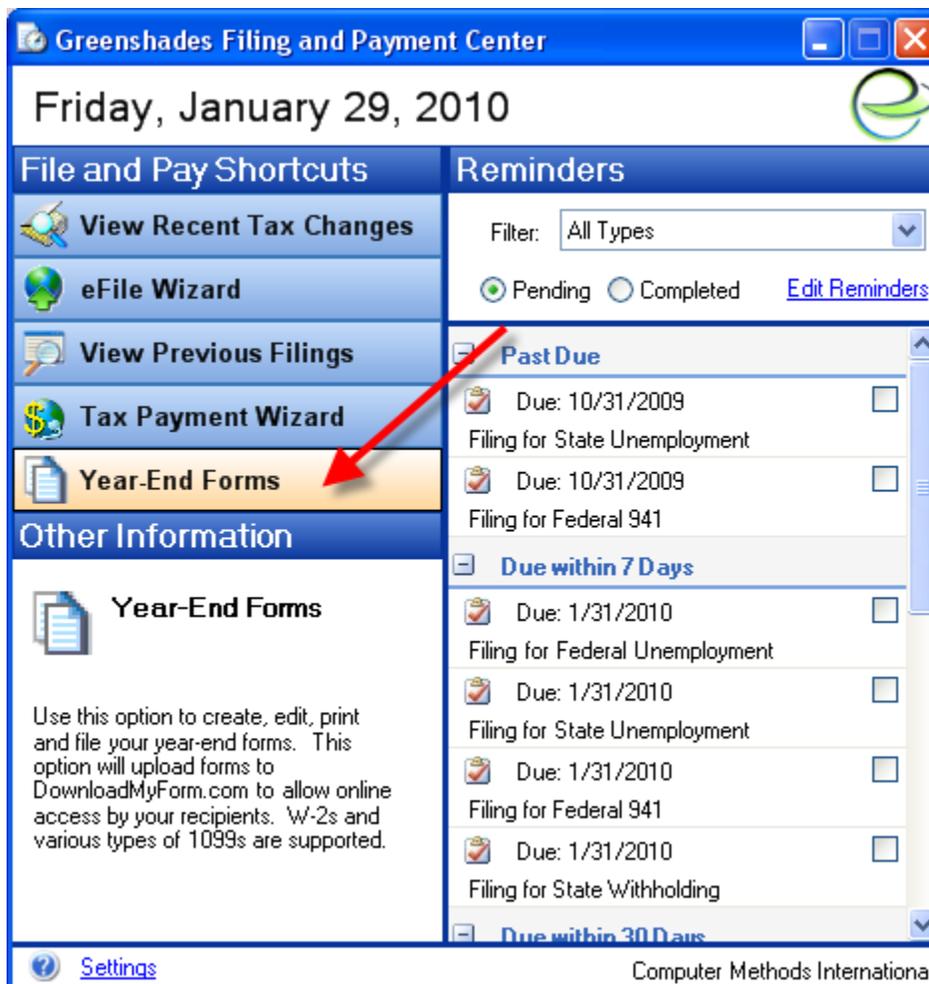
---

The first time Greenshades opens, you may be prompted for updates. Please download and apply these updates before moving on, following Greenshades' update instructions.

After applying the updates, re-open the Greenshades Center. You may be prompted to enter the registration key again. If so, re-enter the registration key as before.

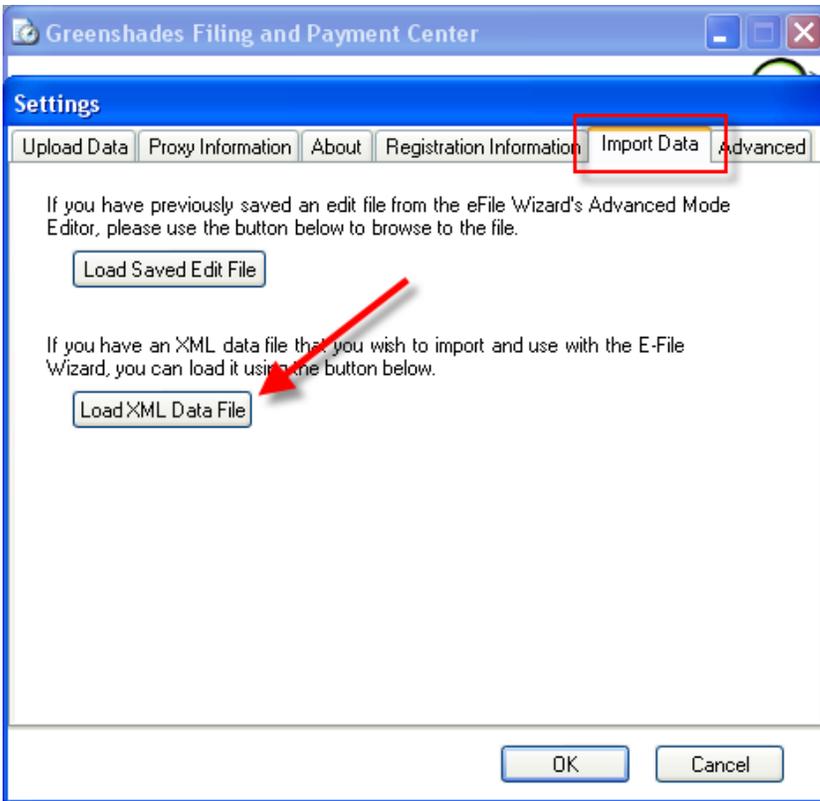
# Reporting via Greenshades

## W-2 Reporting

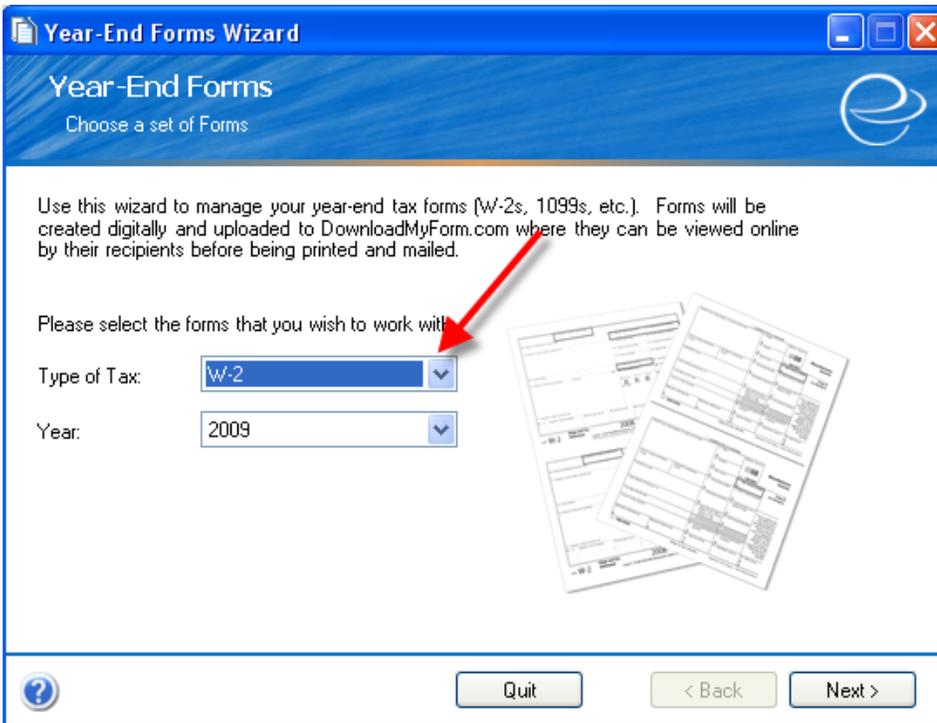


Click the desktop icon created for W-2 reporting in the *Step 4: Icon Setup for Greenshades* section, to bring up the Greenshades screen above.

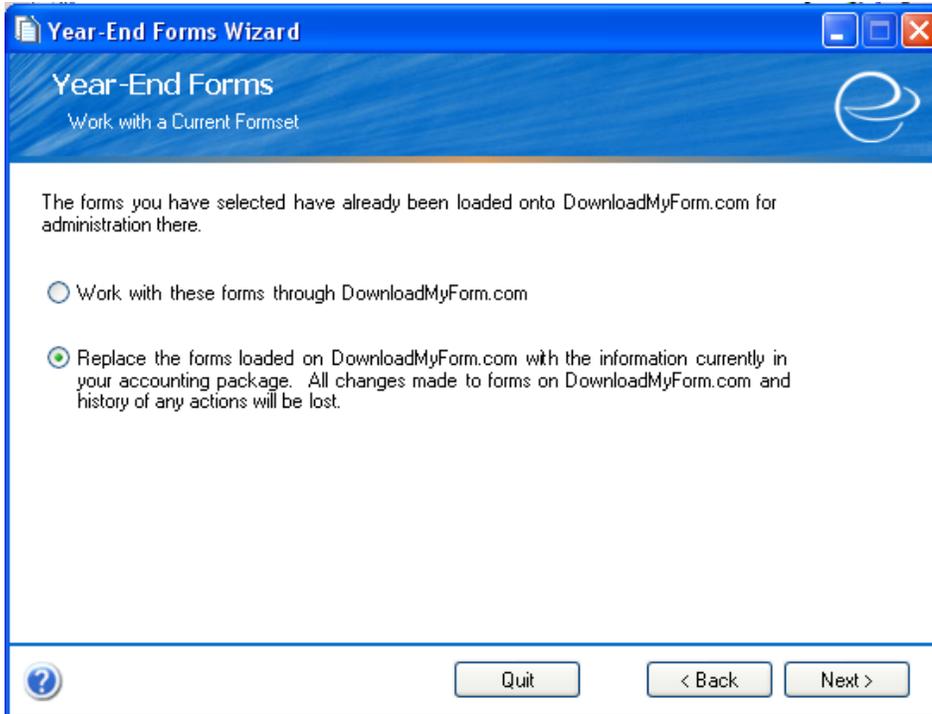
To import W-2 data, click **Year-End Forms**, pointed to by the red arrow above.



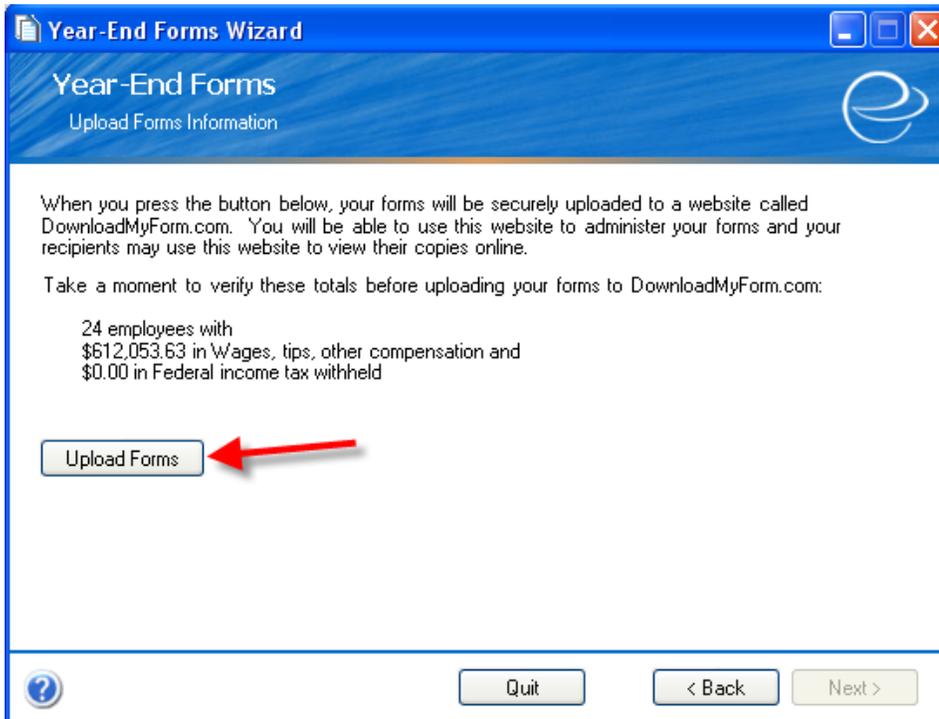
On the **Import Data** tab of the subsequent screen, click **Load XML Data File**, pointed to by the red arrow above.



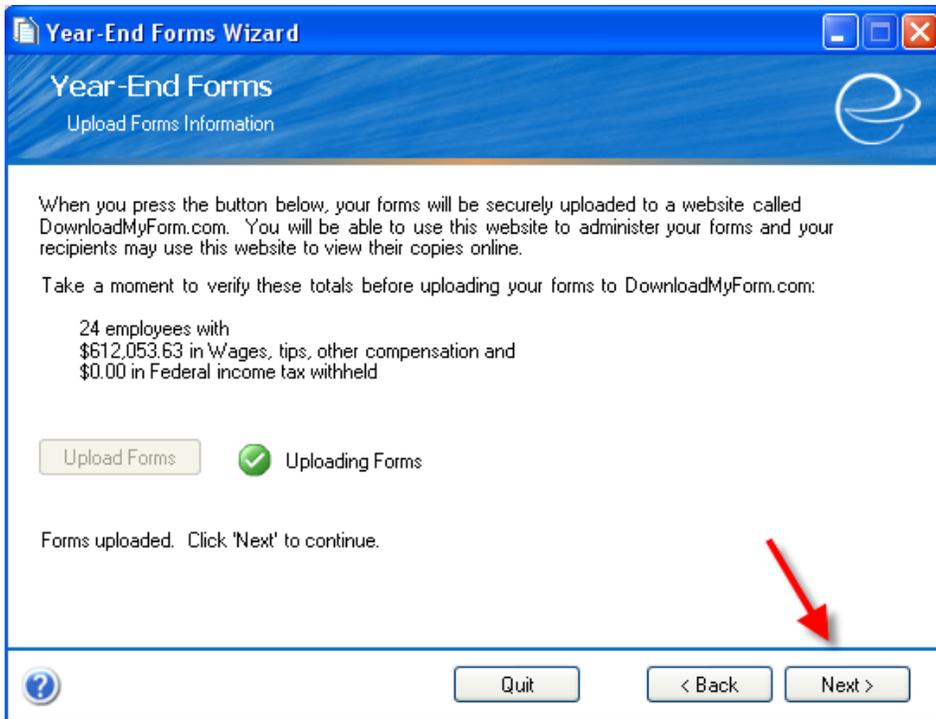
Select W-2 for the **Type of Tax** field, and the relevant year.



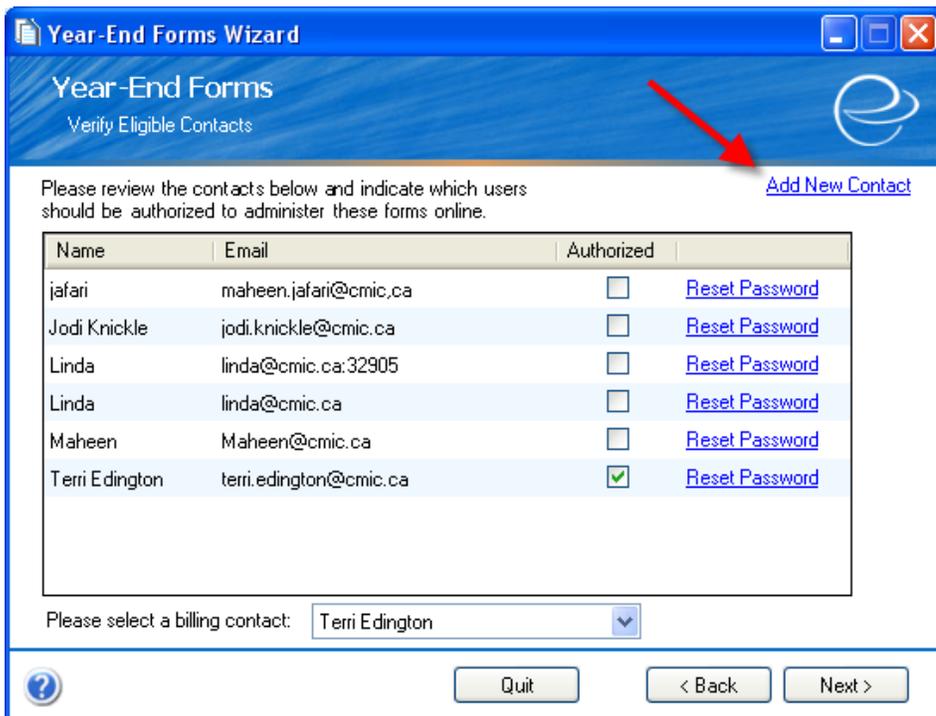
If this is the first time you are loading the W-2 information into Greenshades, select the top option. If you are re-running this process, due to new payroll data, select the second option.



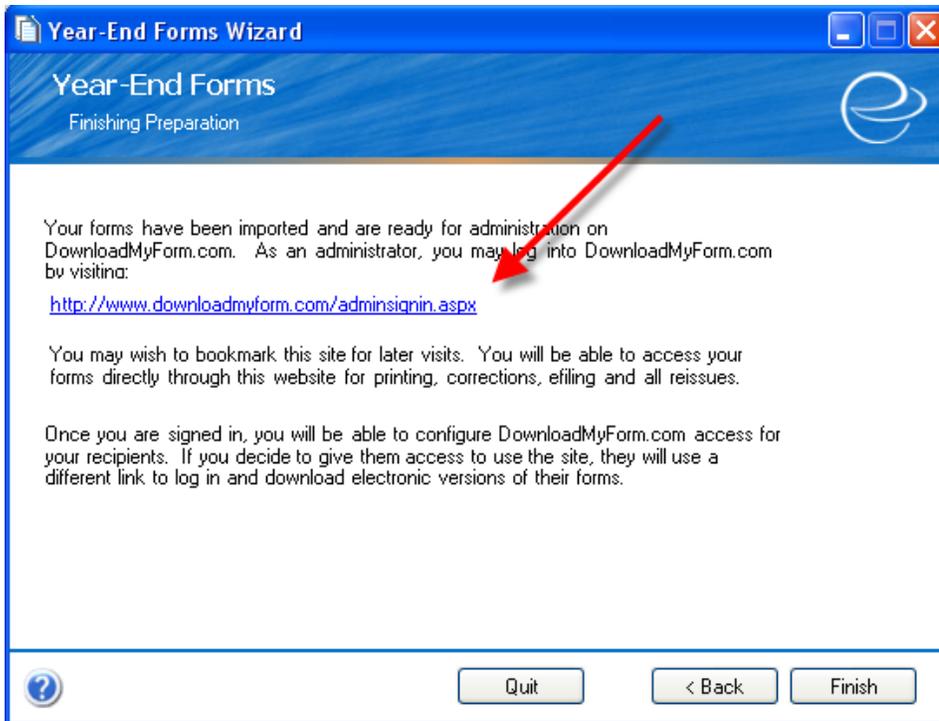
Press the **Upload Forms** button to upload the data to Greenshades.



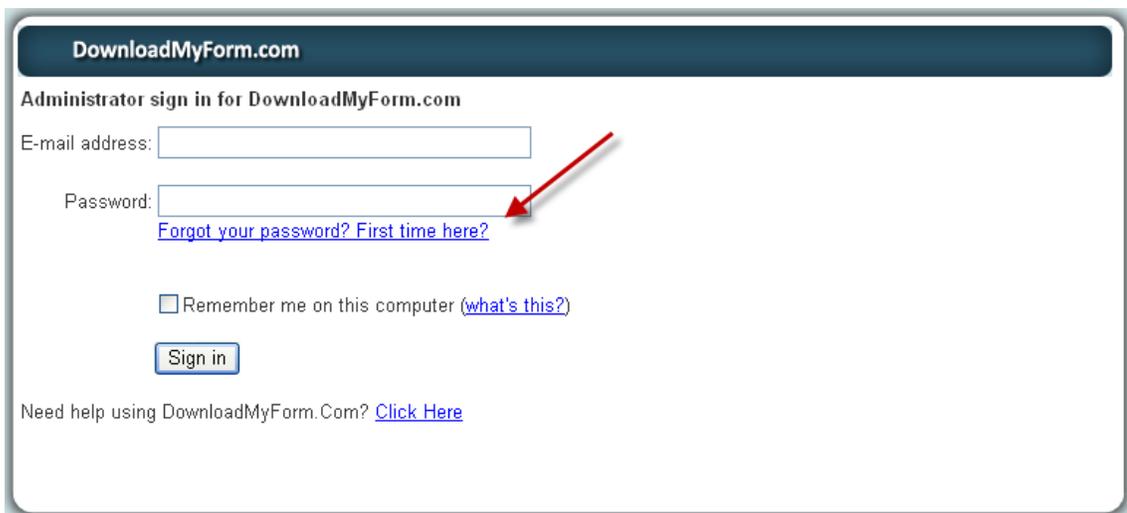
After the forms have been uploaded, press the **Next** button.



Check all the contacts that should have access to the W-2s and select a billing contact. If you need to add an additional contact, you can do so at this time. Press the **Next** button to continue.



Click the link (*point to by red arrow*) to go to the **DownloadMyForm** website, where the W-2s are stored.



Click the link to create or reset your password if necessary.

**DownloadMyForm.com**



Request Password Reset

If you have forgotten your password or have never been issued one, you may reset it using this page. Simply enter your registered email address and follow any further instructions below.

Email Address:



**DownloadMyForm.com**

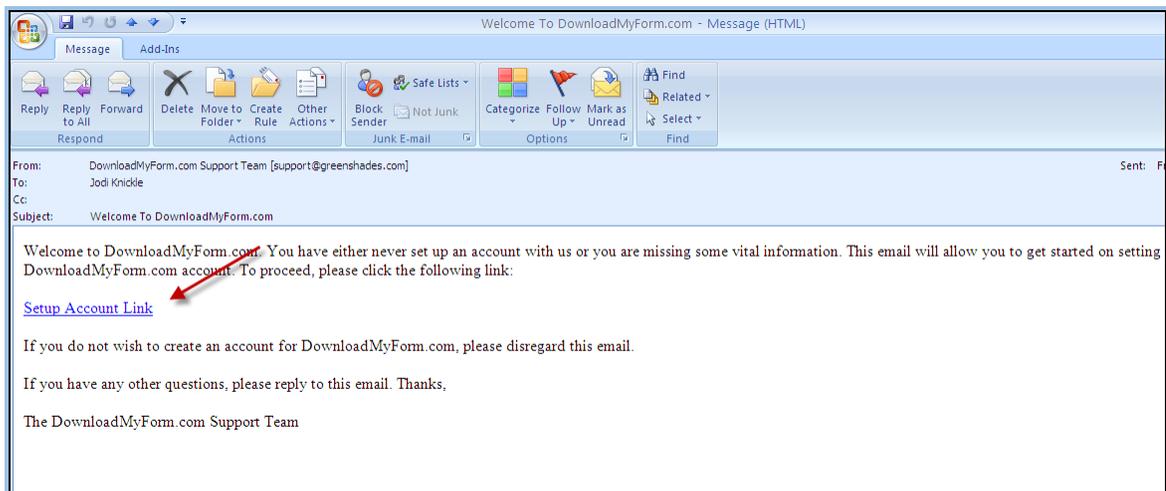


Request Password Reset

If you have forgotten your password or have never been issued one, you may reset it using this page. Simply enter your registered email address and follow any further instructions below.

 An e-mail has been sent to your email address with information on how to set up your account. If you have not recieved an email within a day, use the form to request your password again.

[Return to Login Page](#)



You will receive an email with a link for setting up your password.

DownloadMyForm.com



Account Setup

The following screens will assist you with setting up your account. To start, please enter the password you would like to use to access your account and click Continue.

New Password  
Your password must contain a least one of each of the following: an uppercase character, a lower case character, and a number.

Confirm Password

DownloadMyForm.com



Account Setup

Please select and answer two security questions below. These questions will be required if you forget or wish to change your password.

Security Question 1

Answer

Security Question 2

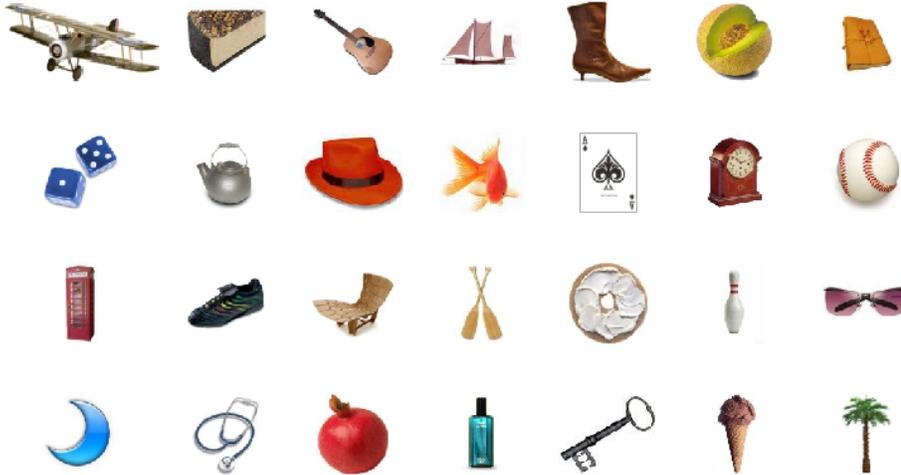
Answer

Answer the security questions.



Account Setup

As a safety precaution please select one of the security images below. You will be shown your security image every time you log in. If you ever do not see your security image, do not provide your password and contact support.



Select a security image, by clicking on one of the icons.

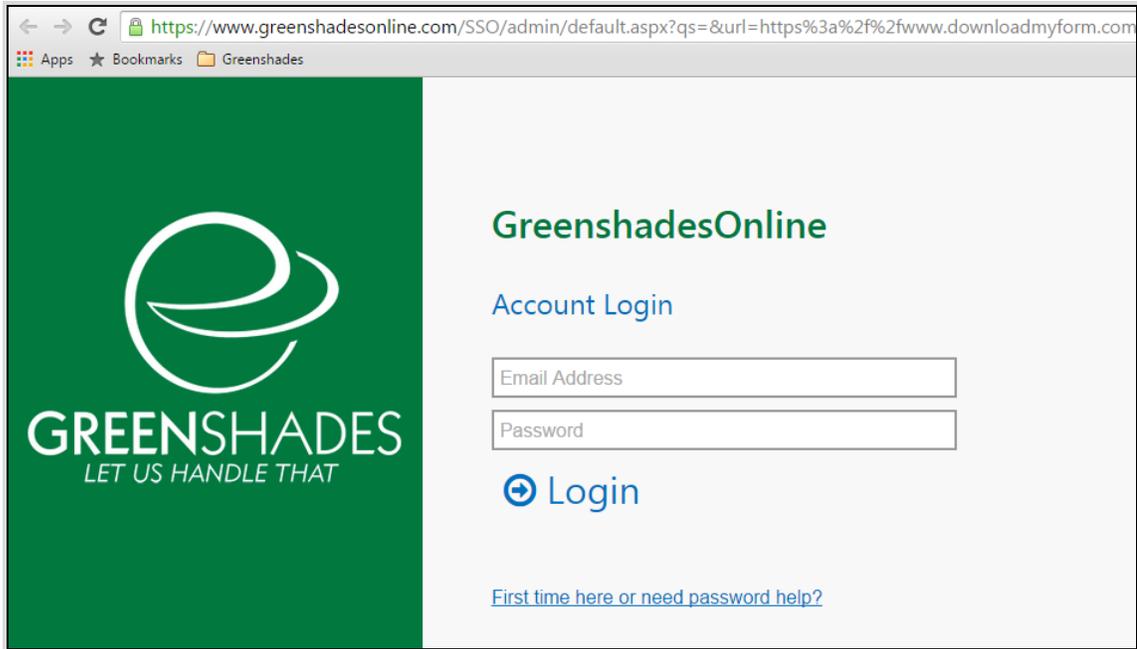


Account Setup

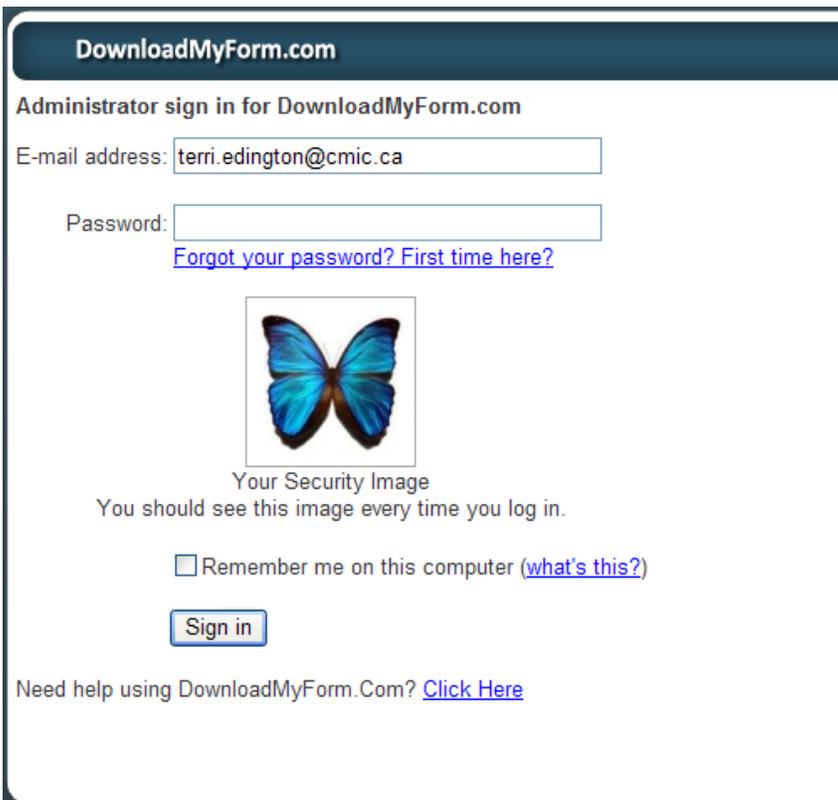
Congratulations. Your account has been setup and is ready to be used. Please use the link below to login.

[Click to Login](#)





Access to the **DownloadMyForm** website can be done through a web browser by specifying the following address: **www.downloadmyform.com**. You may want to save this website as a favorite in your browser.



You should always see your security image after putting in your e-mail address

DownloadMyForm.com [Need Help?](#)

Select a workspace below:

Show only tax year: 2009 Search:  [\(Sign Out\)](#)

You have new workspaces to configure.

---

**Acme, Inc 2009 W-2 Tax Forms** Formset D2W1:2002099  
New!  
 You do not have access to this workspace

<b>Forms Loaded</b>	12/7/2009	0 employees consented to receive their form online.
<b>Forms Issued</b>	--	0 employee forms were printed and mailed by you.
<b>E-File Sent</b>	--	0 employees forms were mailed by us per your request.

1,273 employees were not issued forms by any method above.

**How Forms Were First Issued**



- Employee Consented
- Mailed By You
- Mailed By Us
- Non-Issued Forms

---

**Computer Methods 2009 W-2 Tax Forms** Formset D2W1:2002104  
 24 employees with \$612,053.63 in federal wages

<b>Forms Loaded</b>	1/29/2010	0 employees consented to receive their form online.
<b>Forms Issued</b>	--	0 employee forms were printed and mailed by you.
<b>E-File Sent</b>	--	0 employees forms were mailed by us per your request.

24 employees were not issued forms by any method above.

**How Forms Were First Issued**



- Employee Consented
- Mailed By You
- Mailed By Us
- Non-Issued Forms

[Click here to import new tax forms into DownloadMyForm.com](#)

Click on the blue link. In this example, 24 employees were processed.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington [\(Sign Out\)](#)

**Home**

- My W-2s
- Mail or Download
- Submit E-file
- Reports
- Settings

[View Welcome Wizard](#)

**Current Alerts**

24 employees have not received forms in the mail or online and must have their forms issued by February 1st.

If you want our [mailing service](#) to postmark your forms, we can no longer guarantee that they will be postmarked by February 1st.

Forms must be e-filed to the SSA by March 31st. They may be corrected and re-issued until that time.

15 warnings have been found in your forms.

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

24 Employees Loaded  
 \$612,053.63 in Federal Wages  
 \$0.00 in Federal Tax Withheld

D2W1:2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

If warnings have been found, click on the link to view them.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington [\(Sign Out\)](#)

**Forms with Warnings** [Download Excel](#)  
[Email Report](#)

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

Form	Warning	Severity
<a href="#">Edit</a> Angela Volpe-Baird	SSNs may not start with 8 or 9	High
<a href="#">Edit</a> Avery Matavovsky	SSNs may not start with 8 or 9	High
<a href="#">Edit</a> Charles Burberry	SSNs may not start with 8 or 9	High
<a href="#">Edit</a> Frank Garther	SSNs may not start with 8 or 9	High
<a href="#">Edit</a> Frank Purdum	Employee is Missing Street Address	High
<a href="#">Edit</a> Gina Wicks	Employee is Missing City	High
<a href="#">Edit</a> Gina Wicks	Employee is Missing Street Address	High
<a href="#">Edit</a> Gina Wicks	SSNs may not start with 8 or 9	High
<a href="#">Edit</a> Pow Boom	SSNs may not start with 8 or 9	High
<a href="#">Edit</a> Terri Edington	Employee is Missing City	High
<a href="#">Edit</a> Virginia Coldfingers	SSNs may not start with 8 or 9	High
<a href="#">Edit</a> Frank Purdum	Address May Be Incorrect	Low
<a href="#">Edit</a> Gina Wicks	Address May Be Incorrect	Low
<a href="#">Edit</a> Kirsten Miller	Address May Be Incorrect	Low
<a href="#">Edit</a> 24 Forms	SSN not Verified	Moderate

D2W1:2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

High severity warnings will need attention. Greenshades offers a service to verify employee SSNs with the SSA. Greenshades will bill you for any SSNs are verified as incorrect.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington [\(Sign Out\)](#)

**Home**

- My W-2s
- Mail or Download
- Submit E-file
- Reports
- Settings

[View Welcome Wizard](#)

**Current Alerts**

24 employees have not received forms in the mail or online and must have their forms issued by February 1st.

If you want our [mailing service](#) to postmark your forms, we can no longer guarantee that they will be postmarked by February 1st.

Forms must be e-filed to the SSA by March 31st. They may be corrected and re-issued until that time.

**15 warnings** have been found in your forms.

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

24 Employees Loaded  
 \$612,053.63 in Federal Wages  
 \$0.00 in Federal Tax Withheld

D2W1:2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

You may click the **View More** link to see the totals.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington [\(Sign Out\)](#)

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

	Employees Loaded	State	State Wages	State Tax	Locality	Local Wages	Local Tax
Federal Wages	24	MN	\$0.00	\$142,973.85			
Federal Tax Withheld	\$612,053.63	PA	\$0.00	\$4,520.00			
Social Security Wages	\$151,397.92	VA	\$0.00	\$15,983.31			
Social Security Tax Withheld	\$9,386.70						
Medicare Wages	\$163,477.16						
Medicare Tax Withheld	\$37,313.99						
Social Security Tips	\$0.00						
Allocated Tips	\$0.00						
Advanced Earned Income Credit	\$0.00						
Dependent Care Benefits	\$0.00						
NonQualified Plan 457	\$0.00						

[Home](#)

D2W1.2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

The totals screen is a great way to reconcile the W-2 data with tax reports from CMiC.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington [\(Sign Out\)](#)

**Home**

-  My W-2s
-  Mail or Download
-  Submit E-file
-  Reports
-  Settings

[View Welcome Wizard](#)

**Current Alerts**

24 employees have not received forms in the mail or online and must have their forms issued by February 1st.

If you want our [mailing service](#) to postmark your forms, we can no longer guarantee that they will be postmarked by February 1st.

Forms must be e-filed to the SSA by March 31st. They may be corrected and re-issued until that time.

**15 warnings** have been found in your forms.

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

24 Employees Loaded  
 \$612,053.63 in Federal Wages  
 \$0.00 in Federal Tax Withheld

D2W1.2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

The icons on the left bring you to the same place as the tabs along the top.

# My W-2s

DownloadMyForm.com
My W-2s
Mail
E-File
Reports
Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#)
Terri Edington (Sign Out) [Need Help?](#)

**View Employees**  
 Find a single employee by using the search below. Click 'Print' to view a PDF of a form or 'Edit' to open a form to make changes. [Download Multiple Forms](#)  
[Add a new Employee](#)

Search for:

Look in: All Forms [Advanced Search](#)

	SSN	LastName	FirstName	City	State	Zip	Department
<a href="#">Edit</a> <a href="#">Print</a>	758490345	Abernathy	Christi	Minneapolis	MN	55402	
<a href="#">▲</a> <a href="#">Edit</a> <a href="#">Print</a>	820002899	Boom	Pow	Minneapolis	MN	55408	
<a href="#">▲</a> <a href="#">Edit</a> <a href="#">Print</a>	987567333	Burberry	Charles	Minneapolis	MN	55402	
<a href="#">Edit</a> <a href="#">Print</a>	462389862	Cherry	Linda	Bloomington	MN	55402	
<a href="#">▲</a> <a href="#">Edit</a> <a href="#">Print</a>	987234889	Coldfingers	Virginia	Minneapolis	MN	55405	
<a href="#">▲</a> <a href="#">Edit</a> <a href="#">Print</a>	576839028	Edington	Terri		MN	55406	
<a href="#">Edit</a> <a href="#">Print</a>	743223143	Frederick	George	Minneapolis	MN	55405	
<a href="#">▲</a> <a href="#">Edit</a> <a href="#">Print</a>	987234789	Garther	Frank	Minneapolis	MN	55402	
<a href="#">Edit</a> <a href="#">Print</a>	234988799	Greer	Lisa	Minneapolis	MN	55402	
<a href="#">Edit</a> <a href="#">Print</a>	746333445	Hunter	Jeannie	Norfolk	VA	23323	
<a href="#">Edit</a> <a href="#">Print</a>	746334254	Jackson	Michael	Minneapolis	MN	55405	
<a href="#">Edit</a> <a href="#">Print</a>	309887456	Jackson	Debbie	Minneapolis	MN	55405	
<a href="#">Edit</a> <a href="#">Print</a>	645334567	Jungle	Itsa	Minneapolis	MN	55406	
<a href="#">Edit</a> <a href="#">Print</a>	463787456	Madden	Steve	Minneapolis	MN	55408	
<a href="#">Edit</a> <a href="#">Print</a>	334554567	Masterson	Jayne	Minneapolis	MN	55408	
<a href="#">▲</a> <a href="#">Edit</a> <a href="#">Print</a>	877667889	Matavovsky	Avery	Minneapolis	MN	55406	
<a href="#">▲</a> <a href="#">Edit</a> <a href="#">Print</a>	384726799	Miller	Kirsten	Minneapolis	MN	55408	

**My W-2s** allows you to print individual W-2s. You can search for a specific employee, and edit the employee's W-2 form in this screen. However, any information that is changed here does not flow back into CMiC. Therefore, if you re-load your W-2 information, any changes previously made here will be overridden. We suggest making changes within CMiC and re-running this process.

DownloadMyForm.com
My W-2s
Mail
E-File
Reports
Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#)
Terri Edington (Sign Out)

**Print Employee W-2**  
 Please indicate how you would like us to generate the W-2 below. Then, click on the layout you want to open it.

**Include Instructions**  
 Checking this box will attach instructions to your W-2.

**Attach a Coupon**  
 Checking this box will attach a coupon to your W-2.

**Choose a Layout**



BC22 for 4 Corner Paper

D2W1:2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

You may indicate how you would like to generate the W-2s, and select a layout.

Copy B -- To Be Filed with Employee's FEDERAL Tax Return.		OMB NO. 1545-008	
a Employee's SSN 758-49-0345	1 Wages, tips, other comp. 1600.00	2 Federal income tax withheld	
b Employer ID no.(EIN) 55-7777777	3 Social security wages 800.00	4 Social security tax withheld 49.60	
	5 Medicare wages and tips 800.00	6 Medicare tax withheld 90.35	
c Employer's name, address and ZIP code TERRI'S COMPANIES 3549 24TH AVE. S. MINNEAPOLIS, MN 55406			
d Control Number			
e Employee's name, address, and ZIP code CHRISTI ABERNATHY 68 EAST ST. MINNEAPOLIS, MN 55402			
7 Social security tips	8 Allocated tips	9 Advance EIC payment	
10 Dependent care benefits	11 Nonqualified plans	12a Code See inst. for box 12	
13 Statutory employee <input type="checkbox"/>	14 Other <input type="checkbox"/>	12b Code	
Retirement plan <input type="checkbox"/>		12c Code	

Copy C -- For EMPLOYEE'S RECORDS. (See Notice to Employee on back of Copy B.)		OMB NO. 1545-008	
a Employee's SSN 758-49-0345	1 Wages, tips, other comp. 1600.00	2 Federal income tax withheld	
b Employer ID no.(EIN) 55-7777777	3 Social security wages 800.00	4 Social security tax withheld 49.60	
	5 Medicare wages and tips 800.00	6 Medicare tax withheld 90.35	
c Employer's name, address and ZIP code TERRI'S COMPANIES 3549 24TH AVE. S. MINNEAPOLIS, MN 55406			
d Control Number			
e Employee's name, address, and ZIP code CHRISTI ABERNATHY 68 EAST ST. MINNEAPOLIS, MN 55402			
7 Social security tips	8 Allocated tips	9 Advance EIC payment	
10 Dependent care benefits	11 Nonqualified plans	12a Code See inst. for box 12	
13 Statutory employee <input type="checkbox"/>	14 Other <input type="checkbox"/>	12b Code	
Retirement plan <input type="checkbox"/>		12c Code	

Select a layout.

## Mail

DownloadMyForm.com My W-2s **Mail** E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington (Sign Out)

**Home**

- My W-2s
- Mail or Download**
- Submit E-file
- Reports
- Settings

[View Welcome Wizard](#)

**Current Alerts**

24 employees have not received forms in the mail or online and must have their forms issued by February 1st.

If you want our [mailing service](#) to postmark your forms, we can no longer guarantee that they will be postmarked by February 1st.

Forms must be e-filed to the SSA by March 31st. They may be corrected and re-issued until that time.

15 warnings have been found in your forms.

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

24 Employees Loaded  
\$612,053.63 in Federal Wages  
\$0.00 in Federal Tax Withheld

D2W1:2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

**Mail** allows you to create a batch of all W-2s. If you want to print all employee W-2s at the same time, you would do this through this **Mail or Download** functionality.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington (Sign Out) [Need Help?](#)

Mail or Download: Choose Forms → View Totals → Choose Delivery → Advanced Options → Name Batch

 You have 11 high-severity warnings that you may wish to fix before continuing with this process. Please click [here](#) to view your current warnings.

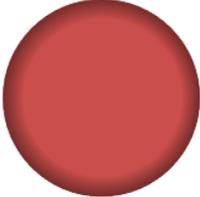
Which forms would you like to work with?

All tax forms in this workspace

All Non-Issued Forms (either on paper or by electronic consent)

Select specific forms by searching for them

**How Forms Were First Issued**



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

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington (Sign Out) [Need Help?](#)

Mail or Download: Choose Forms → View Totals → Choose Delivery → Advanced Options → Name Batch

**Totals For This Batch**  
Below you will find a totals from this batch of forms.

	Employees Loaded	Federal Wages	Federal Tax Withheld	Social Security Wages	Social Security Tax Withheld	Medicare Wages	Medicare Tax Withheld	Social Security Tips	Allocated Tips	Advanced Earned Income Credit	Dependent Care Benefits	NonQualified Plan 457
	24	\$612,053.63	\$0.00	\$151,397.92	\$9,386.70	\$163,477.16	\$37,313.99	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

State	State Wages	State Tax	Locality	Local Wages	Local Tax
MN	\$0.00	\$142,973.85			
PA	\$0.00	\$4,520.00			
VA	\$0.00	\$15,983.31			

D2W1:2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

Select the forms you would like to work with and press Continue.

Mail or Download: Choose Forms → View Totals → Choose Delivery → Advanced Options → Name Batch

What would you like to do with these forms?

Have Greenshades Software print and mail these forms to their recipients  
 Download a PDF of these forms to your computer so that you can print and distribute these forms  
 Have Greenshades Software print these forms, insert them into envelopes, and then ship them to your location so that you can hand them out

**Form Layout**

**BC22 for 4 Corner Paper**



Four copies of the W-2 located in the corners of the page: Copy B to be filed with the employee's federal tax return, copy C for the employee's records, and two copy 2s to be filed with state or local returns.  
[\(Download W-2 Instructions\)](#)

Sort Forms by:

Last Name

You have the option for Greenshades to print and mail the W-2s for you. This is a billable service.

Download Forms: Choose Forms → View Totals → Choose Delivery → Advanced Options → Name Batch

**Proper Paper and Envelopes**

These forms are designed to fit properly with CMiC perforated paper and envelopes. Please check the codes on the bottom of your perforated paper and the inside flap of your envelope to ensure that they match the forms you are about to download.

Paper Code 4UPPERF\* OR 4UPPERFI  
 Envelope Code 4UPDWENV

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

I wish to order more paper or envelopes for my forms

You can also order paper and envelopes from Greenshades.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington (Sign Out) [Need Help?](#)

Download Forms: Choose Forms → View Totals → Choose Delivery → Advanced Options → Name Batch

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

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

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

D2W1.2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

You may print a batch of forms by checking the checkbox and entering a batch name to be used when notified. Press **Continue**.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington (Sign Out)

**Current Download Batches**

You will be notified by email when any 'Pending' or 'In Progress' batches complete and are ready for download. You may use the menu to return to the homepage or view other information while you are waiting.

If you are printing onto perforated paper, please ensure that you have page scaling set to 'None' on the print window.

**SET PAGE SCALING TO 'NONE' WHEN PRINTING**

Page Handling  
Copies: 1  Collate  
Page Scaling: None  
 Auto-Rotate and Center  
 Choose Paper Source by PDF page size

**ADOBE EXAMPLE**

	Name	Status	Owner	Completed
Not Available	<a href="#">More Info</a>	Terri_Test_5	Pending	Terri Edington

D2W1.2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

<a href="#">DownloadMyForm.com</a>	<a href="#">My W-2s</a>	<a href="#">Mail</a>	<a href="#">E-File</a>	<a href="#">Reports</a>	<a href="#">Settings</a>
------------------------------------	-------------------------	----------------------	------------------------	-------------------------	--------------------------

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington ([Sign Out](#))

**Information about: Terri\_Test\_5**

This batch is currently Processing.

Owner	terri.edington@cmic.ca
Issued to employees?	No
Requested at	1/29/2010 11:01:21 AM
Ready at	
Size	Employees on pages
Position in line	3
Estimated wait time	0 hours, 0 minutes, 4 seconds

Click [here](#) to order a CD of these forms to be created and mailed to you.

Click [here](#) here if you wish to remove this batch of PDFs from your download batches. It will no longer appear on this screen or be counted towards forms you have delivered to your employees.

[Back](#)

D2W1:2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

<a href="#">DownloadMyForm.com</a>	<a href="#">My W-2s</a>	<a href="#">Mail</a>	<a href="#">E-File</a>	<a href="#">Reports</a>	<a href="#">Settings</a>
------------------------------------	-------------------------	----------------------	------------------------	-------------------------	--------------------------

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington ([Sign Out](#))

**Information about: Terri\_Test\_5**

This batch is currently Processed.

Owner	terri.edington@cmic.ca
Issued to employees?	No
Requested at	1/29/2010 11:01:21 AM
Ready at	1/29/2010 11:01:55 AM
Size	24 Employees on 25 pages
Position in line	2
Estimated wait time	0 hours, 0 minutes, 0 seconds

Click [here](#) to download or print these forms.

Click [here](#) to order a CD of these forms to be created and mailed to you.

Click [here](#) here if you wish to remove this batch of PDFs from your download batches. It will no longer appear on this screen or be counted towards forms you have delivered to your employees.

[Back](#)

D2W1:2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

Once processed, click on the link to print the forms.

https://www.downloadmyform.com/Forms/2002104/batches/2006924/2990293c-2d30-462e-84dc-2fb58e149ec6/terri\_test\_5.pdf

1 / 25

Copy B -- To Be Filed with Employee's FEDERAL Tax Return.			OMB NO. 1545-008		
a Employee's SSN	1 Wages, tips, other comp.	2 Federal income tax withheld	a Employee's SSN	1 Wages, tips, other comp.	2 Federal income tax withheld
758-49-0345	1600.00		758-49-0345	1600.00	
b Employer ID no.(EIN)	3 Social security wages	4 Social security tax withheld	b Employer ID no.(EIN)	3 Social security wages	4 Social security tax withheld
55-7777777	800.00	49.60	55-7777777	800.00	49.60
	5 Medicare wages and tips	6 Medicare tax withheld		5 Medicare wages and tips	6 Medicare tax withheld
	800.00	90.35		800.00	90.35
c Employer's name, address and ZIP code			c Employer's name, address and ZIP code		
TERRI'S COMPANIES 3549 24TH AVE. S. MINNEAPOLIS, MN 55406			TERRI'S COMPANIES 3549 24TH AVE. S. MINNEAPOLIS, MN 55406		
d Control Number			d Control Number		
e Employer's name, address, and ZIP code			e Employer's name, address, and ZIP code		
CHRISTI ABERNATHY 68 EAST ST. MINNEAPOLIS, MN 55402			CHRISTI ABERNATHY 68 EAST ST. MINNEAPOLIS, MN 55402		
7 Social security tips	8 Allocated tips	9 Advance EIC payment	7 Social security tips	8 Allocated tips	9 Advance EIC payment
10 Dependent care benefits	11 Nonqualified plans	12a Code see inst. for box 12	10 Dependent care benefits	11 Nonqualified plans	12a Code see inst. for box 12
13 Statutory employee	14 Other	12b Code	13 Statutory employee	14 Other	12b Code
<input type="checkbox"/>			<input type="checkbox"/>		
Retirement plan		12c Code	Retirement plan		12c Code
<input type="checkbox"/>			<input type="checkbox"/>		

Once processed, the forms will be made available for printing.

## E-File

DownloadMyForm.com My W-2s Mail **E-File** Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington [\(Sign Out\)](#)

**Home**

- My W-2s
- Mail or Download
- Submit E-file**
- Reports
- Settings

[View Welcome Wizard](#)

**Current Alerts**

24 employees have not received forms in the mail or online and must have their forms issued by February 1st.

If you want our [mailing service](#) to postmark your forms, we can no longer guarantee that they will be postmarked by February 1st.

Forms must be e-filed to the SSA by March 31st. They may be corrected and re-issued until that time.

**15 warnings** have been found in your forms.

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

24 Employees Loaded  
\$612,053.63 in Federal Wages  
\$0.00 in Federal Tax Withheld

**Form Batches**

You have requested to download 1 batch of forms. [View](#)

D2W1:2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

When you are ready to file this information with the government, you may do so through the E-File function.

**NOTE:** These screens WILL file the W-2 information for you, so make sure not to do so until you are 100% ready.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington (Sign Out) [Need Help?](#)

E-File Forms: E-File Information → Verify Totals → Submit E-File

**Creating an E-File**  
 This process will help you easily create and file your E-File to the government. You will be able to edit e-file information, view and verify totals, and finally submit your file. For help at any time, please call 416-736-0123 ext 240 or email us at [maheen@cmic.ca](mailto:maheen@cmic.ca).

 You have 1 moderate warning that you may want to fix before continuing with this process. Please click [here](#) to view your current warnings. You may submit an E-File without fixing these warnings.

 We highly recommend that you do **not** submit an E-File at this time. Waiting until your recipients have a chance to review their forms and discover problems will ensure that your government E-File is created correctly. Your E-File is not due until **3/31/2010**.

**Edit E-File Information**  
 Please review the information below and make any necessary edits.

**Contact Name**  
  
*Enter the name of the employee who should be contacted by the SSA if needed.*

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

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

Fill out the required information on this screen, click **[Next]** to verify, then **[Submit]**.

## Reports

DownloadMyForm.com My W-2s Mail E-File **Reports** Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington (Sign Out)

**Home**

-  My W-2s
-  Mail or Download
-  Submit E-file
-  **Reports**
-  Settings

[View Welcome Wizard](#)

**Current Alerts**

24 employees have not received forms in the mail or online and must have their forms issued by February 1st.  
 If you want our [mailing service](#) to postmark your forms, we can no longer guarantee that they will be postmarked by February 1st.  
 Forms must be e-filed to the SSA by March 31st. They may be corrected and re-issued until that time.  
 15 warnings have been found in your forms.

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

24 Employees Loaded  
 \$612,053.63 in Federal Wages  
 \$0.00 in Federal Tax Withheld

**Form Batches**

You have requested to download 1 batch of forms. [View](#)

D2W1.2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

There are some report capabilities on the **Reports** tab, as shown below.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington [\(Sign Out\)](#)

User Activity Reports  
[Employees who have consented to receive their form electronically](#)  
[Employees who have not consented to receive their form electronically](#)  
[Employees who have viewed their form](#)  
[Employees who have edited their form](#)

Change Reports  
[Changes made to forms](#)

Formset Reports  
[Overall Totals for your forms](#)  
[How Forms were Issued](#)  
[All Form Data](#)  
[Basic Formset Info](#)

[Home](#)

D2W1:2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

## Settings

DownloadMyForm.com My W-2s Mail E-File Reports **Settings**

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington [\(Sign Out\)](#)

Settings for Computer Methods 2009 W-2 Tax Forms

Employee Access Employee Changes Forms Billing Formset Info Security Support

**Setup Employee Access Options**

Would you like your employees to be able to use DownloadMyForm.com to view and print their forms?  
 Yes  No

Please enter a short code that we will use to create a website for your employees:

Employees will be able to access their forms by visiting:  
<https://www.downloadmyform.com/cmhc>

Please enter the following information:

Company's Main Phone Number

**Corporate Logo (optional)**  
 You do not have a corporate logo. [Upload Logo](#)

The company name your employees will recognize:

Employees will log in to DownloadMyForm.com with:

Username    
 Password

[Click here to send email notifications to your employees](#)

Click on the **Settings** tab to bring up the administration options for the online W-2 forms. There are a number of tabs within this screen to set up features, like allowing your employees to access their W-2s through **DownloadMyForm.com**.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington [\(Sign Out\)](#)

Settings for Computer Methods 2009 W-2 Tax Forms

Employee Access **Employee Changes** Forms Billing Formset Info Security Support

**Allow Employees to:**

- Edit their addresses  Yes  No
- Edit their email  Yes  No
- Edit their names  Yes  No
- Edit their Social Security Numbers  Yes  No

**Employee Changes**  
Require approval for changes made by employees?  
 Yes  No

**Select which admins will receive employee change emails**  
Administrators that are selected below will receive a notification email informing them that an employee made an edit to a form.

Name	Email
<input type="checkbox"/>	Terri Edington terri.edington@cmic.ca

[Home](#) [Save](#)

D2W1.2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

If employees have access to the website, you can allow them access to edit their personal information.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington [\(Sign Out\)](#)

Settings for Computer Methods 2009 W-2 Tax Forms

Employee Access Employee Changes **Forms** Billing Formset Info Security Support

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

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

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

Name	Administrators may view	Recipients may view
Revised BC22 for 4 Corner Paper	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
W2C for 1 Part Paper	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[Home](#) [Save](#)

D2W1.2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

You may select the type of paper you want to use for W-2s.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington (Sign Out)

Settings for Computer Methods 2009 W-2 Tax Forms

Employee Access Employee Changes Forms **Billing** Formset Info Security Support

**Designate a Billing Contact**  
Choose the Accounts-Payable contact at your company who will pay for charged services from this site.

Terri Edington

**Please verify this account payable contact's information**

**Name**  
Terri Edington  
*The name of your accounts payable contact*

**Phone Number**  
4167360123 ext.   
*A phone number where we can reach your accounts payable contact*

**Email Address**  
terri.edington@cmic.ca  
*An email address where we can reach your accounts payable contact*

Home Save

D2W1:2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

You may enter a billing contact.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington (Sign Out)

Settings for Computer Methods 2009 W-2 Tax Forms

Employee Access Employee Changes Forms Billing **Formset Info** Security Support

These forms will be removed from DownloadMyForm.com on their expiration date. You may pay an archive fee to extend their expiration date. You may request a CD of your forms to store locally at any time by [creating a Download Batch](#) and then clicking 'Request CD' on the [Download Batches page](#).

**Tax Forms Loaded** 1/29/2010 10:46:50 AM EST  
**Formset Expiration Date** 1/1/2099 12:00:00 AM EST  
**Workspace First Viewed** 7/31/2009 11:16:19 AM EST  
**Workspace Configured By** terri.edington@cmic.ca

**Import History**  
Imported data from XML on 7/31/2009 [Download Not Available](#)  
Replaced data from XML on 7/31/2009 [Download Not Available](#)  
Replaced data from XML on 7/31/2009 [Download Not Available](#)  
Replaced data from XML on 1/29/2010 [Download XML](#)

Home Save

D2W1:2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

The **Formset Info** tab shows the date and time that the forms were loaded, the Formset expiration date, the date and time that the workspace was first viewed, and the name of the person who configured the workspace. Import history information is also provided.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington [\(Sign Out\)](#)

Settings for Computer Methods 2009 W-2 Tax Forms

Employee Access Employee Changes Forms Billing Formset Info **Security** Support

In addition to being able to view a report on changes from the administrative homepage, would you also like to receive an email whenever employees make changes to their forms?  
 No  Yes

**Administrator Credentials**  
[Change Password or Security Questions](#)

**Security Image**



[Change Image](#)

The following is a list of all contacts we have on record for your organization. Use the checkboxes beside each person's name to determine who has access to administer these tax forms.

Authorized	Name	Email	Account Status	Last Login
<input type="checkbox"/>	jafari	maheen.jafari@cmic.ca	Active	
<input type="checkbox"/>	Linda	linda@cmic.ca:32905	Active	
<input type="checkbox"/>	Linda	linda@cmic.ca	Active	
<input type="checkbox"/>	Maheen	Maheen@cmic.ca	Active	

Security settings allow you to specify who has access to administer the tax forms.

DownloadMyForm.com My W-2s Mail E-File Reports Settings

Computer Methods 2009 W-2 Tax Forms [Change Workspace](#) Terri Edington [\(Sign Out\)](#)

Settings for Computer Methods 2009 W-2 Tax Forms

Employee Access Employee Changes Forms Billing Formset Info **Security** Support

If you need help with your tax forms, you may allow our support team to temporarily access to your workspace in order to resolve your issue more quickly. To enable this feature for 8 hours, click the button marked "Allow Remote Assistance".

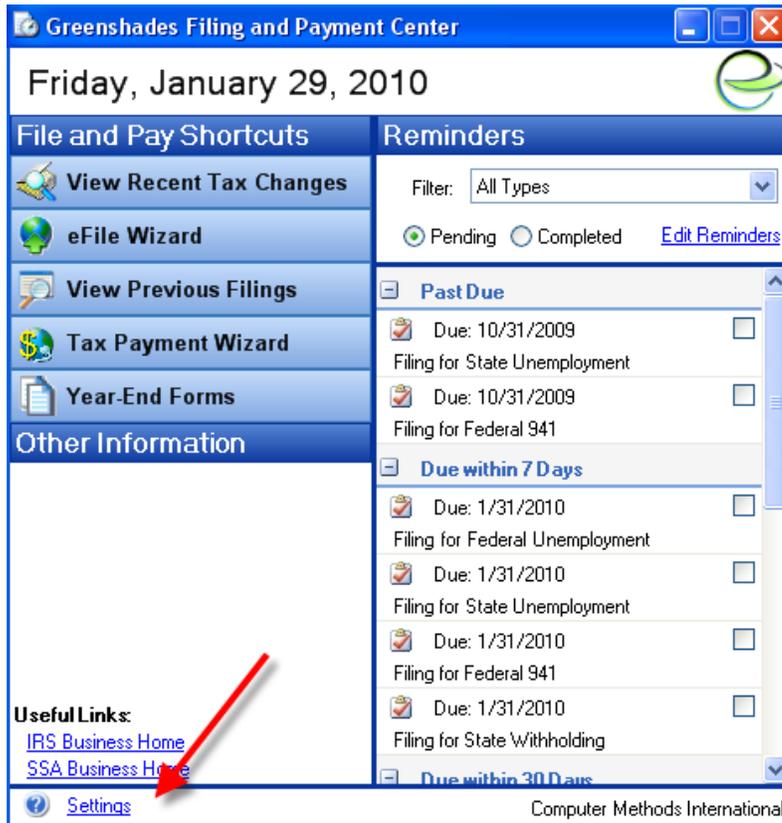
[Allow Remote Assistance](#)

[Home](#) [Save](#)

D2W1:2002104 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [Terms of Service](#) Read our [Privacy Statement](#)

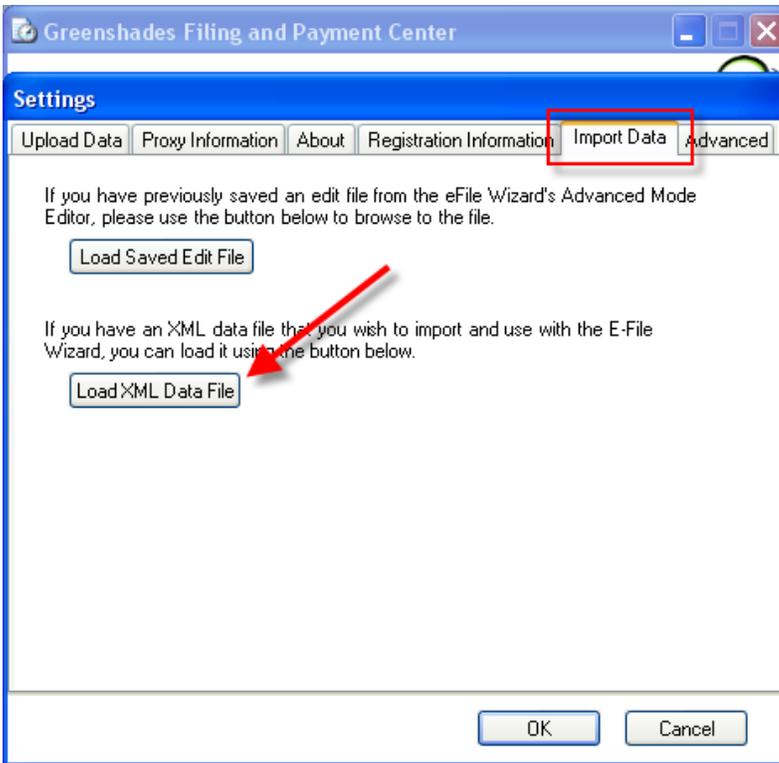
The Support tab allows for remote assistance.

# SUTA/SUI Reporting

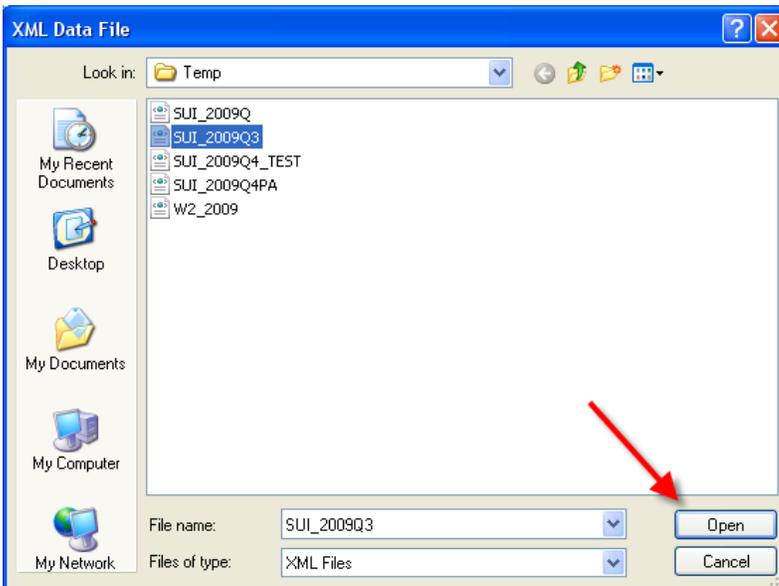


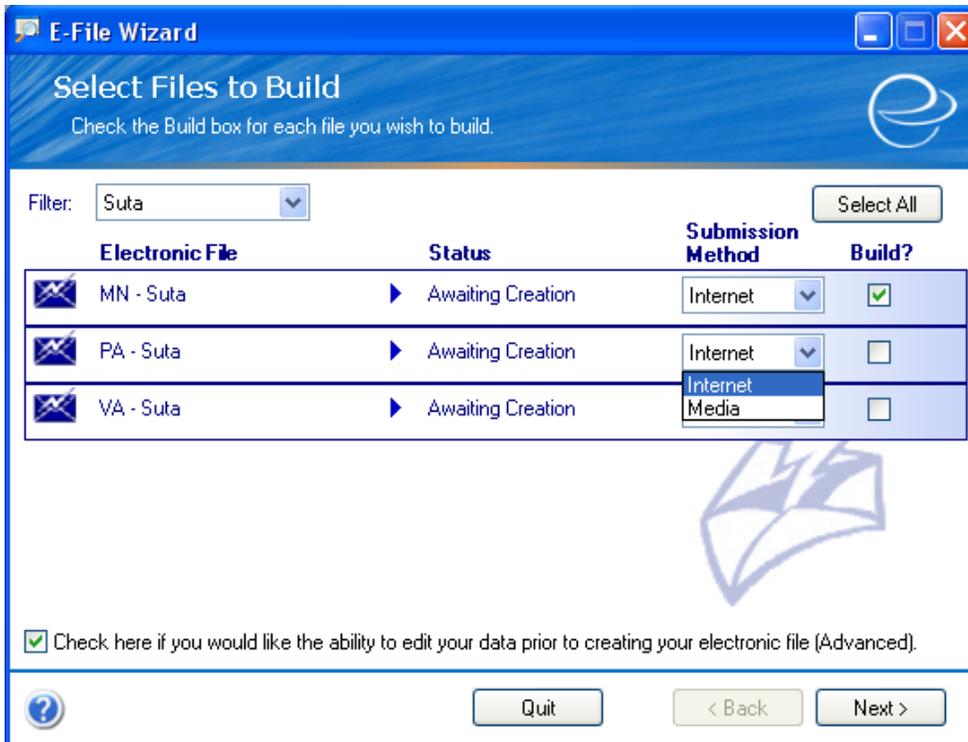
Click the desktop icon created for SUTA/SUI reporting in step 4 (*Step 4: Icon Setup for Greenshades* section in guide) to bring up the Greenshades screen above.

To import SUTA/SUI data, click the **Settings** link pointed to by the red arrow above.



Go to the **Import Data** tab and press the **Load XML Data File** button.



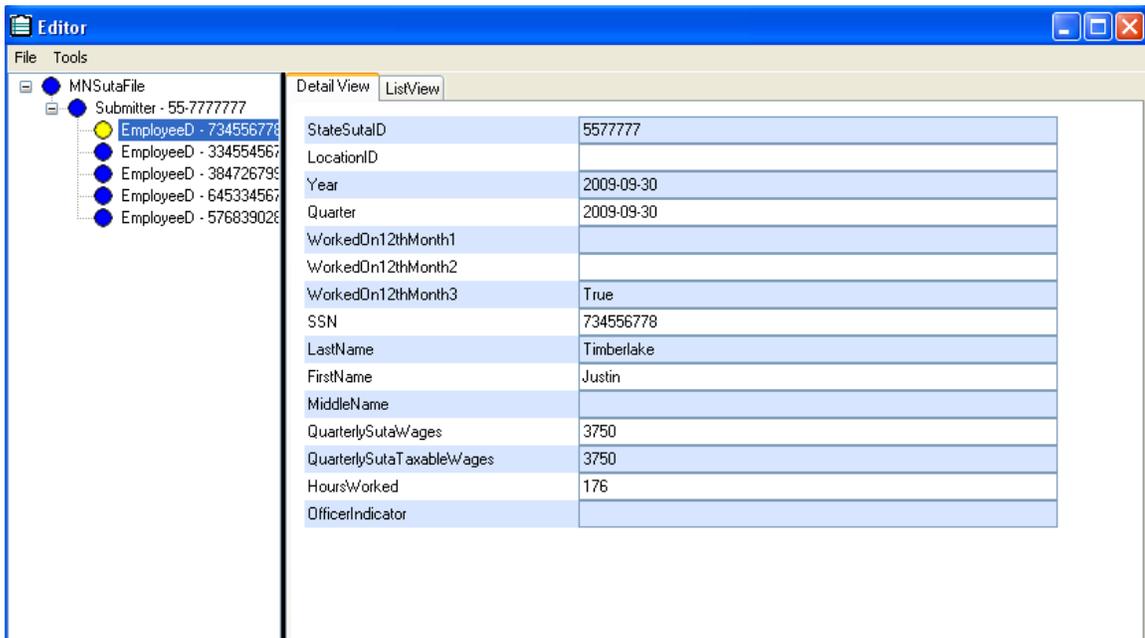


Select the states that you want to build your SUTA files for. Some states allow you to select **Media**, to create a media file, or **Internet**, to report via the Internet. Check the box at the bottom to enable editing of the information prior to creating the electronic file (other options are available to view the data before submitting it).

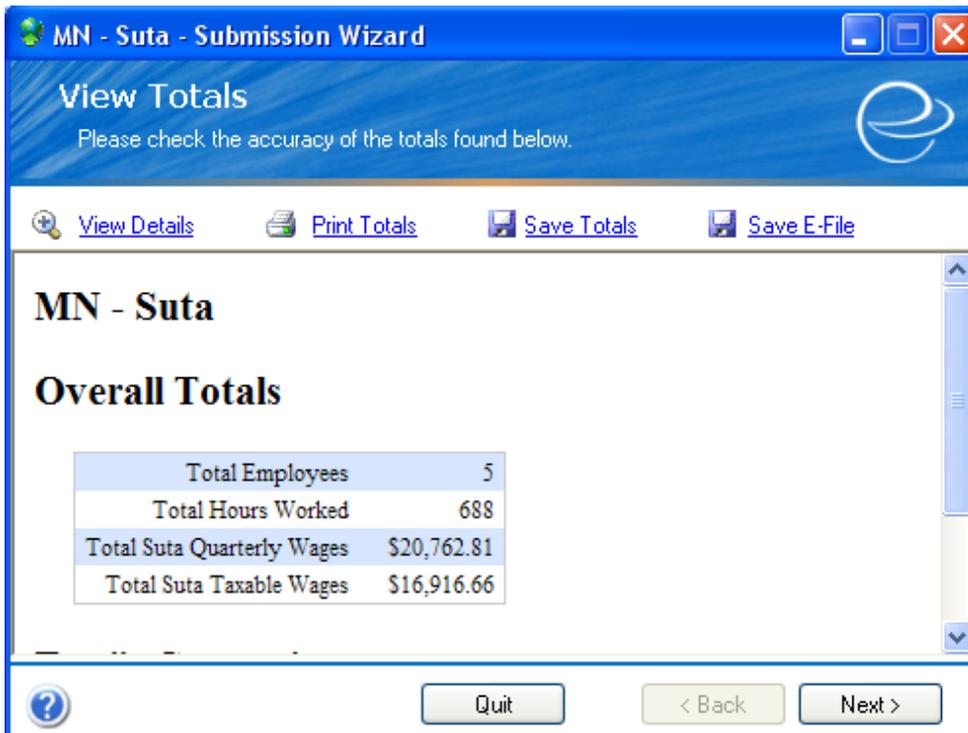
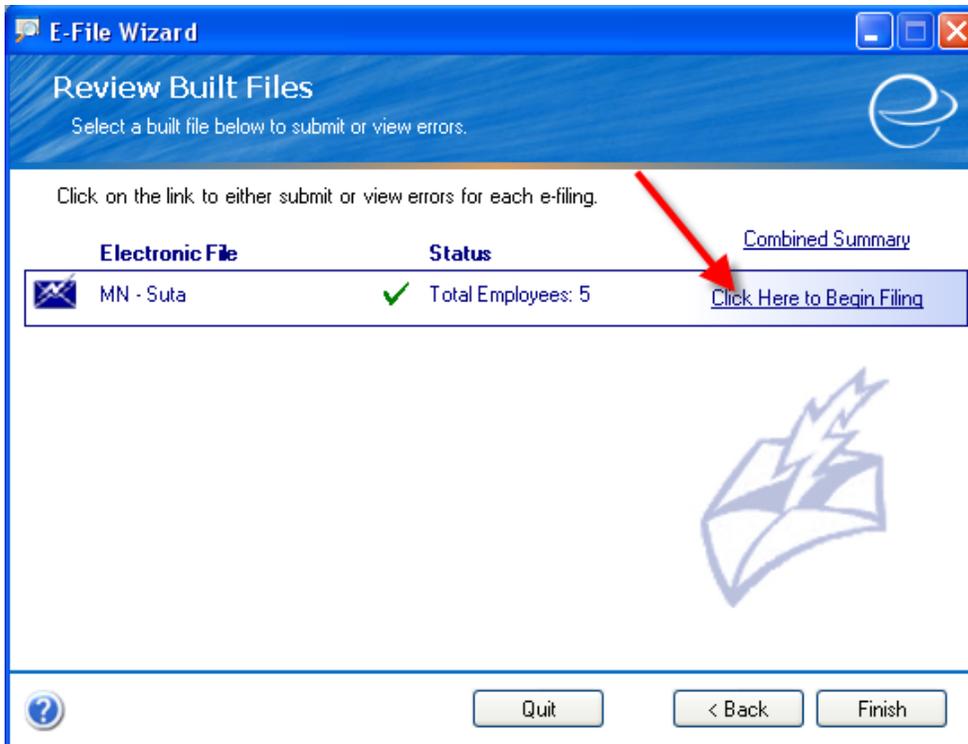
---

**NOTE:** If you edit information here, it does not flow back into the upload data to Greenshades.

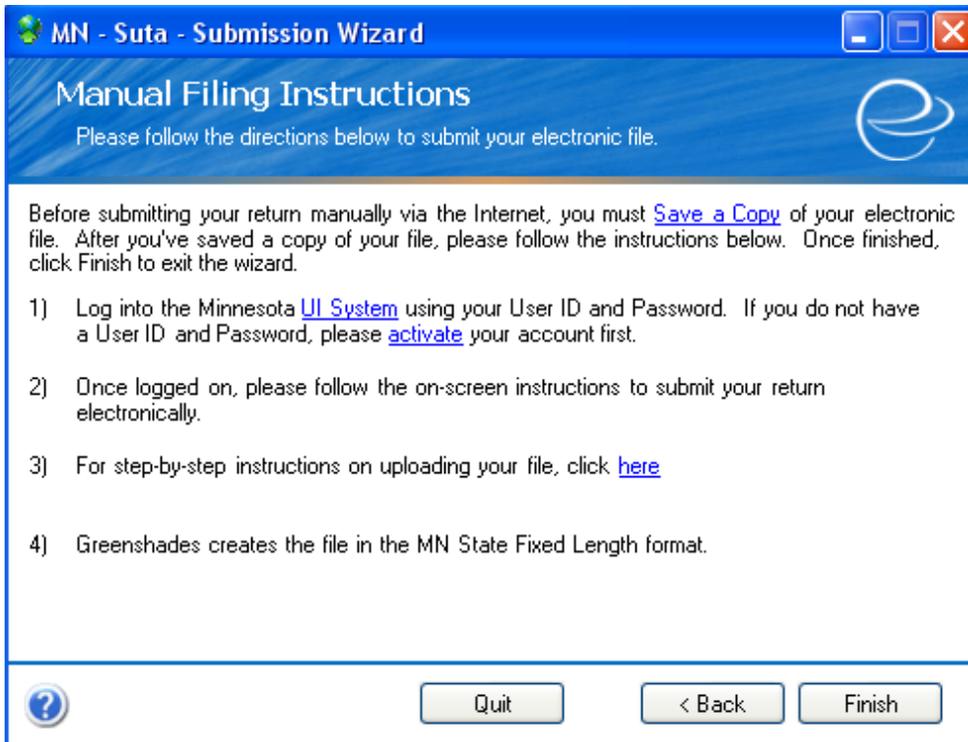
---



If the check box to edit data in the previous screen was checked, the editor appears after clicking **Next**.

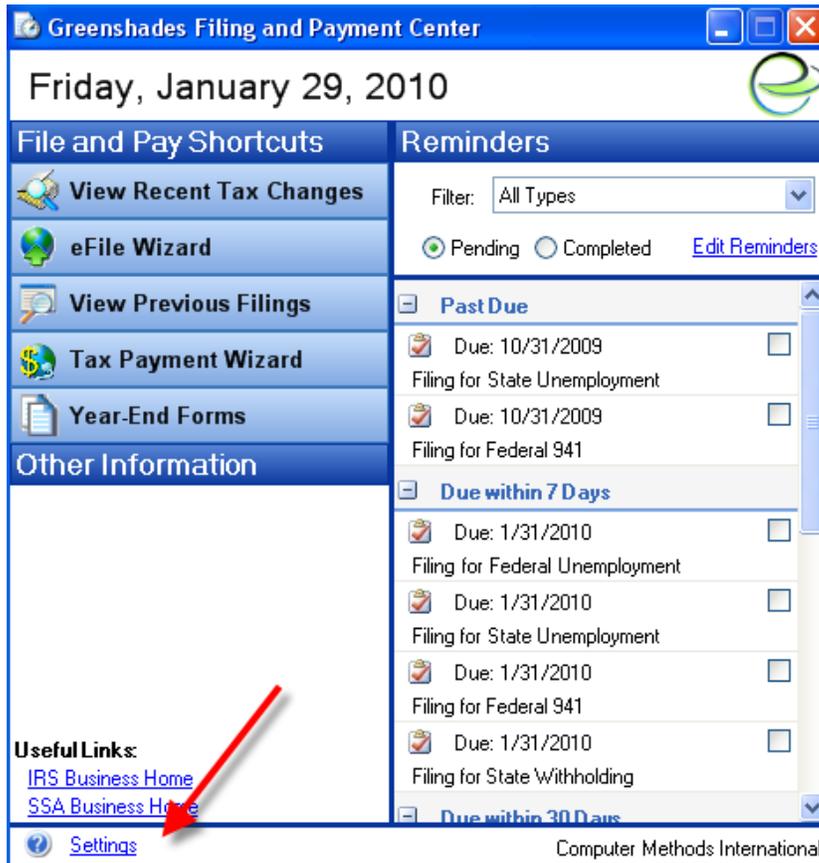


In this screen you can choose to **View Details** to generate an excel document for you to review individual employee data. When ready, click [Next].



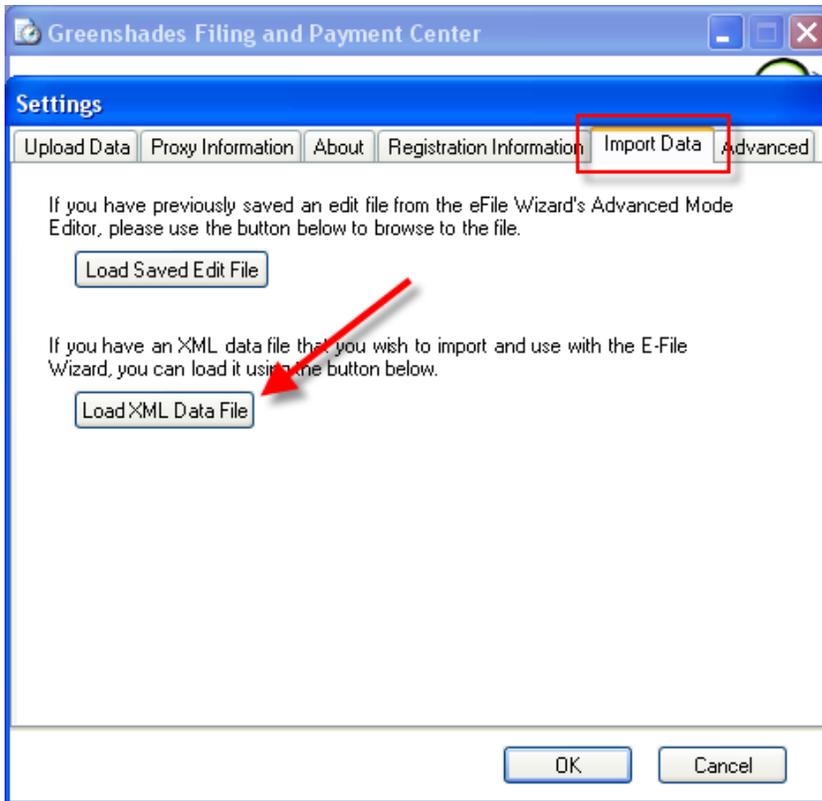
You will be prompted with state specific instructions. You will have to **Save a Copy** of your file before filing.

# 401K Reporting



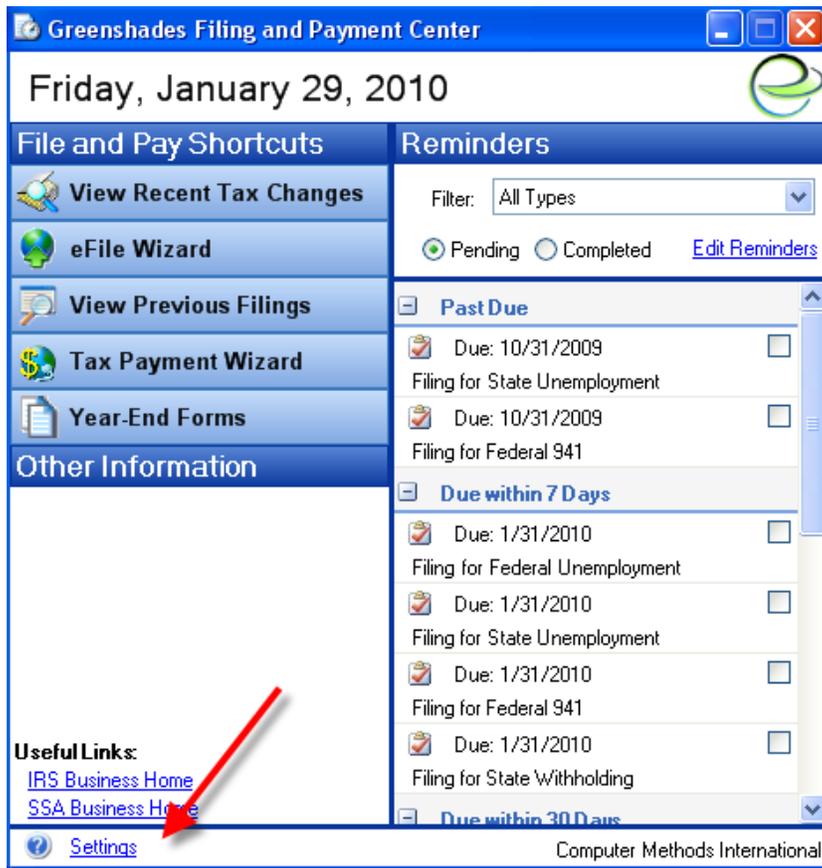
Click the desktop icon created for 401K reporting in step 4 (*Step 4: Icon Setup for Greenshades* section in guide) to bring up the Greenshades screen above.

To import 401K data, click the **Settings** link pointed to by the red arrow above.



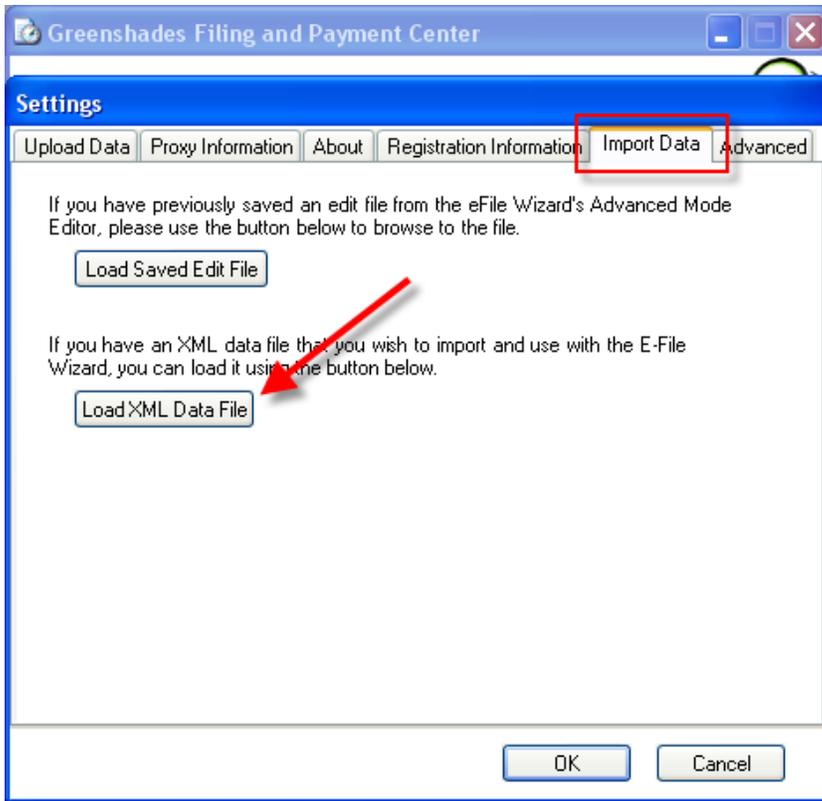
Click the **Import Data** tab and press the **Load XML Data File** button. Greenshades will walk you through the rest of the steps. If you require any assistance, please contact CMiC.

# New Hire Reporting



Click the desktop icon created for New Hire reporting in step 4 (*Step 4: Icon Setup for Greenshades* section in guide) to bring up the Greenshades screen above.

To import New Hire data, click the **Settings** link pointed to by the red arrow above.



Click the **Import Data** tab and press the **Load XML Data File** button. Greenshades will walk you through the rest of the steps. If you require any assistance, please contact CMiC.

---

## 1099 Reporting

There are two ways users may upload the 1099 files to Greenshades for processing/files.

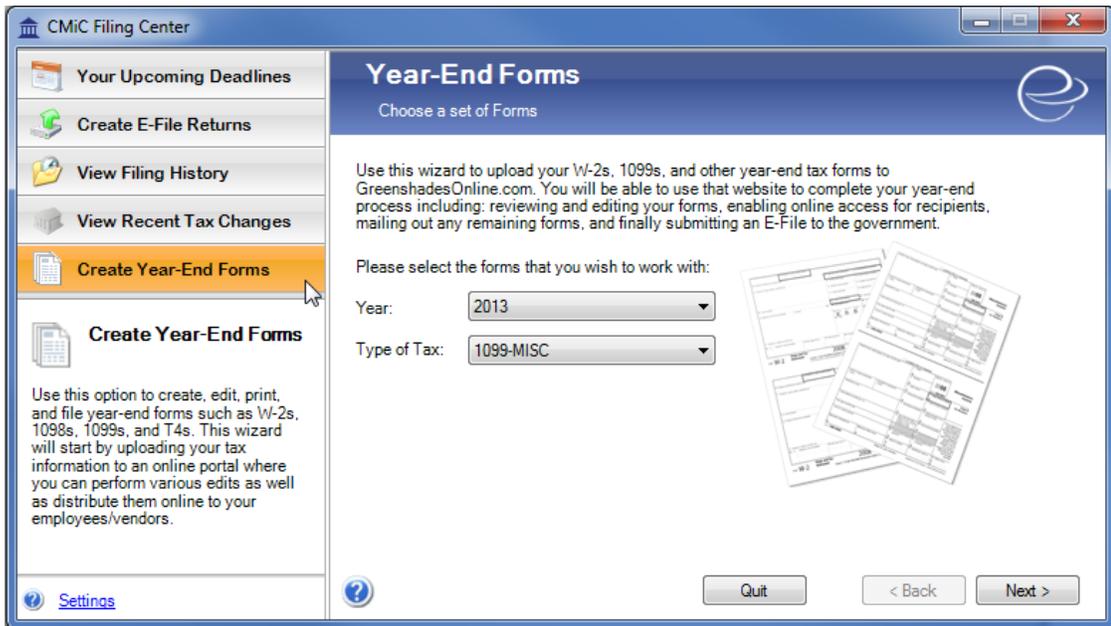
### 1. Download and install the desktop client Filing Center program from Greenshades©.

This method allows users to upload tax information XML file to the online portal of Greenshades© and allows further processing by edits, distribute to employees/vendors, print and file the year end forms for 1099.

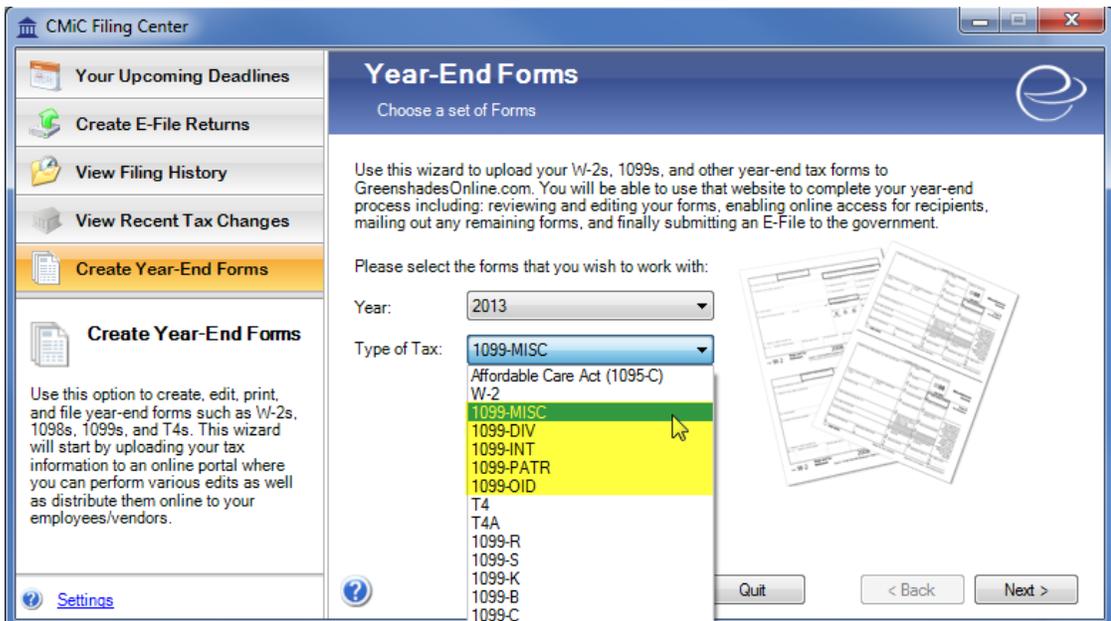
### 2. Directly Upload the XML file using the Greenshades© Web Application Interface

Use the web page at [www.downloadmyform.com](http://www.downloadmyform.com) to log in and start uploading your Year End forms such as 1099 files and performs further processing as required.

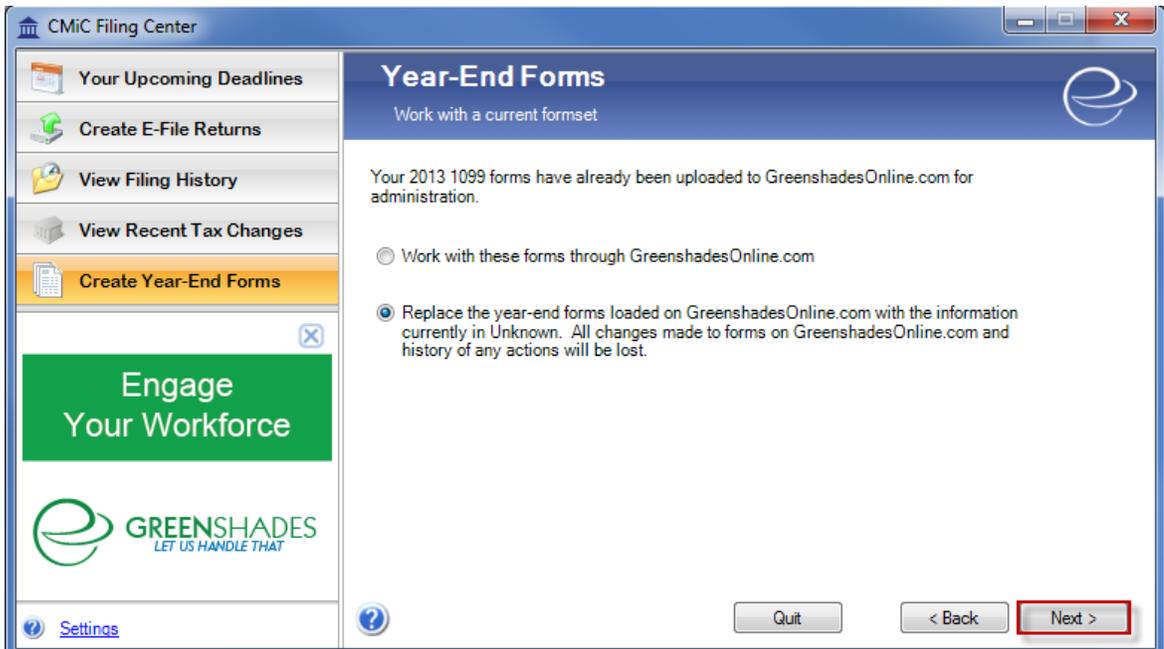
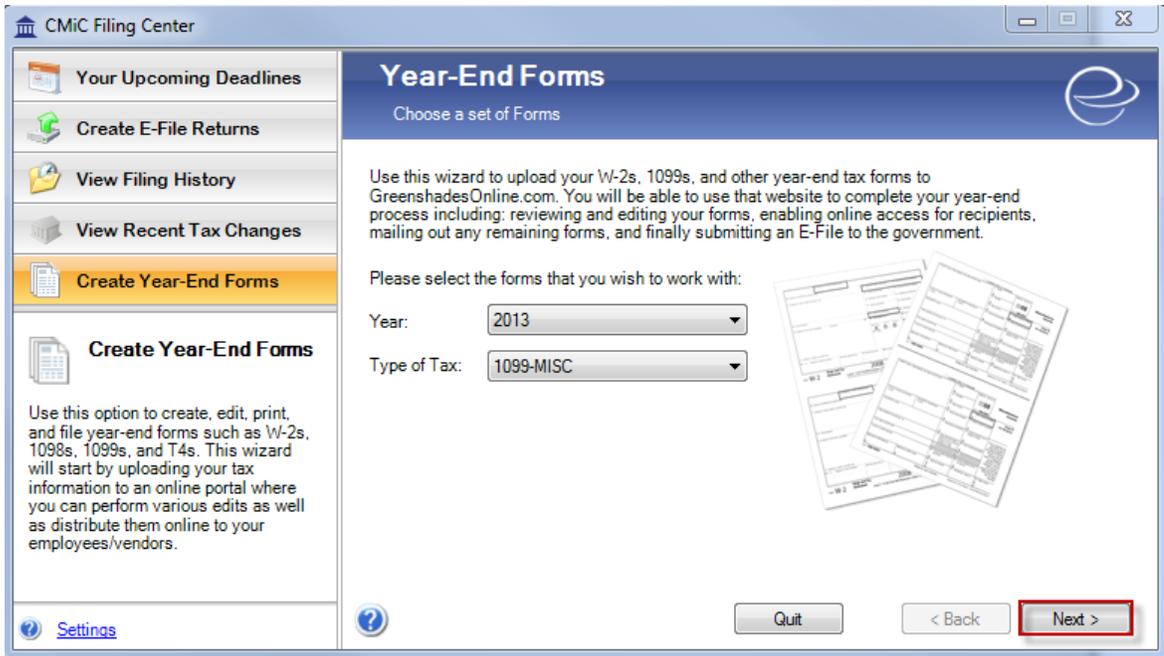
## 1. Using Filing Center Program for uploading the 1099 XML file



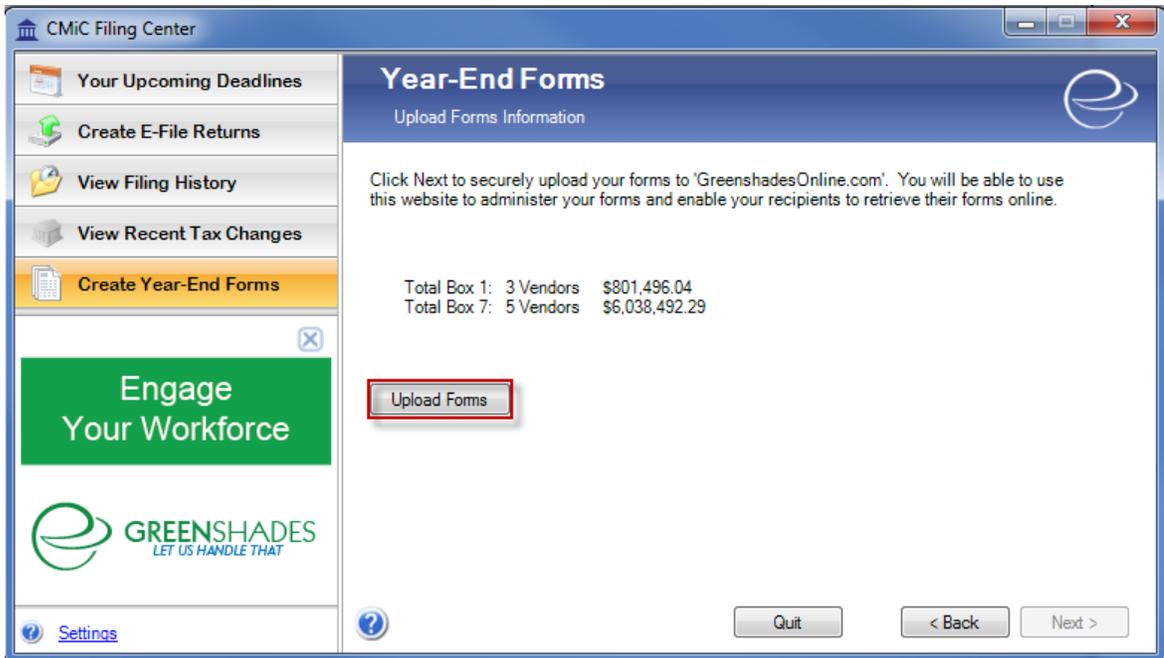
Choose the option **Create Year-End Forms** from the menu and set the **Year** and **Type of Tax** as required.



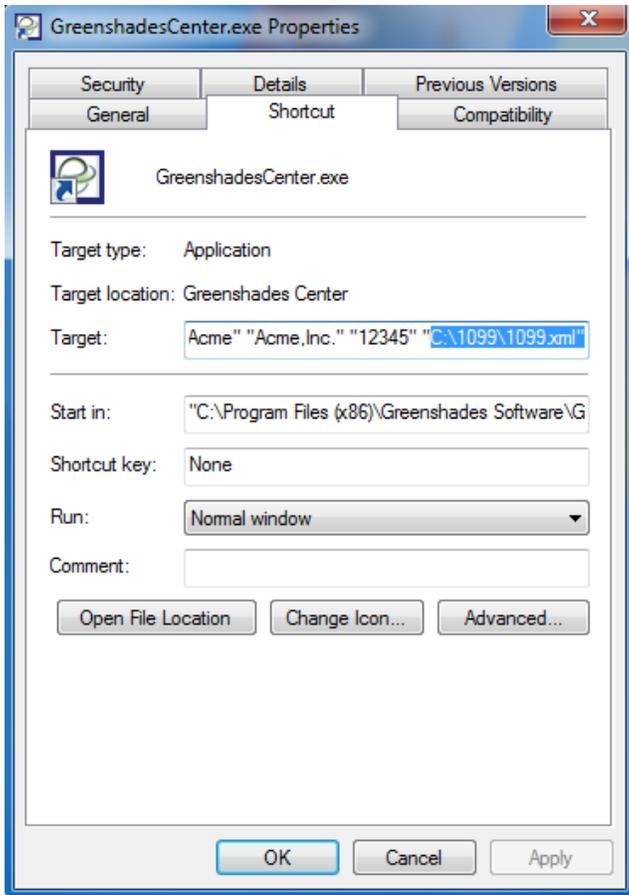
Currently, the 1099 types supported by Greenshades© are 1099-MISC, 1099-DIV, 1099-INT, 1099-PATR, 1099-OID. Users may have to update/check with Greenshades© for any amendments to the same.



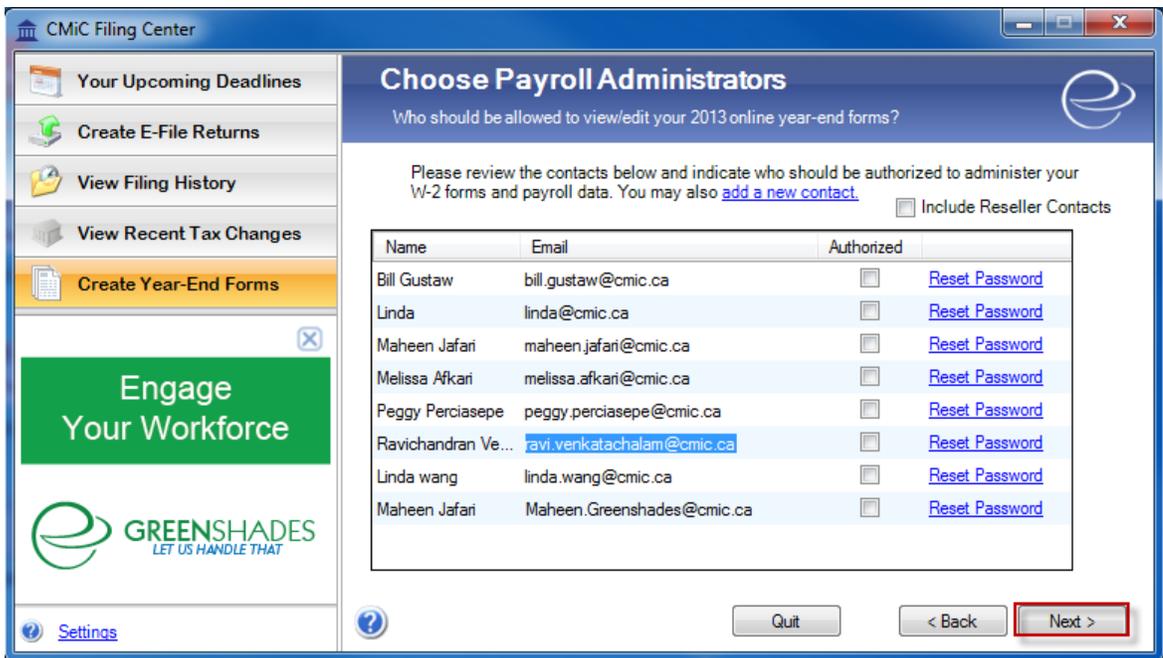
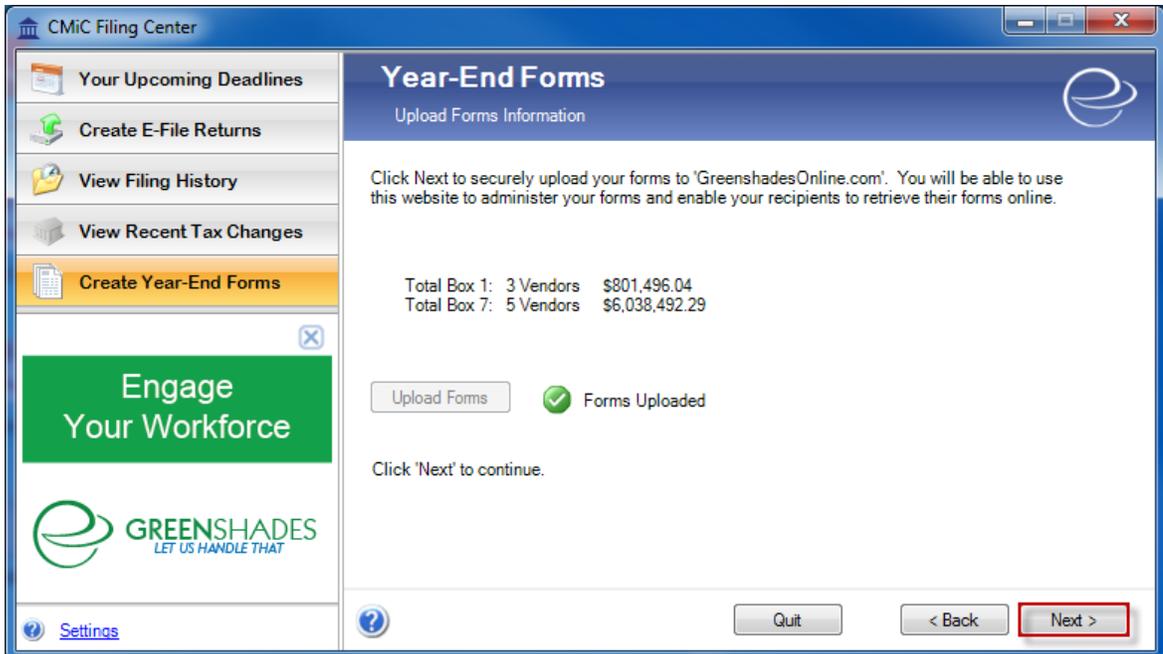
Select the required option whether to continue working on an existing file in the system or Replace with a new upload



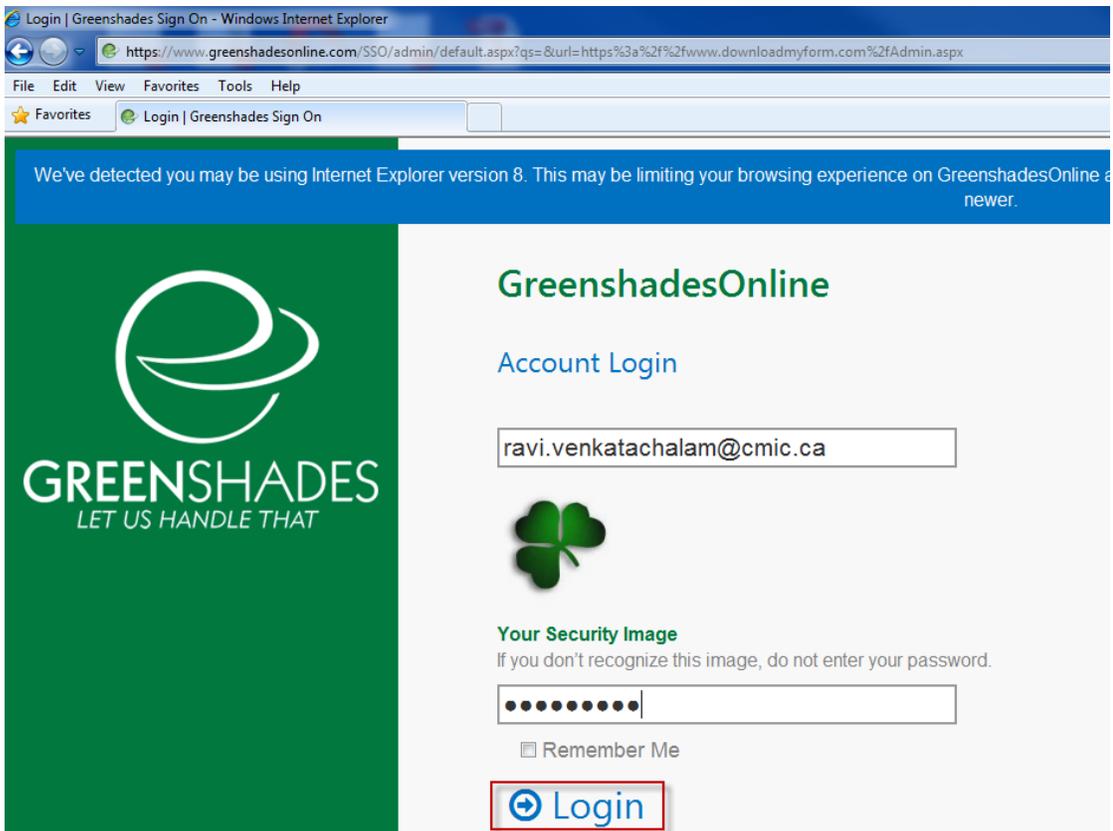
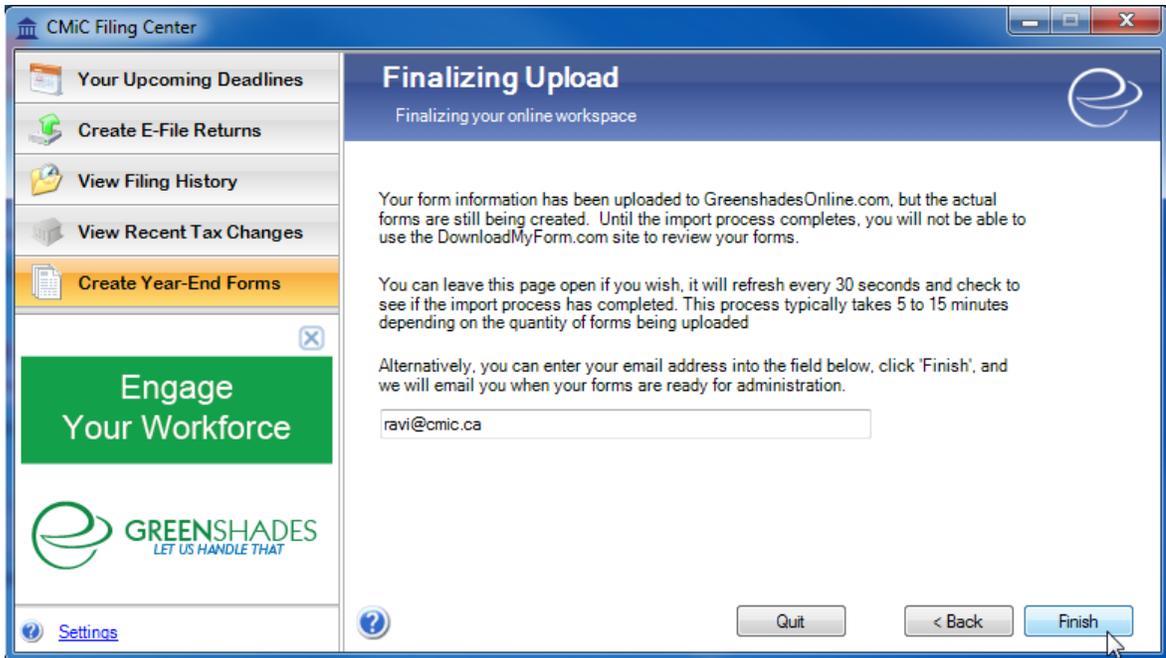
The **Upload Forms** process will upload the XML file from the defined file path and location as shown below.



Right click on the **Greenshades** icon, and set the parameters in the **Target** field to the file path and file name as required.



Once successfully uploaded, select the Contact that is authorized to administer the 1099 forms and then proceed



Log in to the web page at [www.downloadmyform.com](http://www.downloadmyform.com) using the user/credentials authorized to administer the 1099 forms

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

Select a workspace below:

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

Year:  Sort By:  View:  Search:  [\(Sign Out\)](#)

Search for a Form: Form Type:  Tax Year(optional):  Recipient Name/TIN:

You have new workspaces to configure.

<b>ACME: Acme,Inc 2013 1099-MISC Tax Forms</b> <span style="float: right;">Formset D1W5:1018449</span>	
12 vendors with \$6,038,492.29 in nonemployee compensation	
<b>How Forms Were First Issued</b> 	<ul style="list-style-type: none"> <li><span style="color: blue;">■</span> 0 forms were printed and mailed by you.</li> <li><span style="color: green;">■</span> 0 vendors forms were mailed by us per your request.</li> <li><span style="color: red;">■</span> 12 vendor(s) must still be issued a form.</li> </ul>
<b>Important Dates:</b> Forms Loaded 10/31/2014 Forms Issued -- E-File Submitted --	
<b>RYANNAV: Ryan Test CMiC 2013 1099-MISC Tax Forms</b> <span style="float: right;">Formset D1W5:1018195</span>	
<b>ACME: Acme,Inc 2013 W-2 Tax Forms</b> <span style="float: right;">Formset D1W5:1014057</span>	

W5 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [End User License Agreement](#) Read our [Privacy Statement](#)

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

It is past the deadline to issue your 1099-MISCs. Are these corrected 1099-MISCs?

Yes, I am uploading corrected 1099-MISC forms.  
 No, I am uploading new or original 1099-MISC forms.

D1W5:1018449 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [End User License Agreement](#) Read our [Privacy Statement](#)

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

**Welcome Wizard**

Company Information → 
 Admin Access Settings → 
 Country Codes

**Welcome to your Acme,Inc 2013 1099-MISC Tax Forms**

You can use this administrator portal to oversee your entire year end forms process: monitoring vendor downloads, mailing the forms, making corrections, and e-filing your information to the government. For help at any time, please call us at 416-736-0123 ext 240 or email [maheen@cmic.ca](mailto:maheen@cmic.ca).

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

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

**Company EIN**  
  
*Your company's Employer Identification Number that will appear on your forms*

**Designate a Billing Contact**  
Choose the Accounts-Payable contact at your company who will pay for charged services from this site.

**Your Company's Contacts**  
  
*Select "[Add a New Contact]" to enter your billing contact's information if it is not listed.*

D1W5:1018449 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [End User License Agreement](#) Read our [Privacy Statement](#)

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

**Welcome Wizard**

Company Information → 
 Admin Access Settings → 
 Country Codes

**Administrator Access Control**

You can designate specific employees to have super, limited, or no administrator rights on this workspace. They will have access to the employees based on the filters you set below.

Select the employee then configure their access rights:

Administrator:

D1W5:1018449 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [End User License Agreement](#) Read our [Privacy Statement](#)

### Welcome Wizard

Company Information → Country Codes

#### Country Code Verification

We've detected that you have Country Codes on your forms. Please take a moment to verify them below

**WARNING:** Once you assign a new Country Code all forms with the original Country Code will be changed to the new Country Code

#### Current Country Codes

Code	Country Name per IRS
CA	Canada

#### Assign New Country Codes

New Country Code

US - United States

Back

Continue

### Welcome to Year-End Forms

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

-  **My 1099-MISCs** View, Edit, and Print individual 1099-MISC Forms
-  **My Reports** View Reports on User Activity and Overall Form Information

#### Year-End Forms Checklist:



COMPLETED ON 10/31/2014

**1. [Complete Company Setup](#)**

Ravichandran Venkatachalam used the welcome wizard to configure Year-End Forms on 10/31/2014.



DUE NOW

**2. [Resolve Warnings with your Forms](#)**

There are currently 3 warnings with your forms, 0 of which are considered high severity warnings.



DUE NOW

**3. [Verify 1099-MISC Form Totals](#)**

You have loaded 12 forms with \$6,038,492.29 in Nonemployee Compensation.



DEPENDS ON METHOD

**4. Distribute any remaining 1099-MISCs to your Vendors**

12 vendors must still be issued paper forms.

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

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

**4a. [Ask us to Mail Remaining 1099-MISCs](#)**

**! Place your order today for just \$1.75 per form**

OR

**4b. [Distribute Remaining 1099-MISCs Yourself](#)**

You may download and print the remaining 1099-MISCs to mail or hand out to your vendors by 1/31/2014 or else 2/15/2014 depending on the exact content of the forms.



DUE BY 3/28/2014

**5. [E-File US 1099-MISC Return](#)**

You must E-File your US 1099-MISC return by 3/28/2014.

[Classic View](#)

PAYER'S name, street address, city, state, ZIP code, and telephone no. CMIC-HEAD QUARTERS COMPANY 100, LAKESHORE BLVD CHICAGO, IL 61254 4167360123		PAYER'S federal identification number 12-3456789	RECIPIENT'S identification number 956-32-6154	Miscellaneous Income  Copy B For Recipient
Account number (see instructions) A1BRICKS		1 Rents \$	OMB No. 1545-0115 <b>2013</b> Form <b>1099-MISC</b>	
RECIPIENT'S name, street address, city, state, and ZIP code A1 BRICKS MANUFACTURING COMPANY 100, BRICK OVEN STREET- ALL ADDRESSSS 500, BRICK BUILDING4343434343 CHICAGO, IL 60125		2 Royalties \$	4 Federal income tax withheld \$	<input type="checkbox"/> CORRECTED (if checked)
15a Section 409A deferrals \$		3 Other income \$	5 Fishing boat proceeds \$	
15b Section 409A income \$		7 Nonemployee compensation \$ 13929.60	6 Medical and health care payments \$	
		9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale <input type="checkbox"/>	8 Substitute payments in lieu of dividends or interest \$ -85381.07	
		11 Foreign tax paid \$	10 Crop insurance proceeds \$	This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
		13 Excess golden parachute payments \$	12 Foreign country or U.S. possession \$	
		16 State tax withheld \$	14 Gross proceeds paid to an attorney \$	
		17 State/Payer's state no. \$	18 State income \$	
Form <b>1099-MISC</b>		(keep for your records)		Department of the Treasury - Internal Revenue Service

Once edited to resolve the warnings, verified, printed and printed/distributed, users may file the form to the IRS.

**Year-End Forms** Acme: Acme, Inc 2013 1099-MISC Tax Forms Ravichandran Venkatachalam

**E-File Your Forms**  
Use the links below to file these forms electronically with your agency or view historical information regarding one of your past filings.

	Jurisdiction	Status	ID Number	Due Date	Date Submitted
<a href="#">File Now</a>	United States	Not Filed	123456789	3/28/2014	

D1W5:1018449 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [End User License Agreement](#) Read our [Privacy Statement](#)

## 2. Directly Upload the XML file using the Greenshades® Web Application Interface

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

Select a workspace below:

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

Year: 2013 Sort By: Workspace Title -- A to Z View: Expanded Search: (Sign Out)

Search for a Form: Form Type: 1099-MISC Tax Year(optional): All Recipient Name/TIN:

**You have new workspaces to configure.**

**RYANNAV: Ryan Test CMiC 2013 1099-MISC Tax Forms** **New!** Formset D1W5:1018195

**ACME: Acme, Inc 2013 1099-MISC Tax Forms** Formset D1W5:1018449  
12 vendors with \$6,038,492.29 in nonemployee compensation

**How Forms Were First Issued**

- 0 forms were printed and mailed by you.
- 0 vendors forms were mailed by us per your request.
- 12 vendor(s) must still be issued a form.

**Important Dates:**

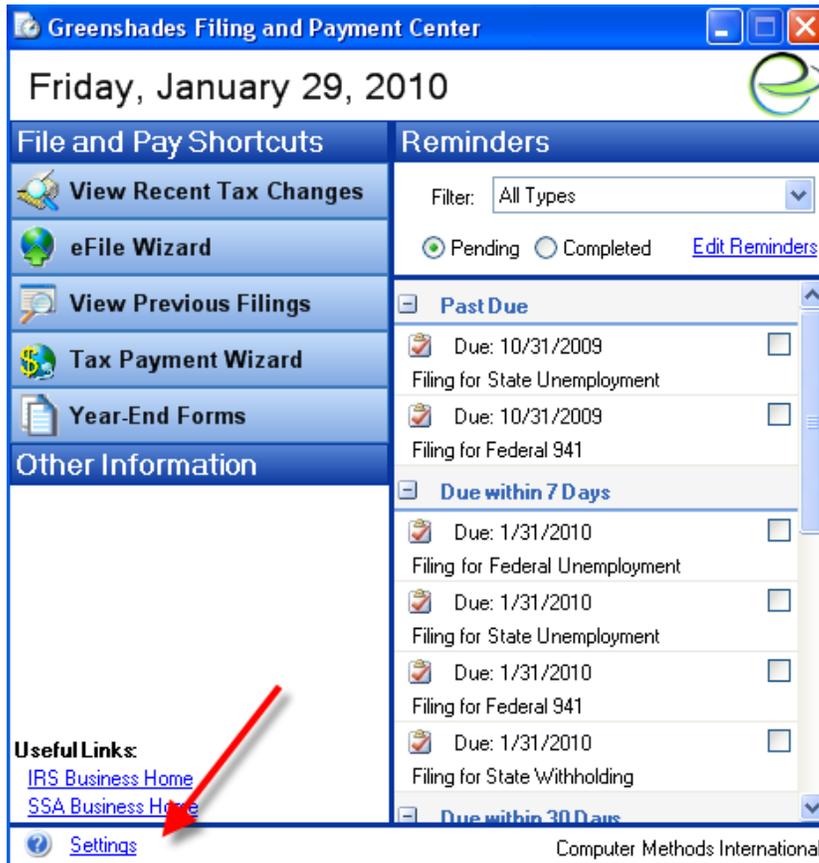
Forms Loaded	10/31/2014
Forms Issued	--
E-File Submitted	--

**ACME: Acme, Inc 2013 W-2 Tax Forms** Formset D1W5:1014057

D1W5:1018449 • ©2003-2013 Green Shades Software Inc. By accessing and using this page you agree to the [End User License Agreement](#) Read our [Privacy Statement](#)

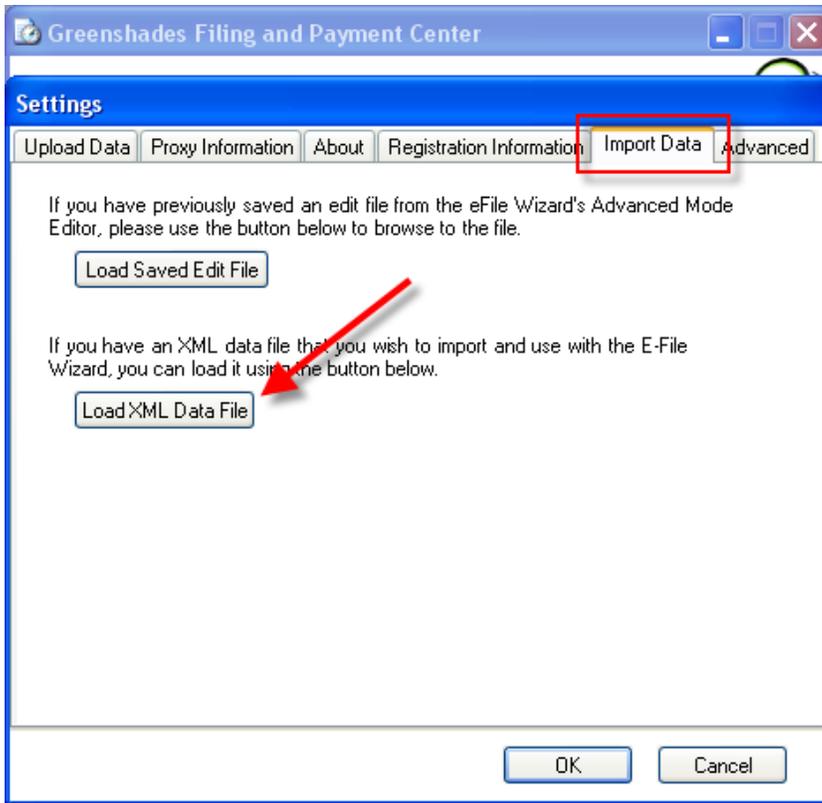
Users may follow on screen instructions for each step to upload an XML file generated by CMiC

## 941 Reporting



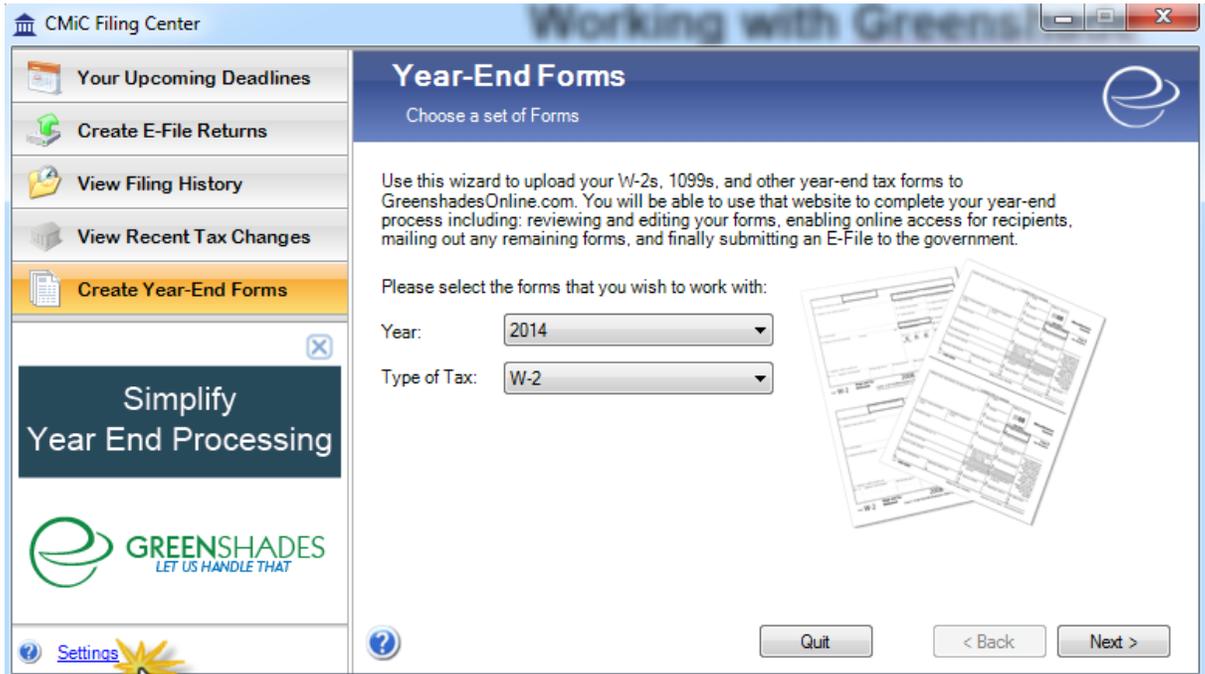
Click the desktop icon created for 941 reporting in step 4 (*Step 4: Icon Setup for Greenshades* section in guide) to bring up the Greenshades screen above.

To import 941 data, click the **Settings** link pointed to by the red arrow above.

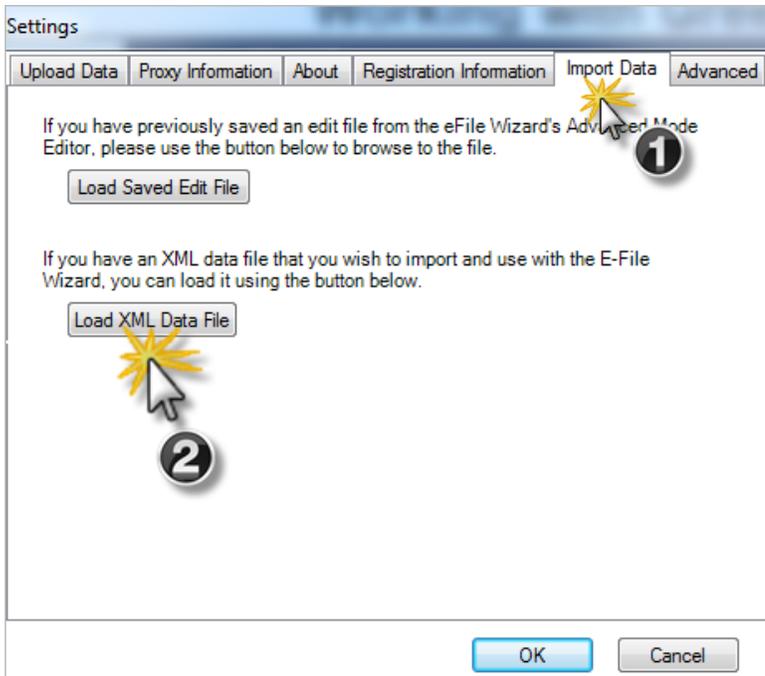


Click the **Import Data** tab and press the **Load XML Data File** button. Greenshades will walk you through the rest of the steps. If you require any assistance, please contact CMiC.

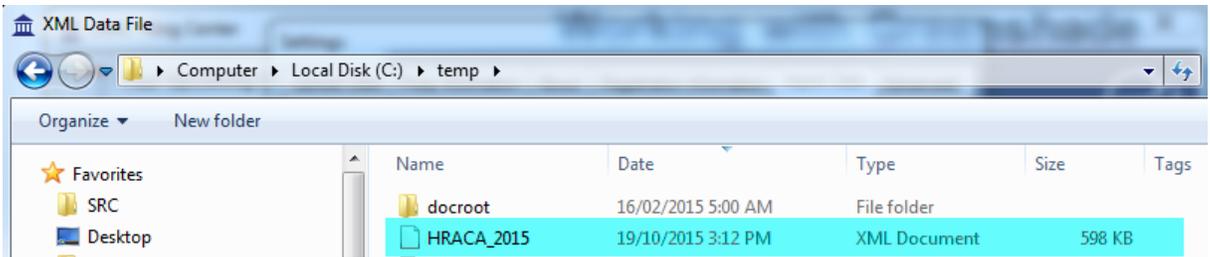
# 1095 Reporting



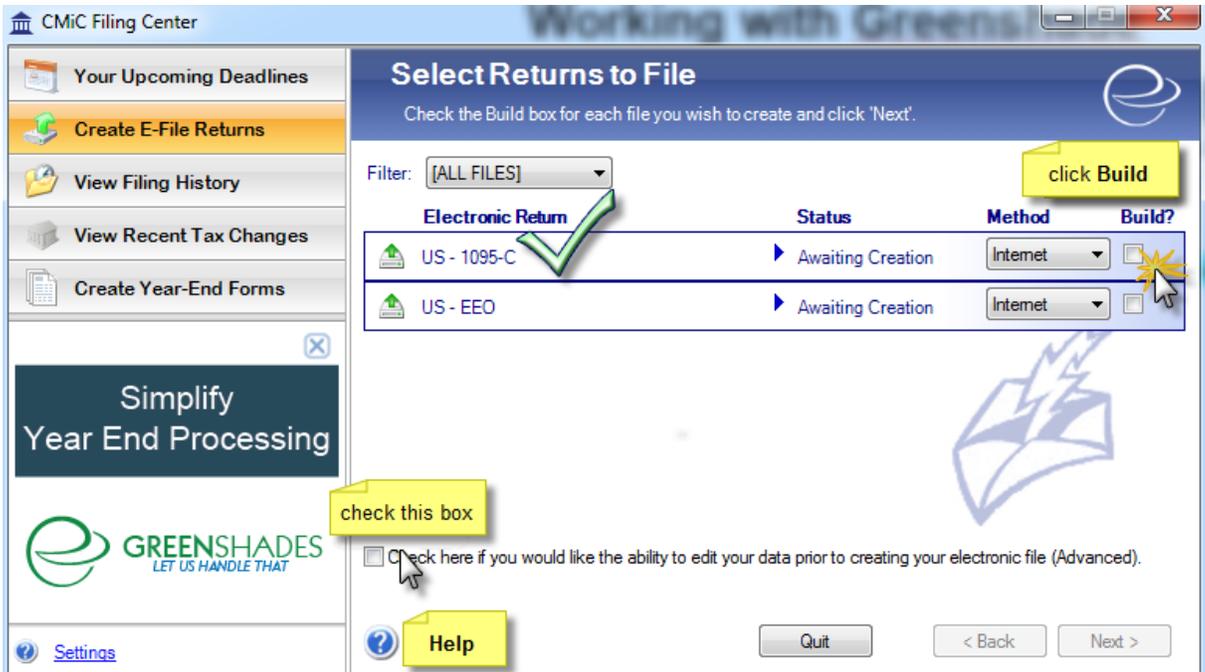
Launch the Greenshades wizard, shown above, and click **Settings** on the bottom-left of the wizard.



In the Settings window, shown above, click the **Import Data** tab, then click [**Load XML Data File**].

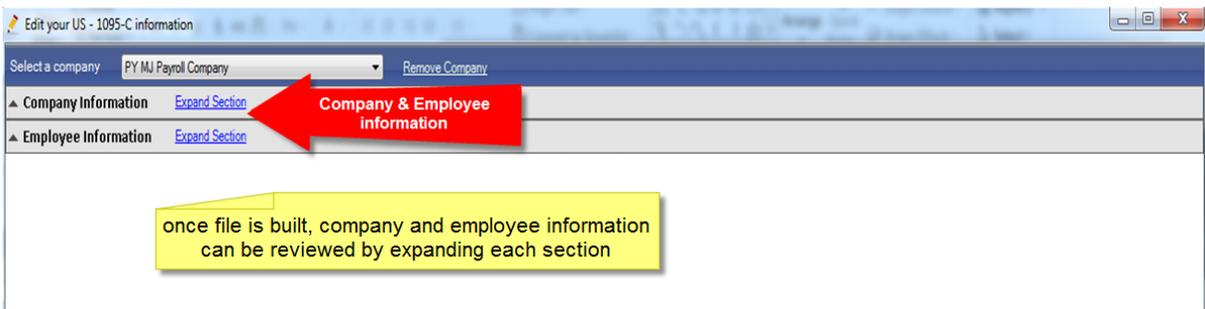


Then, navigate to and select the exported XML file.



Back in Greenshades, for the 1095-C electronic return, click **Build**, as shown in the above screenshot. Then, check the check-box labeled, “Check here if you would like the ability to edit your data prior to creating your electronic file (Advanced).” Click **[Next]** to proceed.

In the next Greenshades window, shown by the following four screenshots, the compiled company and employee information can be reviewed, and if necessary, modified:



Edit your US - 1095-C information

Select a company PY MJ Payroll Company Remove Company

**Company Information**

Company Name PY MJ Payroll Company  
 EIN PYMJ12345678 Submitter   
 Address 12345  
 City, State, Zip Schenectady NY 12345

**Contact Information**

Name maheen  
 Title  
 Phone 4167360123 Ext  
 Email  
 Fax

**Additional Company Information**

Corrected 1094  
 Business Name Control Code  
 Country Code  
 Designated Government Entity (DGE)  
 Designated Entity Company Name  
 Designated Entity Company Name2  
 Authoritative Transmittal   
 Total Forms Filed By ALE 213  
 Member of Aggregated ALE Group

Qualifying Offer Method  
 Qual Offer Method Transition Relief  
 Sec. 4980H Transition Relief  
 98% Offer Method  
 Jurat Signature PIN  
 Min Exception Cover  
 ALETotalFTECount  
 Aggregated Group  
 4880 HRelief Code

**ALE Member Information - Monthly**

Minimum Essential Coverage Offer	Full-Time Employee Count	Total Employee Count	Aggregated Group	Section 4980H Transition Relief
All 12 Months	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Jan	<input checked="" type="checkbox"/>	203	204	<input type="checkbox"/>
Feb	<input checked="" type="checkbox"/>	204	205	<input type="checkbox"/>
Mar	<input checked="" type="checkbox"/>	205	206	<input type="checkbox"/>
Apr	<input checked="" type="checkbox"/>	208	209	<input type="checkbox"/>
May	<input checked="" type="checkbox"/>	209	210	<input type="checkbox"/>
Jun	<input checked="" type="checkbox"/>	210	211	<input type="checkbox"/>
Jul	<input checked="" type="checkbox"/>	209	210	<input type="checkbox"/>
Aug	<input checked="" type="checkbox"/>	209	210	<input type="checkbox"/>
Sep	<input checked="" type="checkbox"/>	209	210	<input type="checkbox"/>
Oct	<input checked="" type="checkbox"/>	209	210	<input type="checkbox"/>
Nov	<input checked="" type="checkbox"/>	209	210	<input type="checkbox"/>
Dec	<input checked="" type="checkbox"/>	209	210	<input type="checkbox"/>

Employee Information Expand Section

Cancel Save and Close

Company Information can be reviewed and modified within GS

Edit your US - 1095-C information

Select a company PY MJ Payroll Company Remove Company

**Company Information** Expand Section

**Employee Information**

Employee ID	SSN	First Name	Middle Name	Last Name	Address1	Address2	City	State	Zip	Country	Employer Provided Self-Insured Coverage
01-MIKE	159654236	Parratt		Mike			Manhattan	NY	12345		<input checked="" type="checkbox"/>
02-JUNE	258969999	June		Chiu	111		Manhattan	NY	12345		<input checked="" type="checkbox"/>
03-ANDY	58777892	Andy		Tjin			Manhattan	NY	12345		<input checked="" type="checkbox"/>
04-MAHEEN	258963147	Jafari		Maheen	7851 Golden Creek		Manhattan	NY	12345		<input checked="" type="checkbox"/>

Employee Offer and Coverage Covered Individuals

Month	Offer Of Coverage Code	Employee Share	Section 4980H Code
All 12 Months	1A	\$0.00	2C
Jan	1A	\$0.00	2C
Feb	1A	\$0.00	2C
Mar	1A	\$0.00	2C
Apr	1A	\$0.00	2C
May	1A	\$0.00	2C
Jun	1A	\$0.00	2C
Jul	1A	\$0.00	2C
Aug	1A	\$0.00	2C
Sep	1A	\$0.00	2C
Oct	1A	\$0.00	2C
Nov	1A	\$0.00	2C
Dec	1A	\$0.00	2C

Users can review and edit 1095-C information with GS

Edit your US - 1095-C information

Select a company PY MJ Payroll Company Remove Company

**Company Information** Expand Section

**Employee Information**

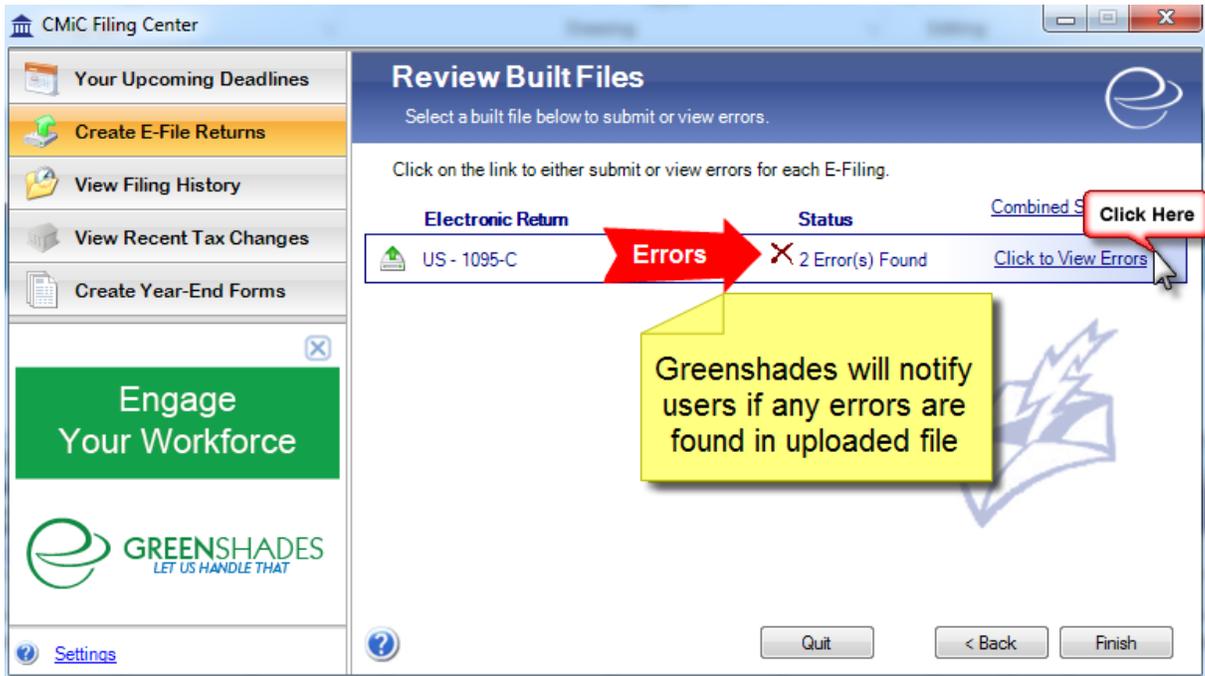
Employee ID	SSN	First Name	Middle Name	Last Name	Address1	Address2	City	State	Zip	Country	Employer F
01-MIKE	159654236	Parratt		Mike			Manhattan	NY	12345		
02-JUNE	258969999	June		Chiu	111		Manhattan	NY	12345		
03-ANDY	58777892	Andy		Tjin			Manhattan	NY	12345		
04-MAHEEN	258963147	Jafari		Maheen	7851 Golden Creek		Manhattan	NY	12345		

Employee Offer and Coverage Covered Individuals

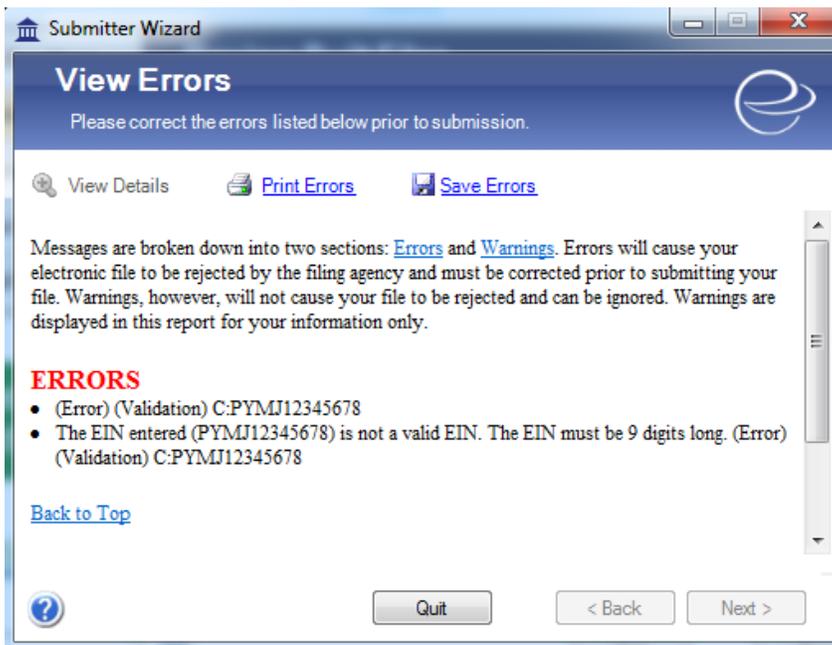
Dependent ID	First Name	Last Name	SSN	Birth Date	Covered All 12 Months	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
0	Jafari	Maheen	258963147	01/01/1972	<input checked="" type="checkbox"/>												
1	A	Jafari	00000000	01/01/1997	<input type="checkbox"/>												
2	B	Jafari	00000007	01/01/2001	<input checked="" type="checkbox"/>												

User can also review and modify dependent information within GS.

## Built File Errors



As shown above, if any errors are found in the uploaded file, Greenshaes will report them.



Although errors can be fixed within Greenshades, to maintain the integrity of Enterprise's data, it is recommend that any data related errors are fixed within Enterprise. After the corrections, the 1095 data can be re-built, re-exported, and re-import into Greenshades for re-processing.

Once the errors are resolved, user can save the created e-File and submit it to authorities.



# Index

---

## *I*

1095 Reporting .....	102
1099 Reporting .....	87
1099 Reporting Setup.....	24

---

## *4*

401K Reporting .....	84
401K Reporting Setup.....	21

---

## *9*

940 Reporting .....	27
941 Reporting .....	100
941 Reporting Setup.....	25

---

## *A*

ACA Compliance (1095-C, 1094-C) Reporting Setup .....	32
---	----

---

## *C*

Convert Health Care Plan from Payroll to HR.....	47
Create 1095 Export File .....	50
Create 1099 Export File .....	25
Create 941 Export File .....	26
Create New Hire Export File for Greenshades.....	18
Create SUTA Export File for Greenshades.....	15
Create W-2 Export File for Greenshades .....	13

---

## *E*

E-File .....	73
Employee Self Service - Enrolling Dependents .....	47
Ensure State Employer Account IDs Entered for Each State .....	5

---

## ***G***

General Setup Procedures for Government Reporting (W-2, SUTA/SUI, New Hire, 401K).....	5
Greenshades Locality Options .....	8
Greenshades Tax Filing Center.....	1

---

## ***I***

Integrating CMiC with Greenshades .....	3
---	---

---

## ***M***

Mail .....	68
Monthly Builds of ACA Compliance Data & Screens to View/Edit Data .....	42
My W-2s .....	67

---

## ***N***

New Hire Reporting .....	86
New Hire Reporting Setup .....	17

---

## ***O***

Overview - ACA Compliance Reporting.....	32
Overview - Greenshades .....	1

---

## ***P***

Part 1 of Form 1095-C (Lines 1 - 13).....	33
Part 2 of Form 1095-C (Lines 14-16).....	33
Part 3 of Form 1095-C (Lines 17-34).....	39

---

## ***R***

Reminder: Ensure State Employer Account IDs Entered for Each State .....	6, 17
Reporting via Greenshades .....	55
Reports.....	74
Required Employee Information for Lines 14, 15, & 16 of Form 1095-C .....	33

---

## ***S***

Security - Phishing Attacks .....	2
Security Setup.....	32
Set Greenshades Installed Flag .....	4
Settings .....	75
Step 1: Acquisition and Support .....	3
Step 2: Installing Greenshades.....	3
Step 3: CMiC Setup for Integration with Greenshades.....	3
Step 4: Icon Setup for Greenshades.....	52
Step 5: Registering Greenshades.....	54
SUTA/SUI Reporting.....	79

SUTA/SUI Reporting Setup .....15

---

***U***

Updating Greenshades.....54

---

***W***

W-2 Parameters Mapping..... 6  
W-2 Reporting .....55  
W-2 Reporting Setup ..... 6

---