User Reference

CMiC - Greenshades v10x

By CMiC

Proprietary Notice

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

Risk of Use Notice

User Reference Guide – Version: **CMiC Open Enterprise v10x** Printed: **May 29, 2017**

Contents

GREENSHADES TAX FILING CENTER **1**

OVERVIEW – GREENSHADES 1
SECURITY – PHISHING ATTACKS 2

INTEGRATING CMIC WITH GREENSHADES **3**

STEP 1: ACQUISITION AND SUPPORT 3
STEP 2: INSTALLING GREENSHADES 3
STEP 3: CMIC SETUP FOR INTEGRATION WITH GREENSHADES 3
Set Greenshades Installed Flag *4*
General Setup Procedures for Government Reporting (W-2, SUTA/SUI, New Hire, 401K) *5*
Ensure State Employer Account IDs Entered for Each State 5
W-2 Reporting Setup *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
SUTA/SUI Reporting Setup *15*
Create SUTA Export File for Greenshades 15
New Hire Reporting Setup *17*
Reminder: Ensure State Employer Account IDs Entered for Each State 17
Create New Hire Export File for Greenshades 18
401K Reporting Setup *21*
1099 Reporting Setup *24*
Create 1099 Export File 25
941 Reporting Setup *25*
Create 941 Export File 26
940 Reporting *27*
ACA Compliance (1095-C, 1094-C) Reporting Setup *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

REPORTING VIA GREENSHADES **55**

W-2 REPORTING 55
My W-2s *67*
Mail *68*
E-File *73*
Reports *74*

Settings *75*
SUTA/SUI REPORTING 79
401K REPORTING 84
NEW HIRE REPORTING 86
1099 REPORTING 87
941 REPORTING 100
1095 REPORTING 102

INDEX 107

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@decresente.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 or 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:

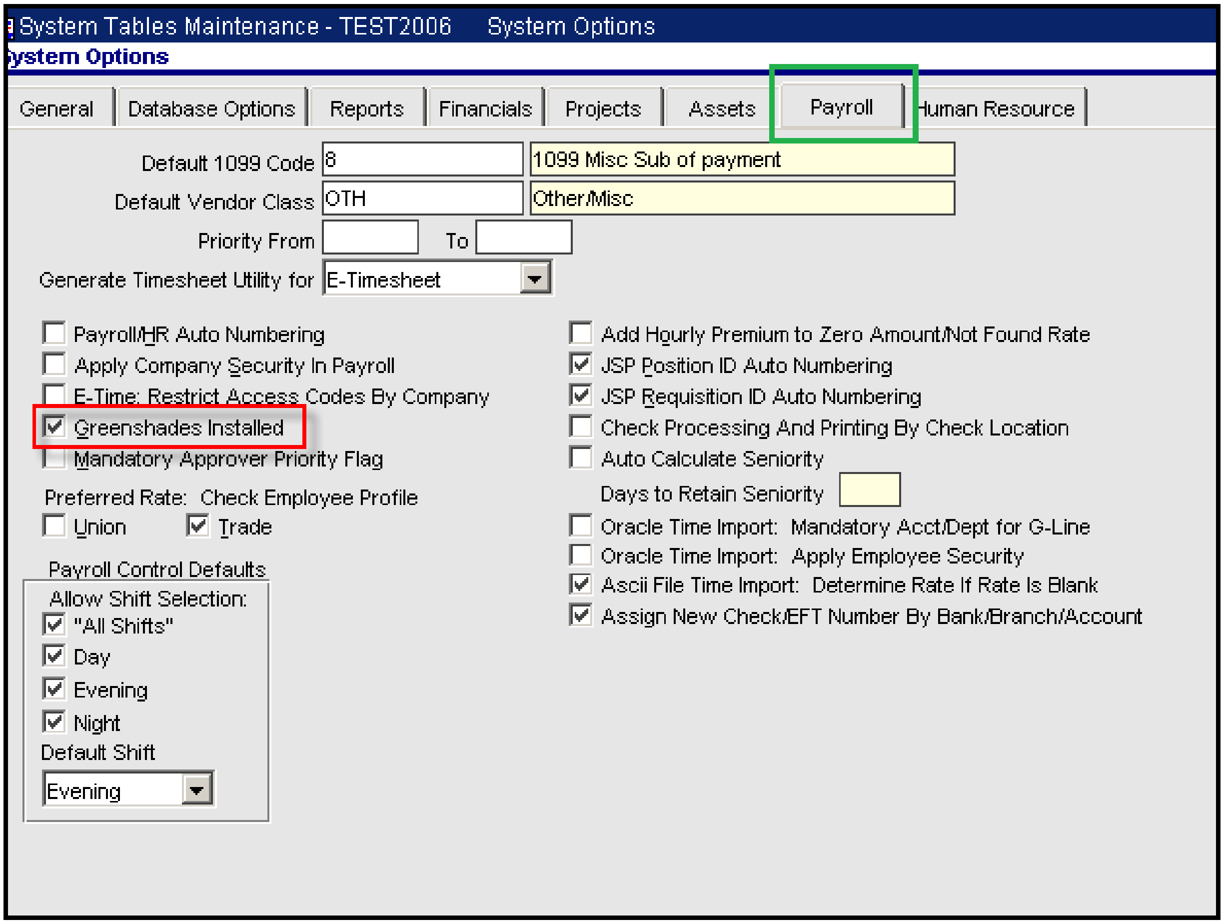
http://Greenshades.com/pub/downloads/documentation/FilingCenterInstallation.pdf

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

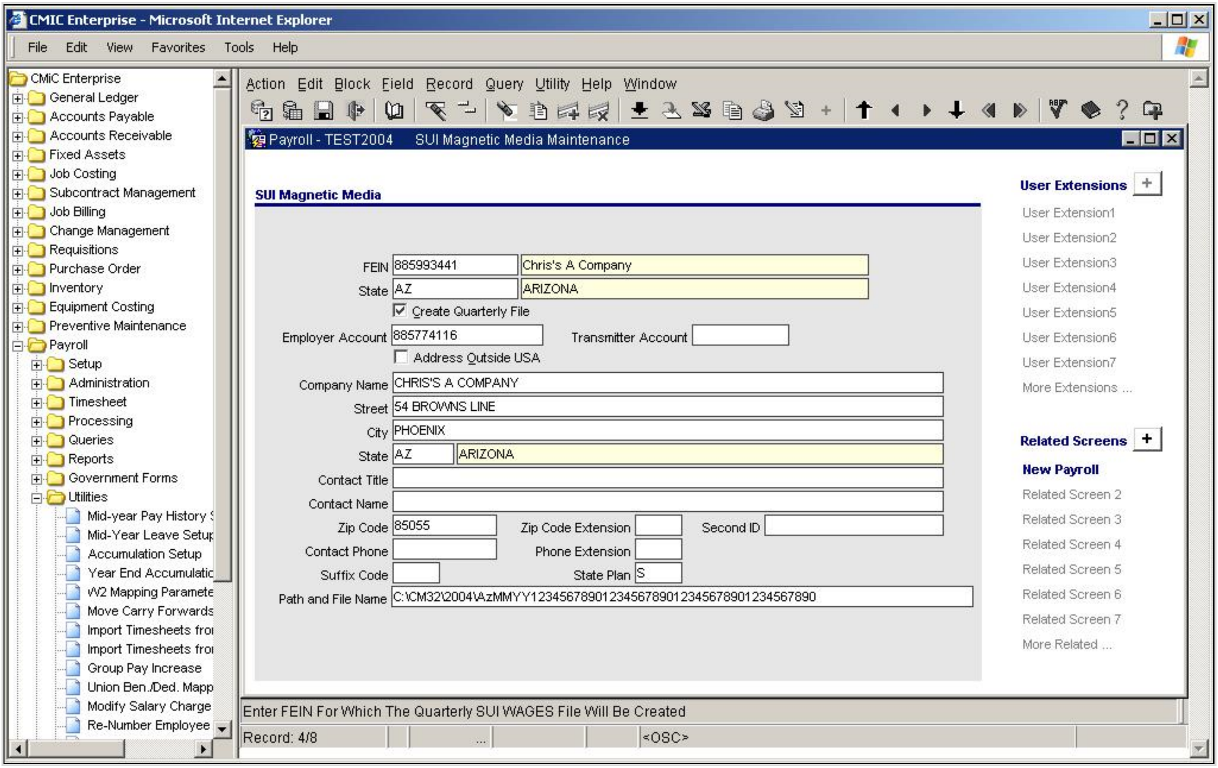
To integrate CMiC's software with Greenshades, CMiC exports year-end tax data, such as that for 1099 reporting, into an XML file for importing into Greenshades.

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



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

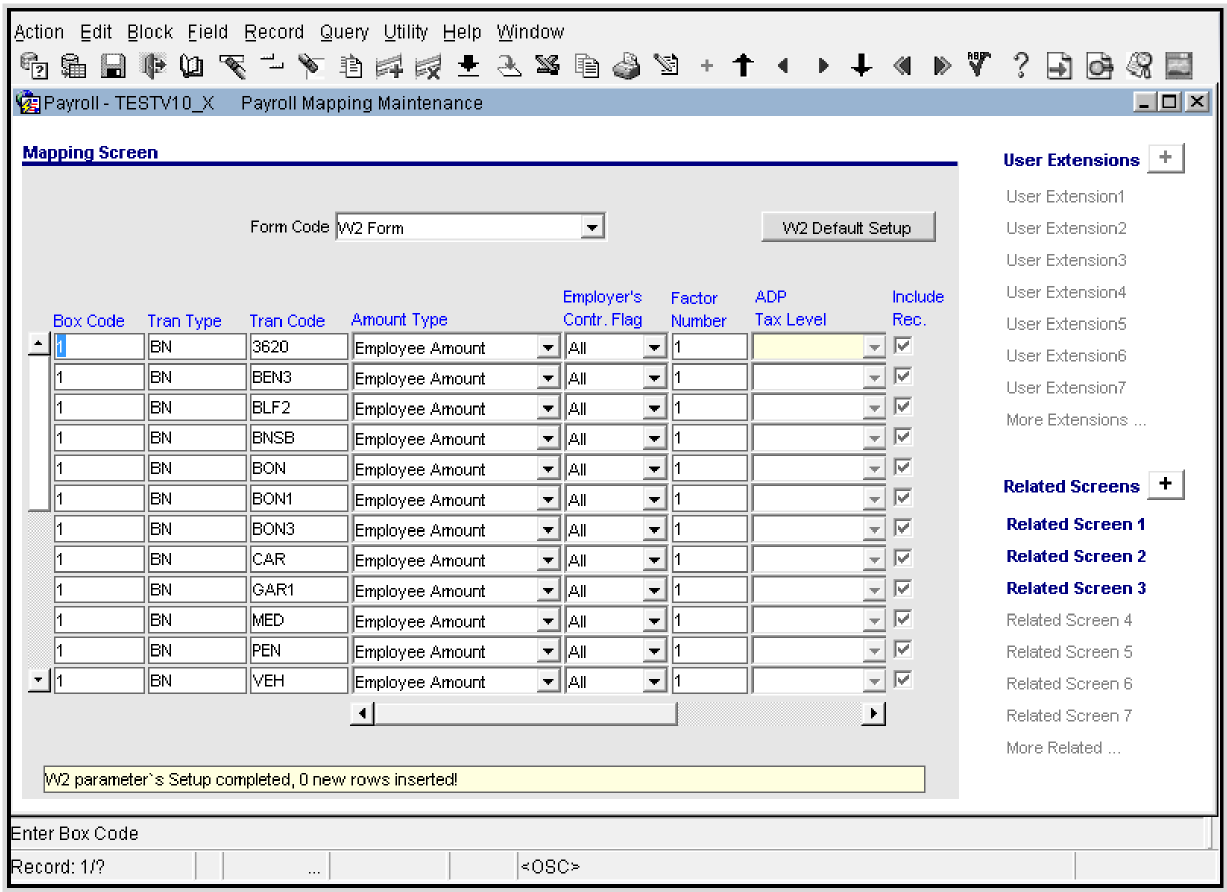
Enter the company's state-supplied Employer Account number.

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



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

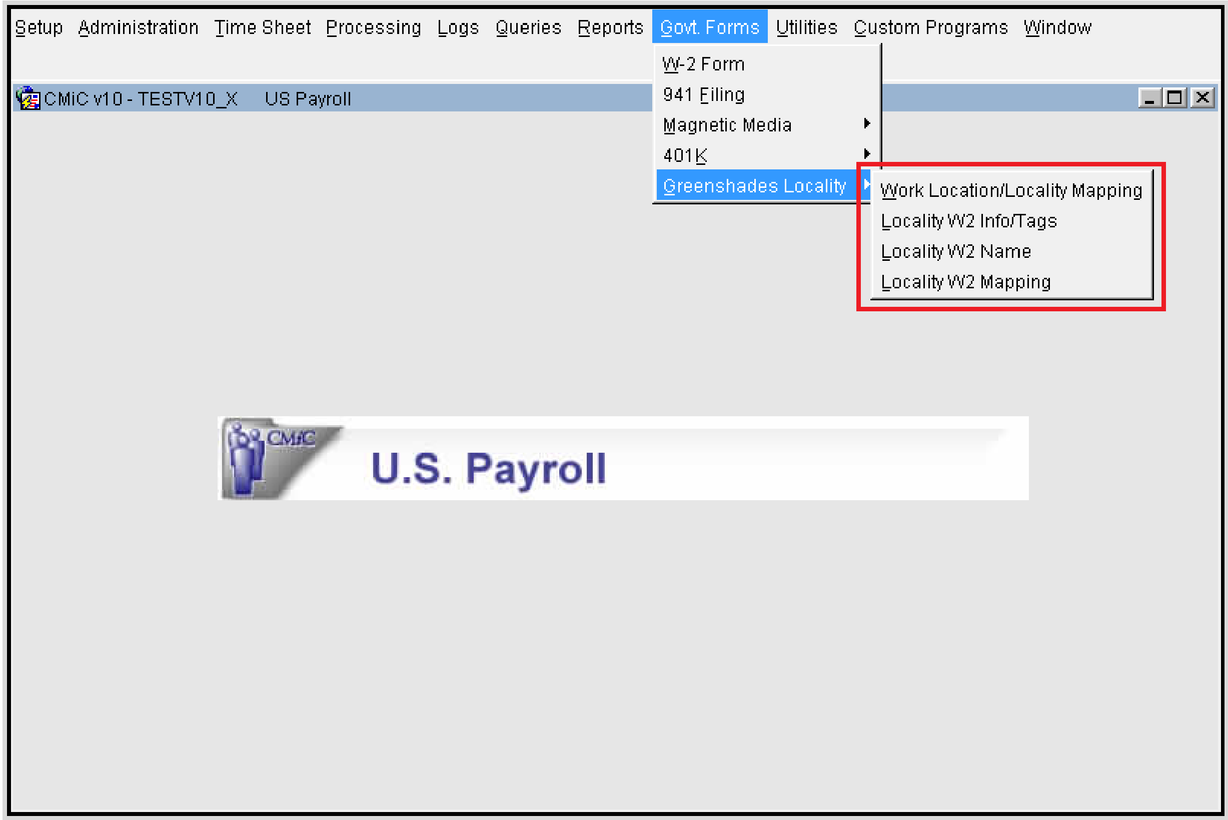
Description

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.

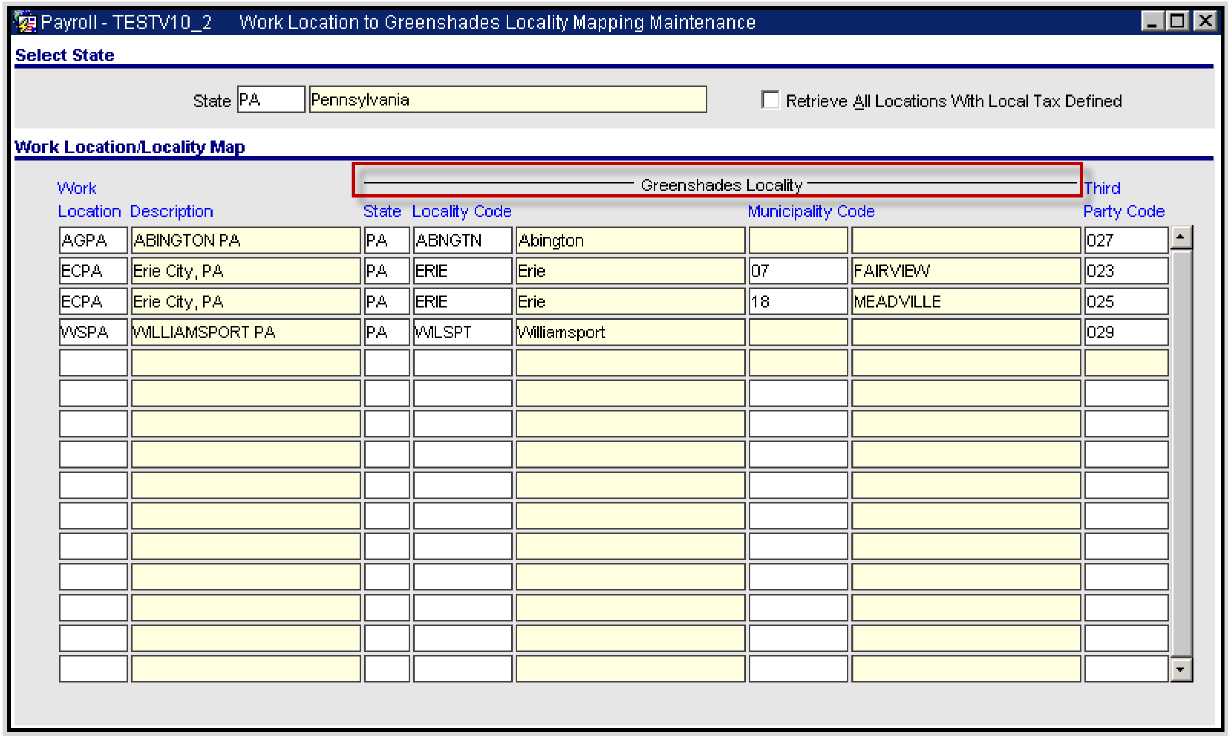
Locality W2 Name

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).*

Work Location/Locality Mapping

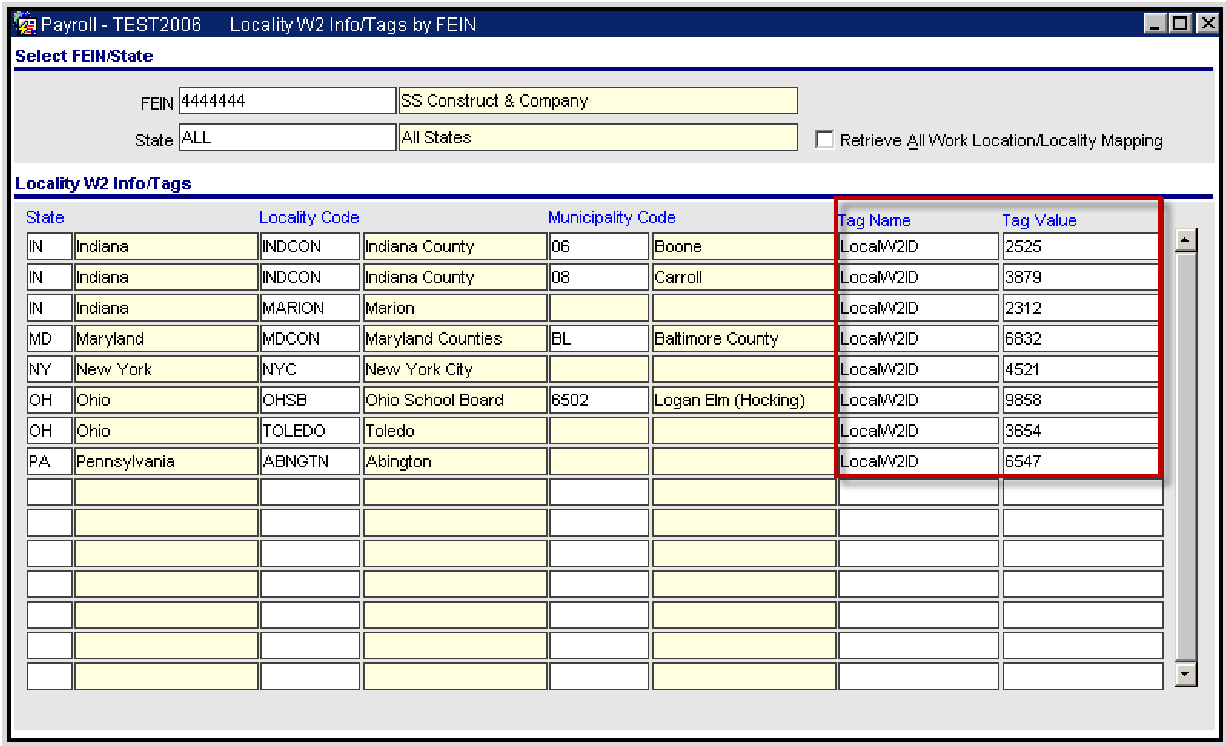


Work Location to Greenshades Locality Mapping Maintenance: Payroll (US) > Government Forms > Greenshades Locality >Work Location/Locality Mapping

Local Tax filing through Greenshades is set up in the **Work Location to Greenshades Locality Mapping Maintenance** screen. **Work Locations** are mapped to **Locality Codes** and **Municipality Codes** already defined in Payroll. The **Locality Code** represents the locality where the tax is reported. Localities are further broken down into segments and are represented by Municipalities. Not all **Local Codes** have associated **Municipalities**.

W2 Mapping Parameters should be set up to include local taxes. When the W2 is processed, the XML file generated will include the "Local W2" node with the **State**, **Locality Code** and **Municipality Code**. The Locality Name, Annual Local Wages and Annual Local Tax Withheld fields are also printed.

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

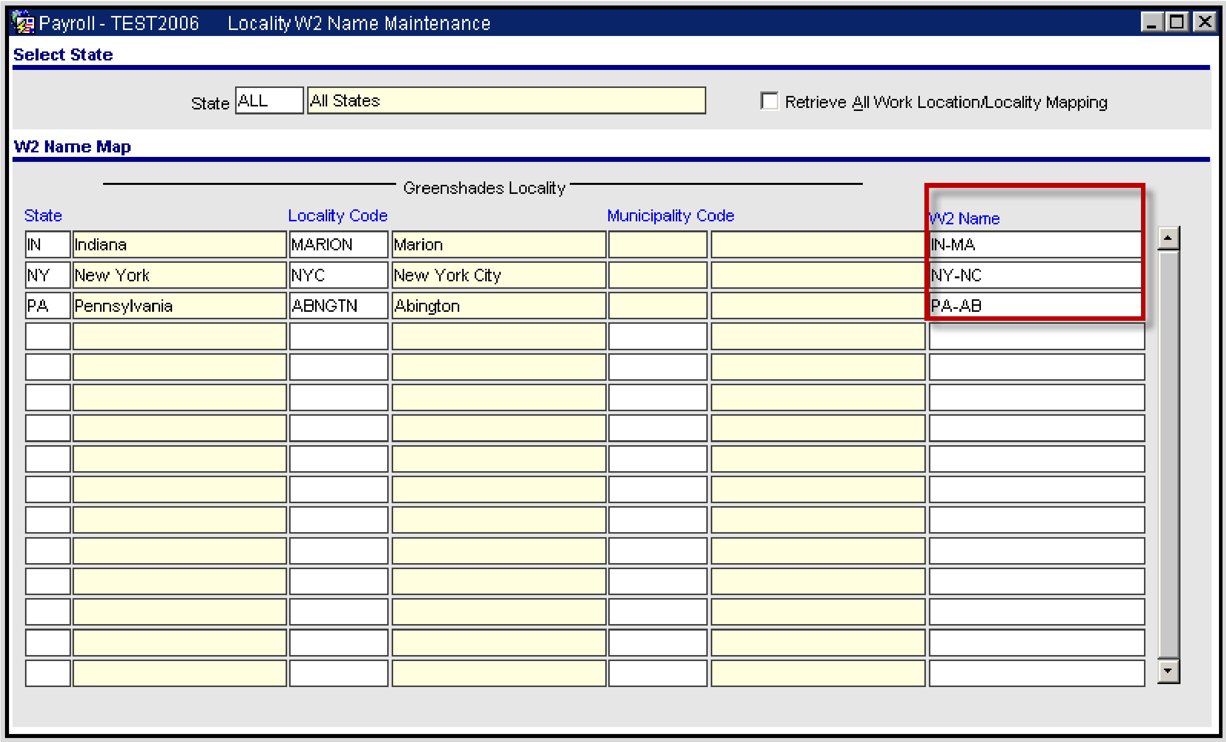
Locality W2 Info/Tags

State		Locality Code		Municipality Code		Tag Name	Tag Value
IN	Indiana	INDCON	Indiana County	06	Boone	LocalW2ID	2525
IN	Indiana	INDCON	Indiana County	08	Carroll	LocalW2ID	3879
IN	Indiana	MARION	Marion			LocalW2ID	2312
MD	Maryland	MDCON	Maryland Counties	BL	Baltimore County	LocalW2ID	6832
NY	New York	NYC	New York City			LocalW2ID	4521
OH	Ohio	OHSB	Ohio School Board	6502	Logan Elm (Hocking)	LocalW2ID	9858
OH	Ohio	TOLEDO	Toledo			LocalW2ID	3654
PA	Pennsylvania	ABNGTN	Abington			LocalW2ID	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.

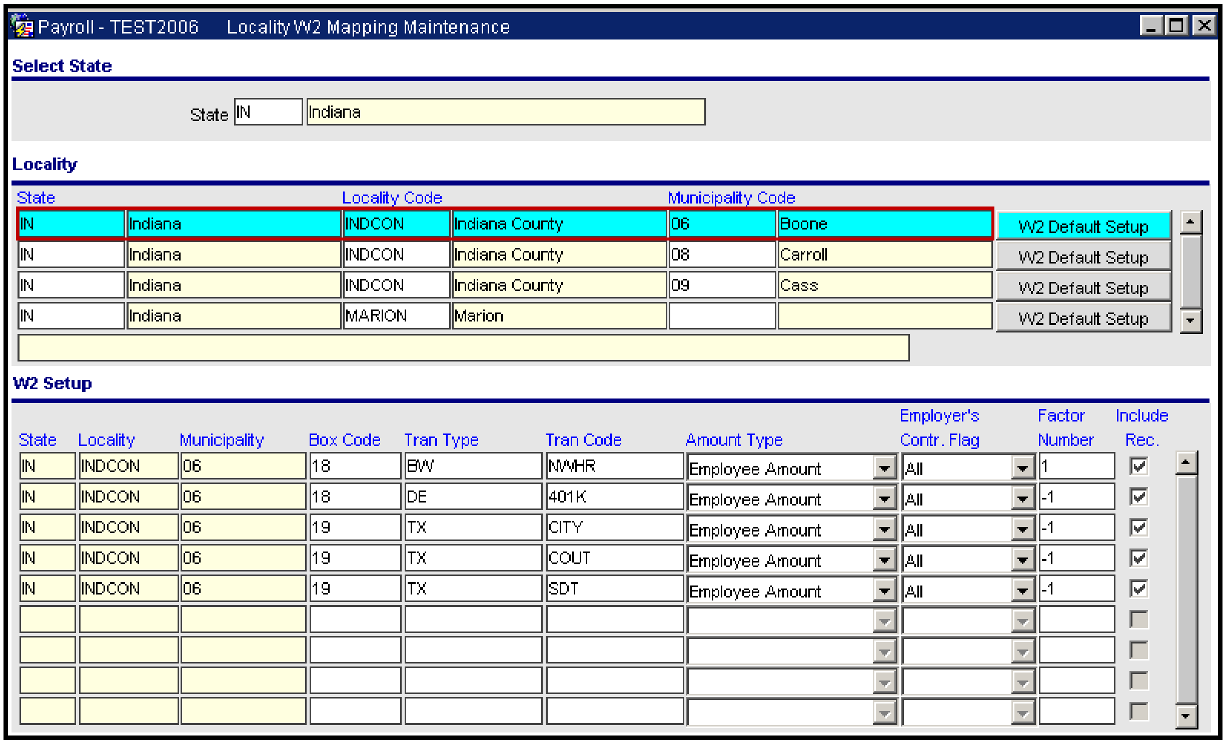
Locality W2 Name



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

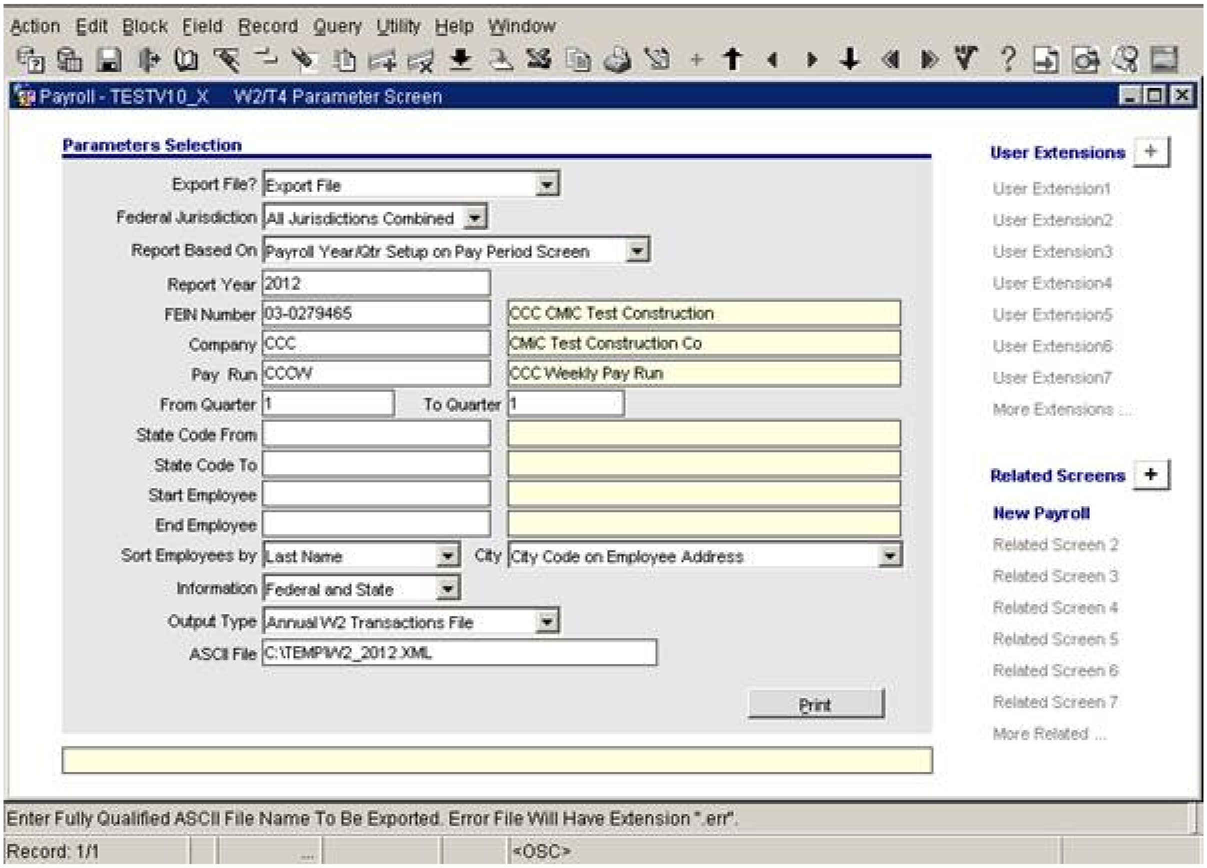


Locality W2 Mapping Maintenance: Payroll (US) > Government Forms > Greenshades Locality > Locality W2 Mapping

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



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 *(7th 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.

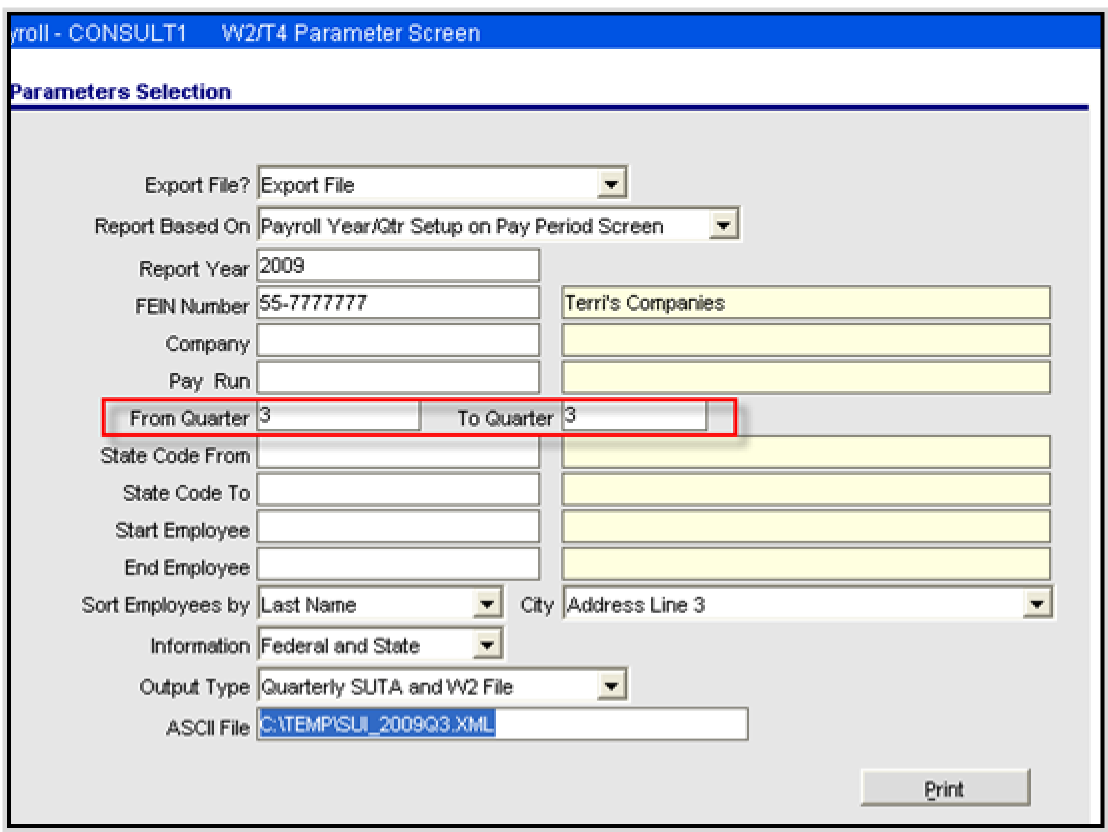
Now that the W-2 export file has been created through CMiC's software, the next step is to specify the file's name and location to Greenshades. This is done by passing the name and location of the exported file to Greenshades during its launching. This information is passed to Greenshades through the 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



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

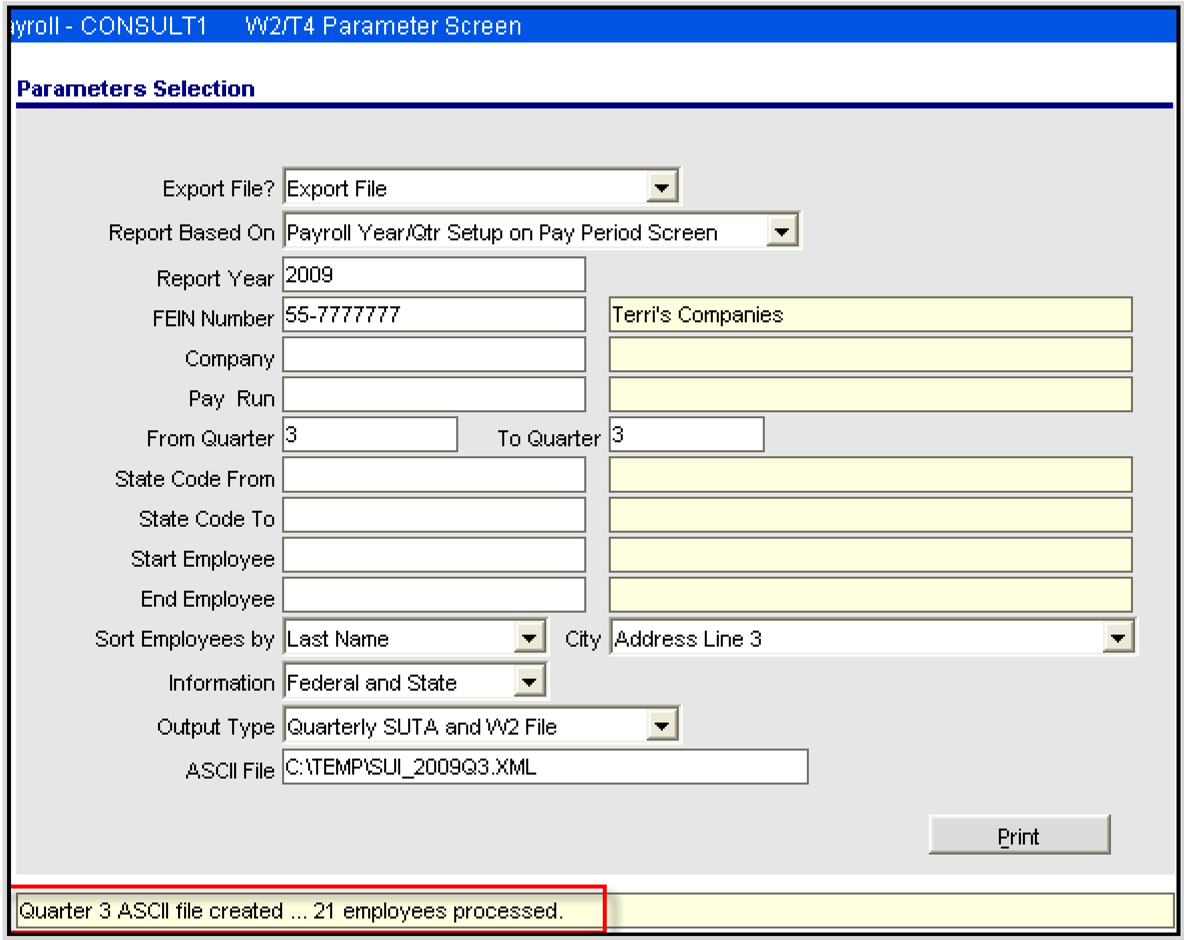
Select Quarterly SUTA and W2 File.

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 *(7th 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



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.

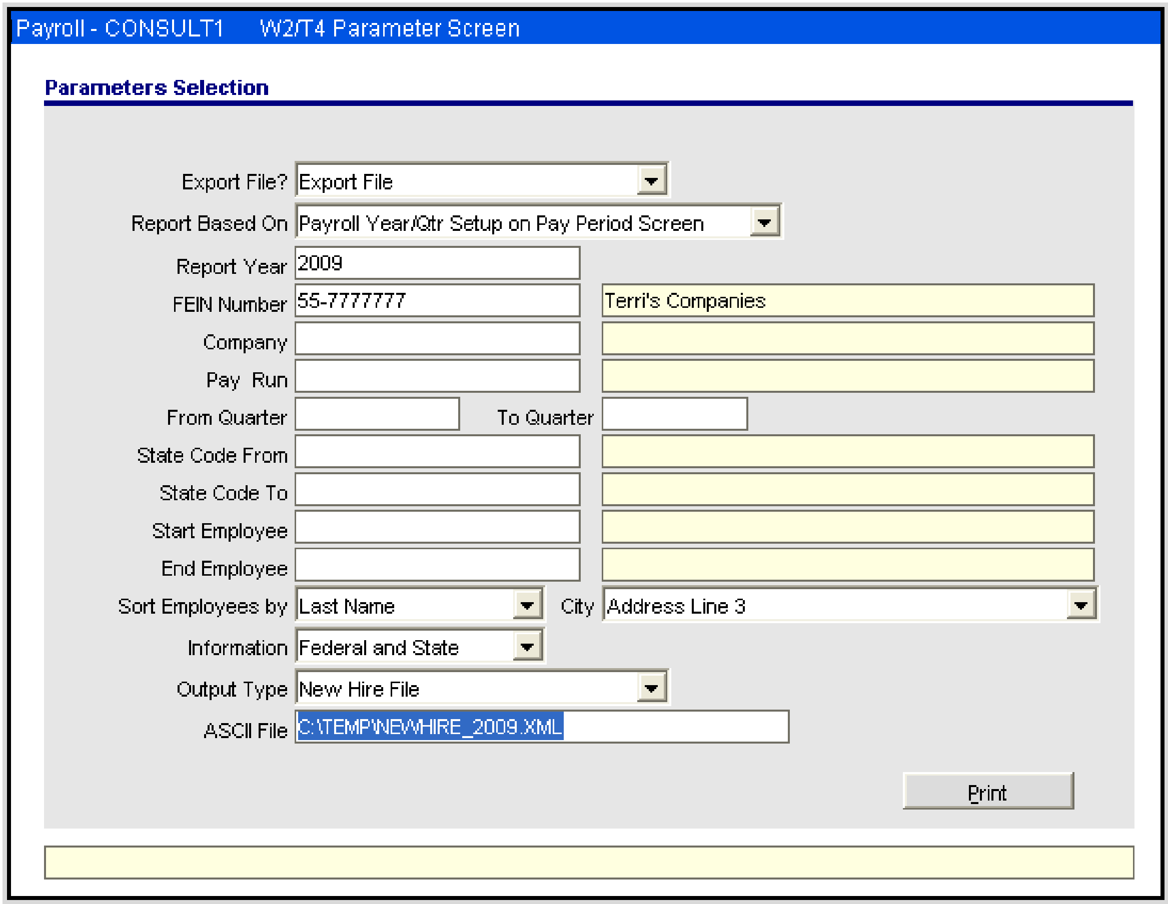
New Hire Reporting Setup

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



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.

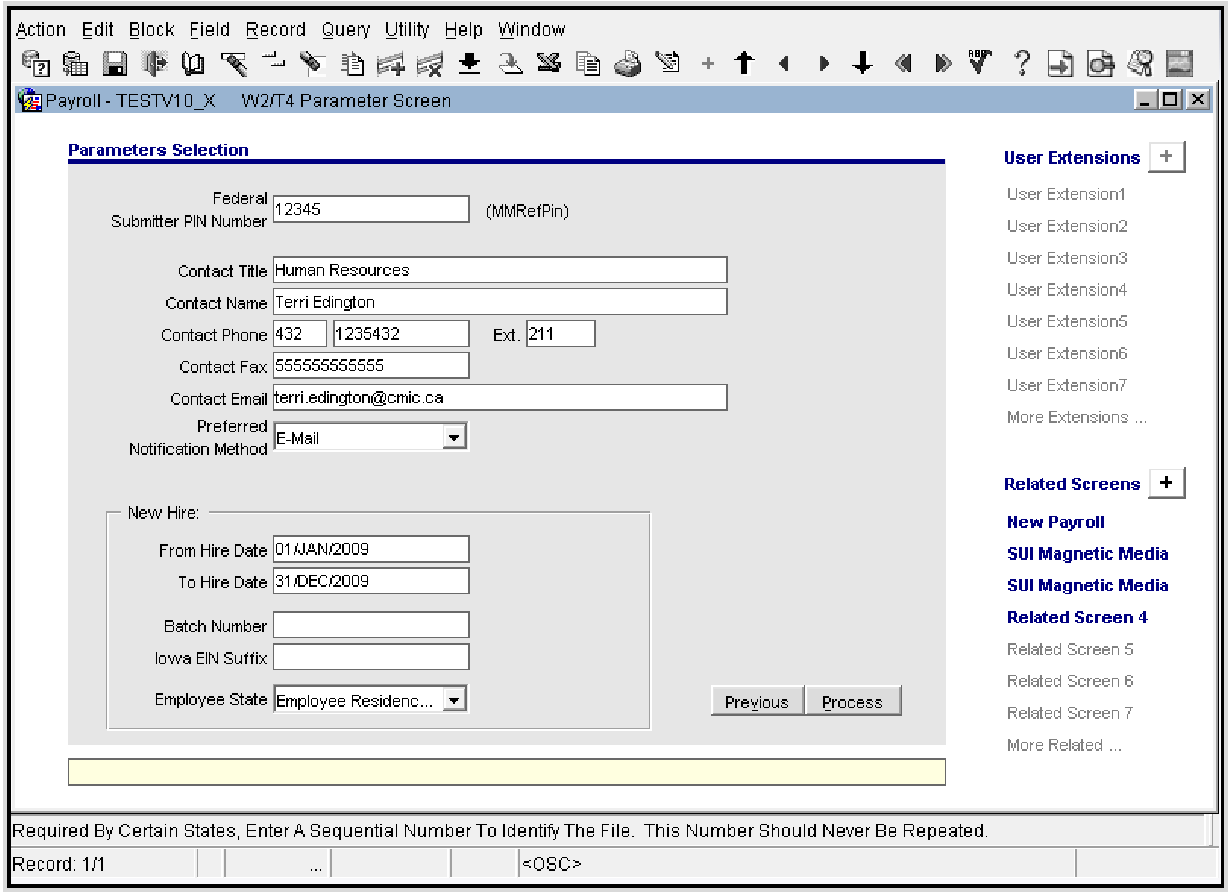
ASCII File

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 *(7th 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



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 bellow)*. 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.

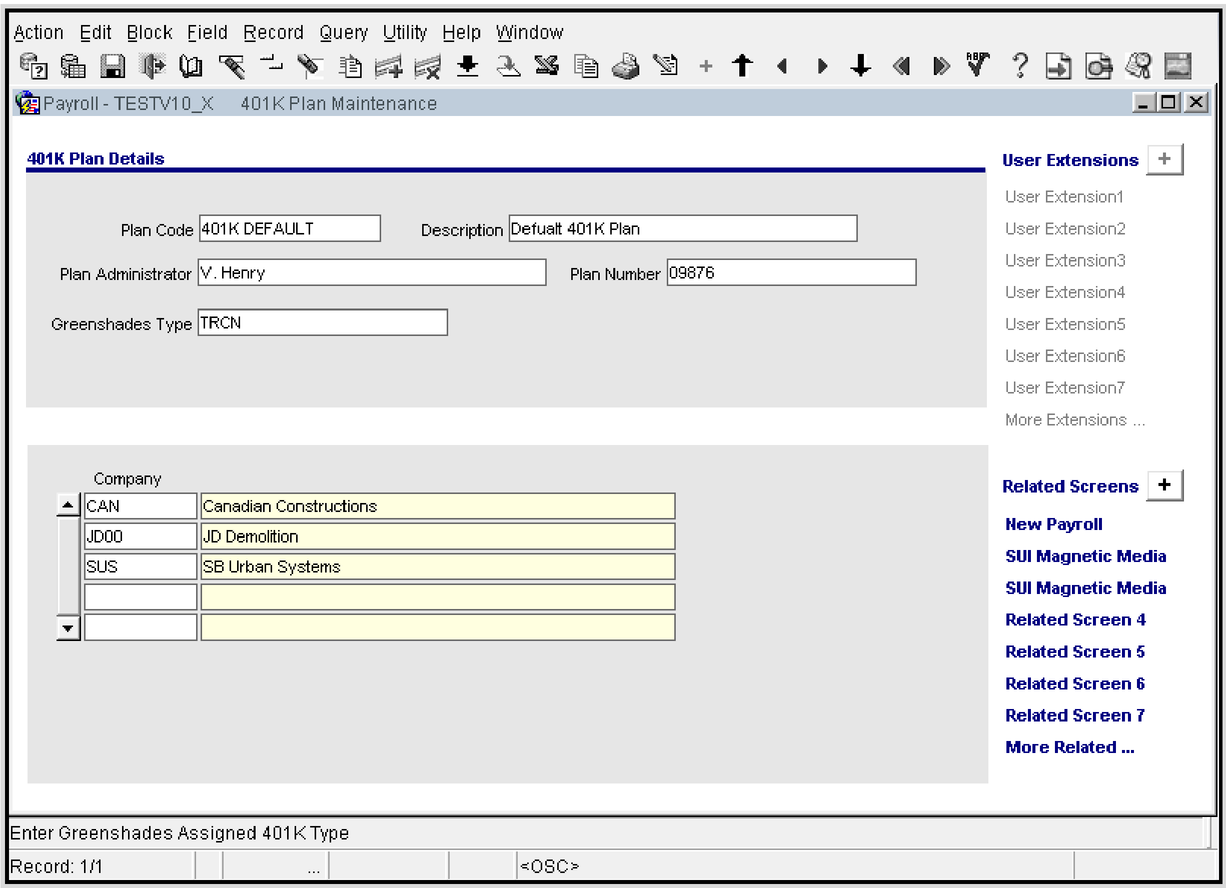
401K Reporting Setup

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.

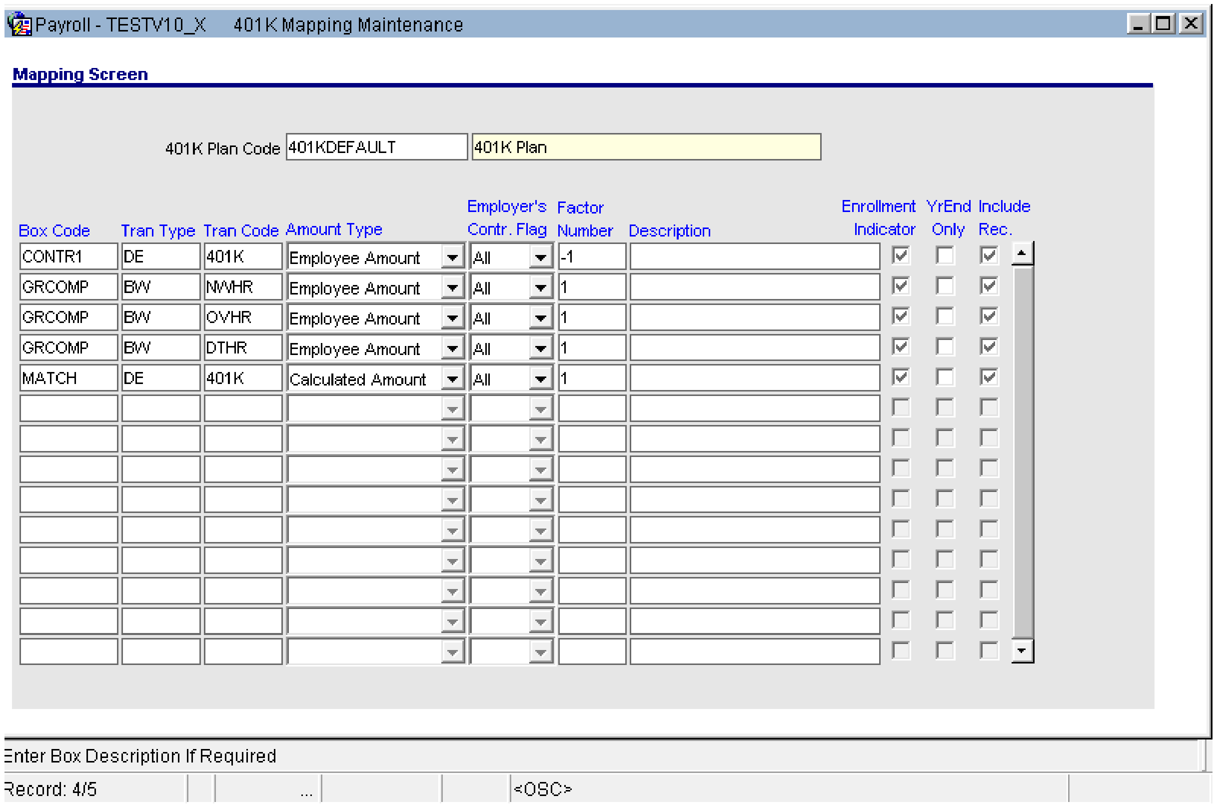
Ensure 401K Plans Details Entered for Each 401K Plan



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



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.

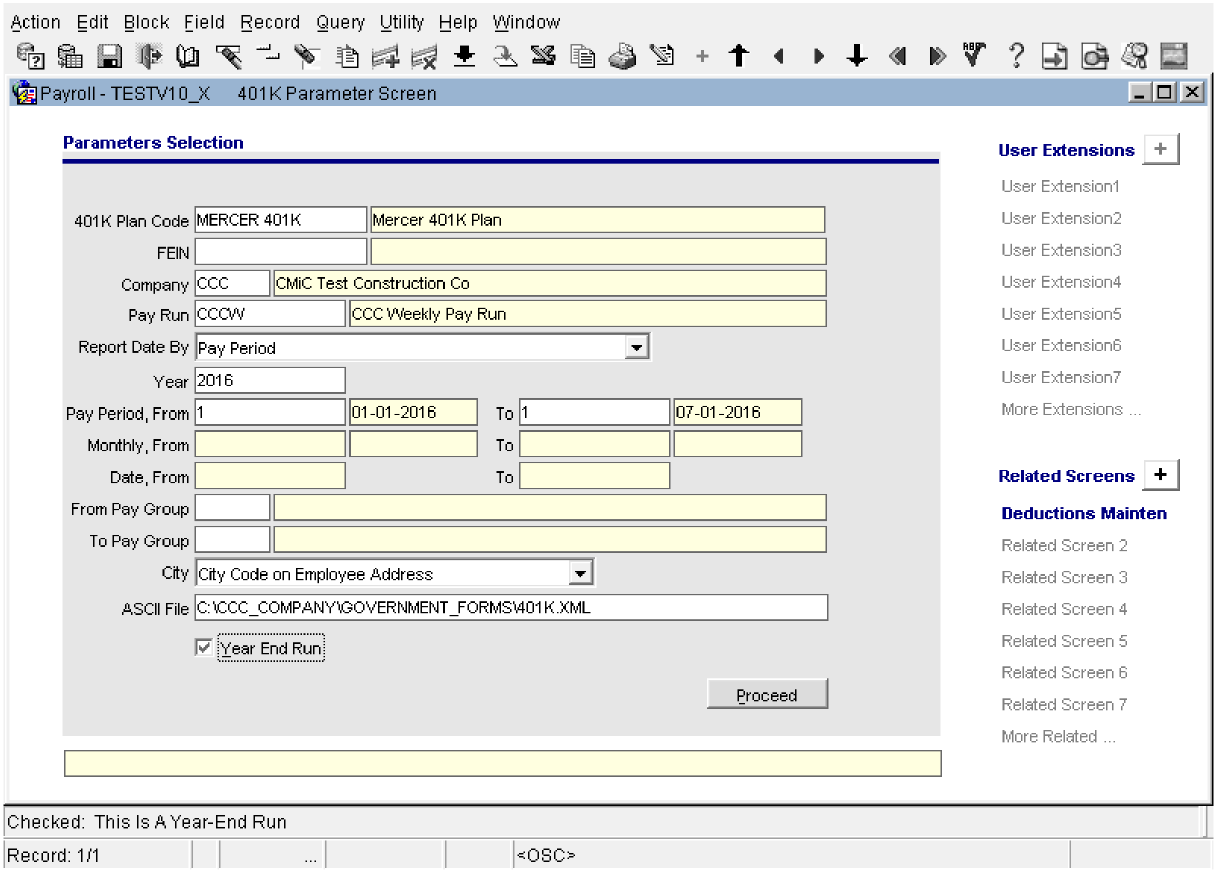
YrEnd Only

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



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.

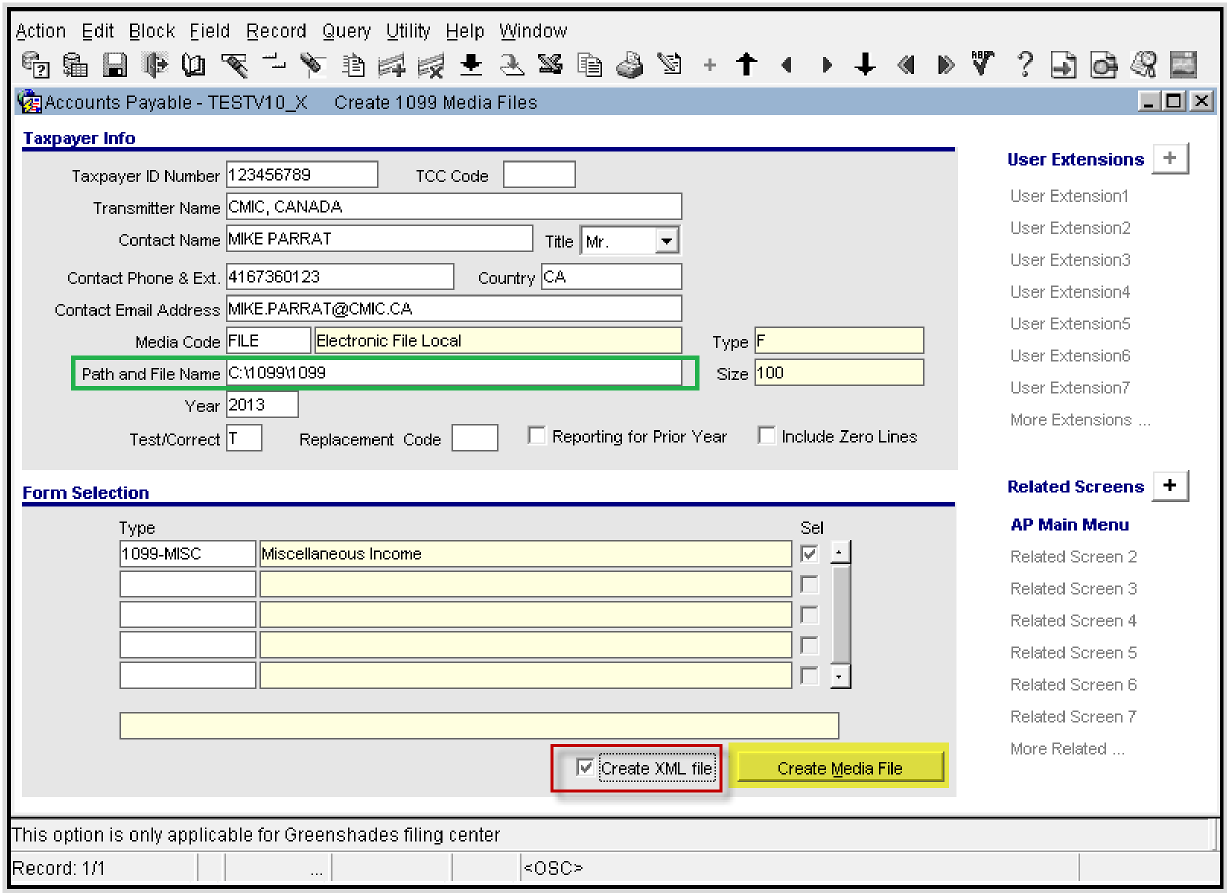
Now that the 401K export file has been created through CMiC's software, the next step is to specify this file's name and location to Greenshades. This is done by passing the name and location of the exported file to Greenshades during its launching. This information is passed to Greenshades through the 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



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.

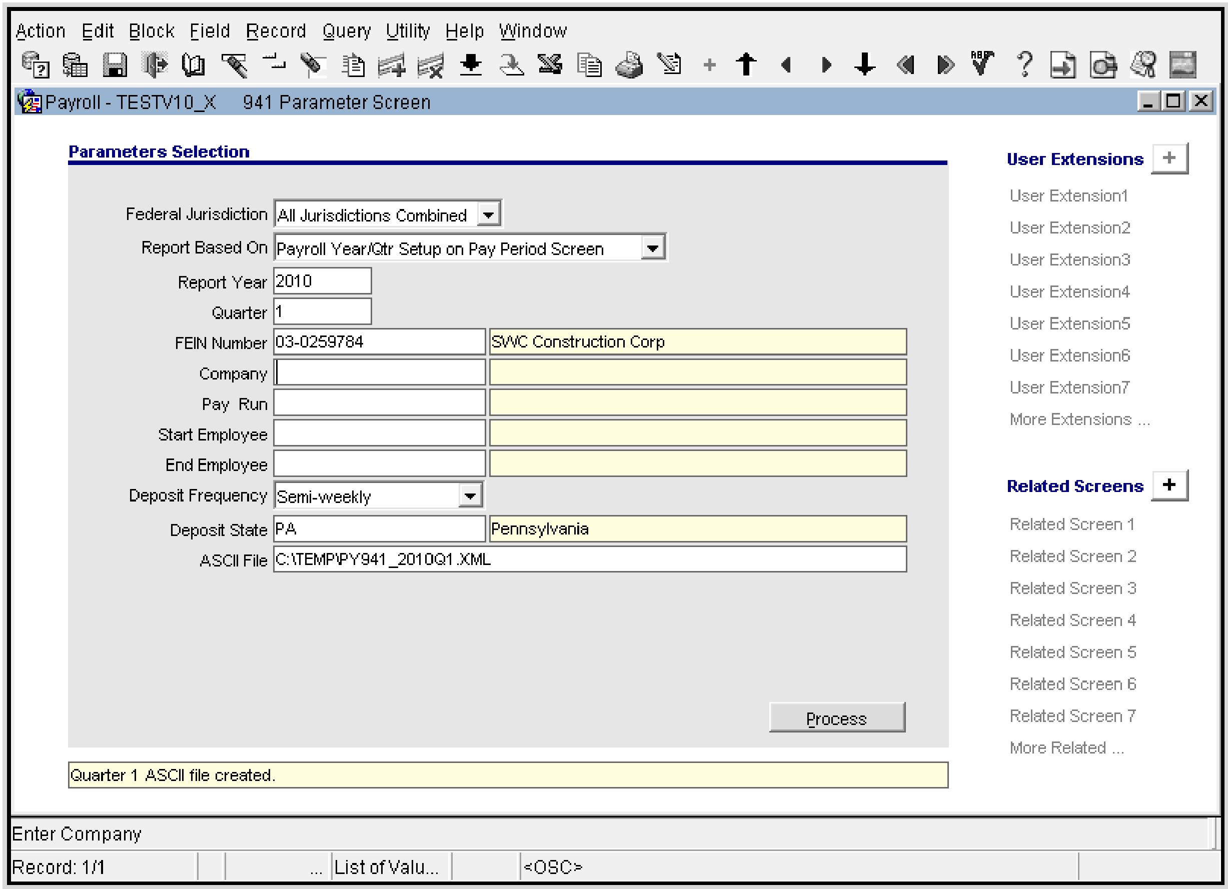
Now that the 1099 export file has been created through CMiC's software, the next step is to specify this file's name and location to Greenshades. This is done by passing the name and location of the exported file to Greenshades during its launching. This information is passed to Greenshades through the 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



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.

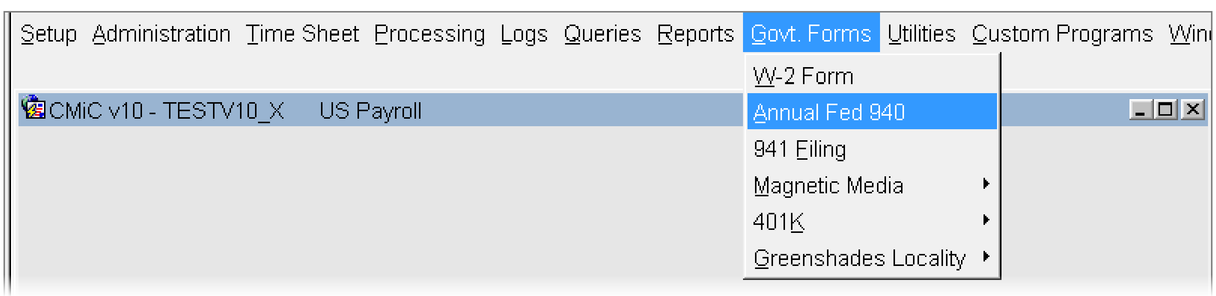
ASCII File

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.

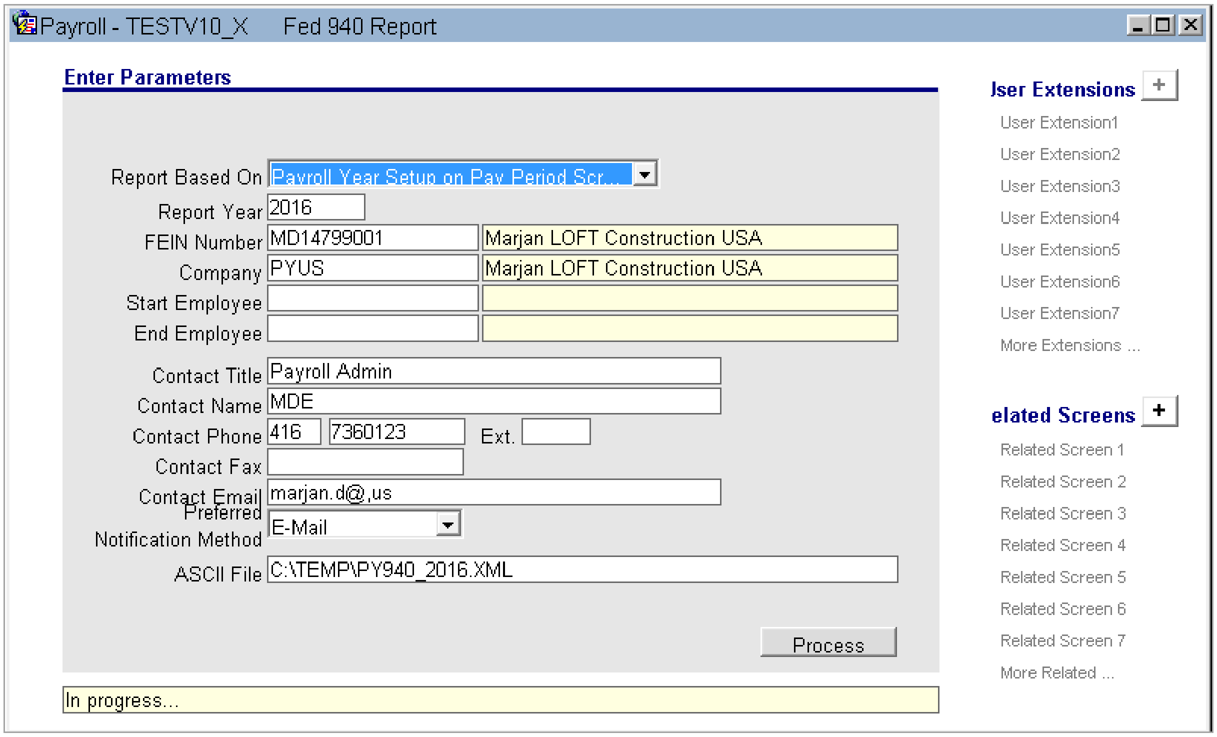
To create the 941 export file, as specified by the parameters above, click the **Process** button. This process will export the data into an XML file, with the file name and location specified by **ASCII File** parameter.

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.



Pgm: PY940 – Fed 940 Report

Enter the relevant paramters, 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
<?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"/>
```

```
<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 Adminstrator"/>
            <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

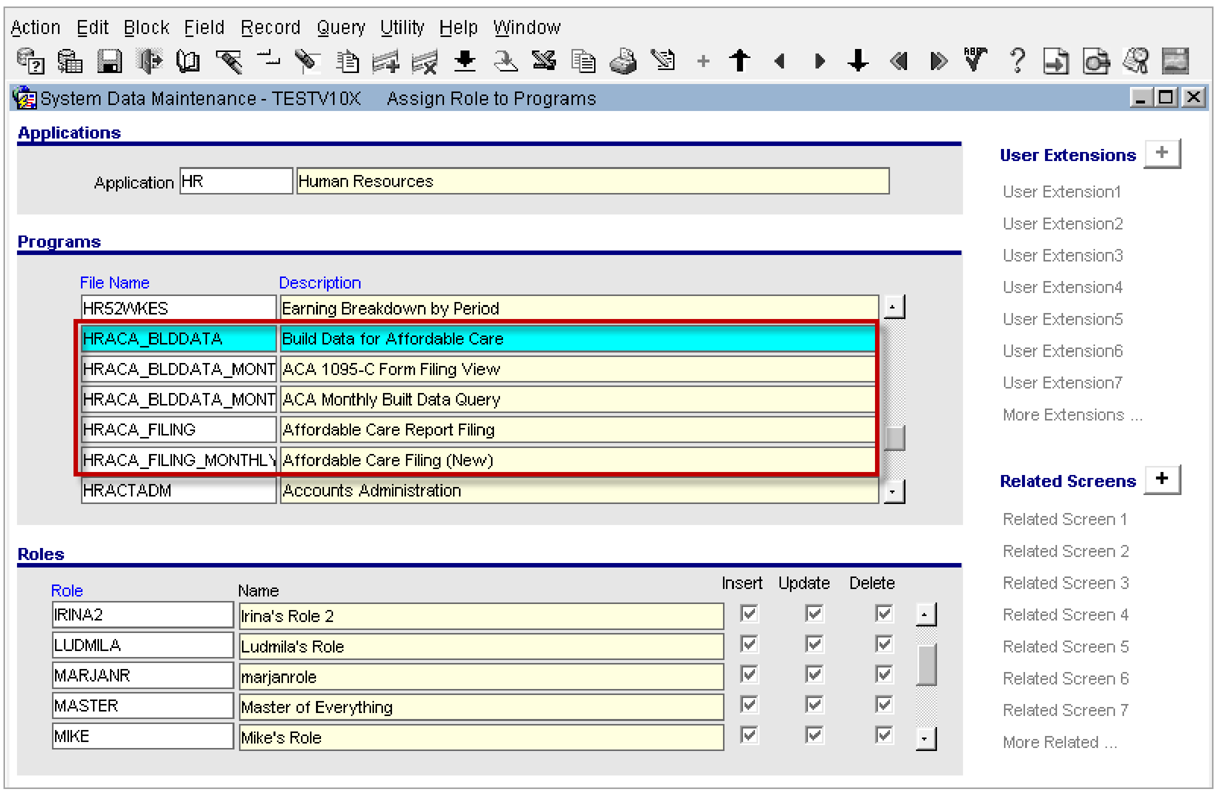
Overview – ACA Compliance Reporting

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**):

> **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



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** filed 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 produced 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**.

- **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).

  TIP

  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.)

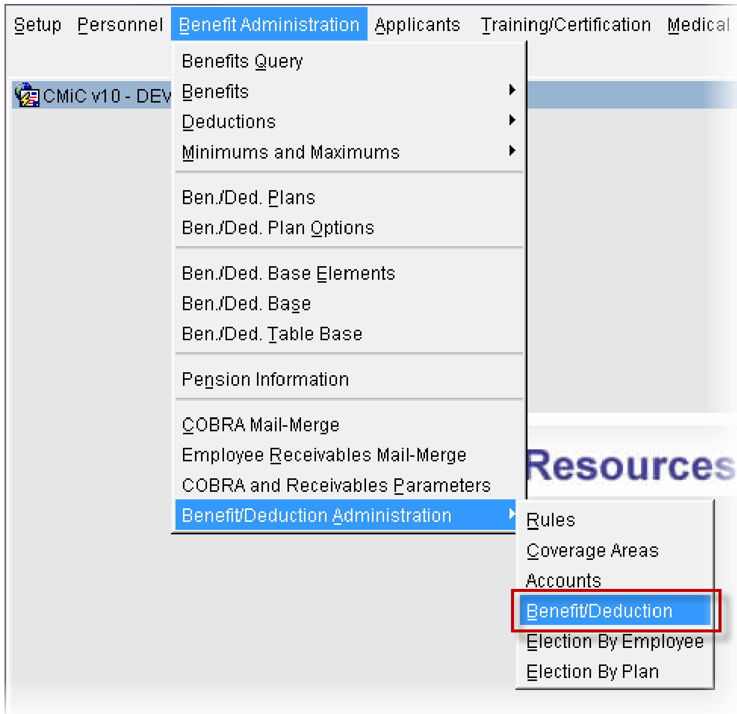
Line 15. Complete line 15 only if code 1B, 1C, 1D, 1E, 1J, or 1K is entered on line 14 either in the "All 12 Months" box or in any of the monthly boxes. Enter the amount of the Employee Required Contribution, which is, generally, the employee share of the monthly cost for the lowest-cost self-only minimum 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.

TIP

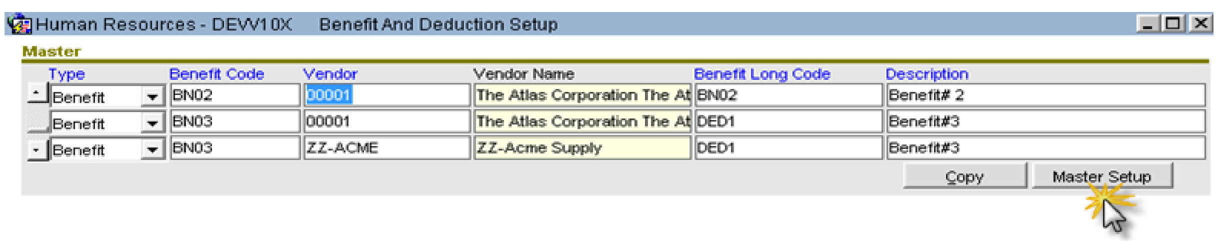
For line 15, the amount entered might not be the amount the employee is paying for the coverage, for example, if the employee chose to enroll in more expensive coverage such as family coverage or if the employee is eligible for certain other healthcare arrangements.

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

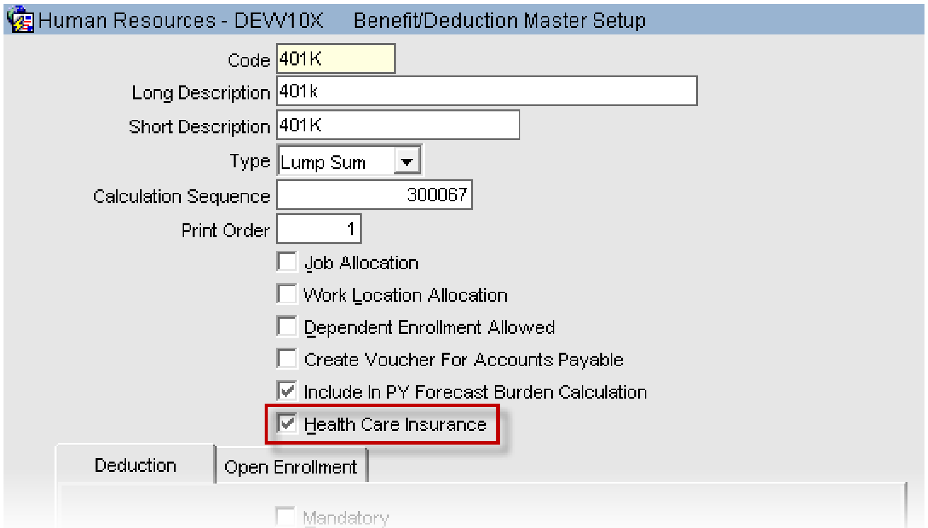


The Benefit And Deduction Setup screen has been modified to allow users to assign Code Series 1 codes to each plan options offered for Health Care benefits. The screen's standard Treeview path is: **Human Resources > Benefit Administration > Benefit/Deduction Administration > Benefit/Deduction**.



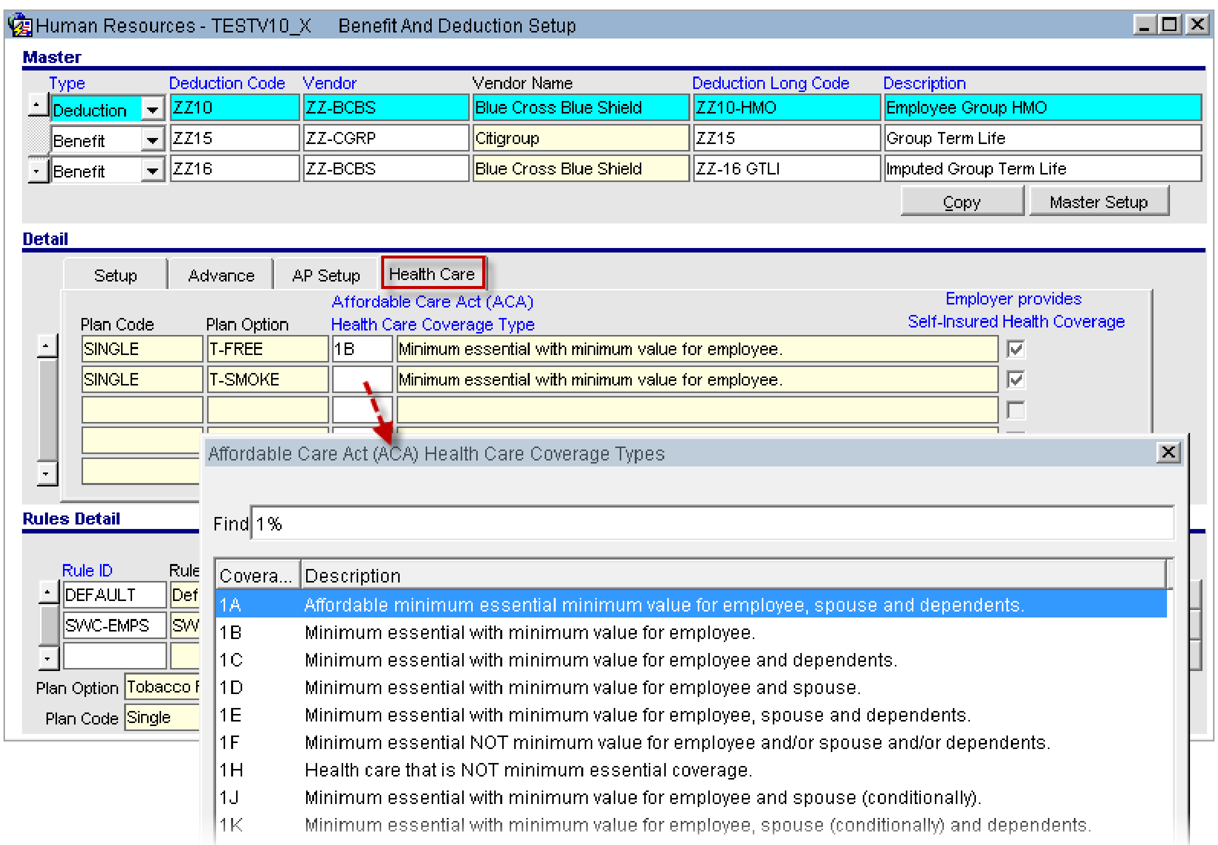
*Sample of top section (**Master**) of Benefit And Deduction Setup screen (program: HRBDADM)*

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



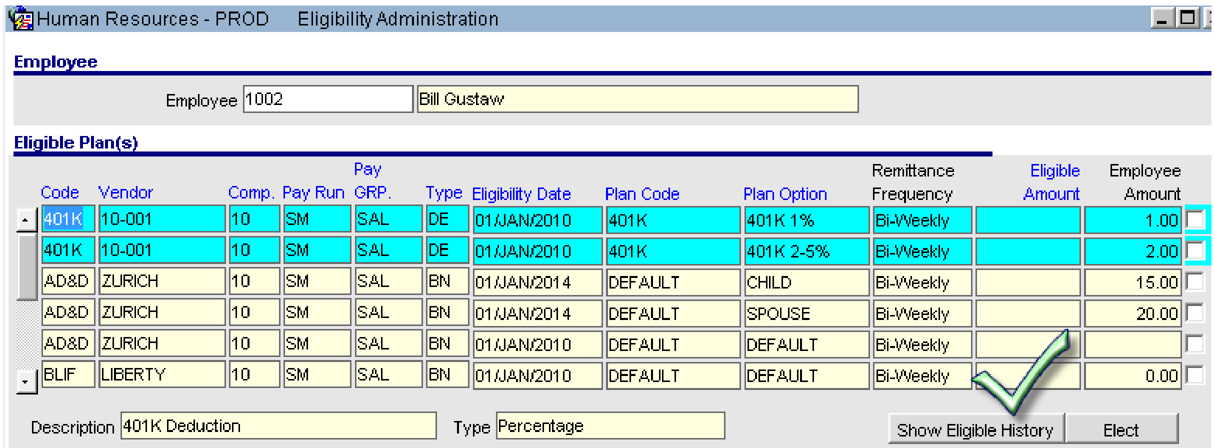
In the Benefit/Deduction Master Setup screen, shown above, check the **Health Care Insurance** checkbox.

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 Heath 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.



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).



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	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

Description 401K Deduction Type Percentage Show Eligible History Elect

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:

I) Employee was not employed or was not a full-time employee.

II) Employee enrolled in the minimum essential coverage offered.

III) Employee was in a Limited Non-Assessment Period with respect to section 4980H(b).

IV) 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**:

- **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.

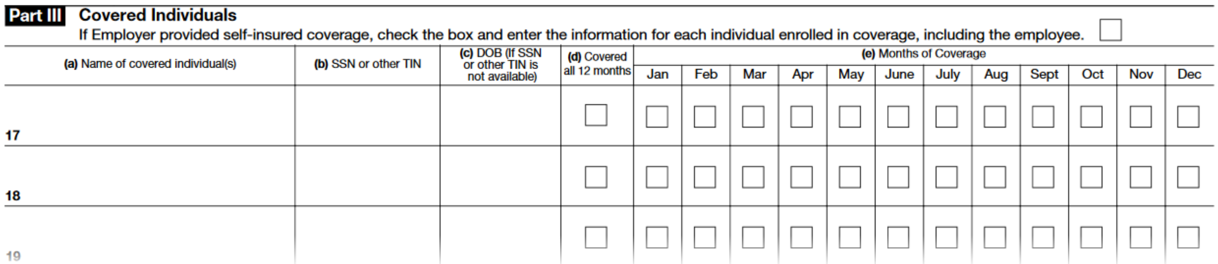
  Note. Although ALE Members may use the section 4980H affordability safe harbors to determine affordability for purposes of the multiemployer arrangement interim guidance, an ALE Member eligible for the relief provided in the multiemployer arrangement interim guidance for a month for an employee should 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.

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)

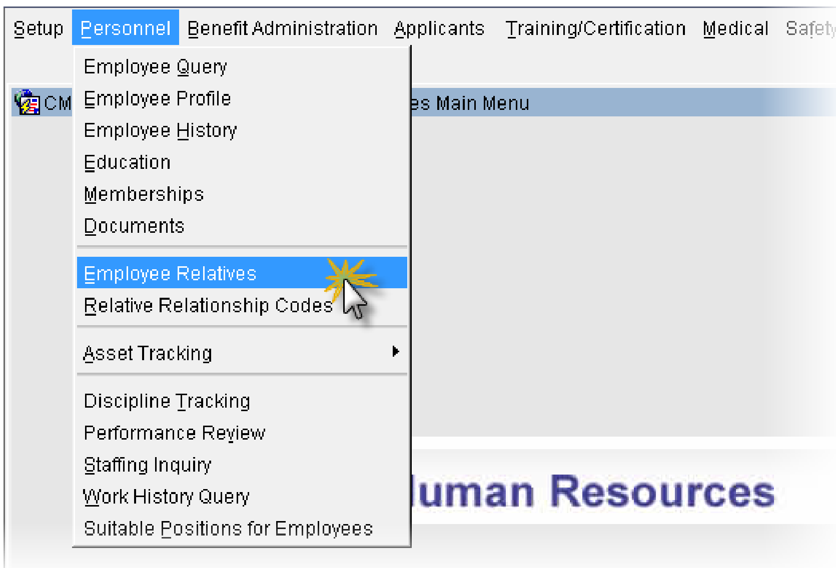


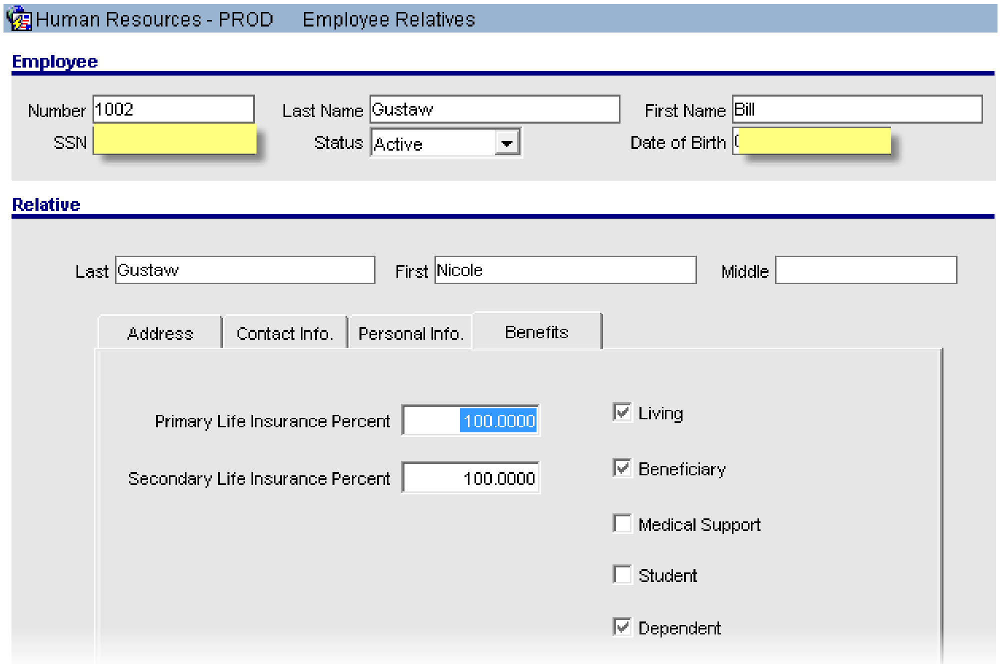
Part III **Covered Individuals**

If Employer provided self-insured coverage, check the box and enter the information for each individual enrolled in coverage, including the employee. ☐

	(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				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
18				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
19				☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

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.



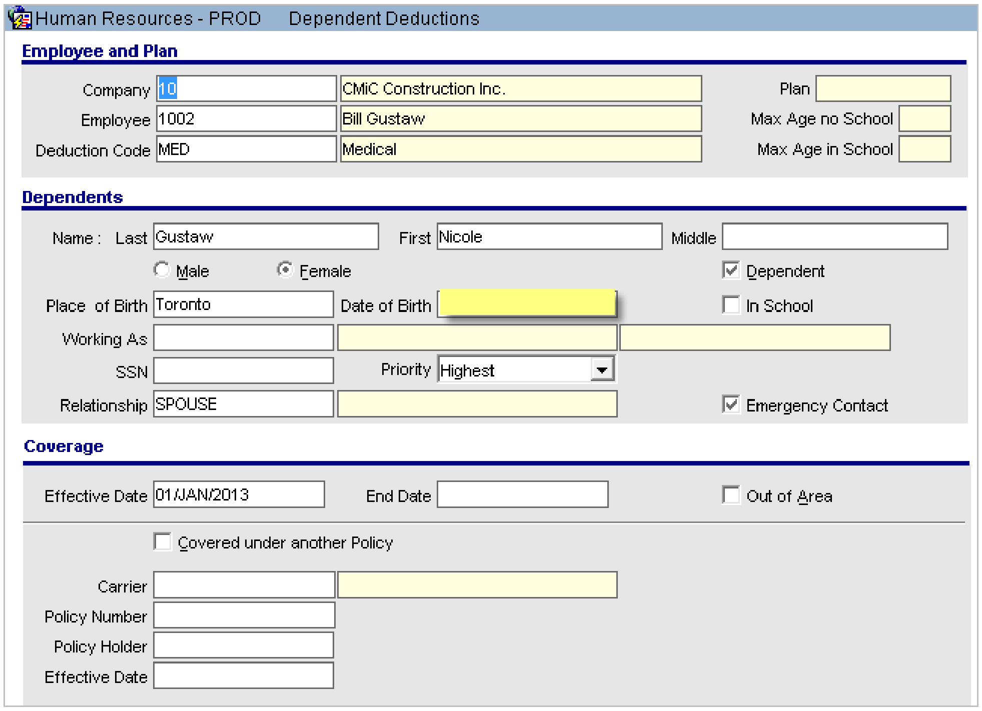


Sample of Employee Relatives screen (program: HREMPREL)

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.

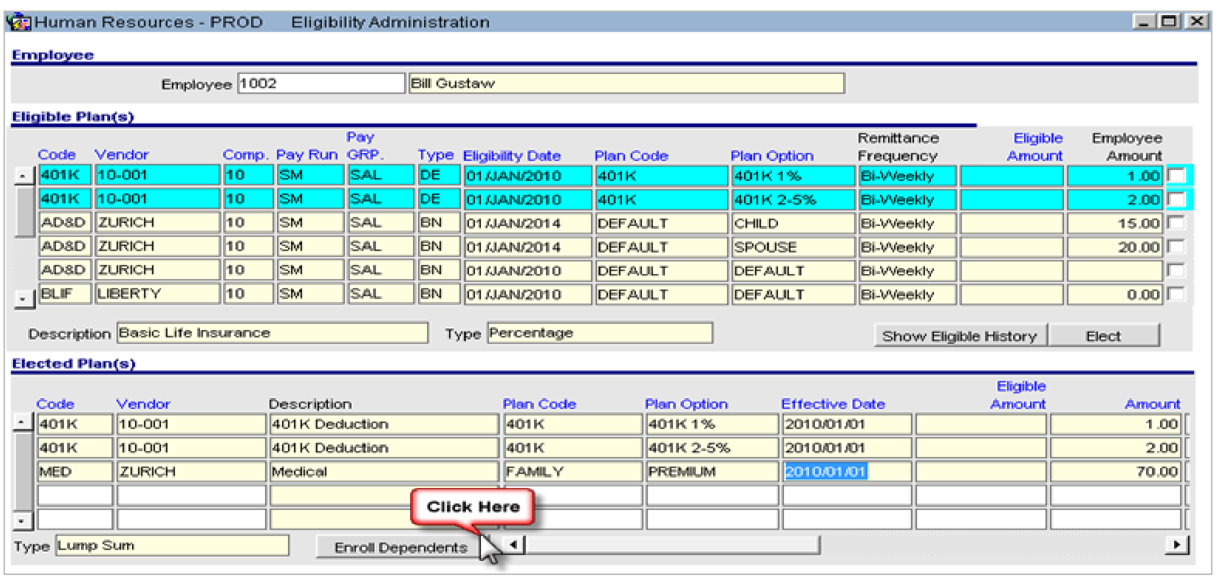
Also, there are different screens which either administrators or employees themselves can use to enroll employees' dependents for specific plans. The forms versions allows HR personnel to enroll dependents to specific plans, and Employee Self Service allows employees to enroll their dependents themselves.

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:



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**.

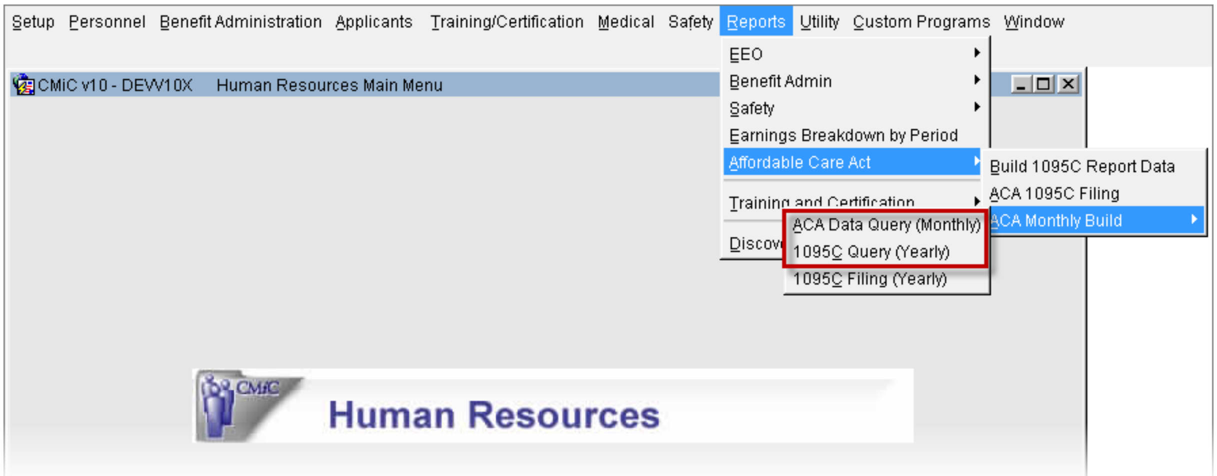


Sample of Eligibility Administration screen (program: HRELGADM)

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.*

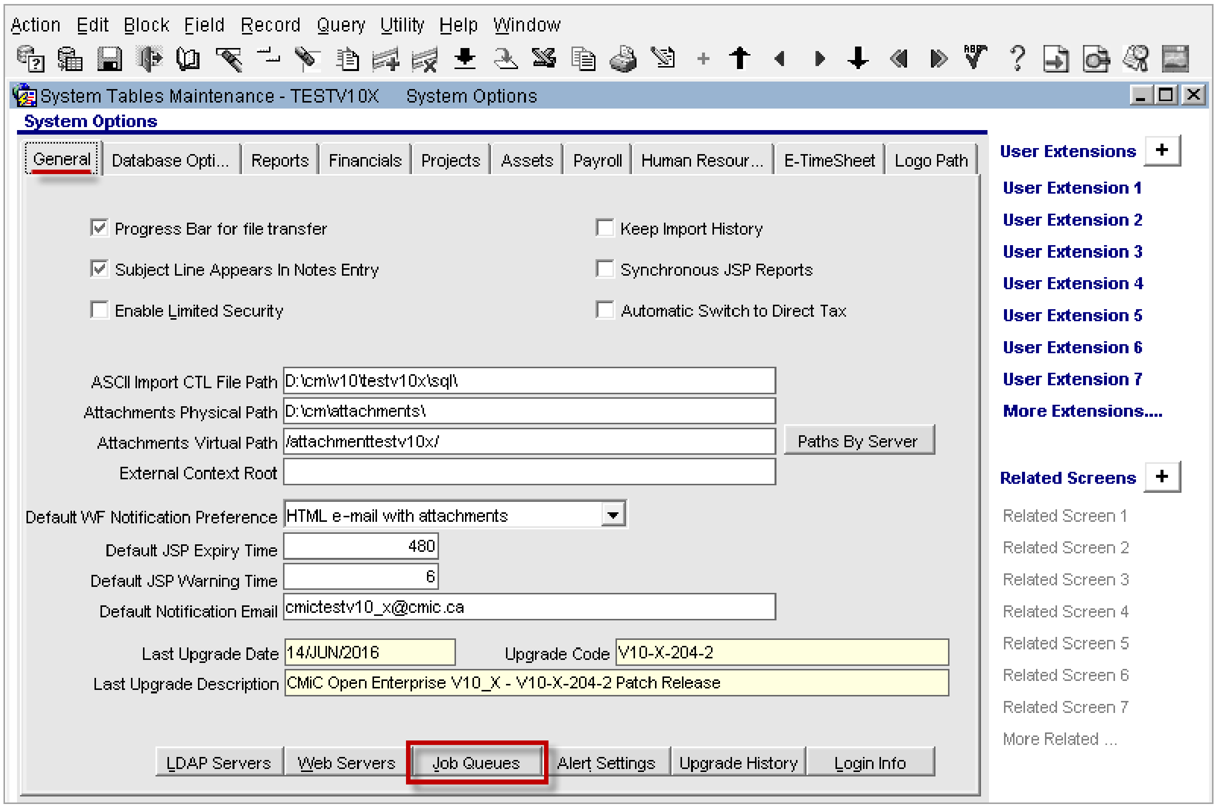
To view or edit this generated ACA compliance data for the months it has been built, the following two screens have been added to the standard menu of the Human Resources module: ACA Monthly Built Data Query, and View/Update ACA 1095-C Form, shown in the below screenshot. The standard Treeview path to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



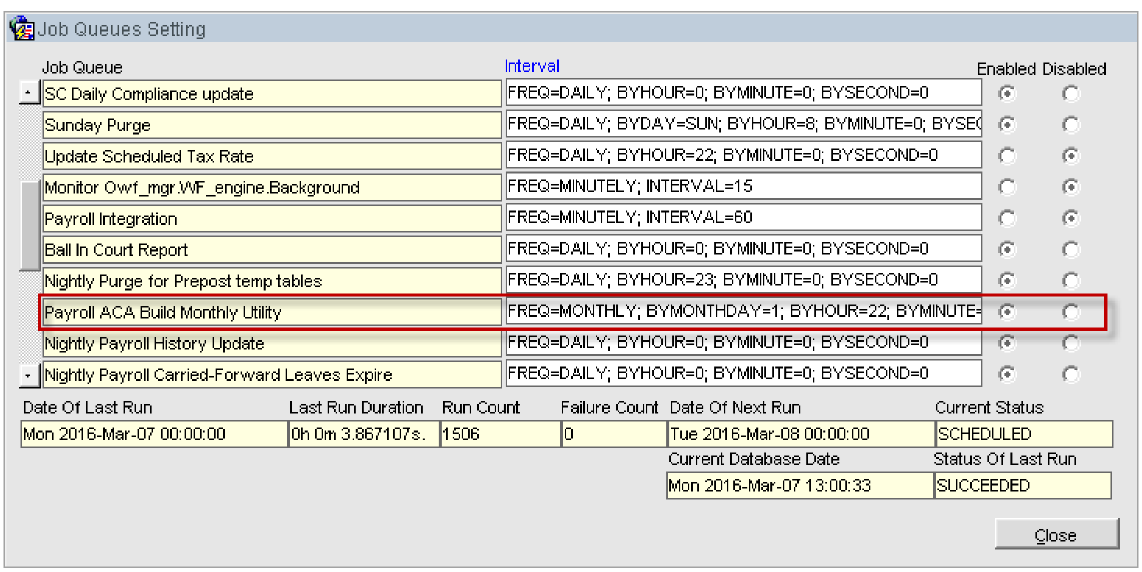
Sample of HR screen with the two new screens added to the ***Reports*** *menu.*

Enable Monthly ACA Process to Automatically Build ACA Compliance Data

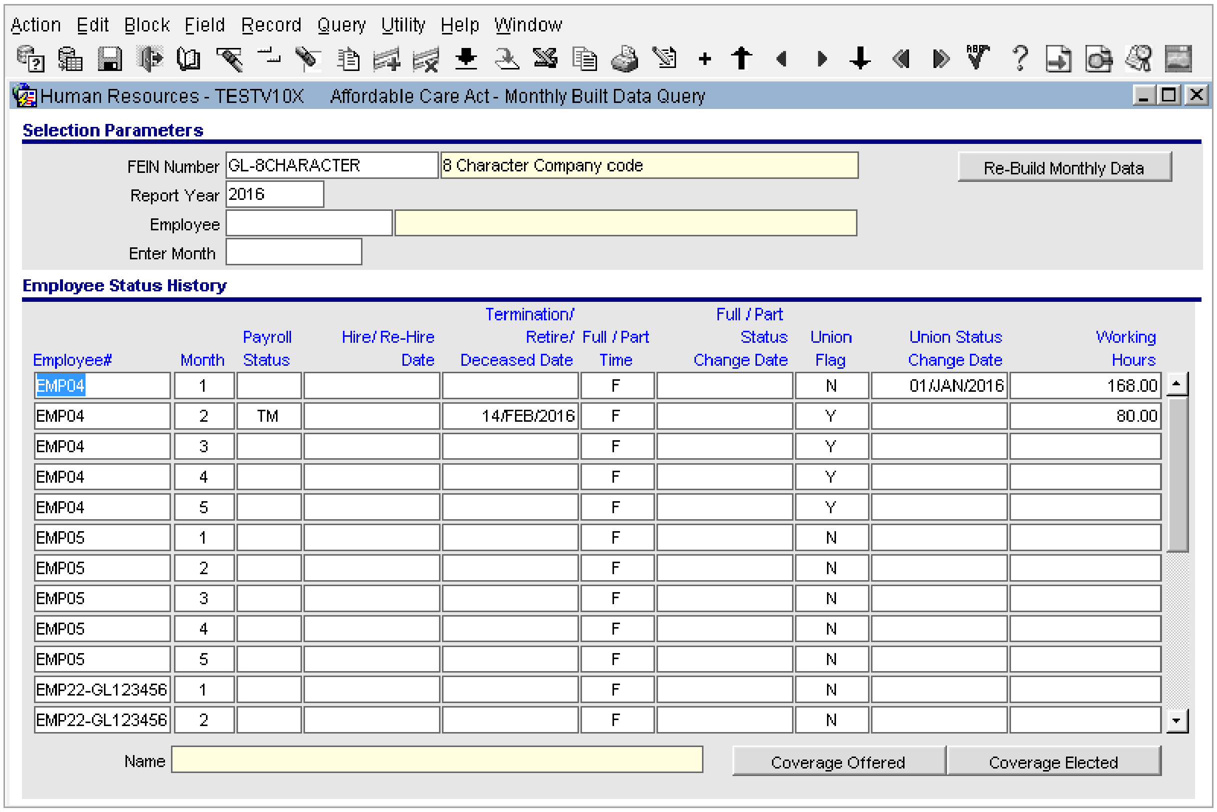
In order for the system to automatically build ACA compliance data, the process that builds it must be enabled. To do so, launch the System Options screen (standard Treeview path**: System > Setup > System Options**), shown below, and on the **General** tab, click the [**Job Queues**] button.



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



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
FEIN Number	Company to which Employees belong
Report Year	Reporting year for ACA compliance reporting
Employee	press F9 and select an Employee, or leave this field blank to indicate all Employees
Enter Month	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

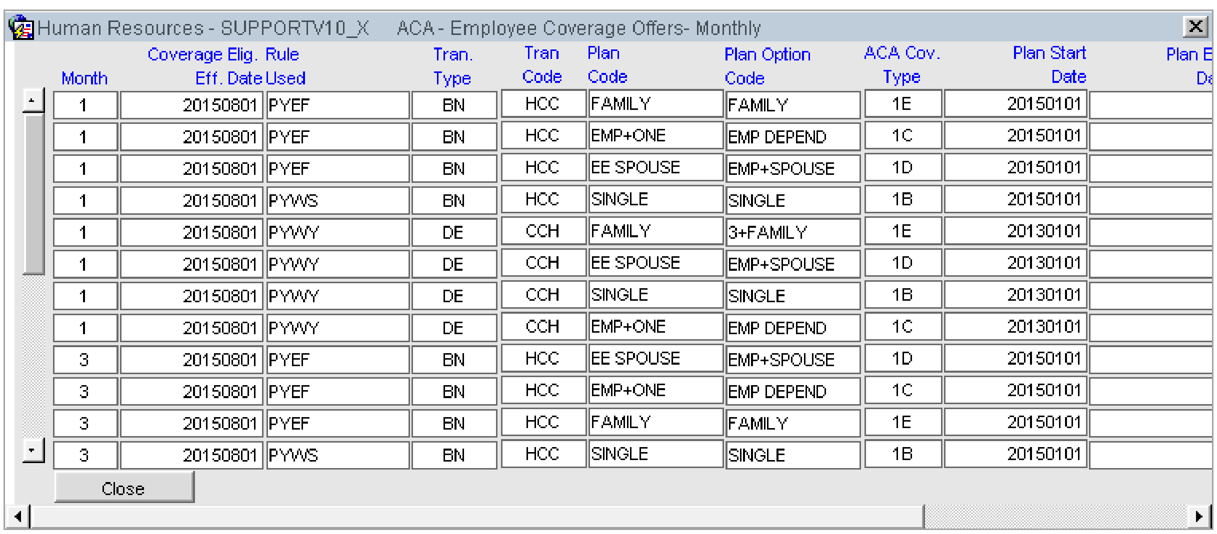
Click this button to run the Payroll ACA Build Monthly utility to rebuild the ACA compliance data for the specified parameters. On the popup, enter the month to rebuild the data for and click [**Build Data**].

Employee Status History – Section

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

Column	Description
Employee#	Employee's number
Month	number in this column represents a calendar month
Payroll Status	entries appear in this column only if the employee's payroll status changed, in which case the new status will be displayed
Hire/Re-Hire Date	entries appear in this column only if the employee was hired/re-hired
Termination Date/Retire Date/Deceased Date	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
Full/Part Time	this column indicates whether the employee was full-time (F) or part-time (P) for the month
Full/Part Change Date	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
Union Flag	this column indicates whether the Union flag for the employee was checked or not for the corresponding month
Union Status Change Date	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
Working Hours	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

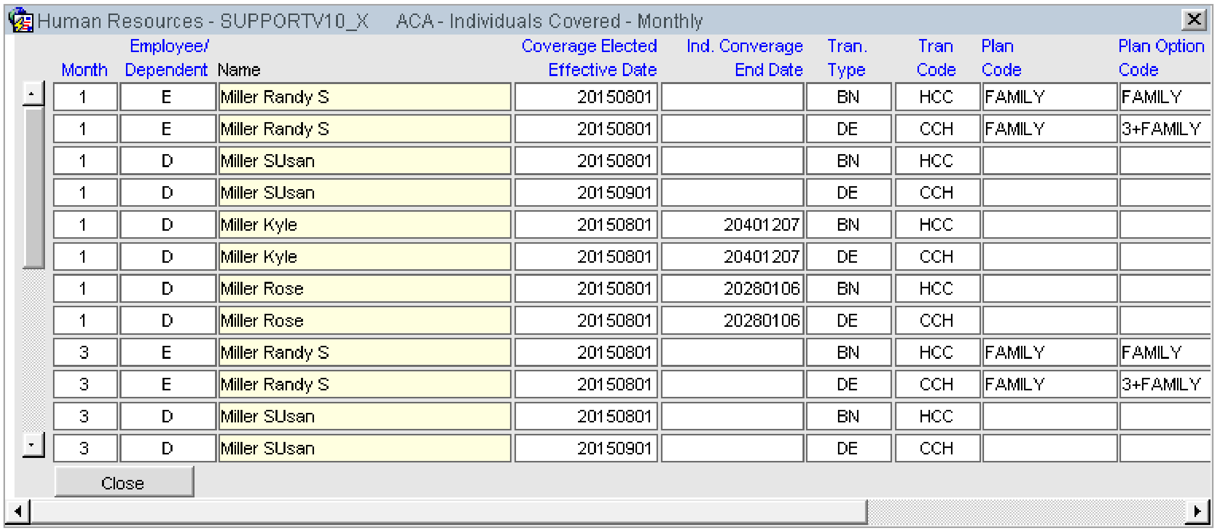

Human Resources - SUPPORTV10_X ACA - Employee Coverage Offers- Monthly

Month	Coverage Eff. Date	Elig. Rule Used	Tran. Type	Tran Code	Plan Code	Plan Option Code	ACA Cov. Type	Plan Start Date	Plan E Da
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	

Close

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



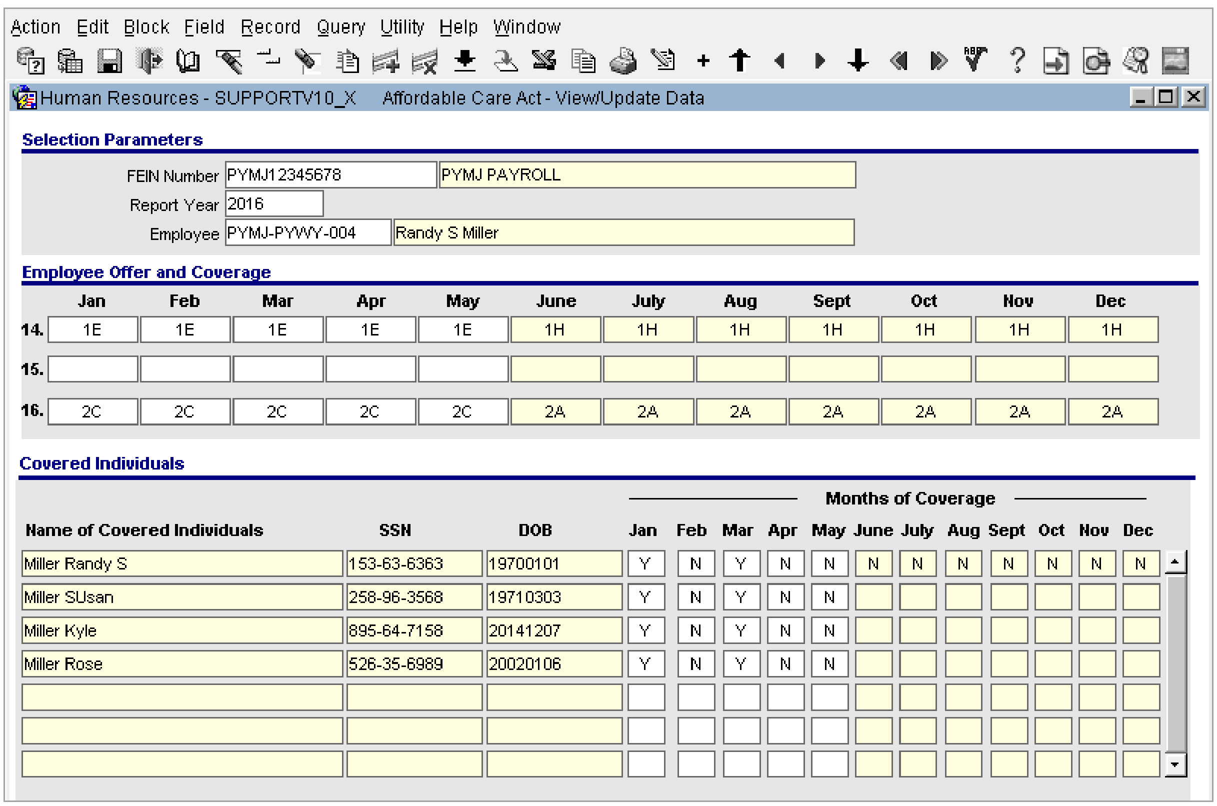
Human Resources - SUPPORTV10_X   ACA - Individuals Covered - Monthly

Month	Employee/ Dependent	Name	Coverage Elected Effective Date	Ind. Converage 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		

Close

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



Action Edit Block Field Record Query Utility Help Window

Human Resources - SUPPORTV10_X   Affordable Care Act - View/Update Data

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

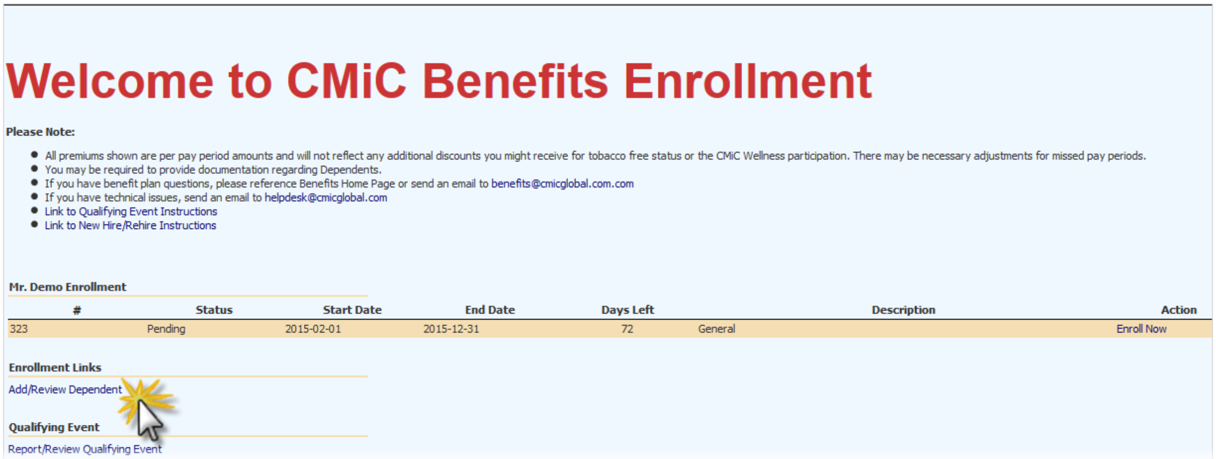
Name of Covered Individuals	SSN	DOB	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
			Months of Coverage											
Miller Randy S	153-63-6363	19700101	Y	N	Y	N	N	N	N	N	N	N	N	N
Miller SUsan	258-96-3568	19710303	Y	N	Y	N	N							
Miller Kyle	895-64-7158	20141207	Y	N	Y	N	N							
Miller Rose	526-35-6989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

Program: HRACA_BLDDATA_MONTHLY; standard Treeview path: ***HR > Reports > Affordable Care Act > ACA Monthly Build > 1095C Query (Yearly)***

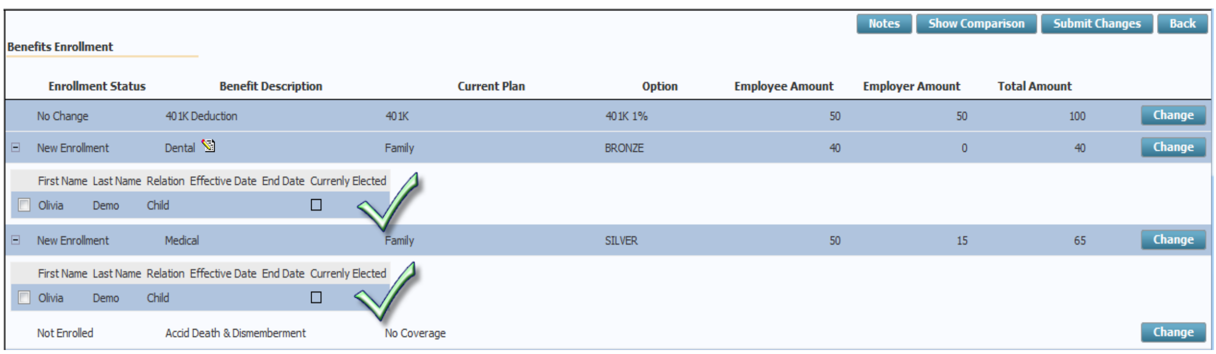
This screen is used to view and edit an Employee's generated ACA compliance data for lines 14 to 16, under the **Employee Offer and Coverage** section. Only data from previous months is editable.

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



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:

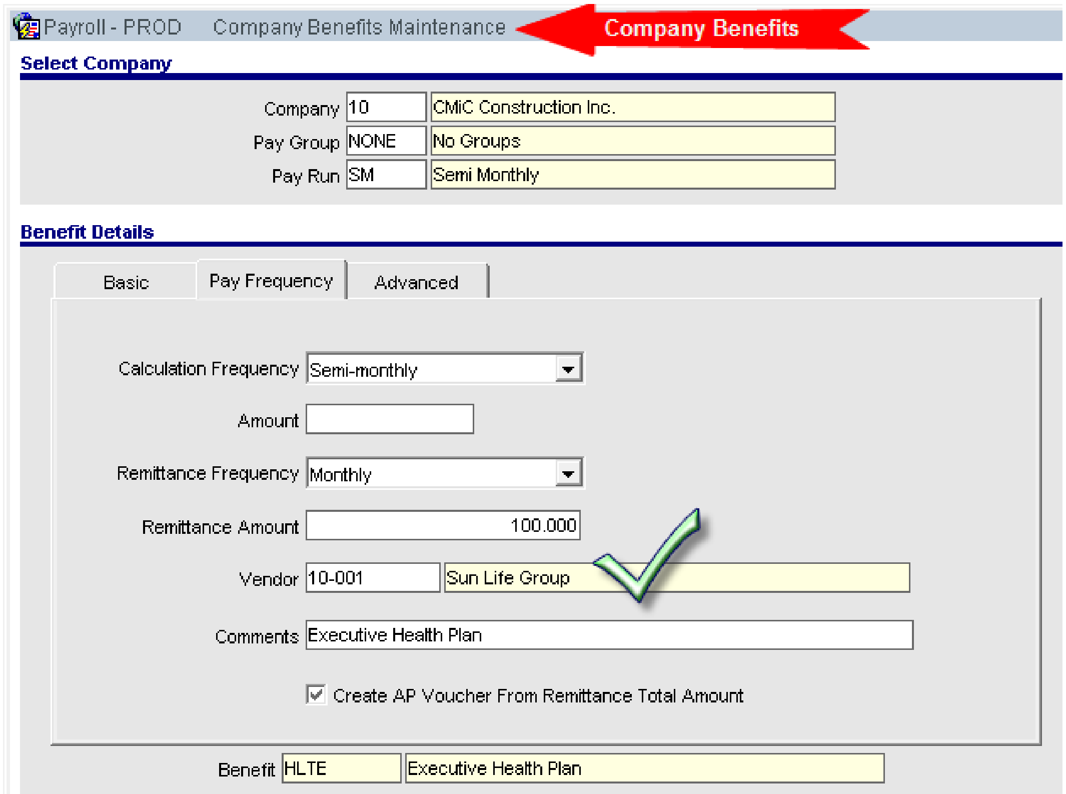


Convert Health Care Plan from Payroll to HR

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:

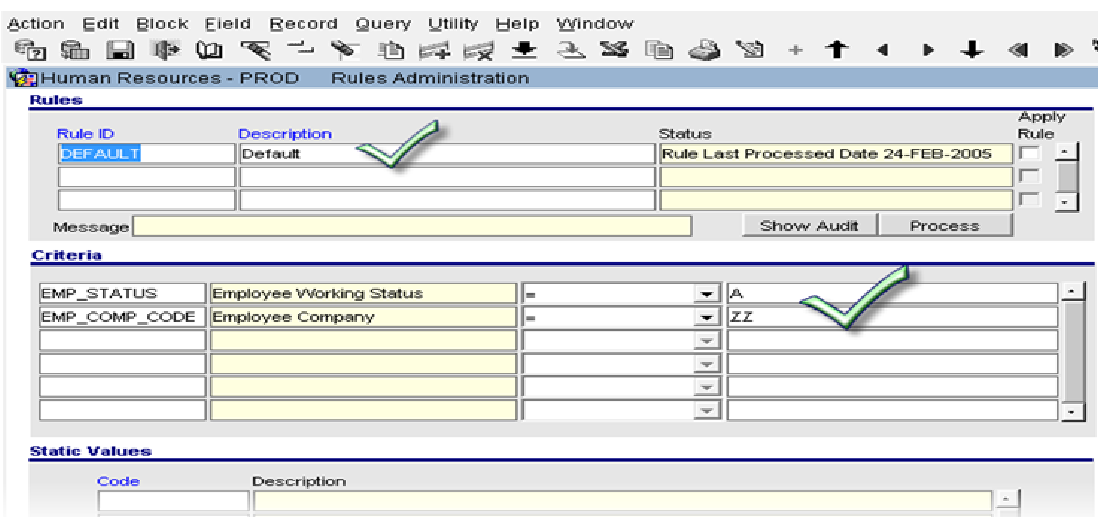
I) User must prepare existing payroll data for HR prior to running utility.

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**):



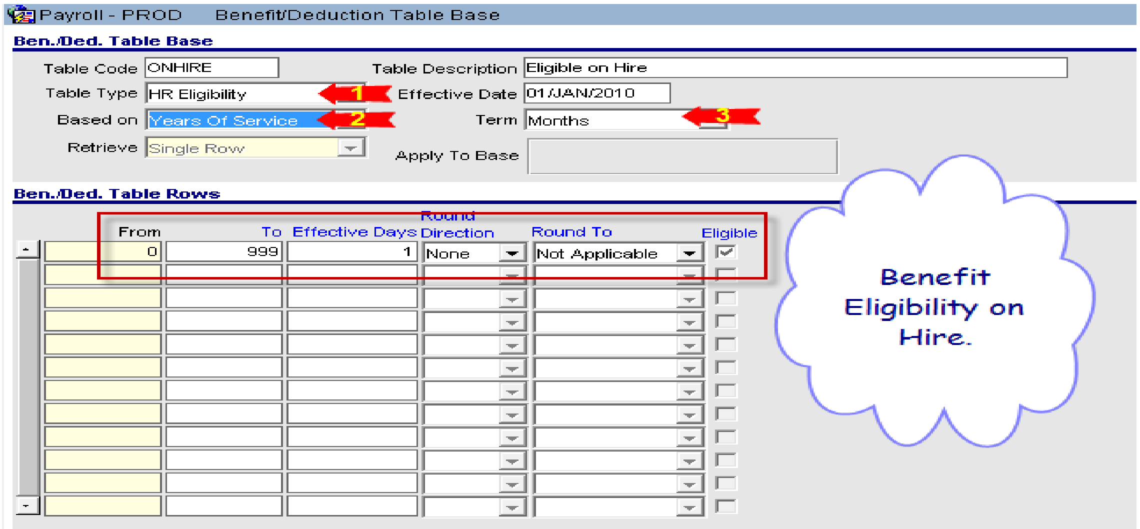
Sample of Company Benefits Maintenance screen (program: PYCOMBEN)

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)

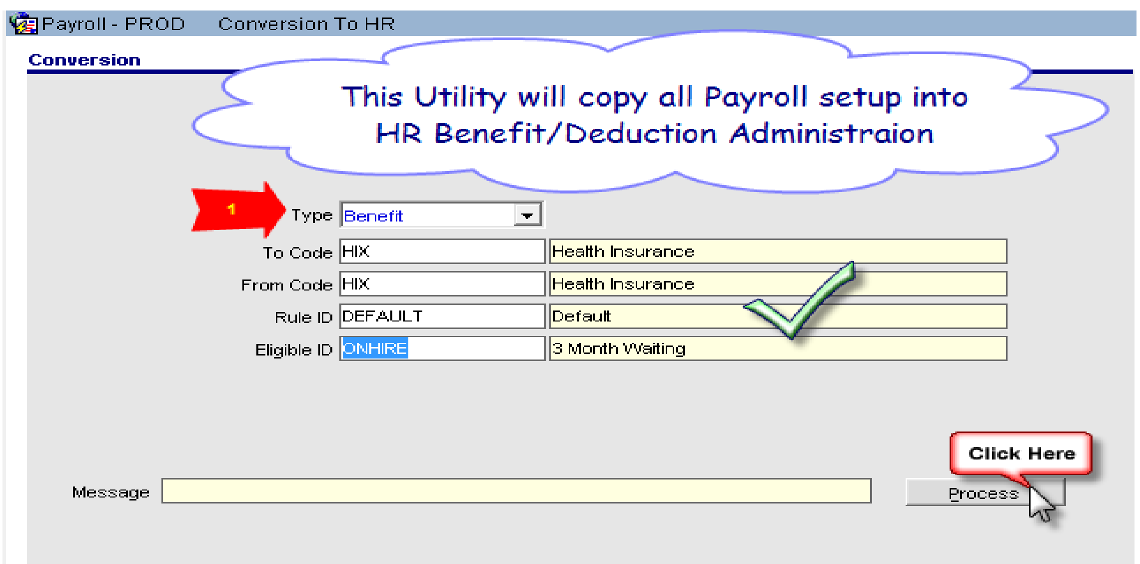
IV) Eligible IDs must be set up for plans using the Benefit/Deduction Table Base screen (standard Treeview path: **Human Resources** > **Benefit Administration** > **Benefit/Deduction Administration** > **Rules**):



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

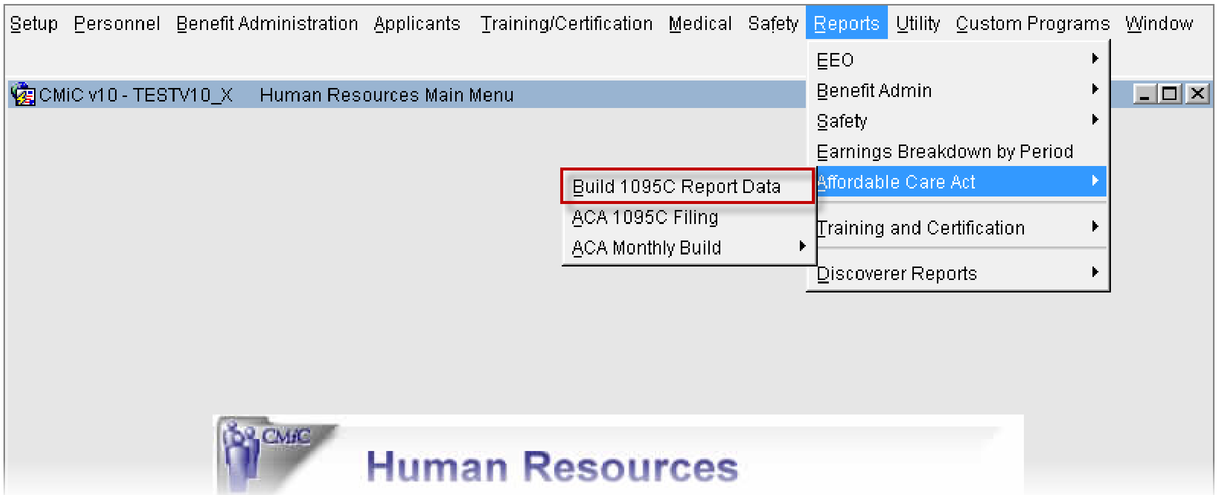
Utility: Plans Conversion from Payroll to Human Capital

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**):



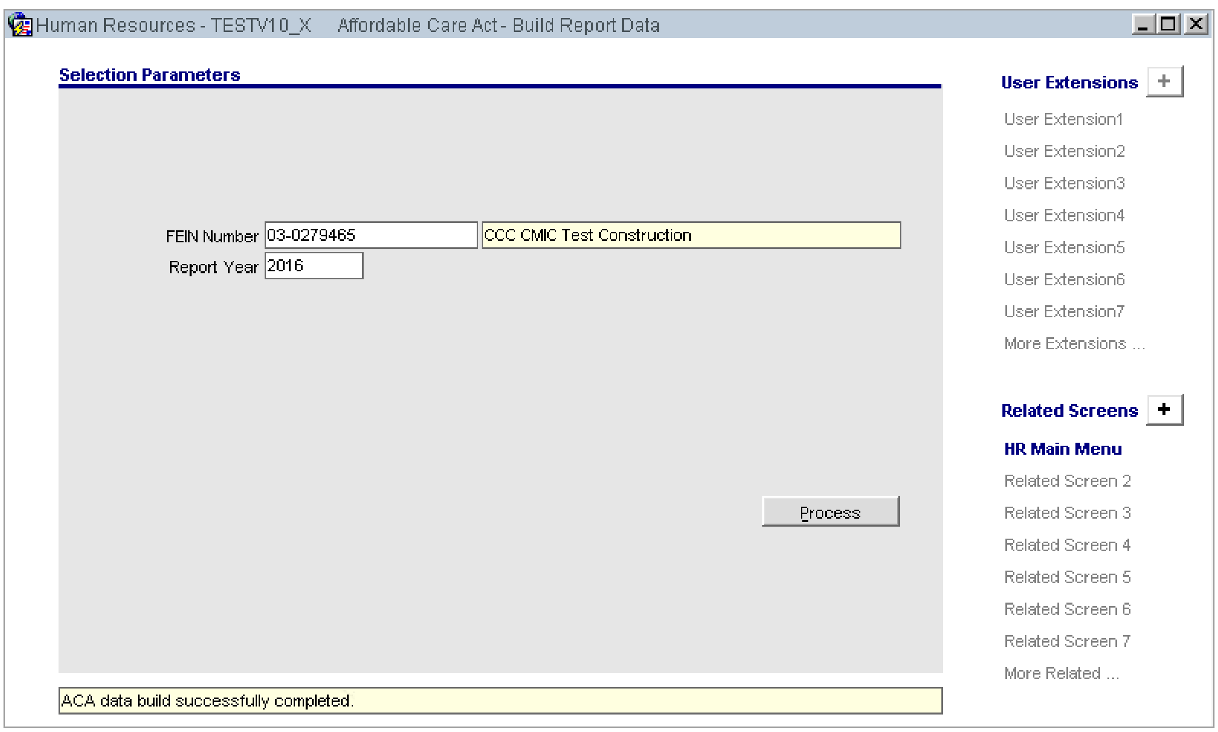
Sample of Conversion to HR screen (program: PYBDCONV).

Create 1095 Export File



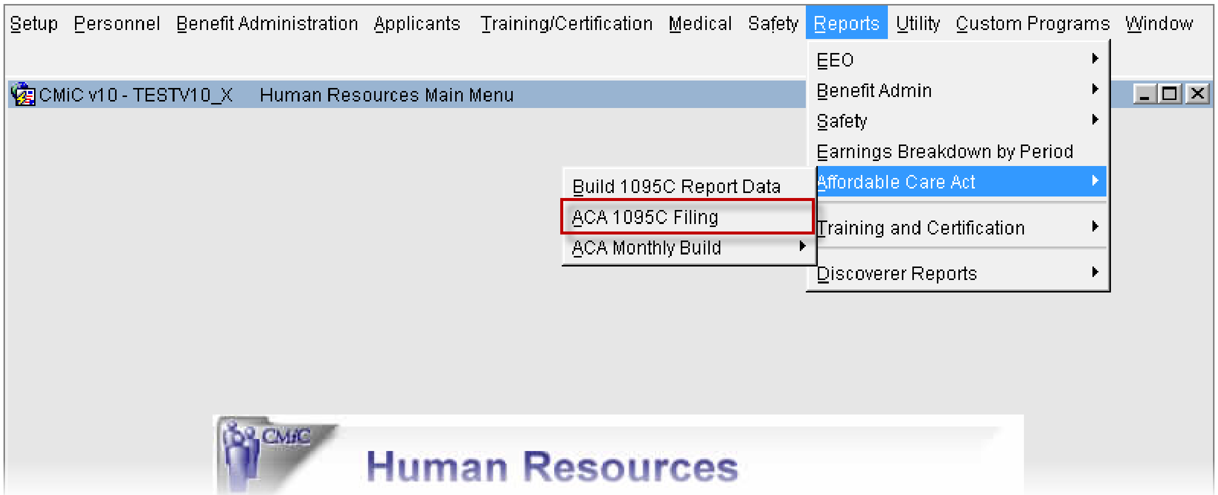
Sample of HR module's main menu.

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**.

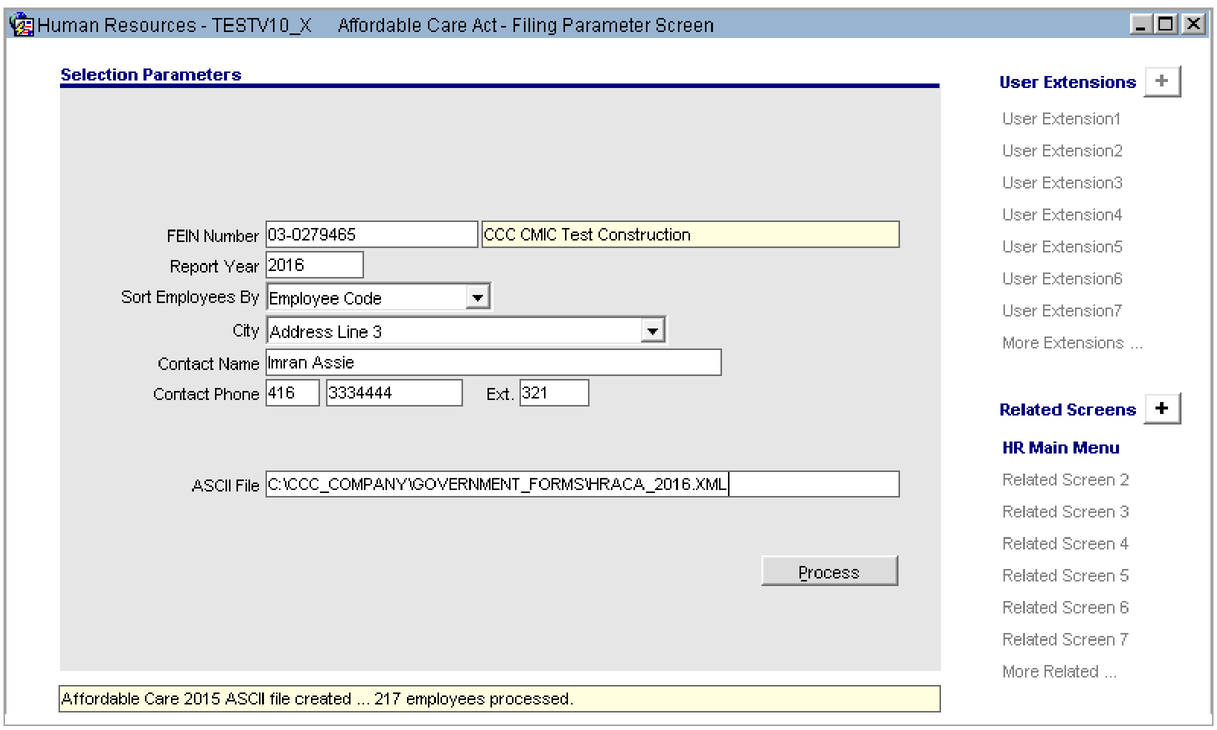


The utility, shown above, runs based on an FEIN number. The utility will process relevant data for all employees, for a specified year, including data from all subsidiaries under the FEIN number for which employees worked. The resulting ACA data will be stored into a separate table, by year, for audit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

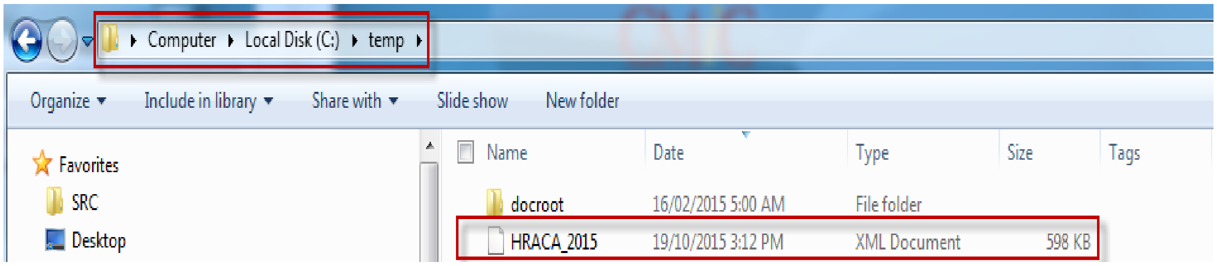
The next step is to export the ADA data into an XML file for Greenshades. This is done through the Affordable Care Act – Filing Parameter screen, and its standard Treeview path is as follows: **Human Resources > Reports > Affordable Care Act > ACA 1095C Filing**.



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.

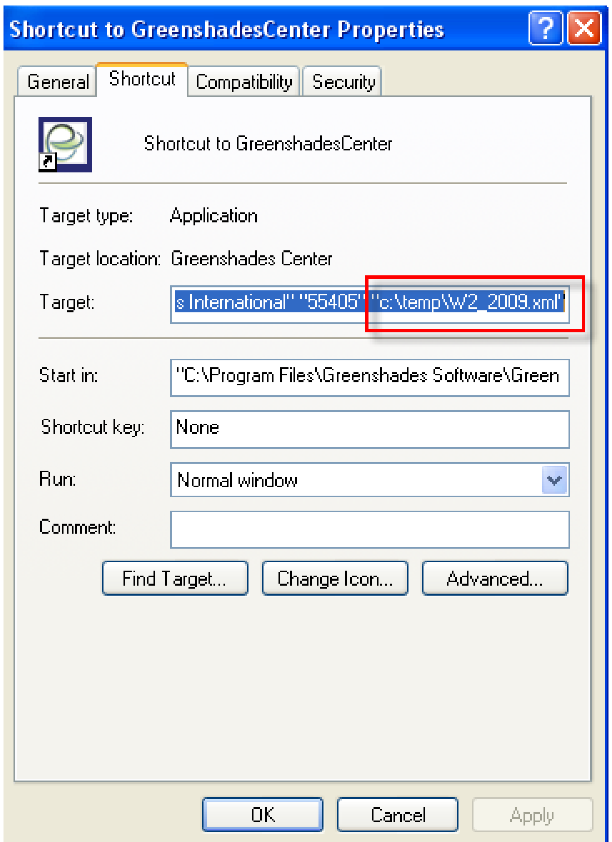


The file will be created using the specified name and file path, as shown below:



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**>**"**

<u>Target Parameters Explained</u>

<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:

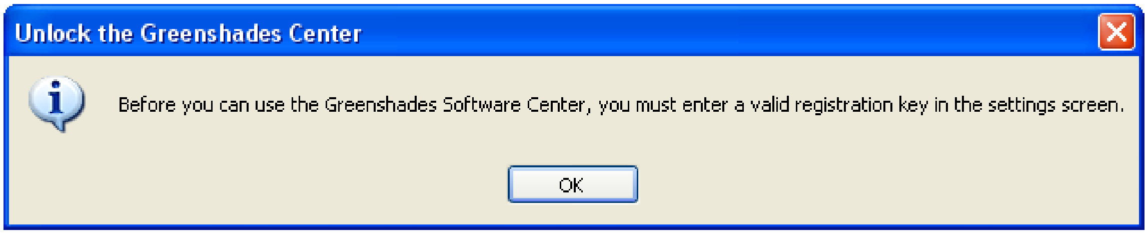
If running Greenshades to process **W-2** tax data, and your company's name is **Acme**, its registered name is **Acme, Inc.**, its Zip Code is **12345**, and the path to the XML file exported by CMiC for uploading is **G:\Greenshades\W2xml.xml**, then you would set the 'Target' property of the desktop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

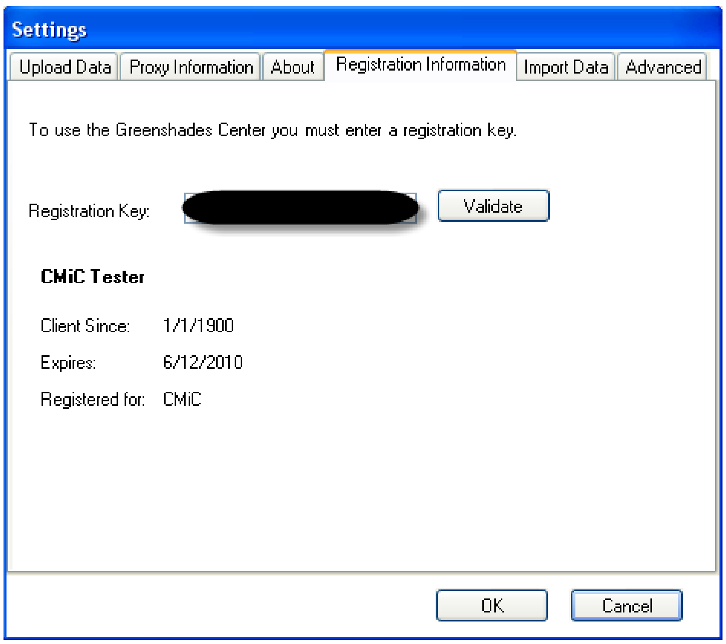
If the following step, Step 5, has already been completed, click the icon to launch Greenshades for a specific type of filing, and continue to the corresponding sub-section under *Reporting via Greenshades* to continue.

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**].

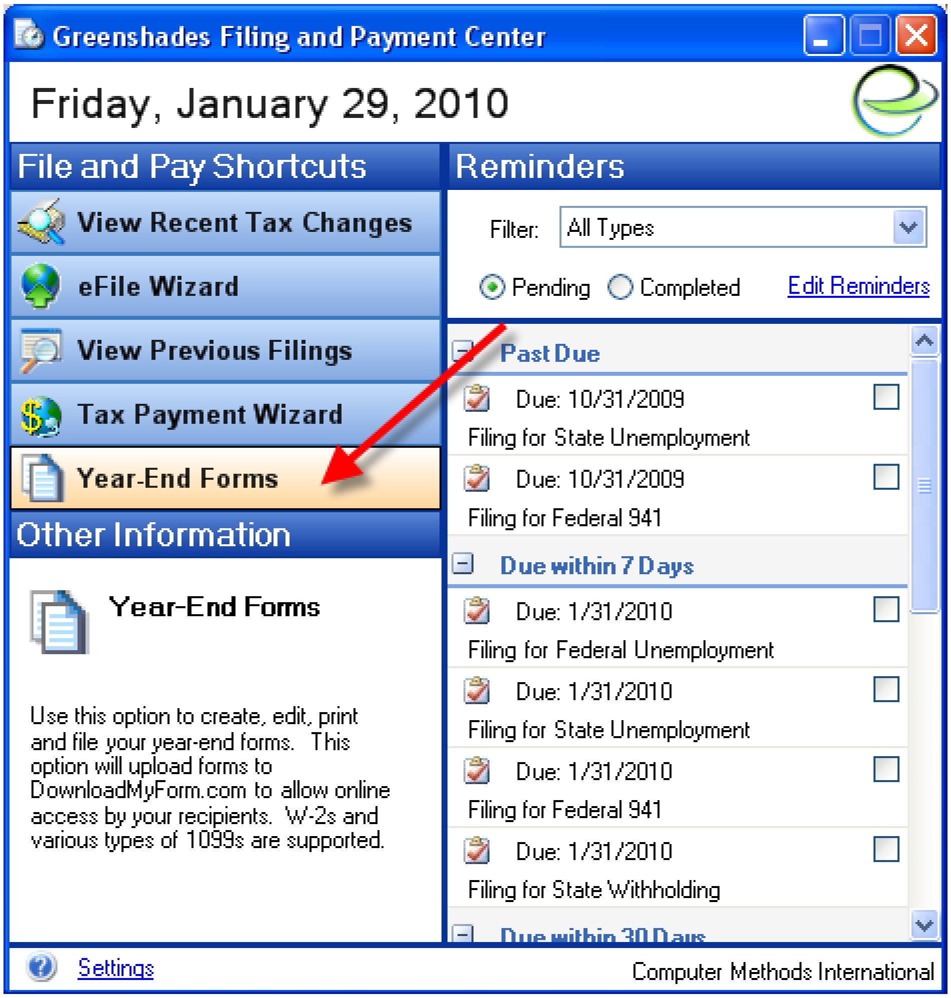
Updating Greenshades

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.

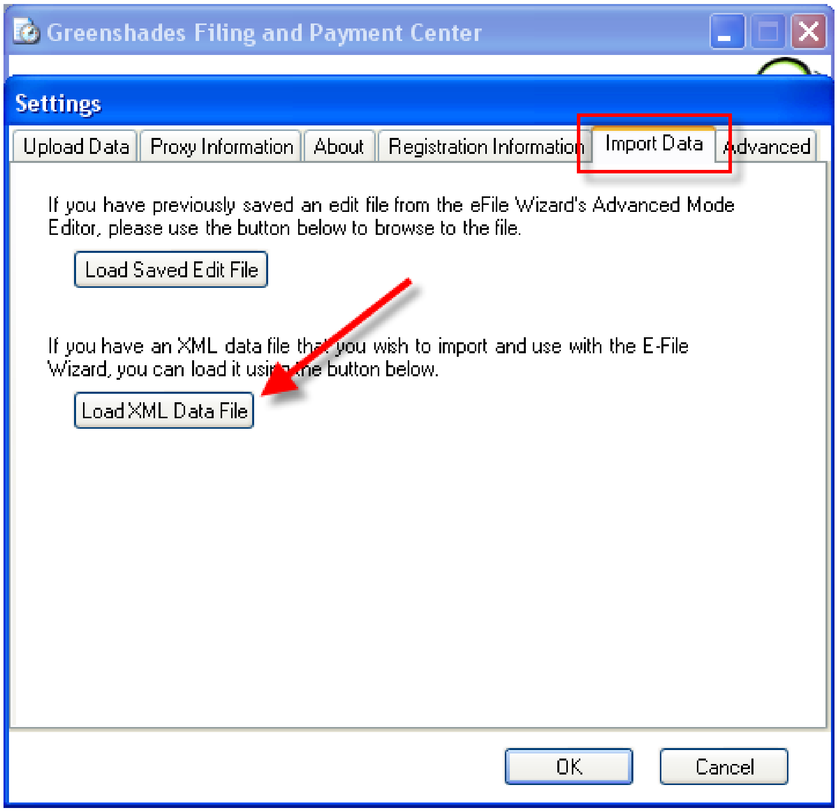
Reporting via Greenshades

W-2 Reporting

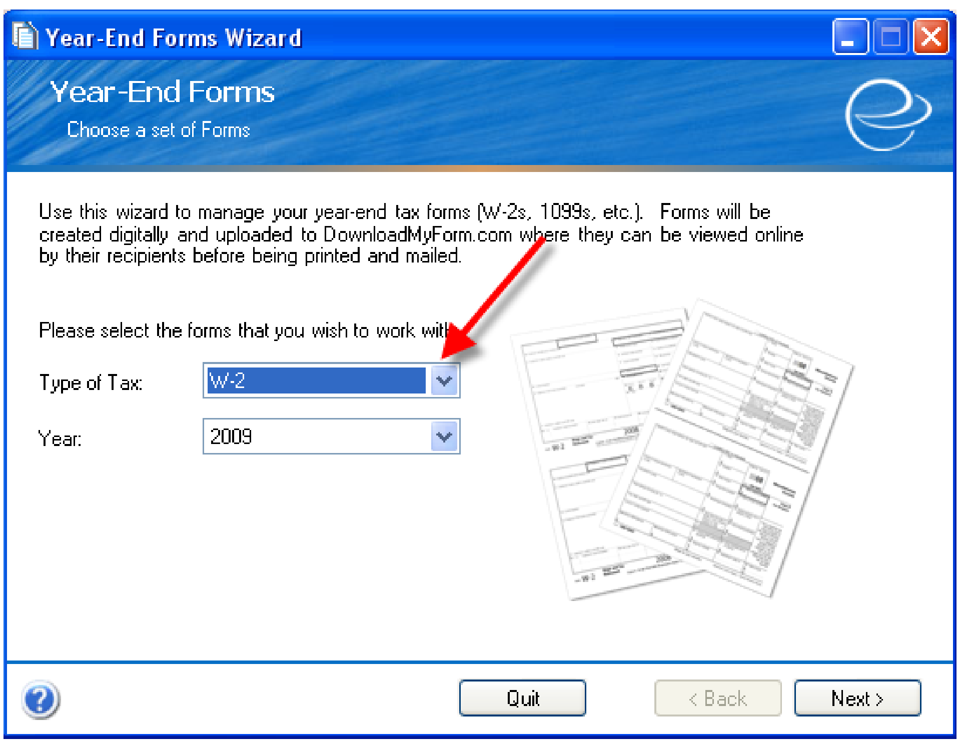


Click the desktop icon created for W-2 reporting in the *Step 4: Icon Setup for Greenshades* section, to bring up the Greenshades screen above.

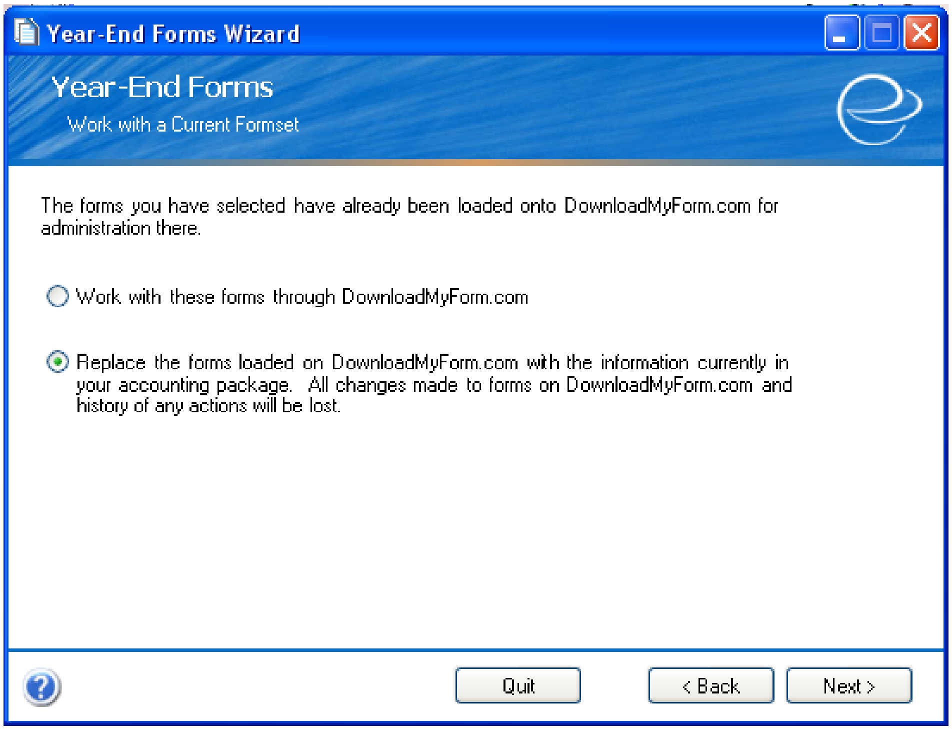
To import W-2 data, click **Year-End Forms**, pointed to by the red arrow above.



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

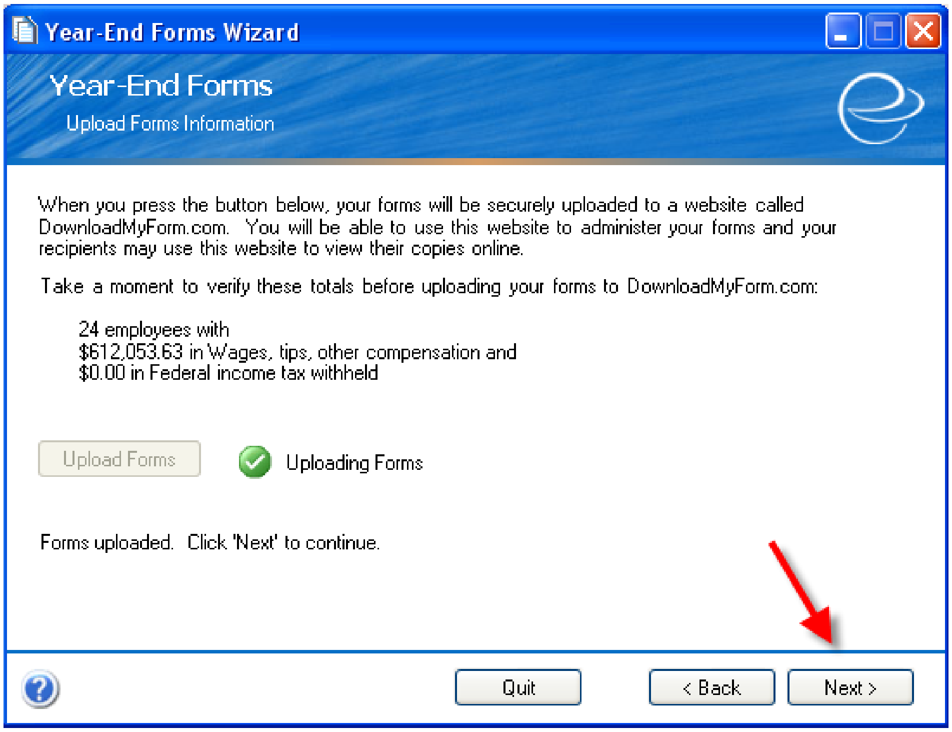


Select W-2 for the **Type of Tax** field, and the relevant year.

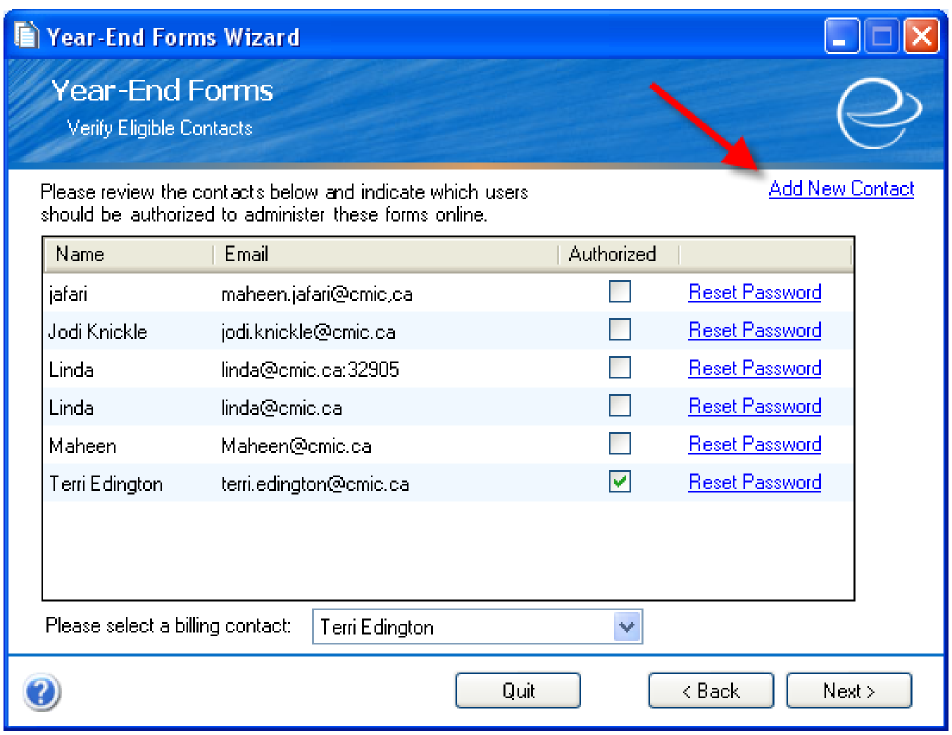


If this is the first time you are loading the W-2 information into Greenshades, select the top option. If you are re-running this process, due to new payroll data, select the second option.

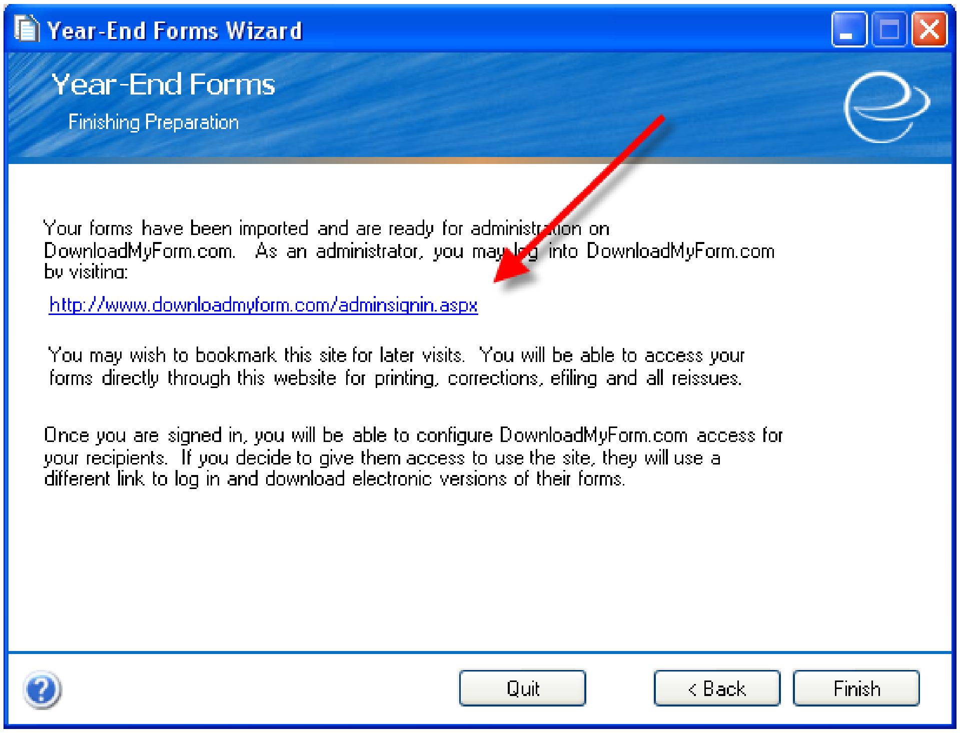
Press the **Upload Forms** button to upload the data to Greenshades.



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

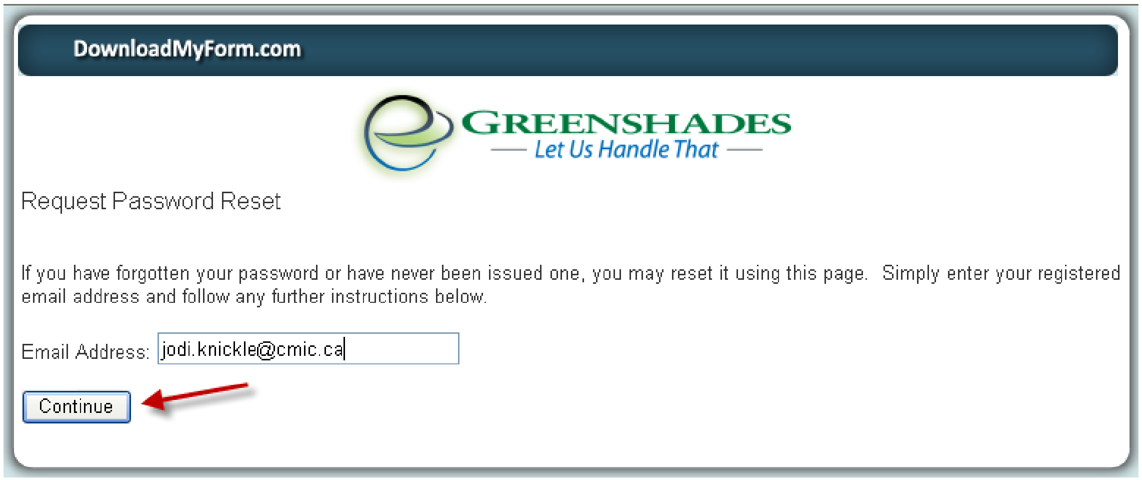


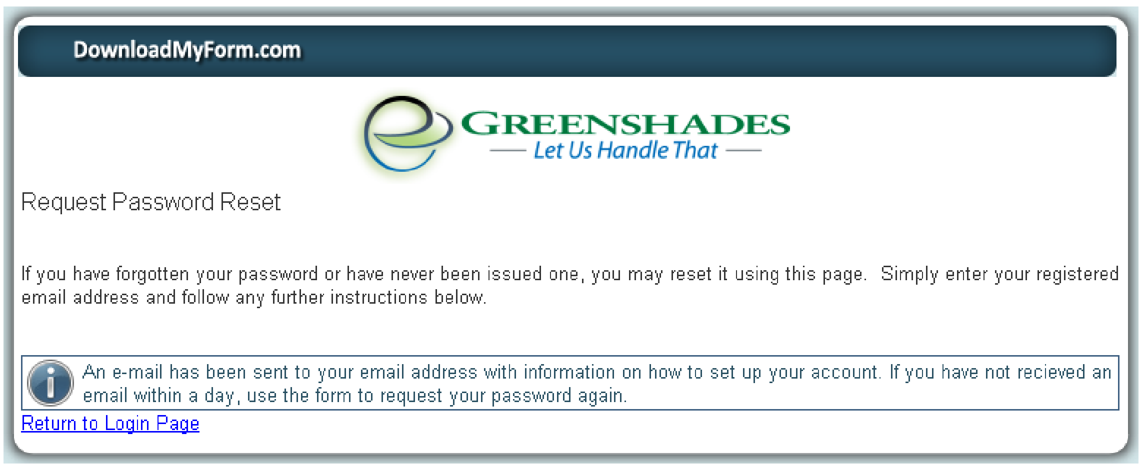
Check all the contacts that should have access to the W-2s and select a billing contact. If you need to add an additional contact, you can do so at this time. Press the **Next** button to continue.

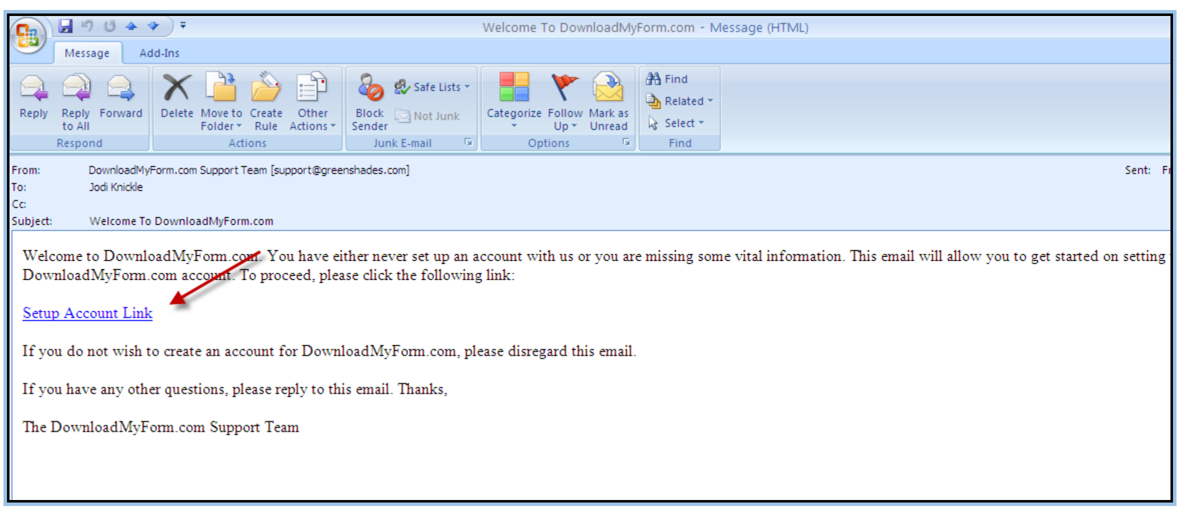


Click the link *(point to by red arrow)* to go to the **DownloadMyForm** website, where the W-2s are stored.

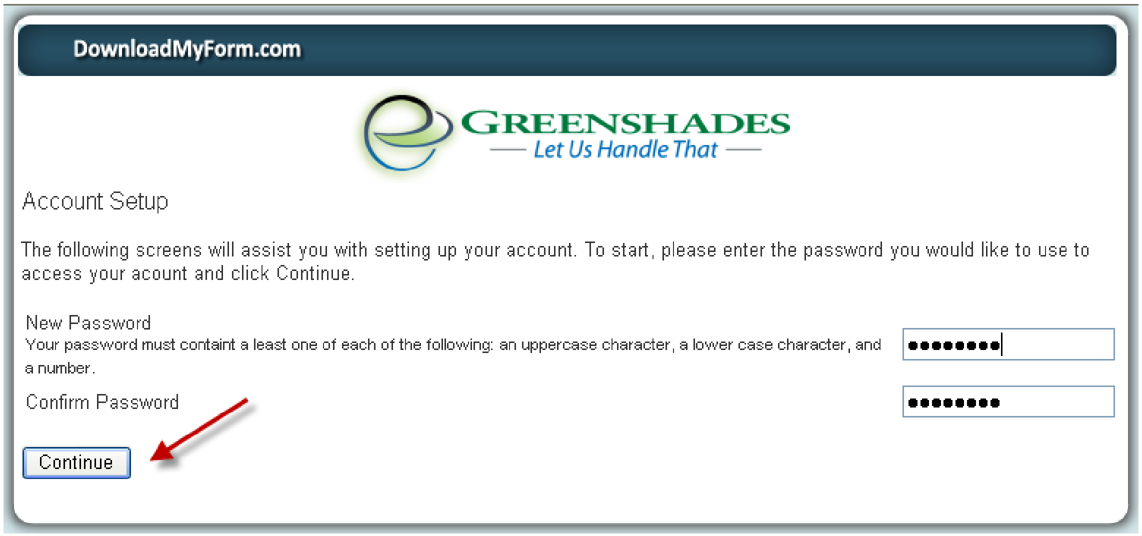
Click the link to create or reset your password if necessary.



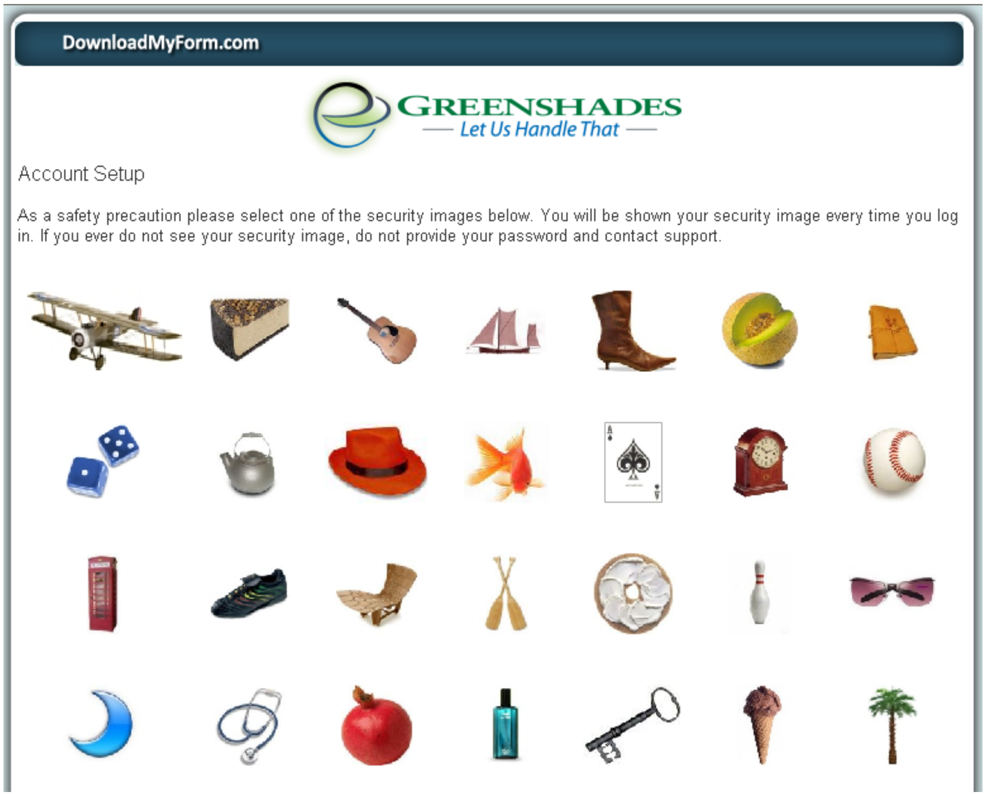




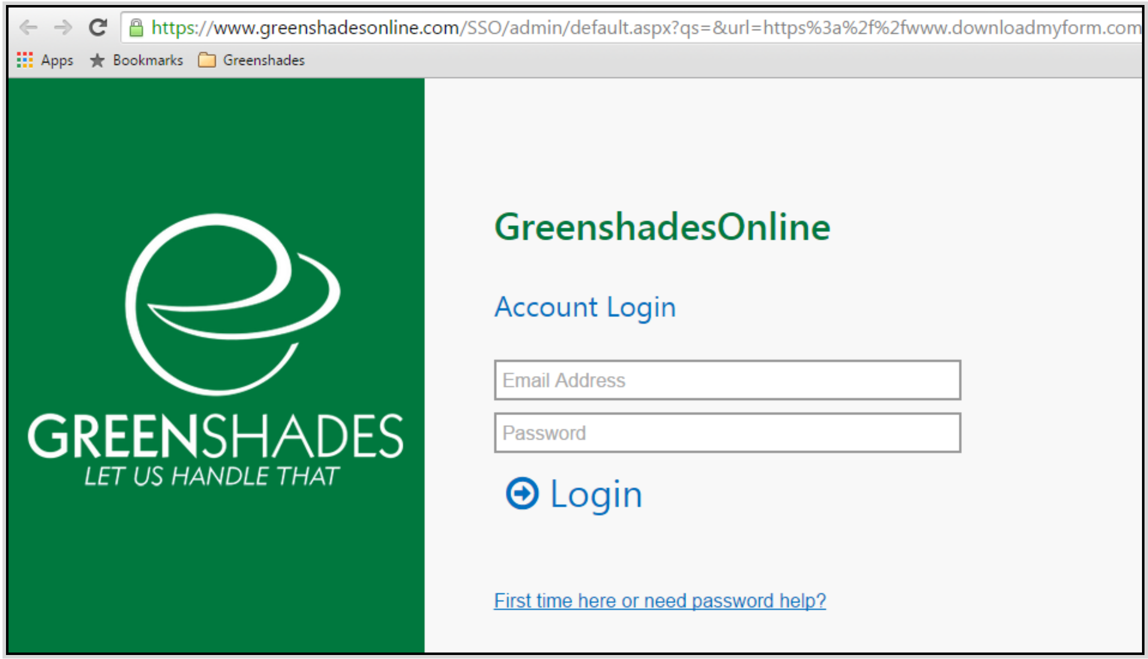
You will receive an email with a link for setting up your password.



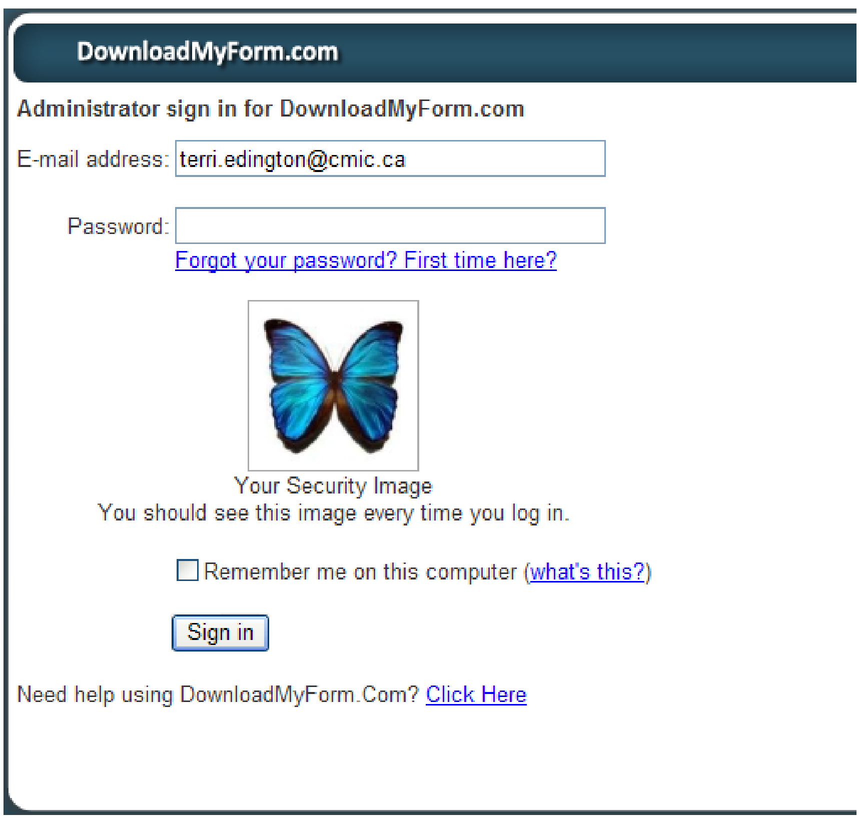
Answer the security questions.



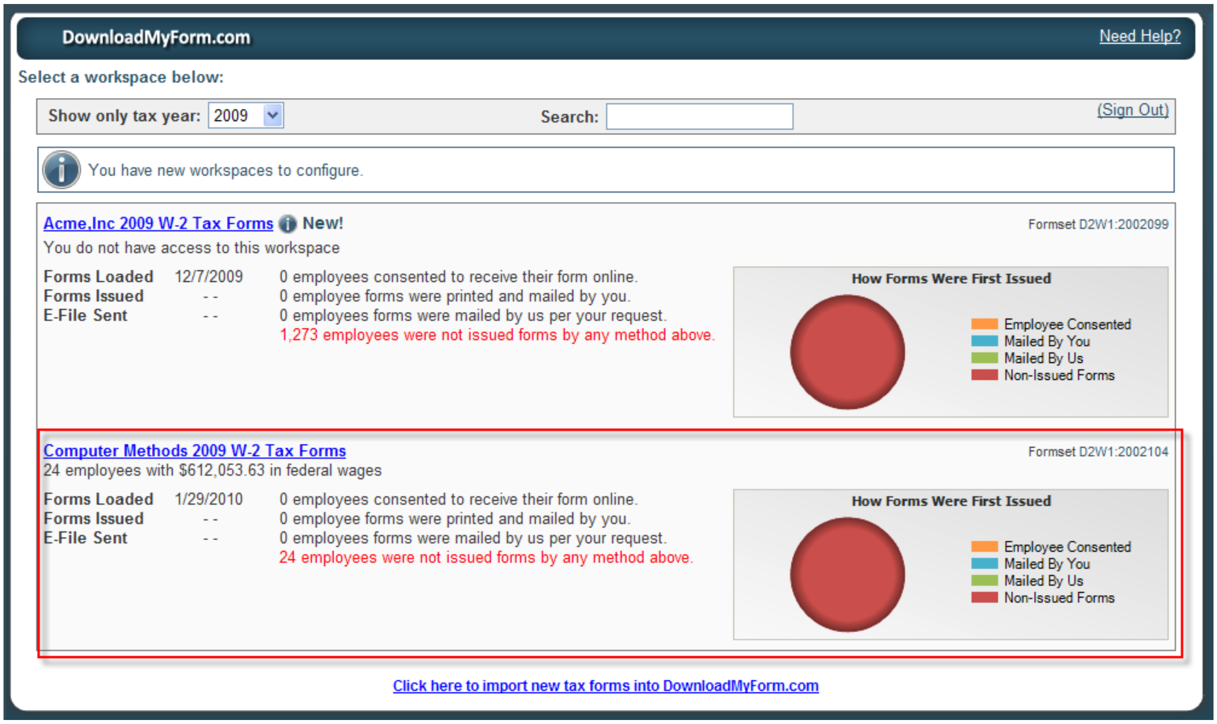
Select a security image, by clicking on one of the icons.



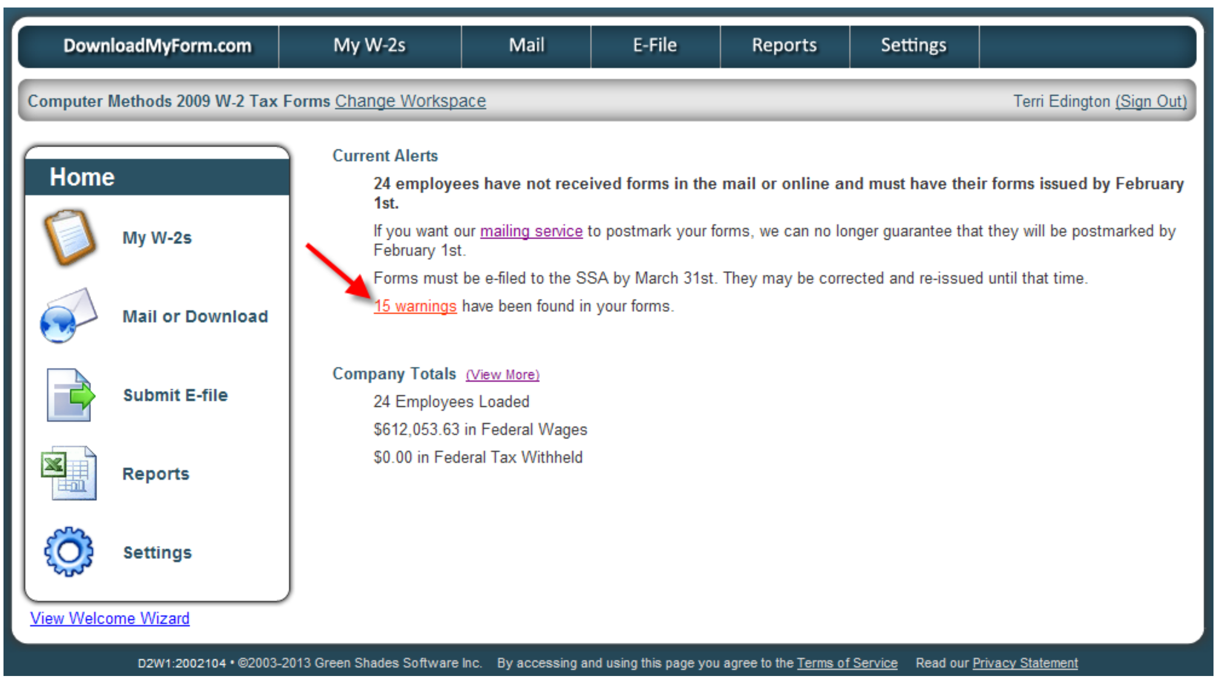
Access to the **DownloadMyForm** website can be done through a web browser by specifying the following address: **www.downloadmyform.com**. You may want to save this website as a favorite in your browser.



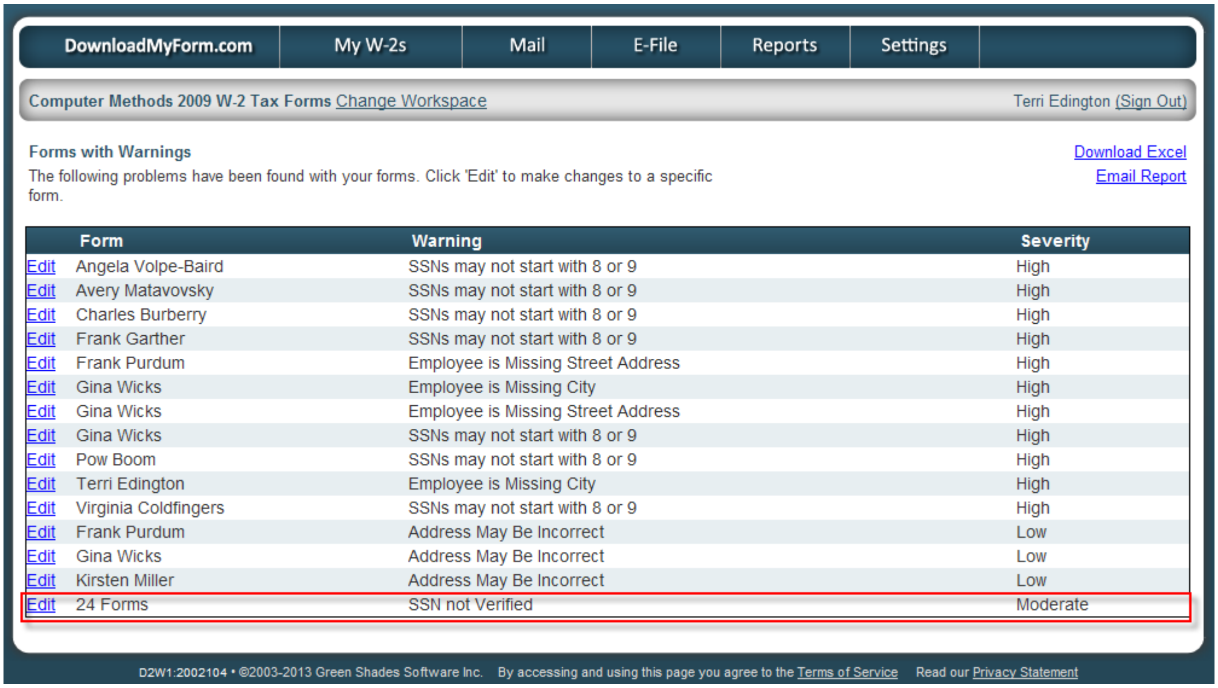
You should always see your security image after putting in your e-mail address



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



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

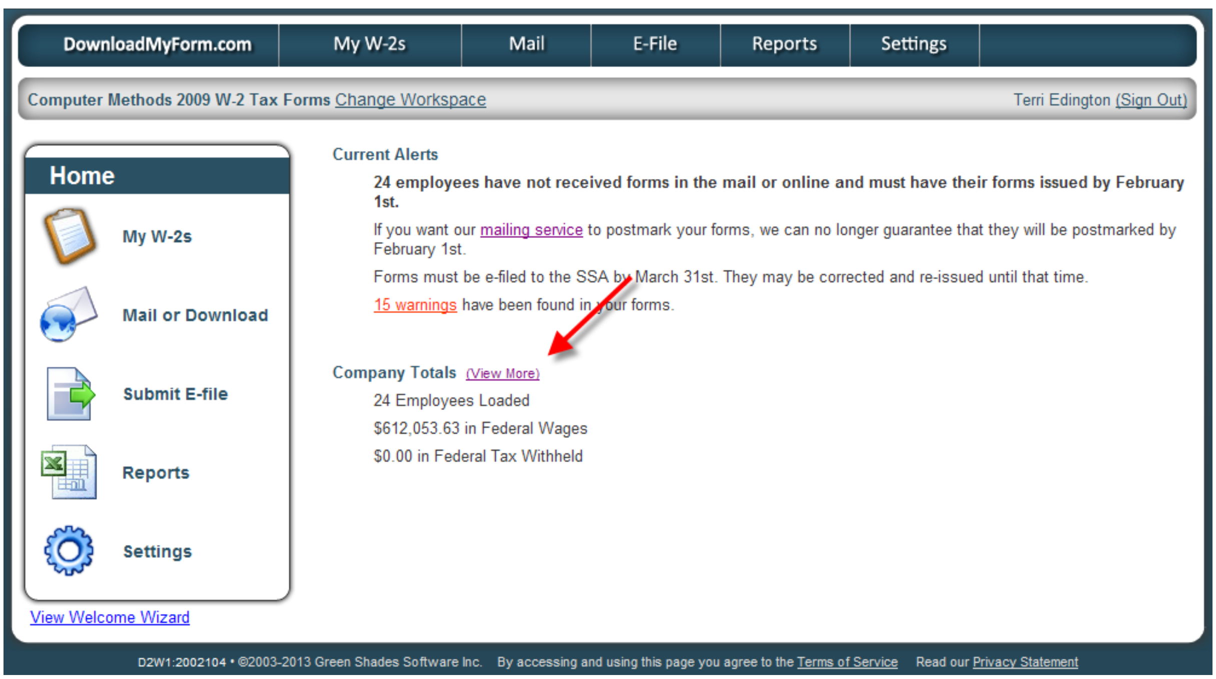
The following problems have been found with your forms. Click 'Edit' to make changes to a specific form.

Download Excel
Email Report

	Form	Warning	Severity
Edit	Angela Volpe-Baird	SSNs may not start with 8 or 9	High
Edit	Avery Matavovsky	SSNs may not start with 8 or 9	High
Edit	Charles Burberry	SSNs may not start with 8 or 9	High
Edit	Frank Garther	SSNs may not start with 8 or 9	High
Edit	Frank Purdum	Employee is Missing Street Address	High
Edit	Gina Wicks	Employee is Missing City	High
Edit	Gina Wicks	Employee is Missing Street Address	High
Edit	Gina Wicks	SSNs may not start with 8 or 9	High
Edit	Pow Boom	SSNs may not start with 8 or 9	High
Edit	Terri Edington	Employee is Missing City	High
Edit	Virginia Coldfingers	SSNs may not start with 8 or 9	High
Edit	Frank Purdum	Address May Be Incorrect	Low
Edit	Gina Wicks	Address May Be Incorrect	Low
Edit	Kirsten Miller	Address May Be Incorrect	Low
Edit	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)

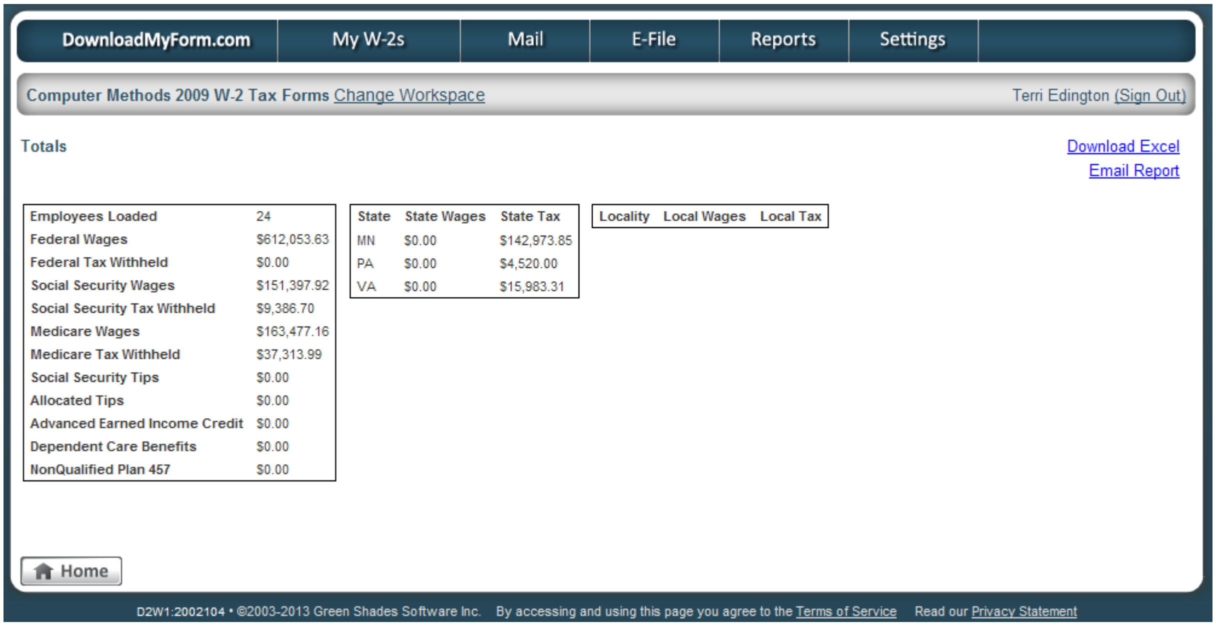
24 Employees Loaded

$612,053.63 in Federal Wages

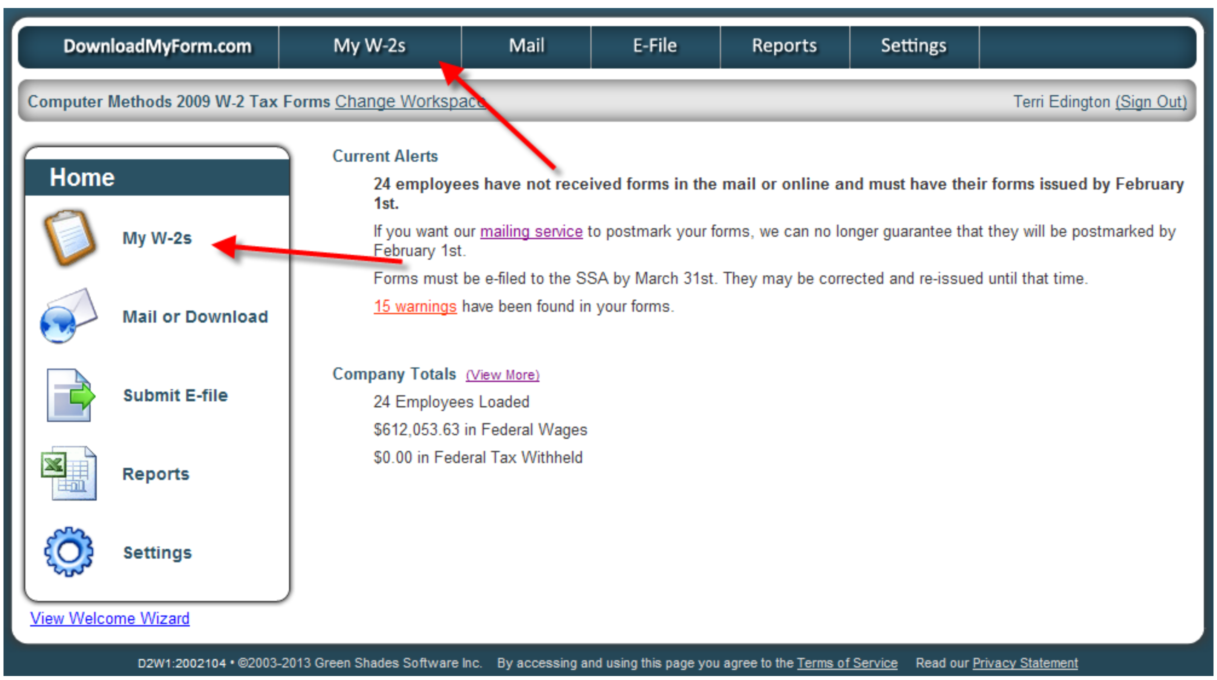
$0.00 in Federal Tax Withheld

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.

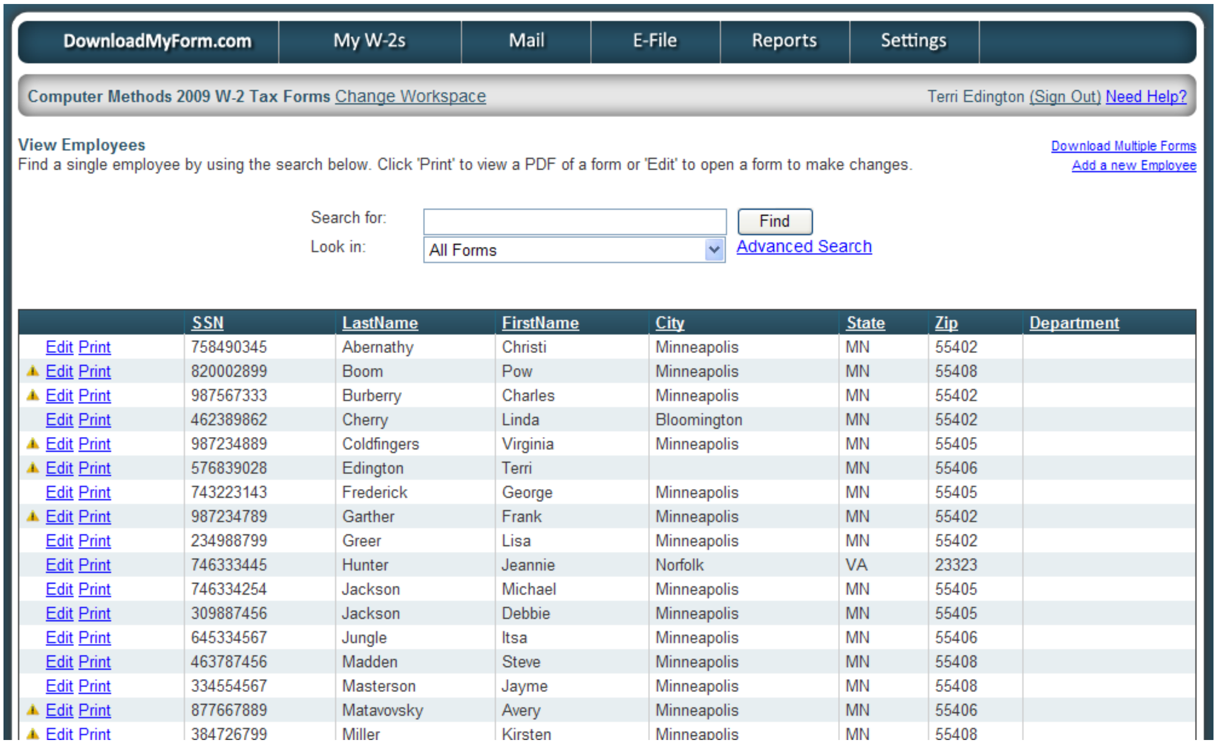


The totals screen is a great way to reconcile the W-2 data with tax reports from CMiC.



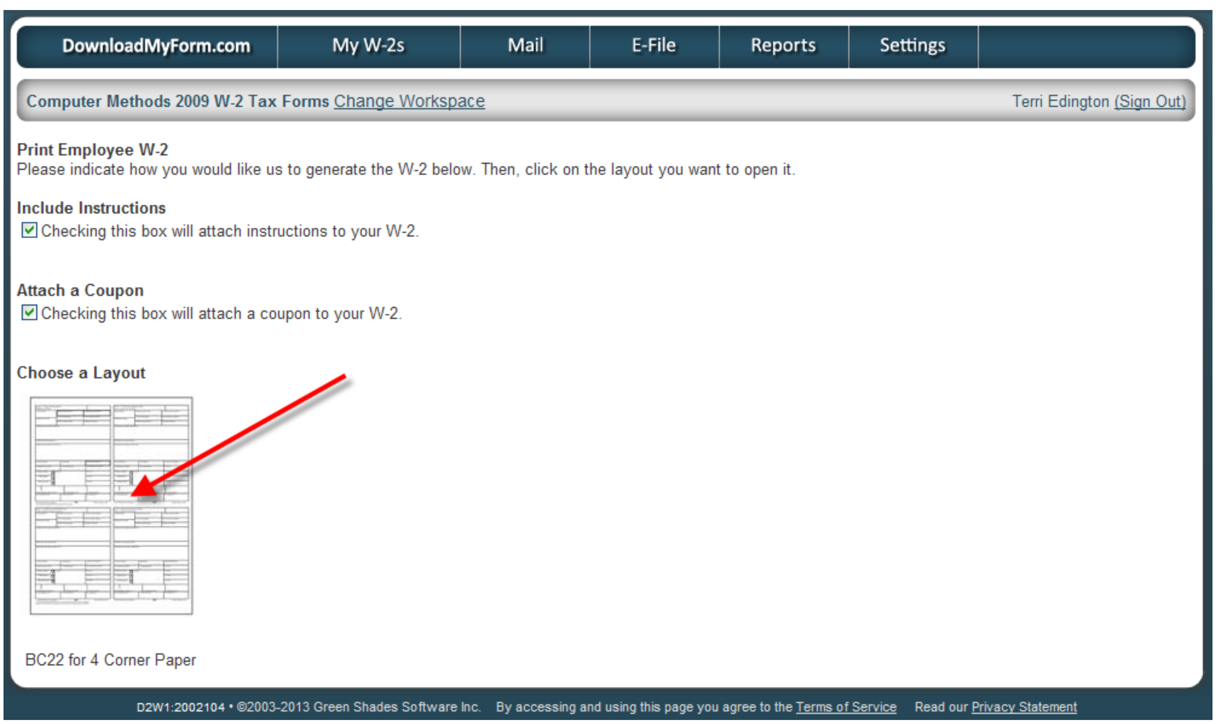
The icons on the left bring you to the same place as the tabs along the top.

My W-2s

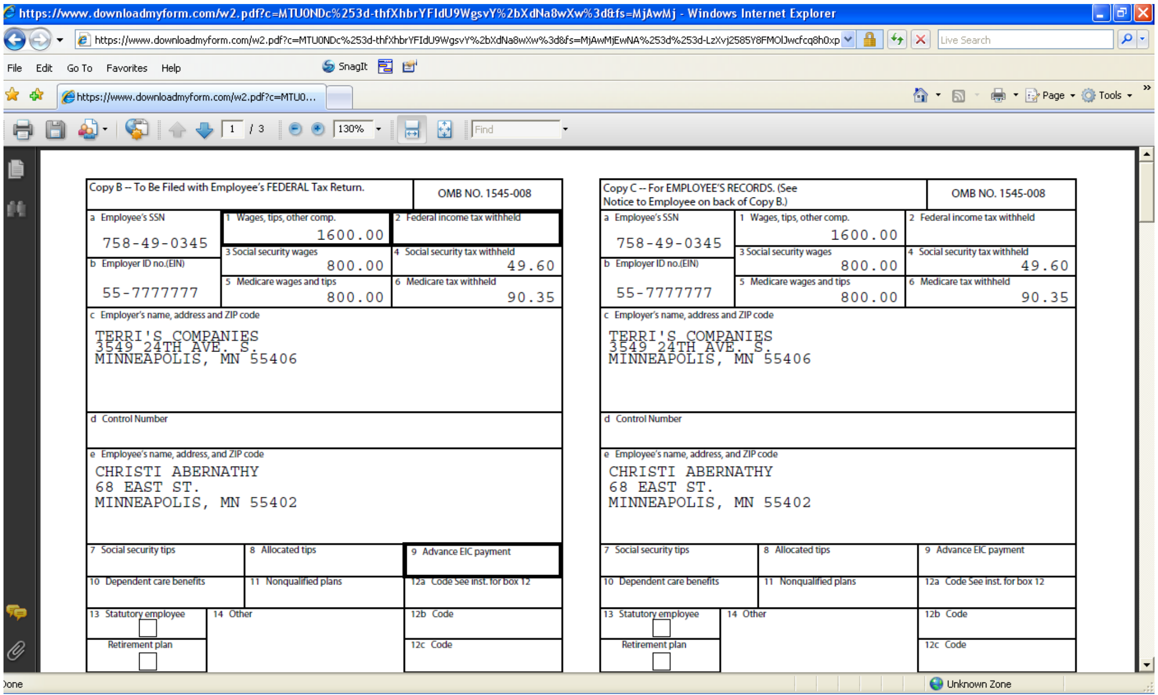


	SSN	LastName	FirstName	City	State	Zip	Department
Edit Print	758490345	Abernathy	Christi	Minneapolis	MN	55402	
Edit Print	820002899	Boom	Pow	Minneapolis	MN	55408	
Edit Print	987567333	Burberry	Charles	Minneapolis	MN	55402	
Edit Print	462389862	Cherry	Linda	Bloomington	MN	55402	
Edit Print	987234889	Coldfingers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

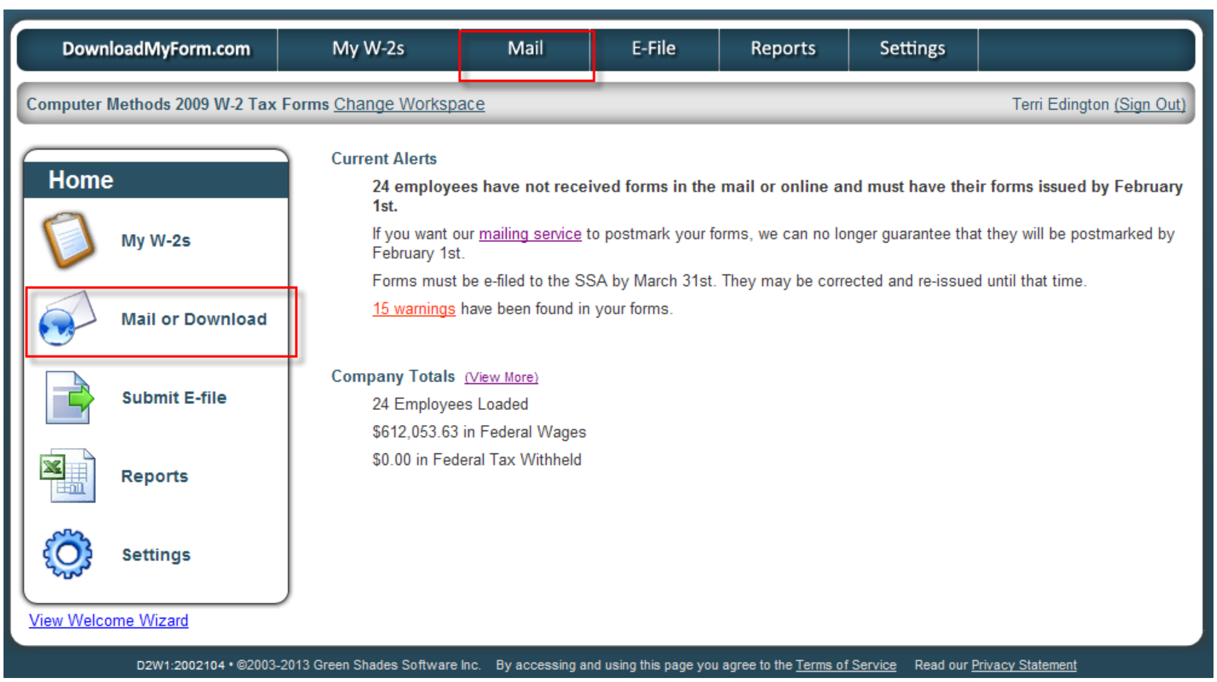


You may indicate how you would like to generate the W-2s, and select a layout.

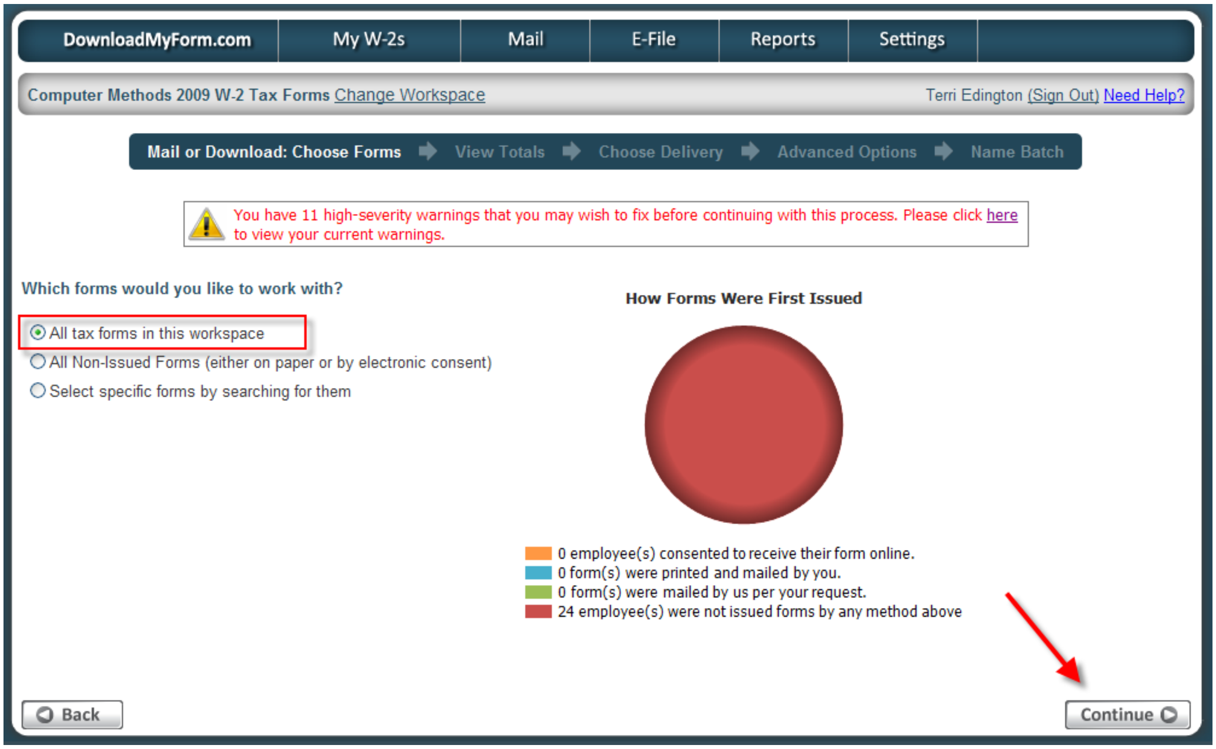


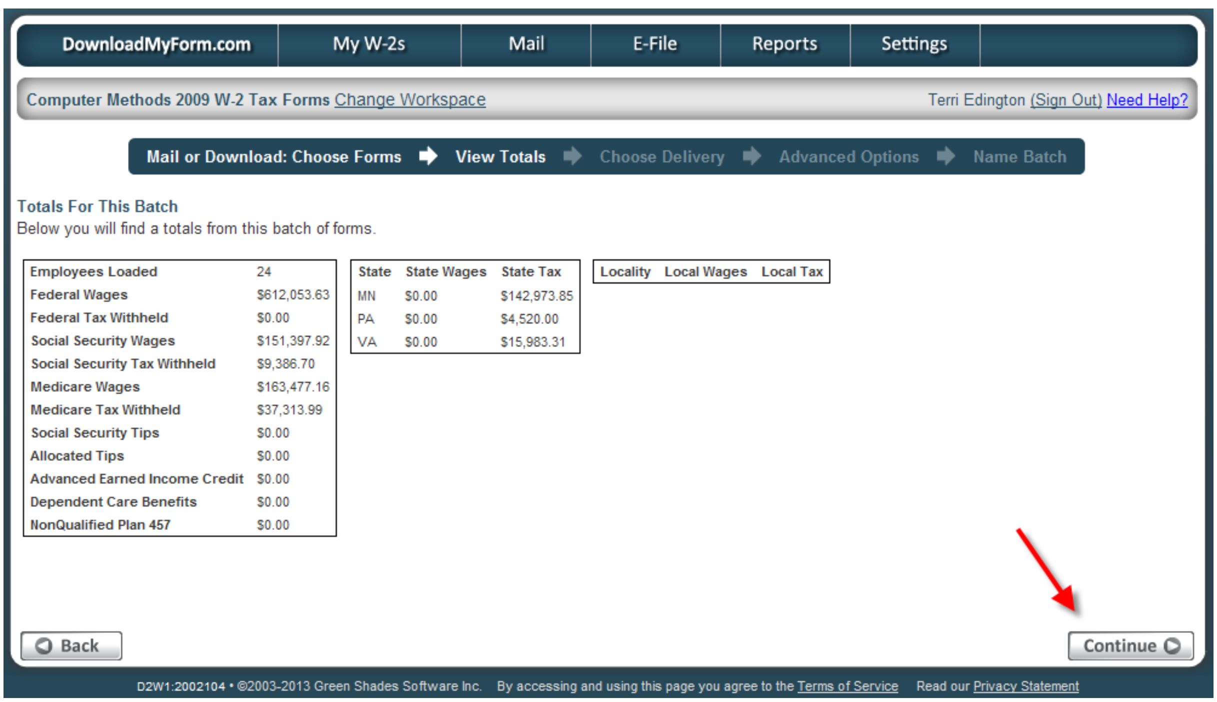
Select a layout.

Mail

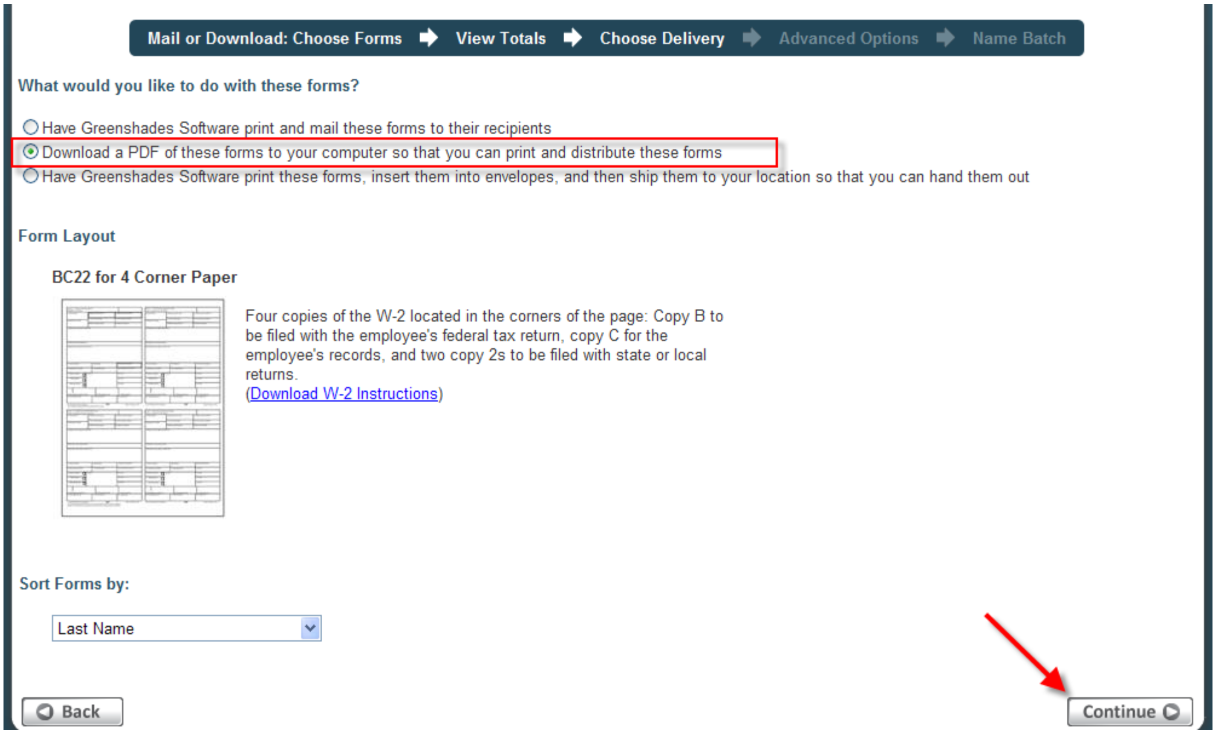


Mail allows you to create a batch of all W-2s. If you want to print all employee W-2s at the same time, you would do this through this **Mail or Download** functionality.

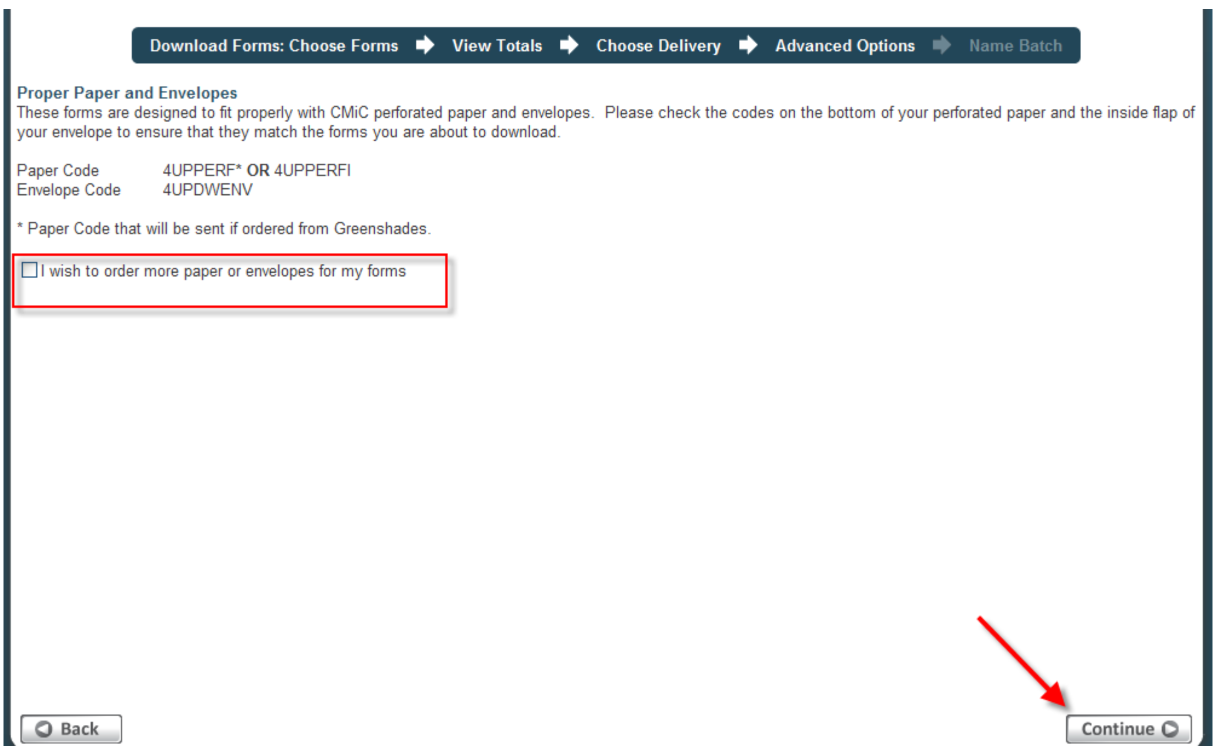




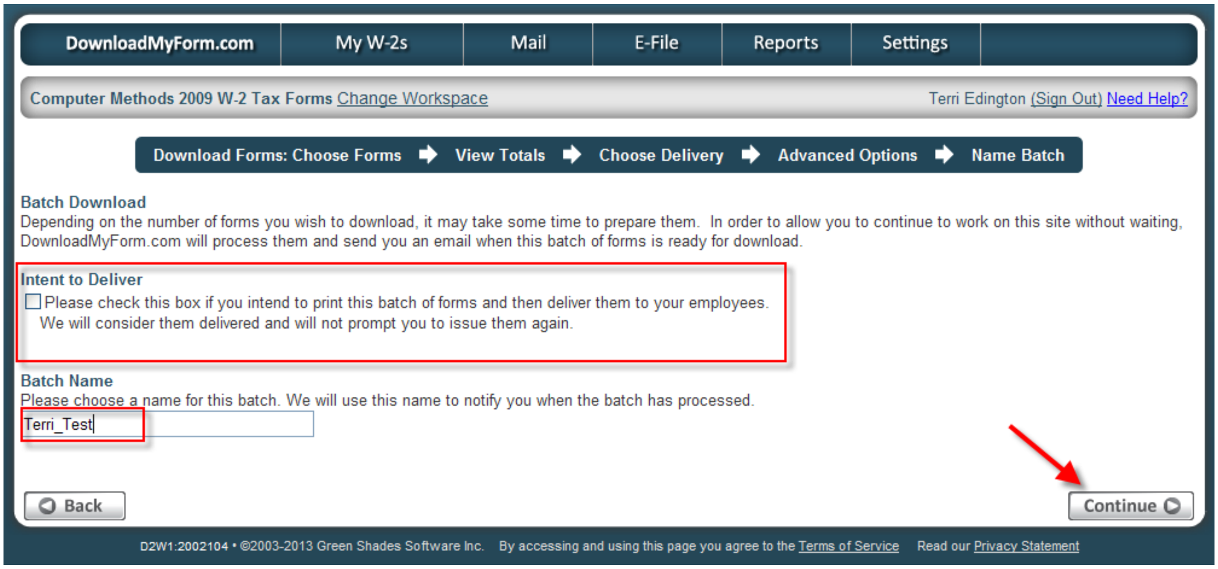
Select the forms you would like to work with and press Continue.



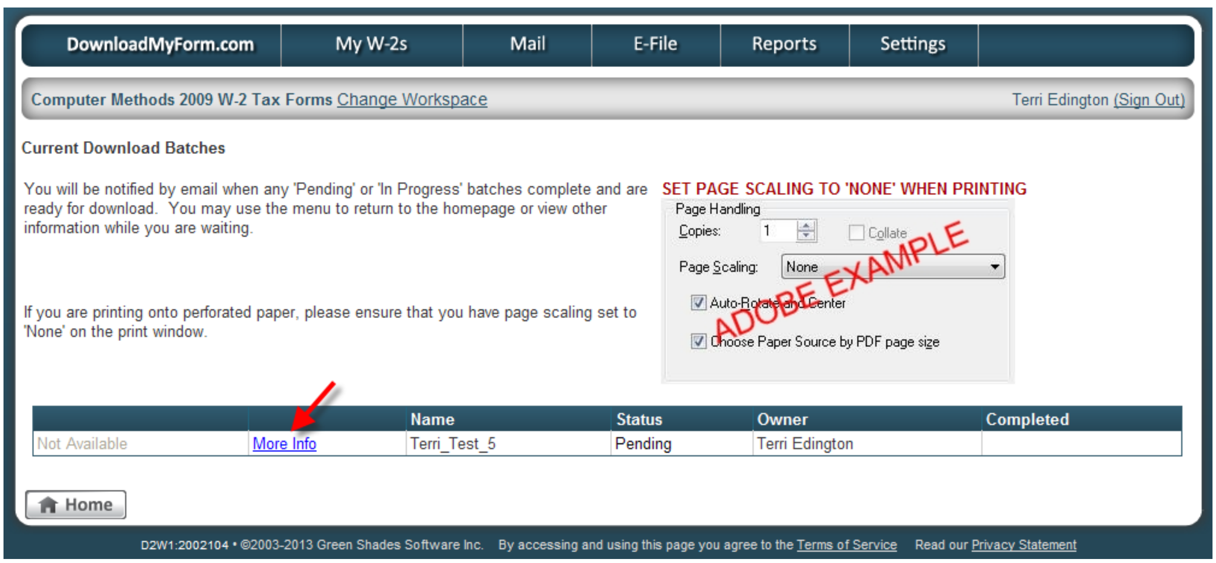
You have the option for Greenshades to print and mail the W-2s for you. This is a billable service.

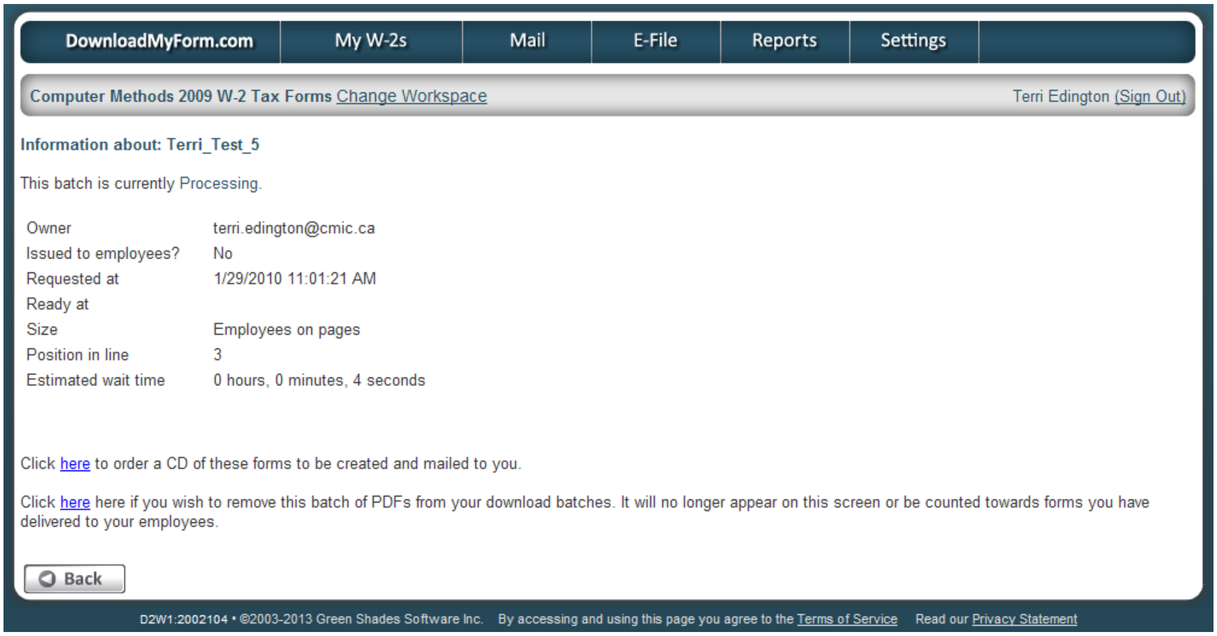


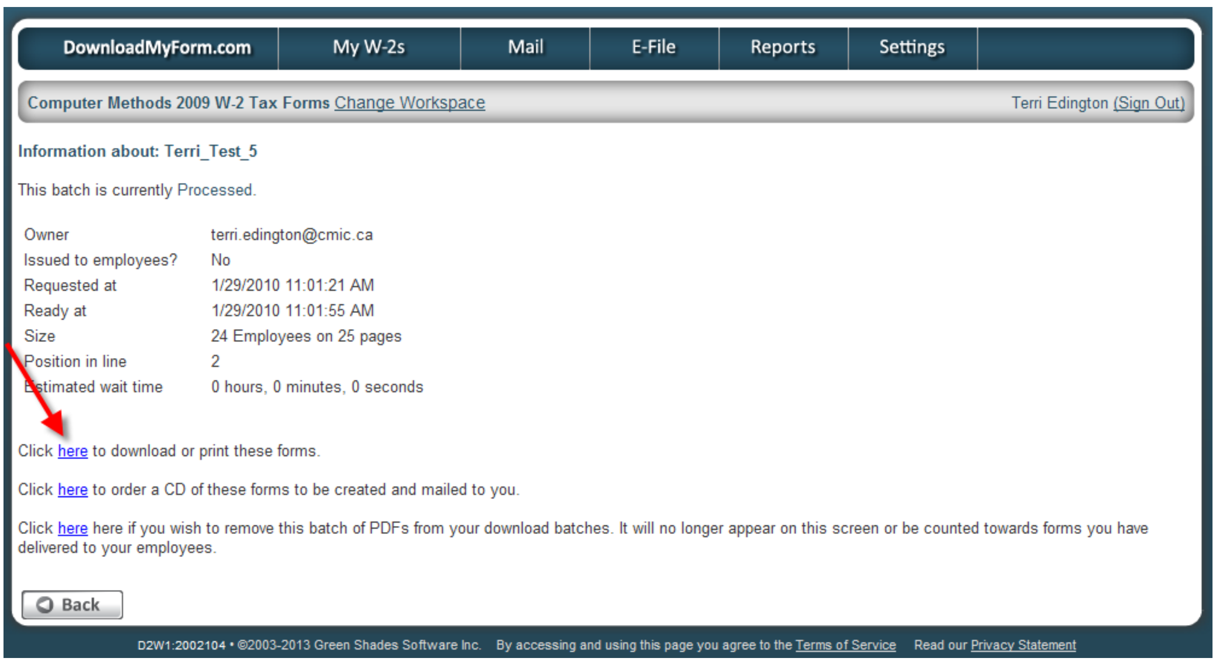
You can also order paper and envelopes from Greenshades.



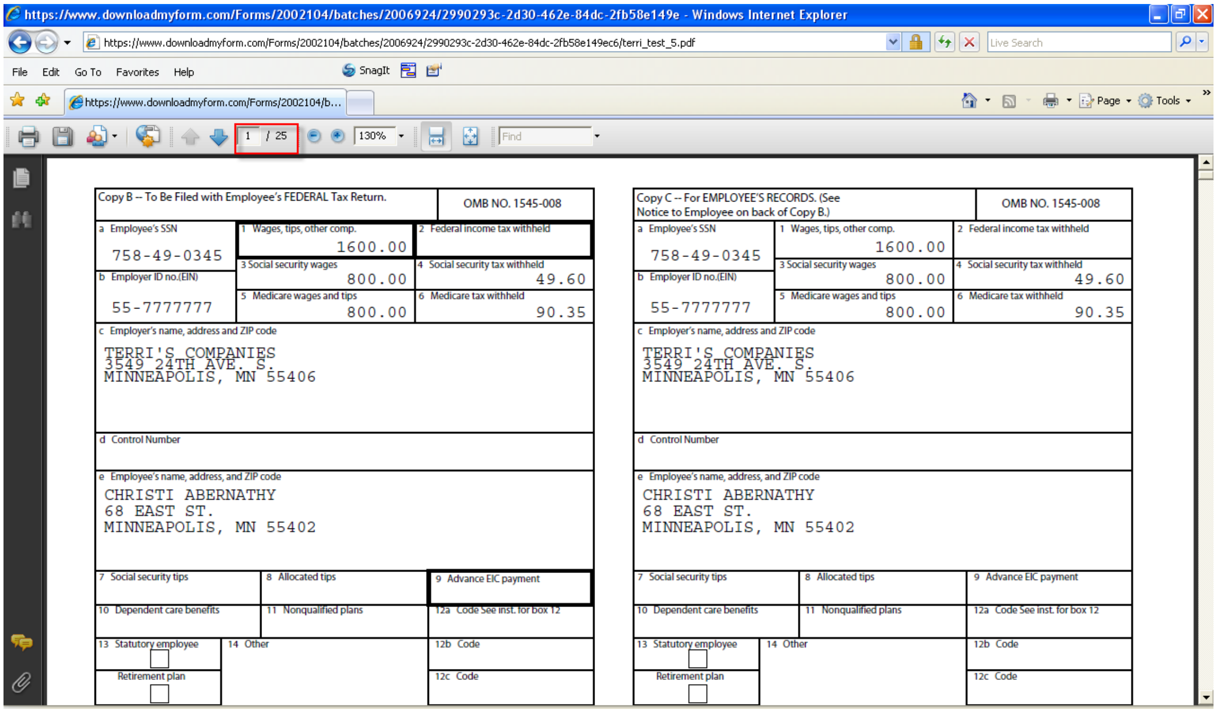
You may print a batch of forms by checking the checkbox and entering a batch name to be used when notified. Press **Continue**.





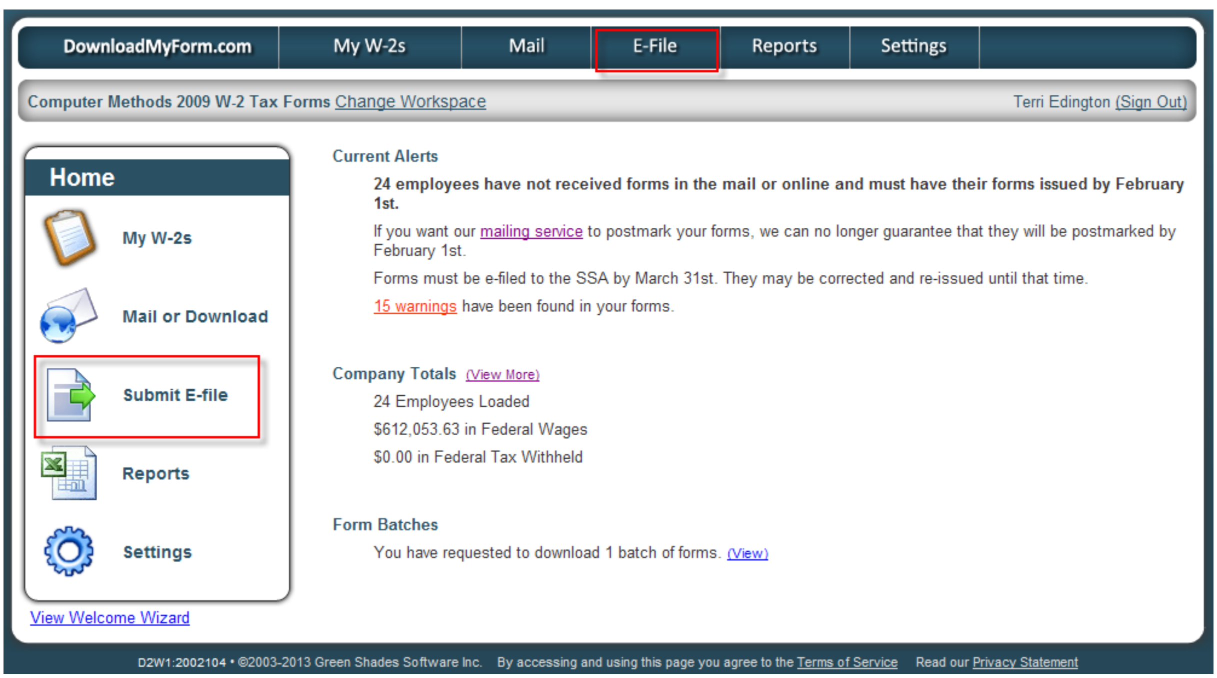


Once processed, click on the link to print the forms.



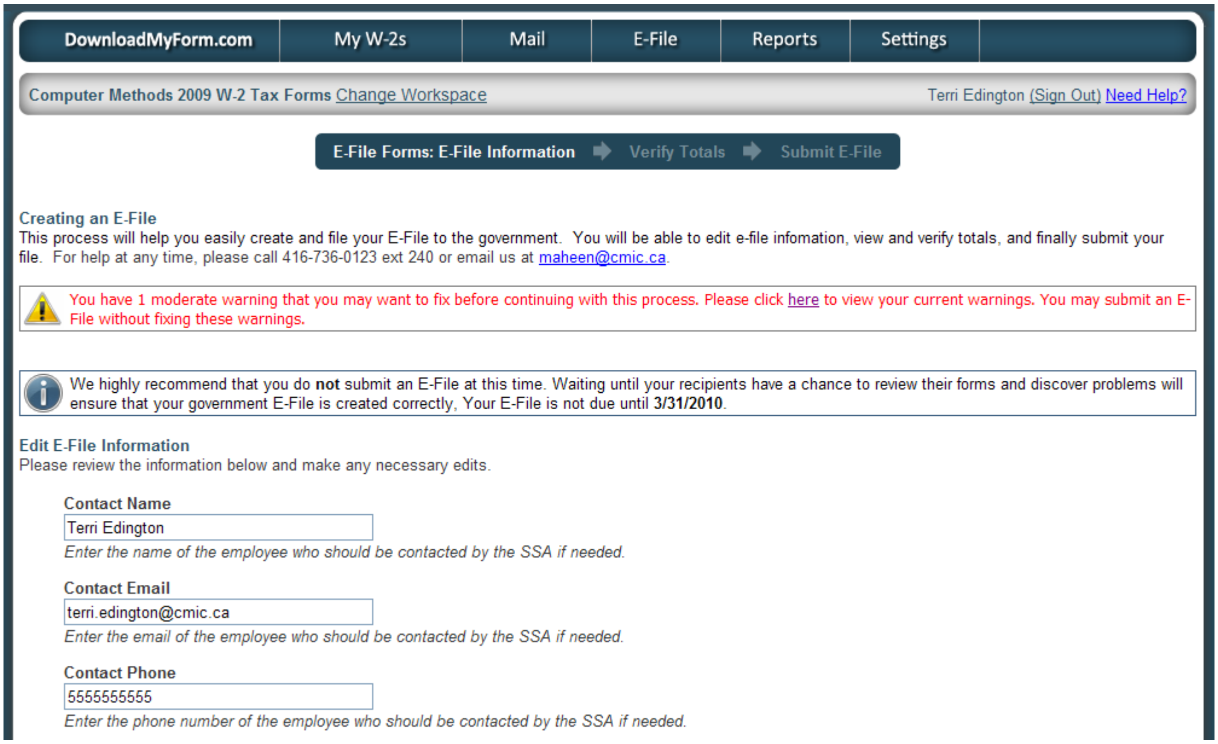
Once processed, the forms will be made available for printing.

E-File



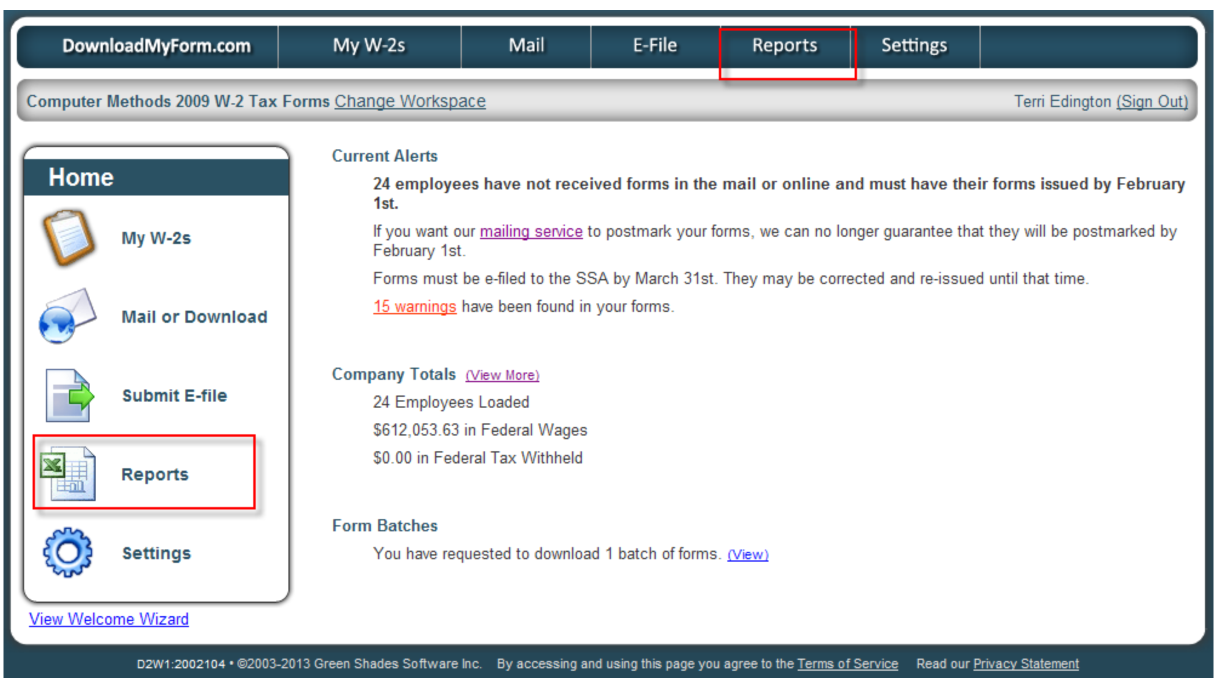
When you are ready to file this information with the government, you may do so through the E-File function.

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

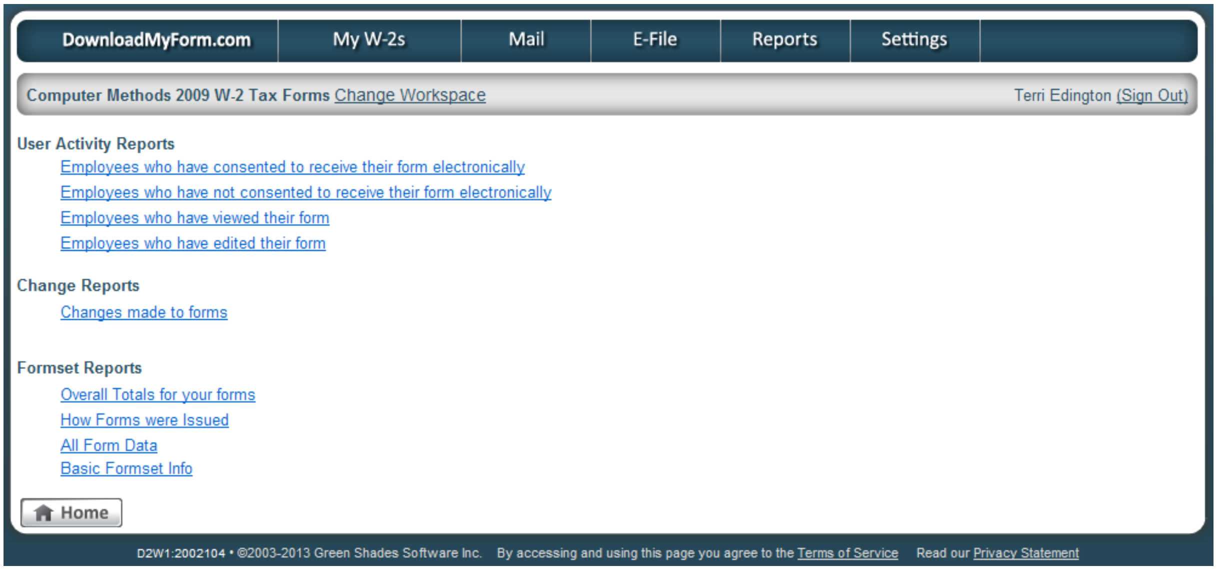


Fill out the required information on this screen, click [**Next**] to verify, then [**Submit**].

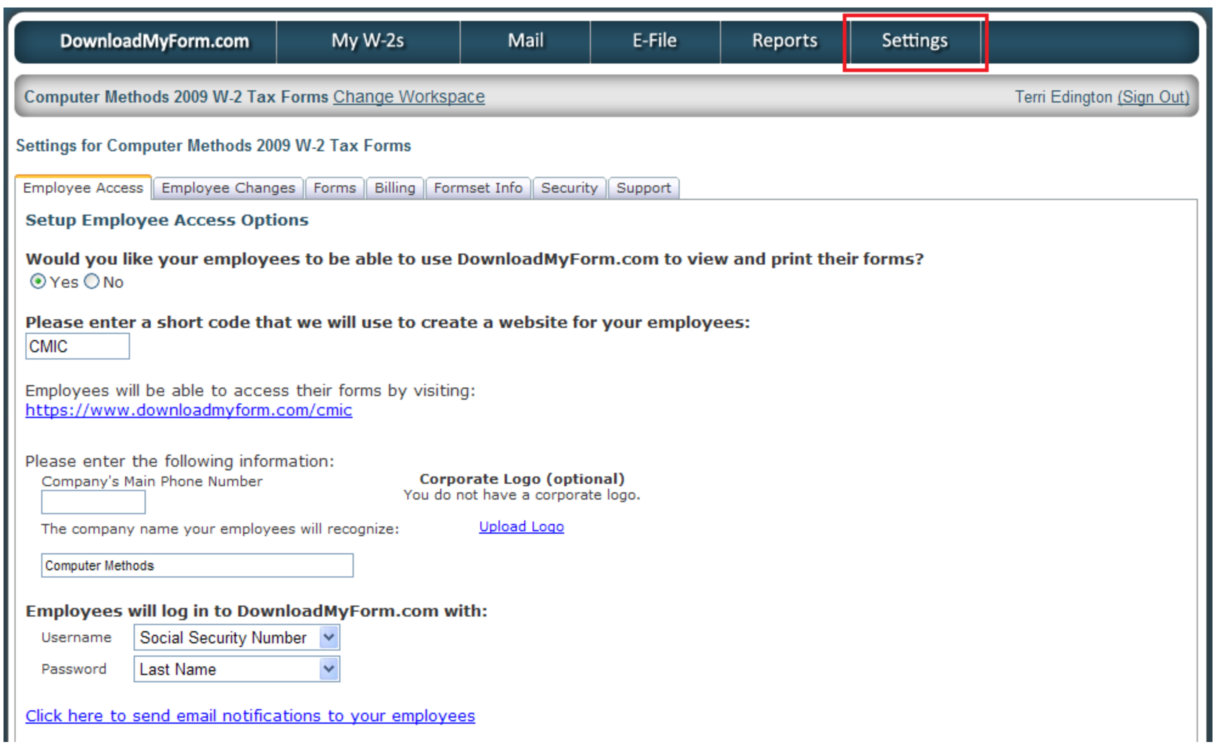
Reports



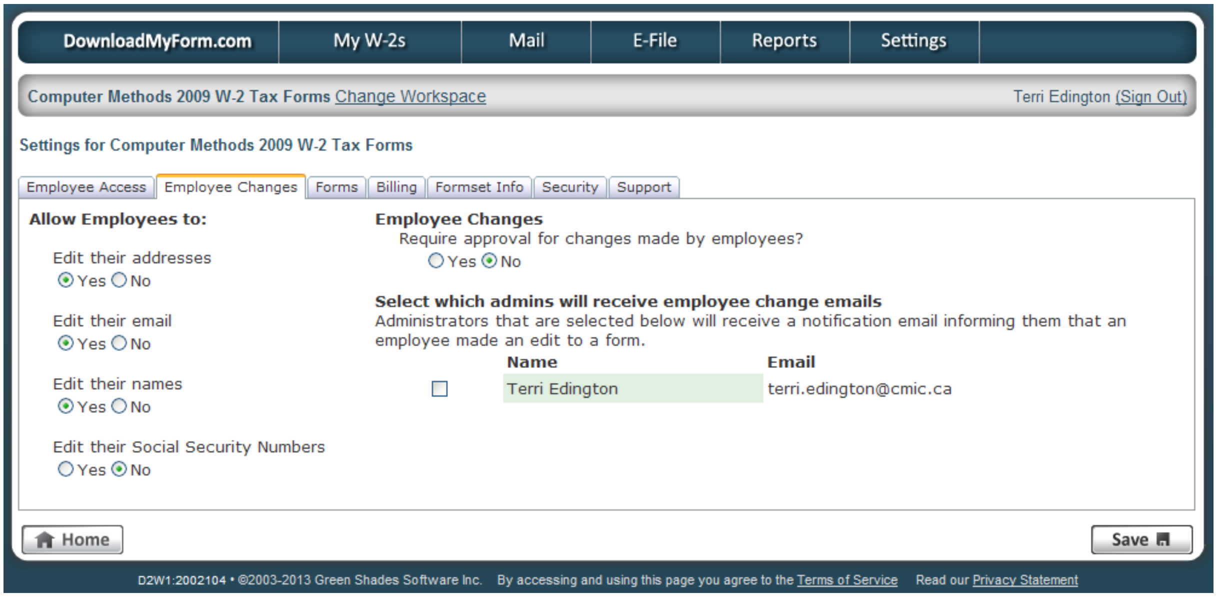
There are some report capabilities on the **Reports** tab, as shown below.



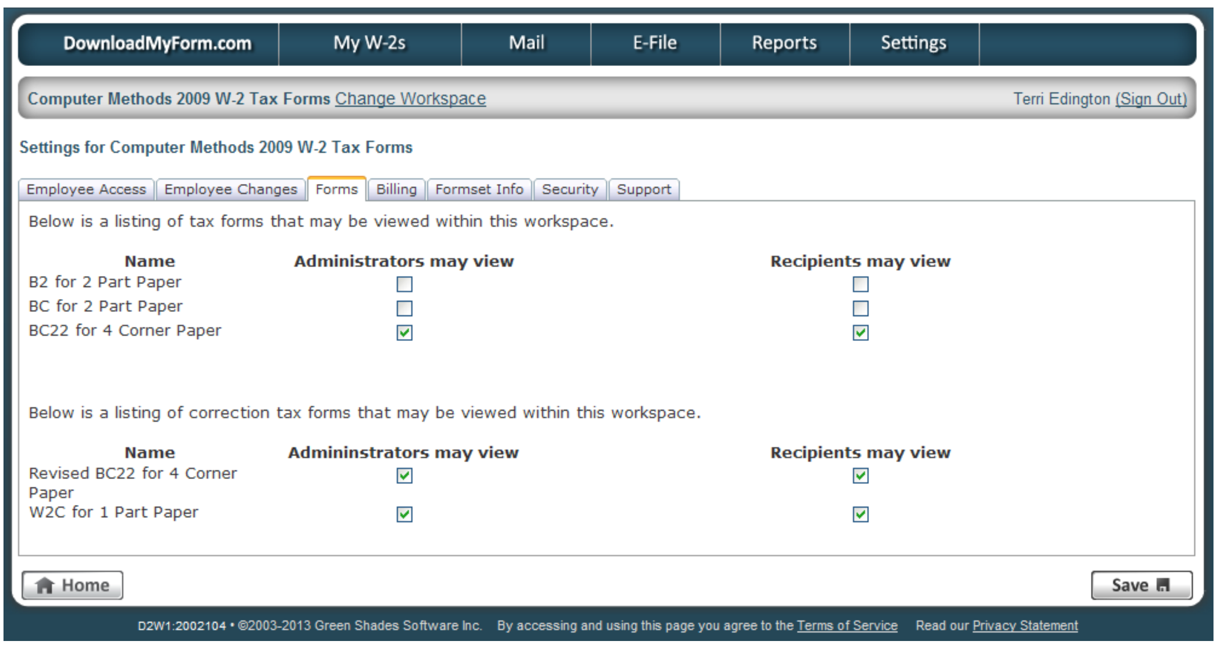
Settings



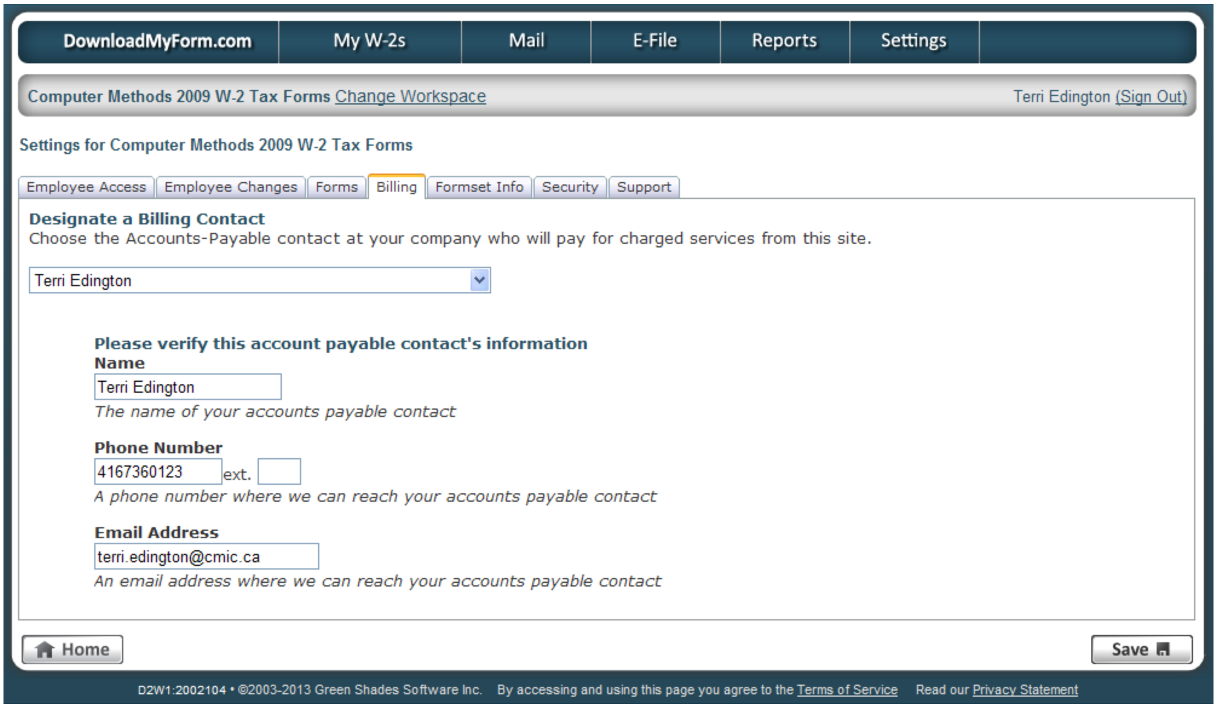
Click on the **Settings** tab to bring up the administration options for the online W-2 forms. There are a number of tabs within this screen to set up features, like allowing your employees to access their W-2s through **DownloadMyForm.com**.



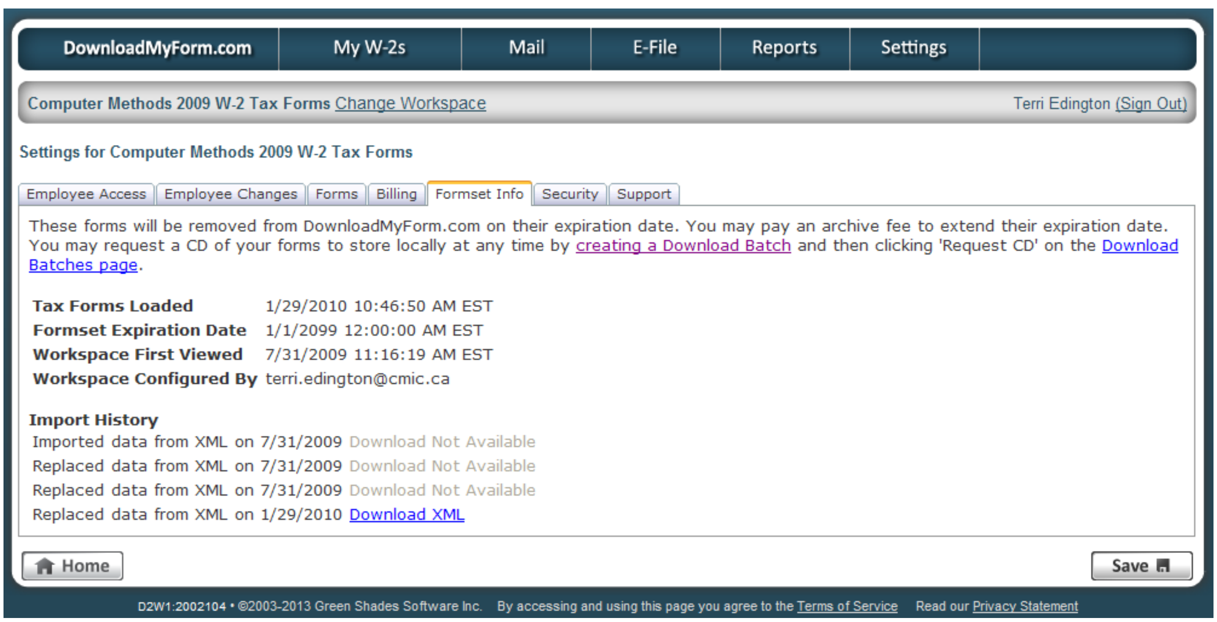
If employees have access to the website, you can allow them access to edit their personal information.



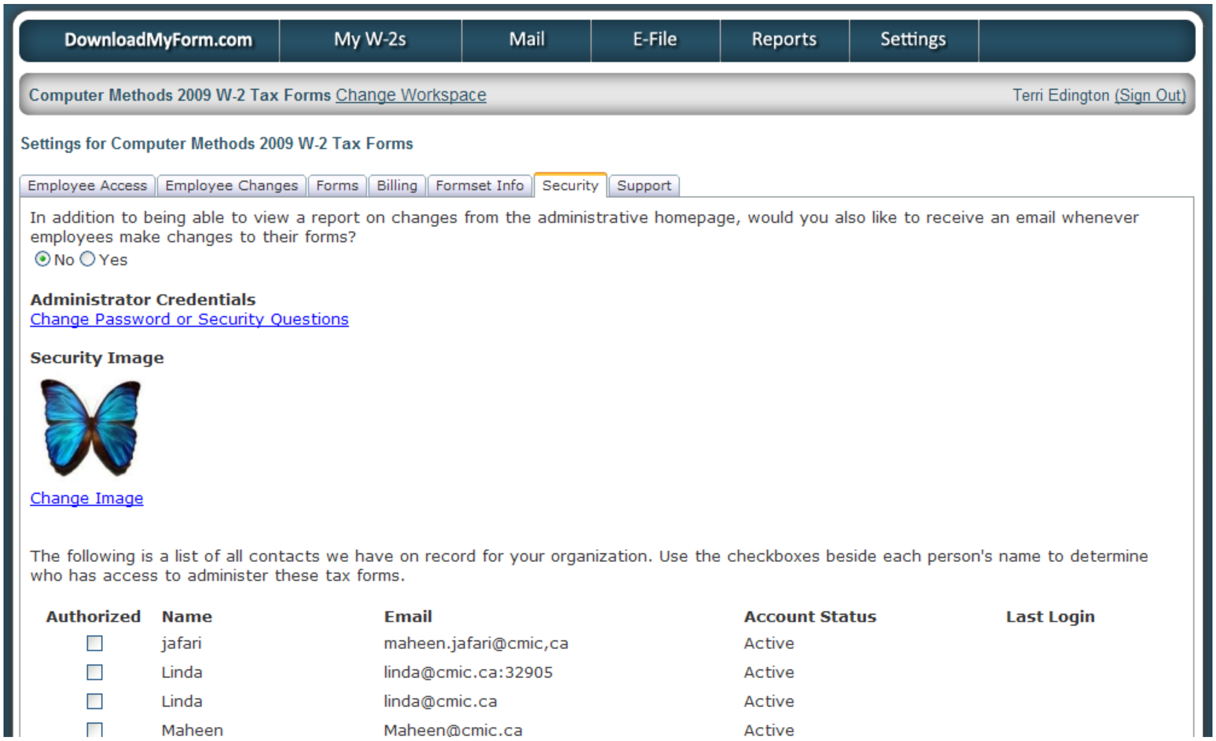
You may select the type of paper you want to use for W-2s.



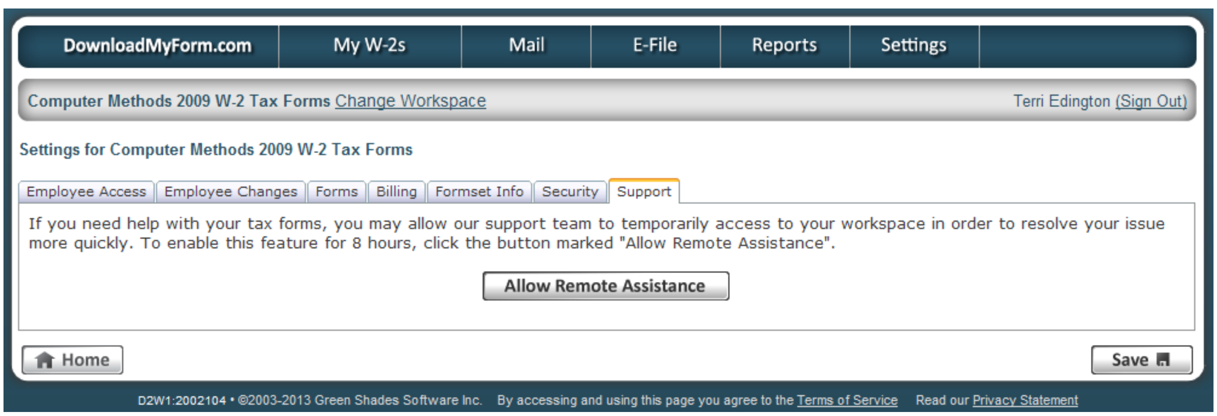
You may enter a billing contact.



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.

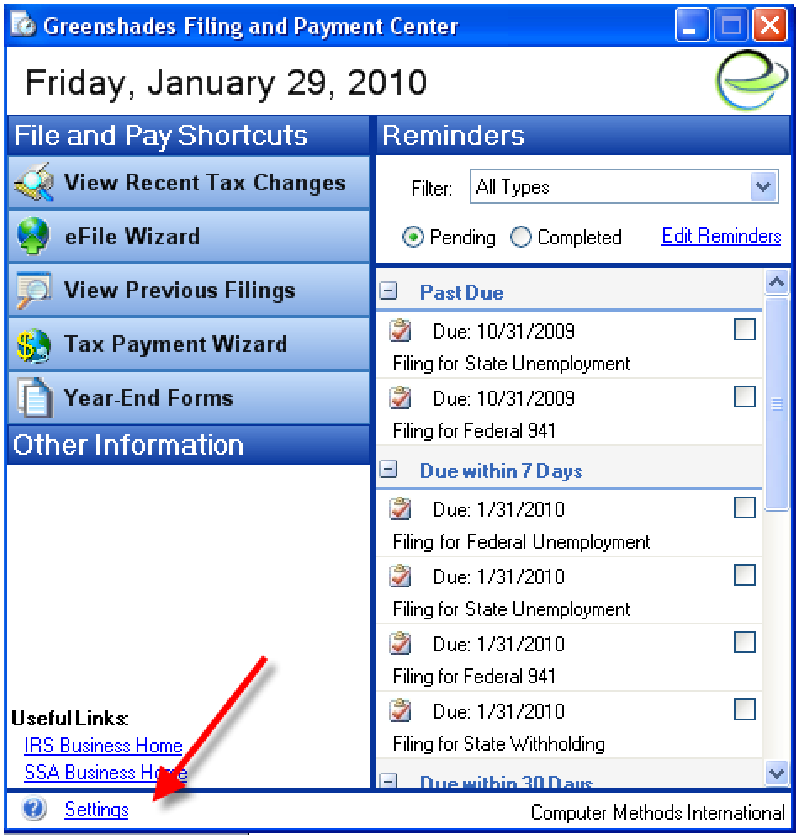


Security settings allow you to specify who has access to administer the tax forms.



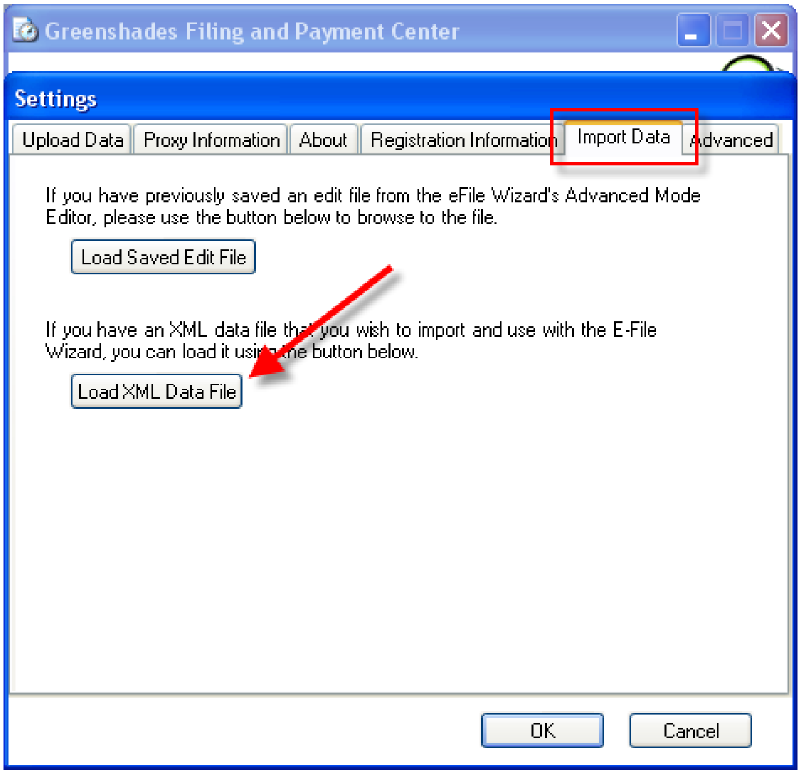
The Support tab allows for remote assistance.

SUTA/SUI Reporting

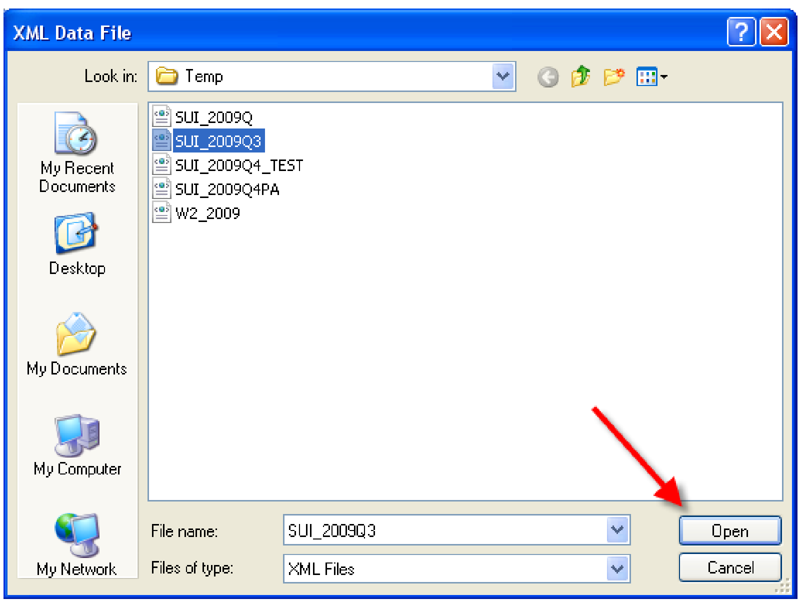


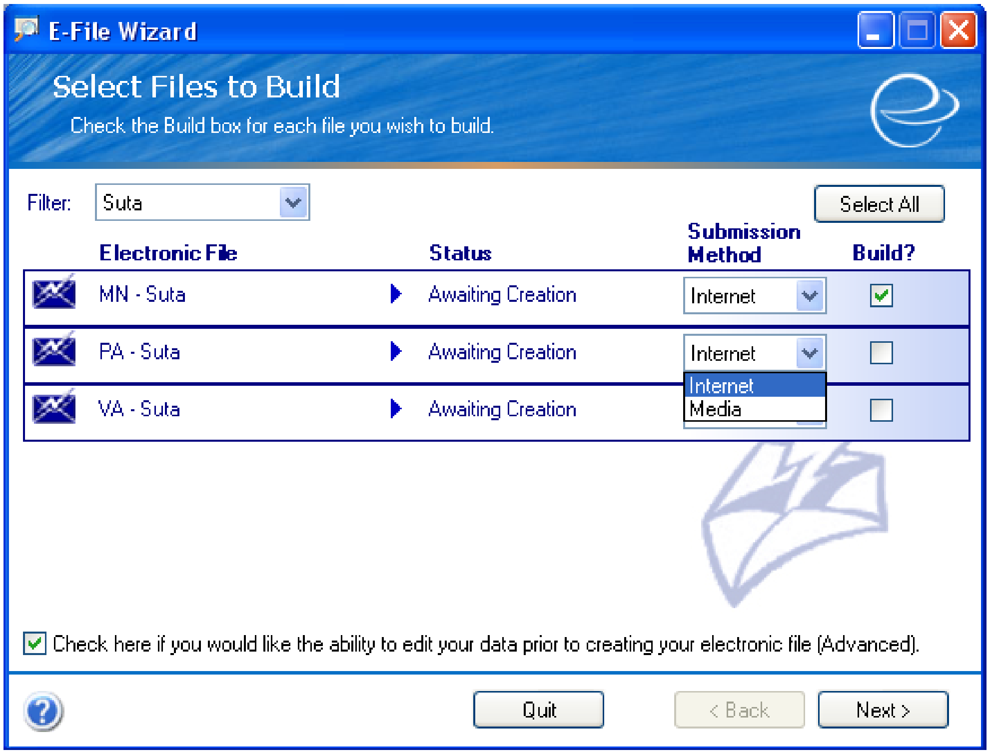
Click the desktop icon created for SUTA/SUI reporting in step 4 (*Step 4: Icon Setup for Greenshades* section in guide) to bring up the Greenshades screen above.

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



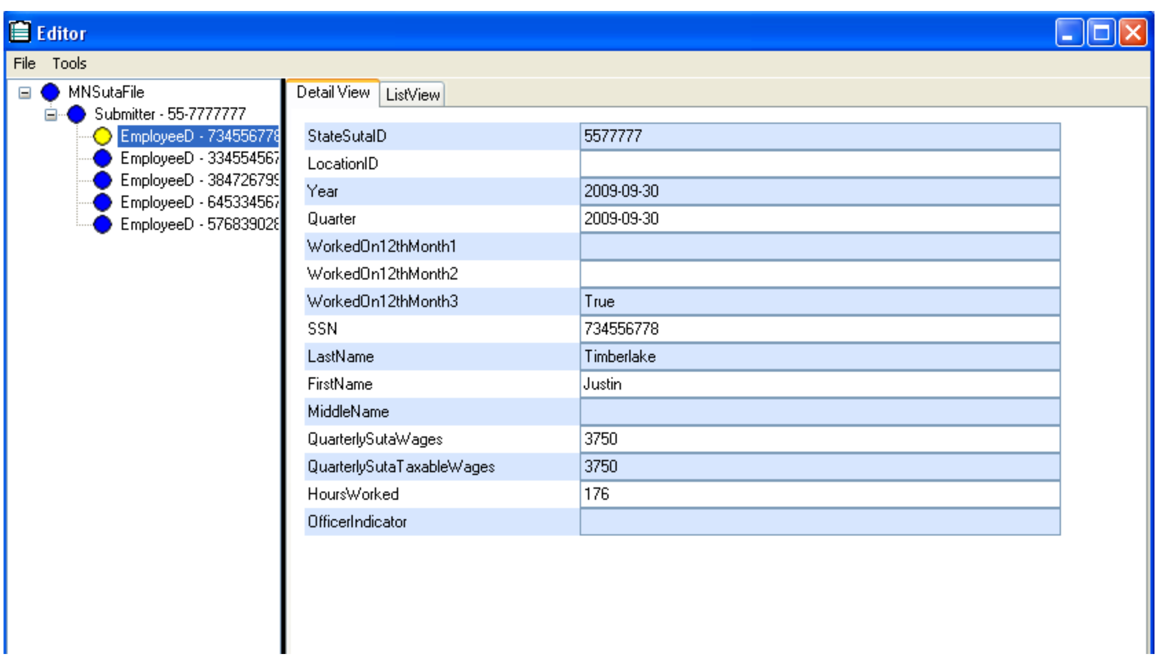
Go to the **Import Data** tab and press the **Load XML Data File** button.



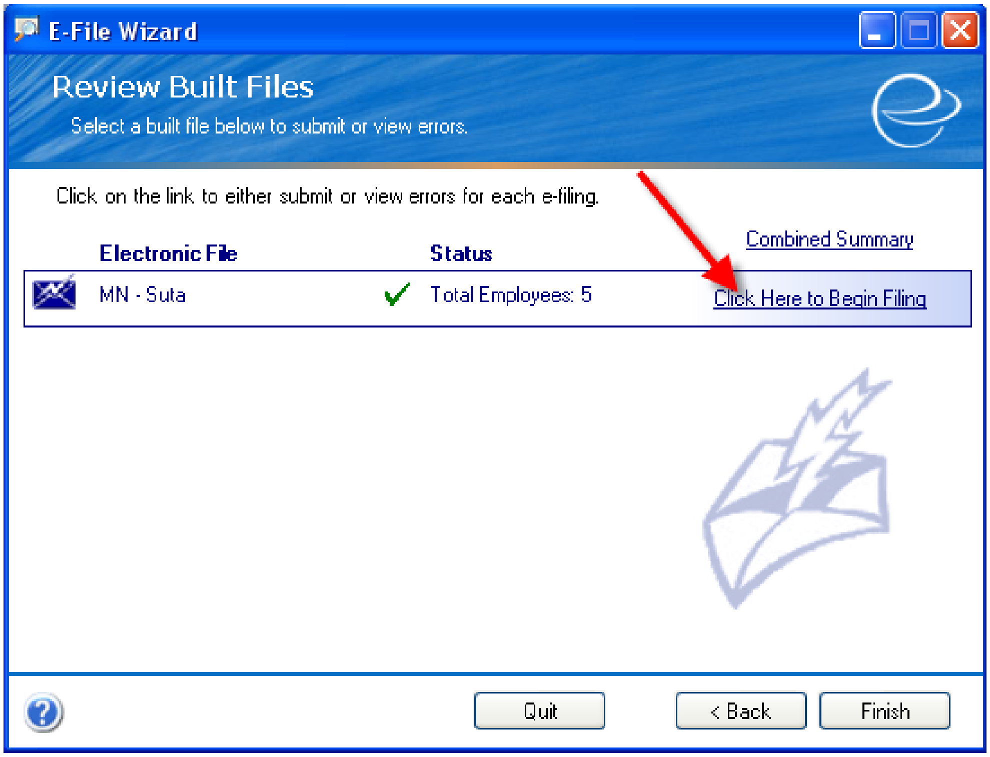


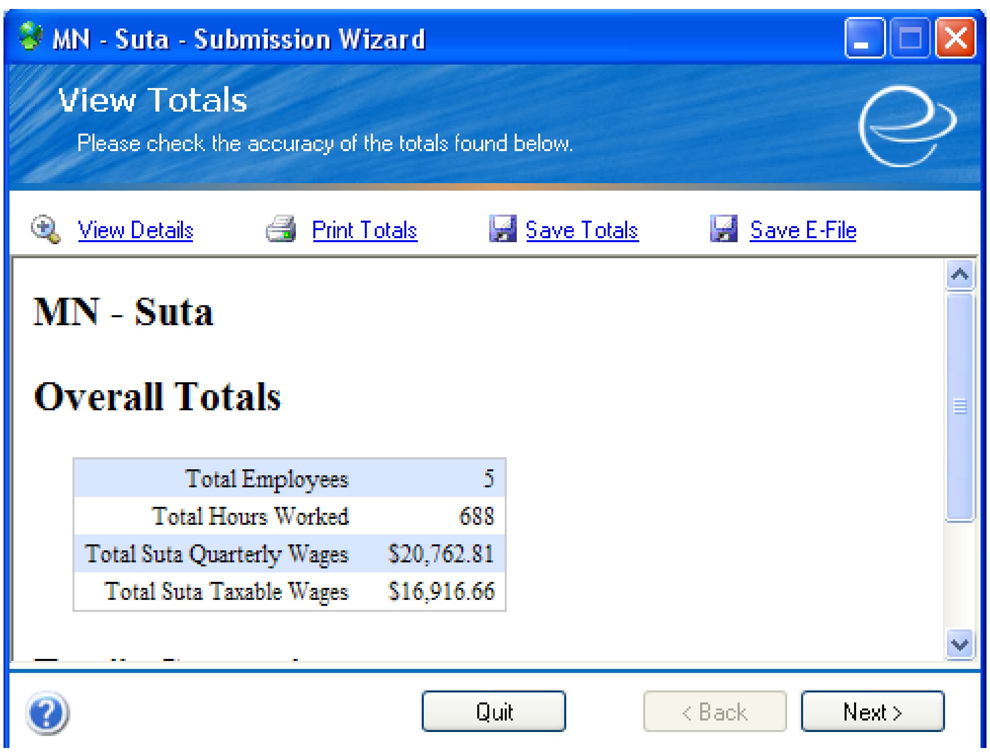
Select the states that you want to build your SUTA files for. Some states allow you to select **Media,** to create a media file, or **Internet,** to report via the Internet. Check the box at the bottom to enable editing of the information prior to creating the electronic file (other options are available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

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

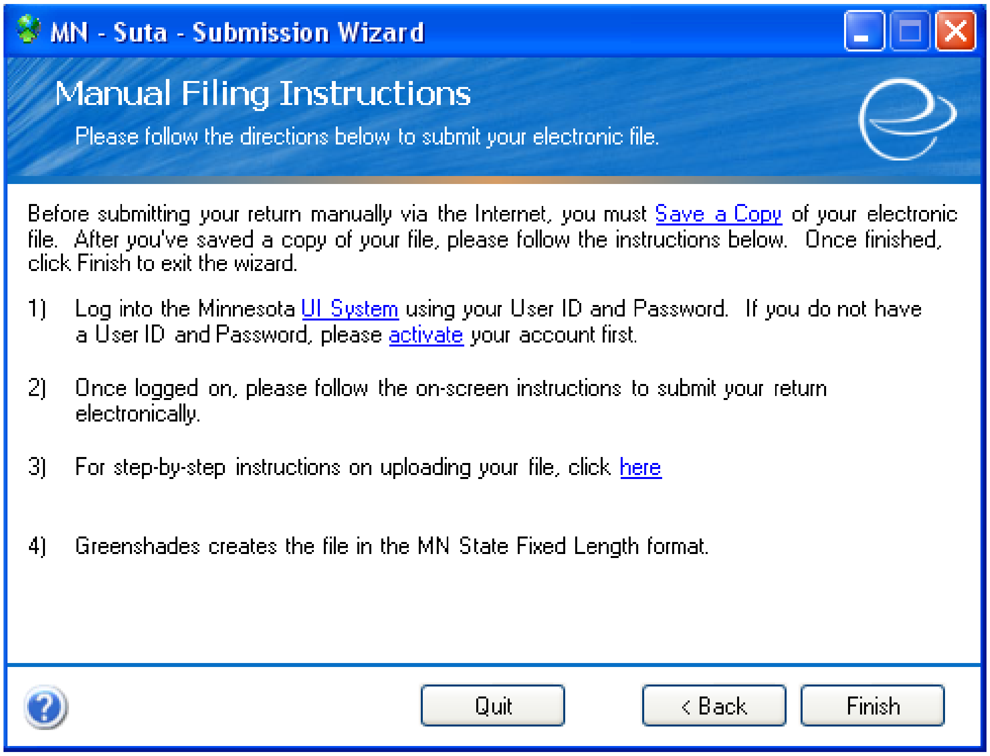


If the check box to edit data in the previous screen was checked, the editor appears after clicking **Next**.



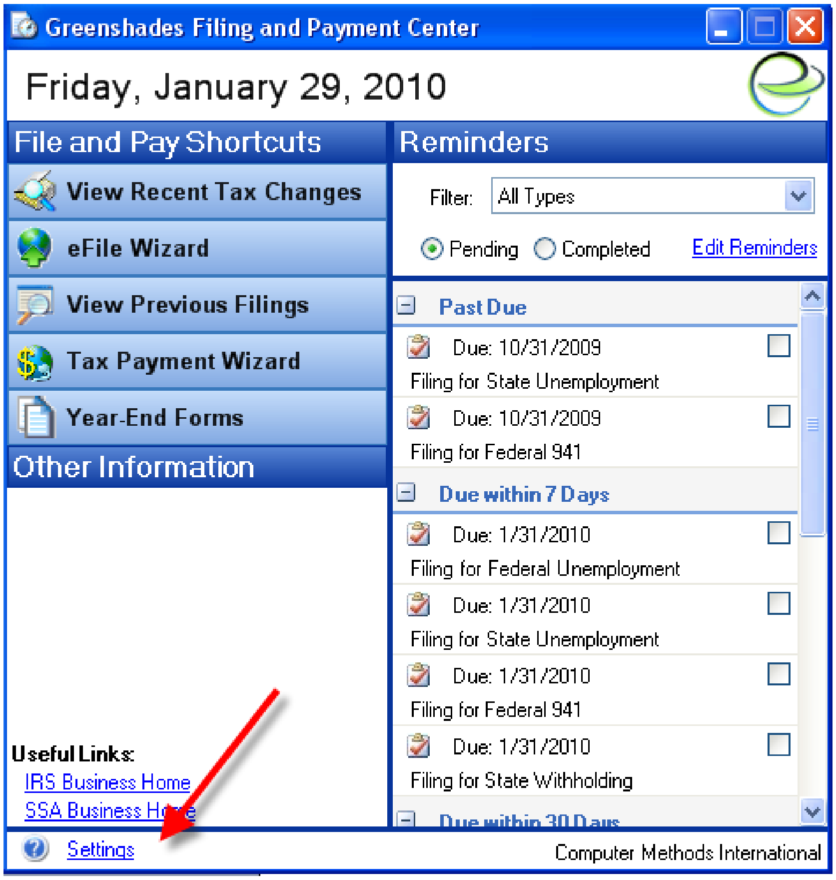


In this screen you can choose to **View Details** to generate an excel document for you to review individual employee data. When ready, click [**Next**].



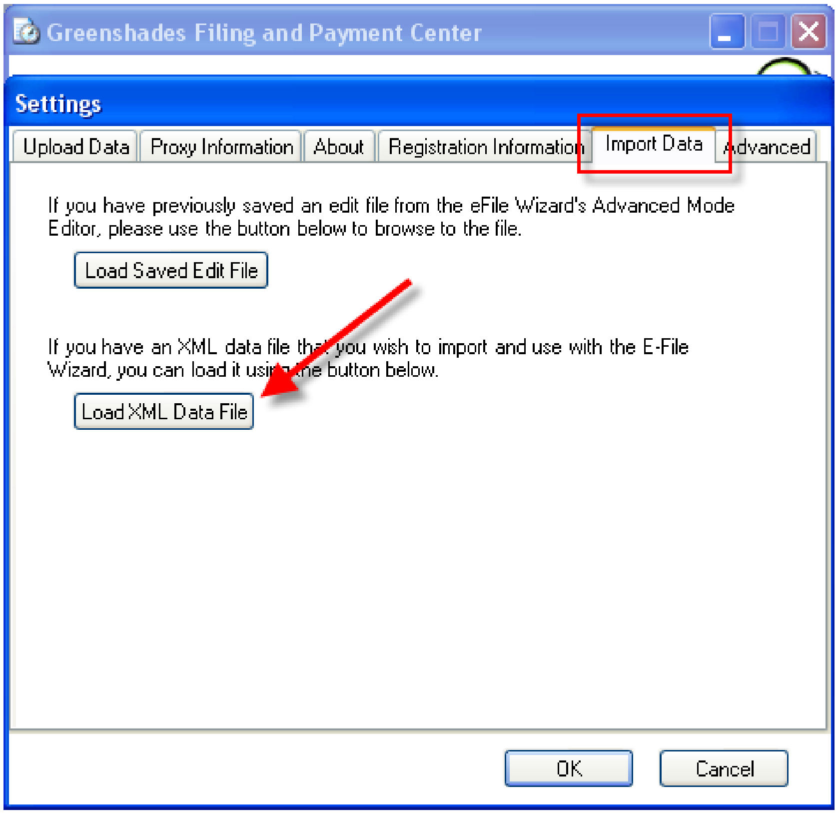
You will be prompted with state specific instructions. You will have to **Save a Copy** of your file before filing.

401K Reporting



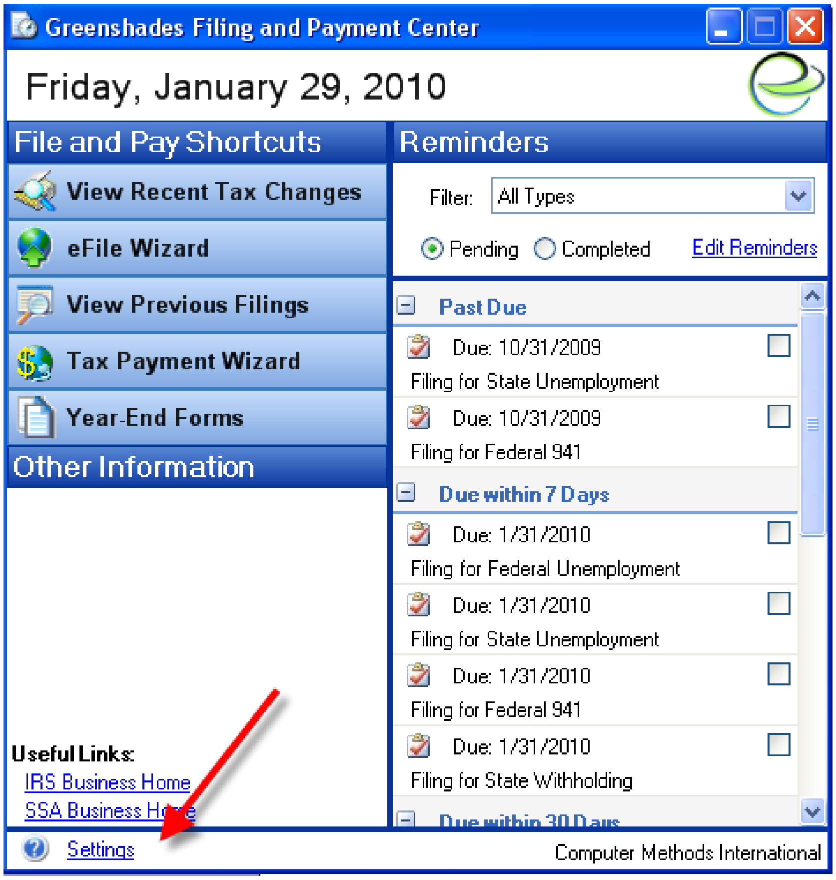
Click the desktop icon created for 401K reporting in step 4 (*Step 4: Icon Setup for Greenshades* section in guide) to bring up the Greenshades screen above.

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



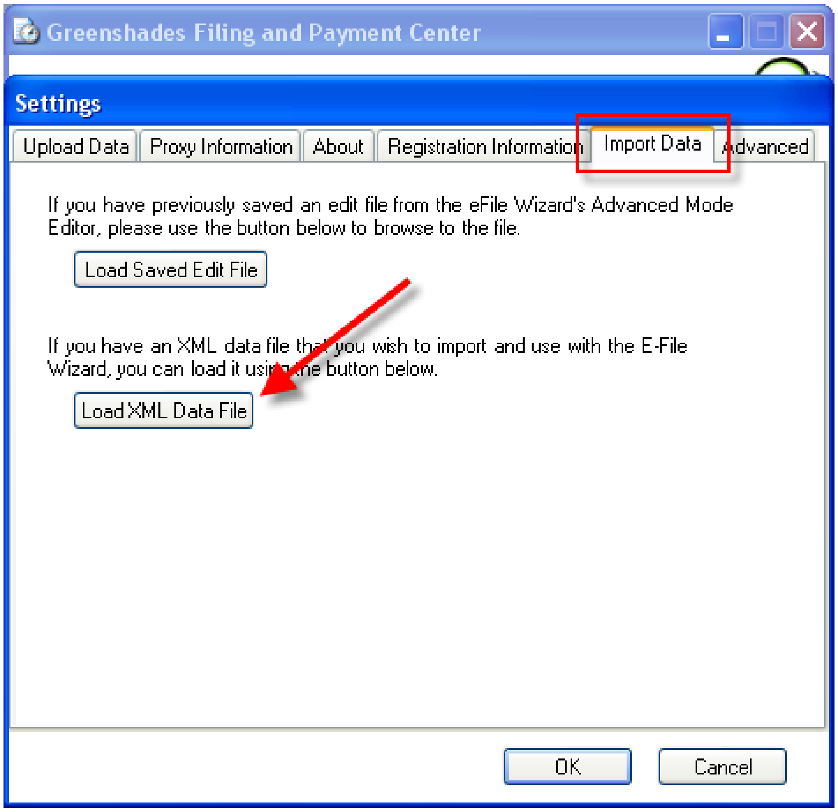
Click the **Import Data** tab and press the **Load XML Data File** button. Greenshades will walk you through the rest of the steps. If you require any assistance, please contact CMiC.

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.

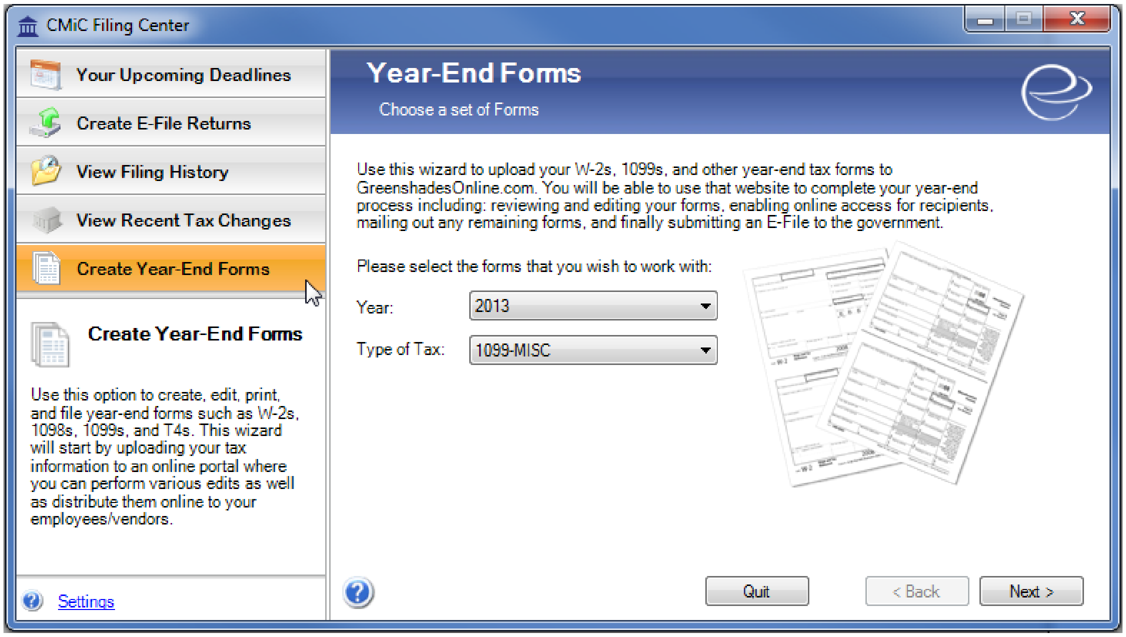
1. Download and install the desktop client Filing Center program from Greenshades©.

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.

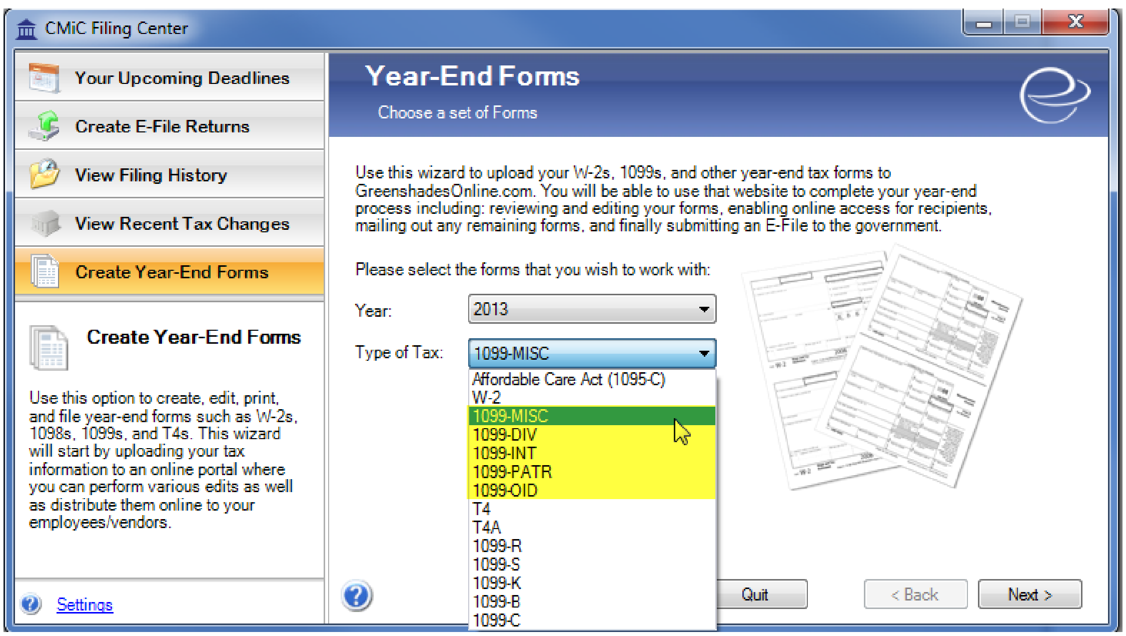
2. Directly Upload the XML file using the Greenshades© Web Application Interface

Use the web page at www.downloadmyform.com to log in and start uploading your Year End forms such as 1099 files and performs further processing as required.

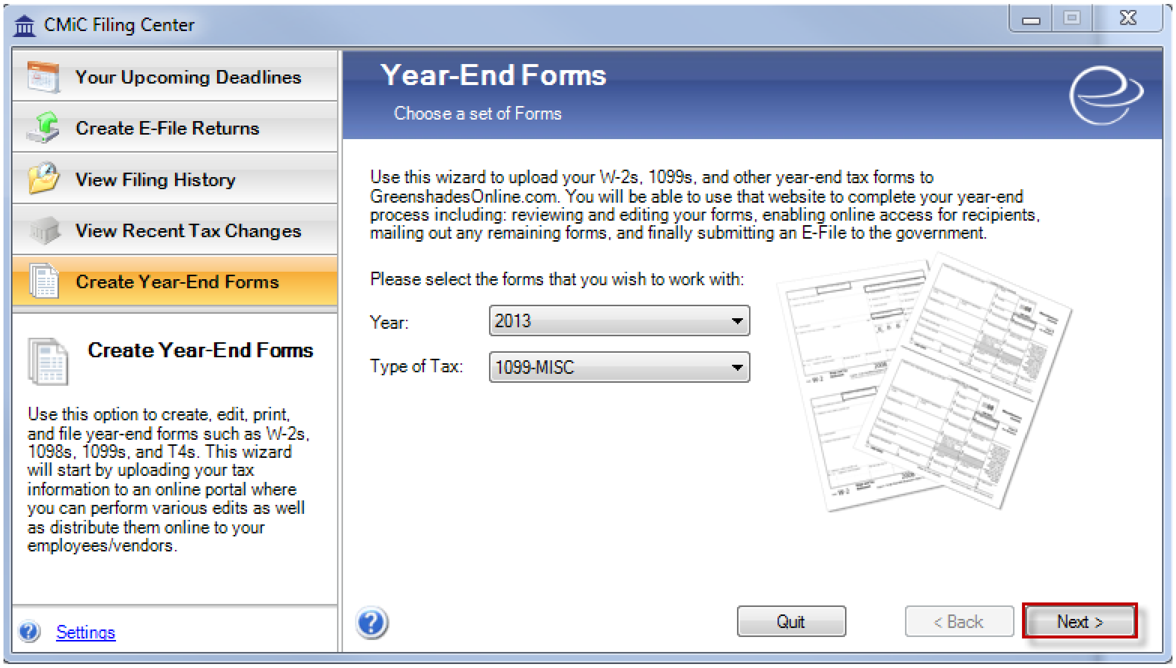
1. Using Filing Center Program for uploading the 1099 XML file

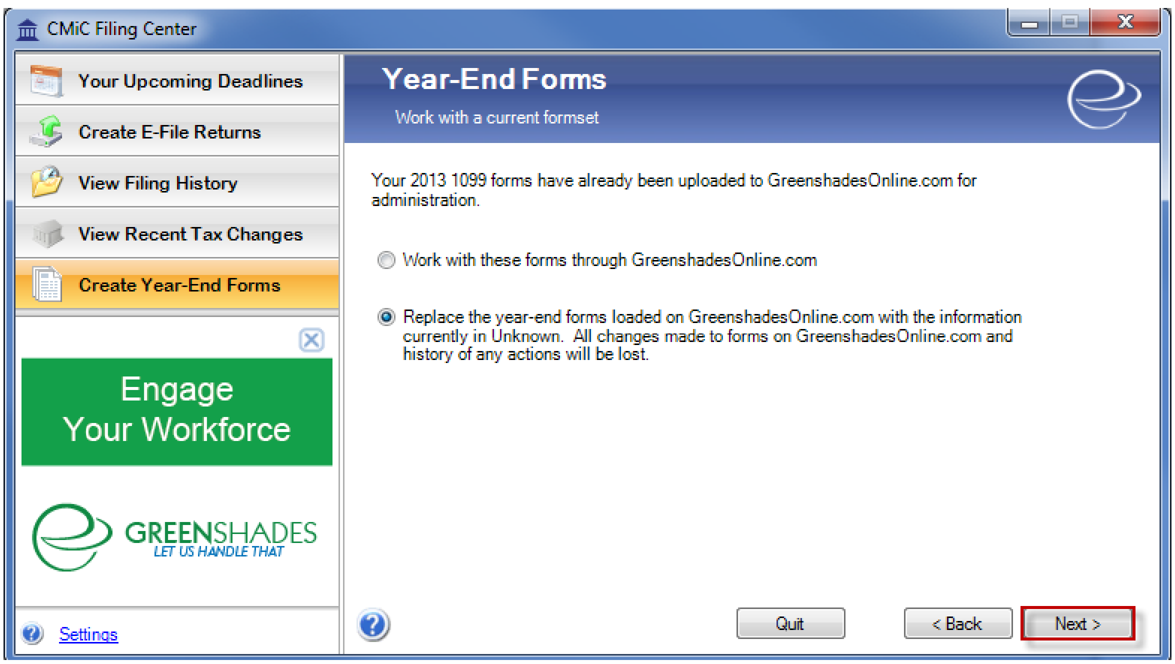


Choose the option **Create Year-End Forms** from the menu and set the **Year** and **Type of Tax** as required.

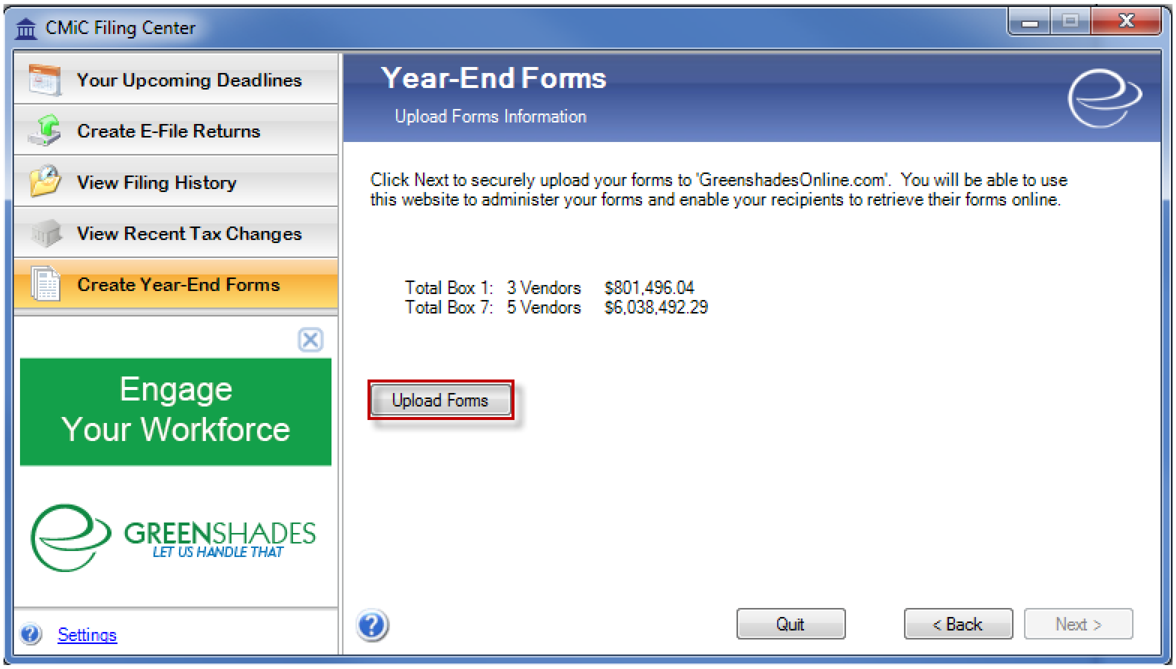


Currently, the 1099 types supported by Greenshades© are 1099-MISC, 1099-DIV, 1099-INT, 1099-PATR, 1099-OID. Users may have to update/check with Greenshades© for any amendments to the same.

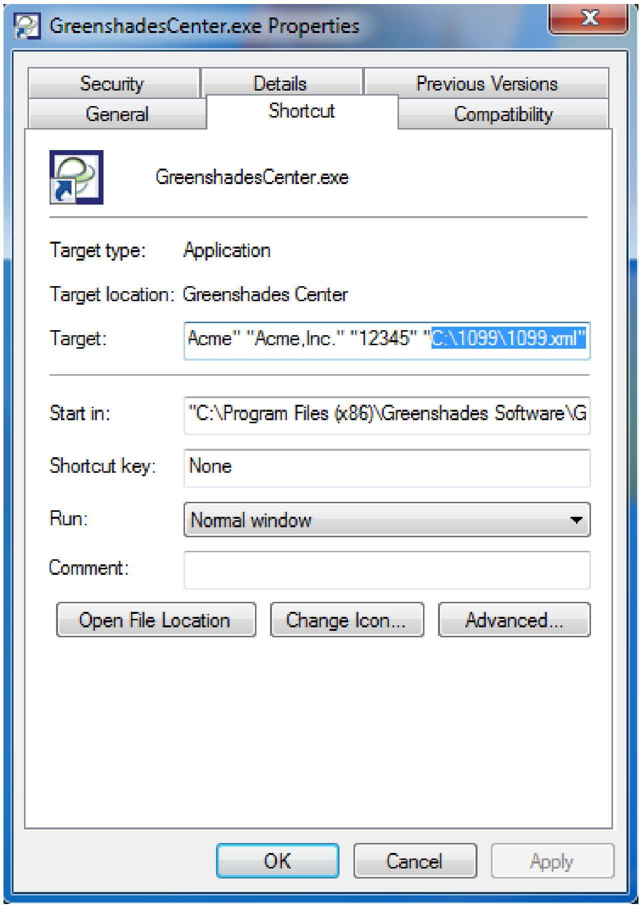




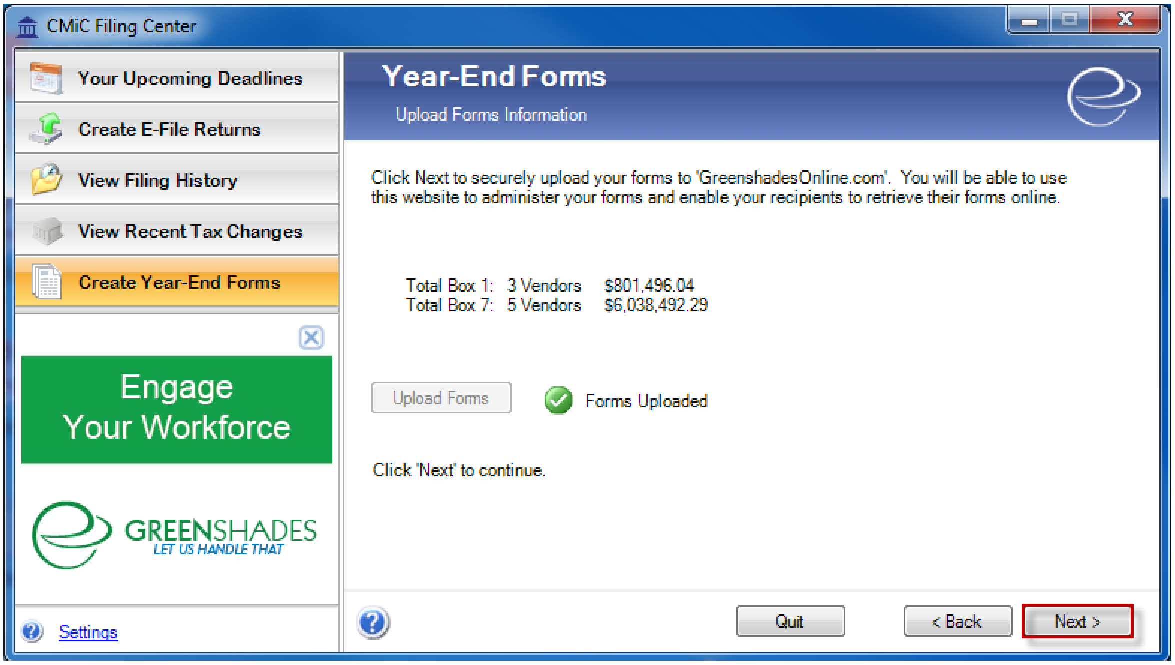
Select the required option whether to continue working on an existing file in the system or Replace with a new upload

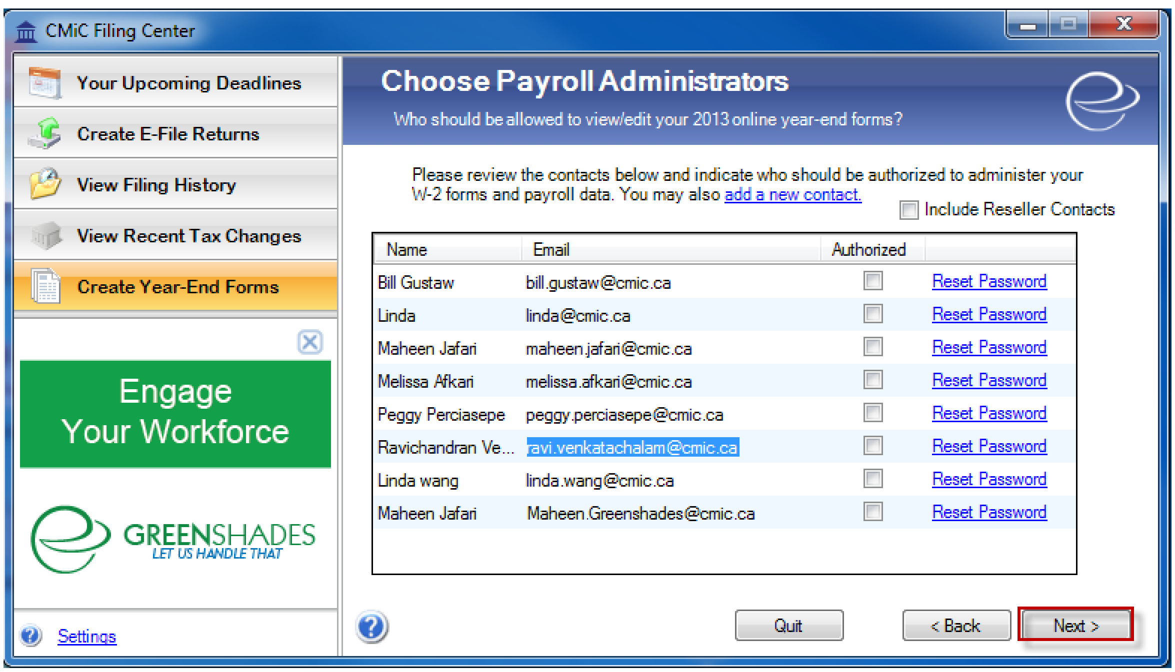


The **Upload Forms** process will upload the XML file from the defined file path and location as shown below.

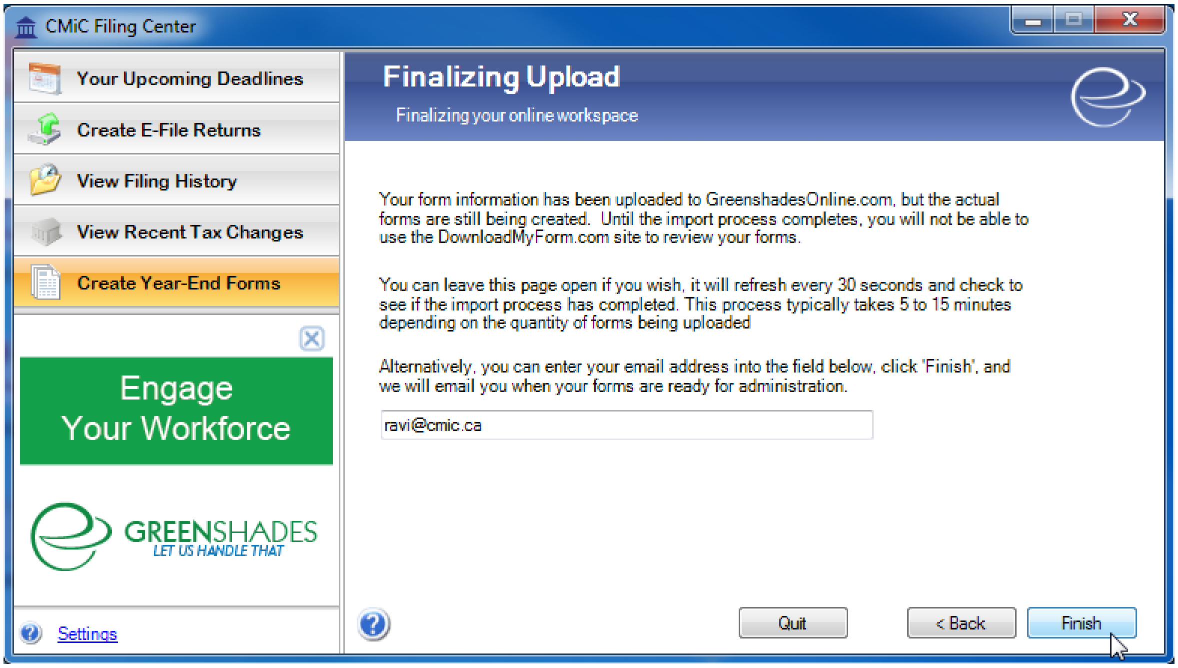


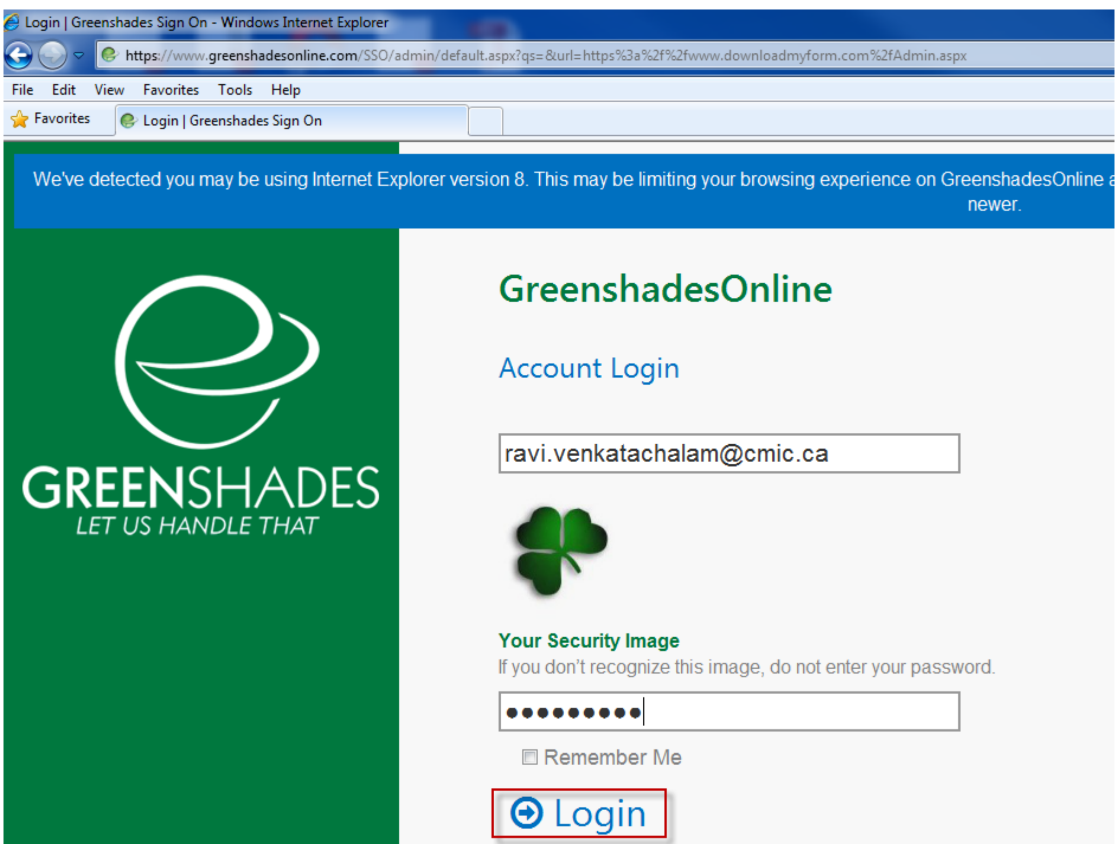
Right click on the **Greenshades** icon, and set the parameters in the **Target** field to the file path and file name as required.



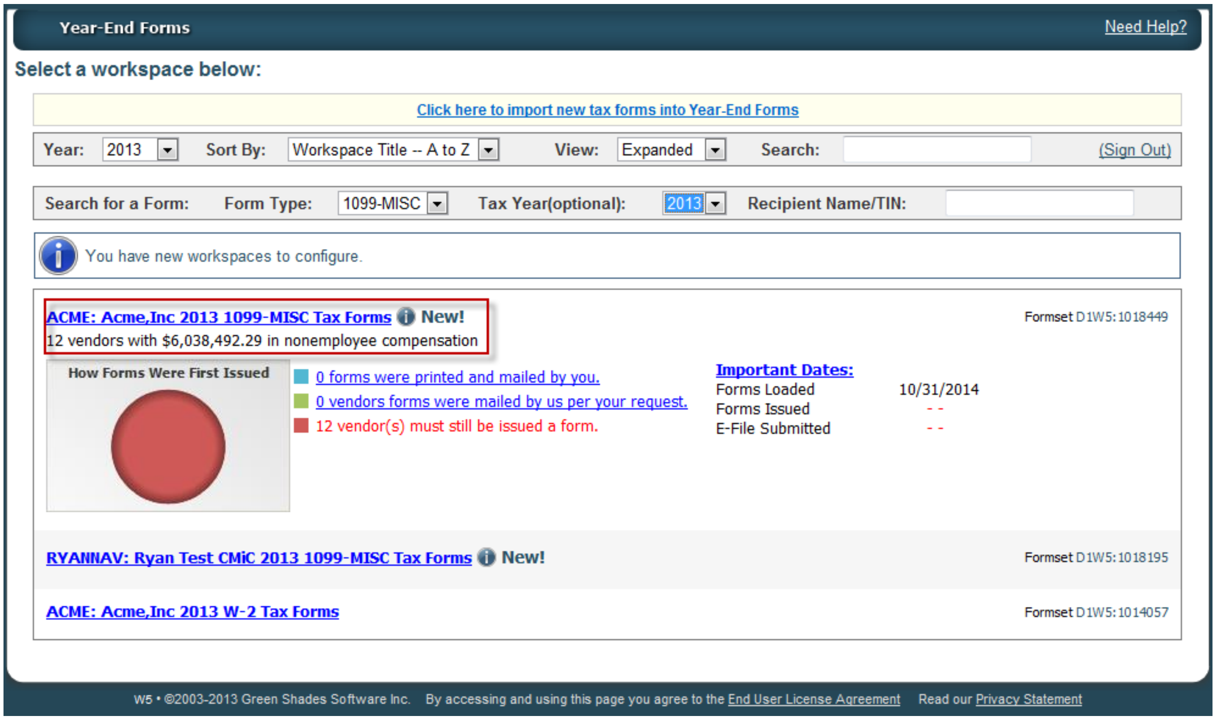


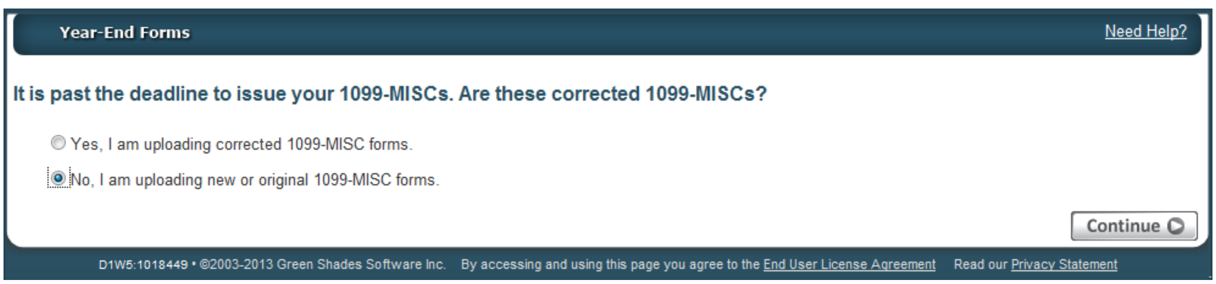
Once successfully uploaded, select the Contact that is authorized to administer the 1099 forms and then proceed

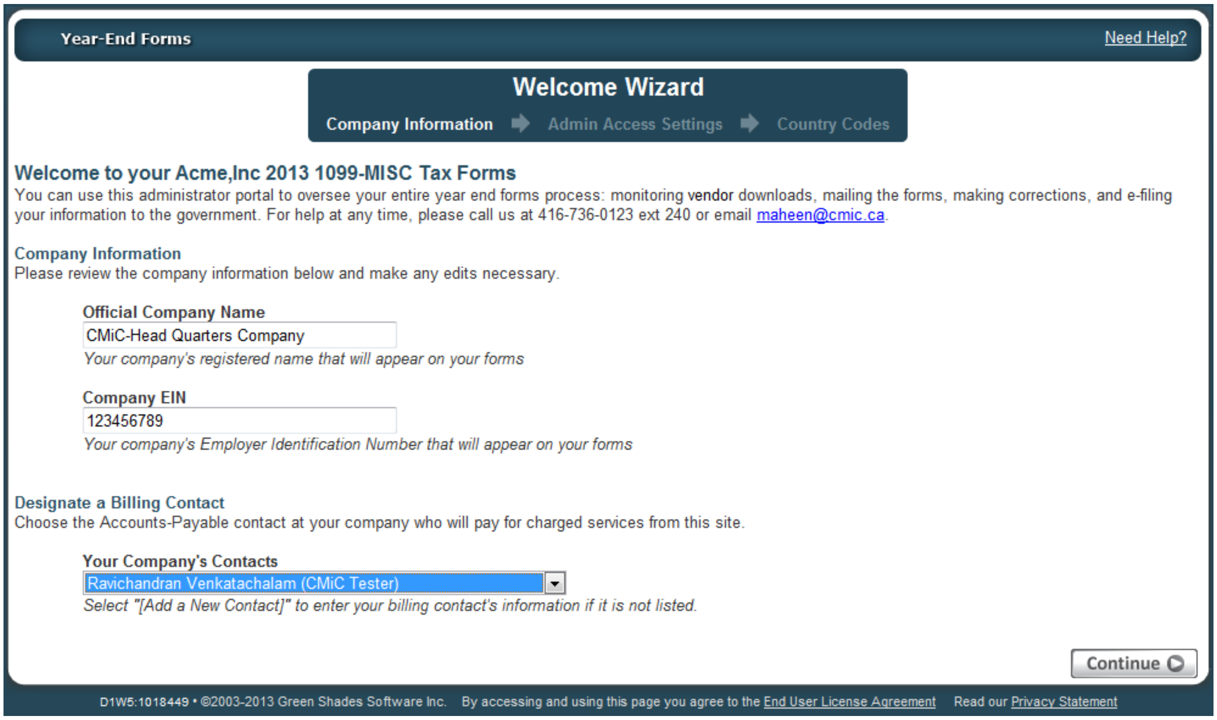


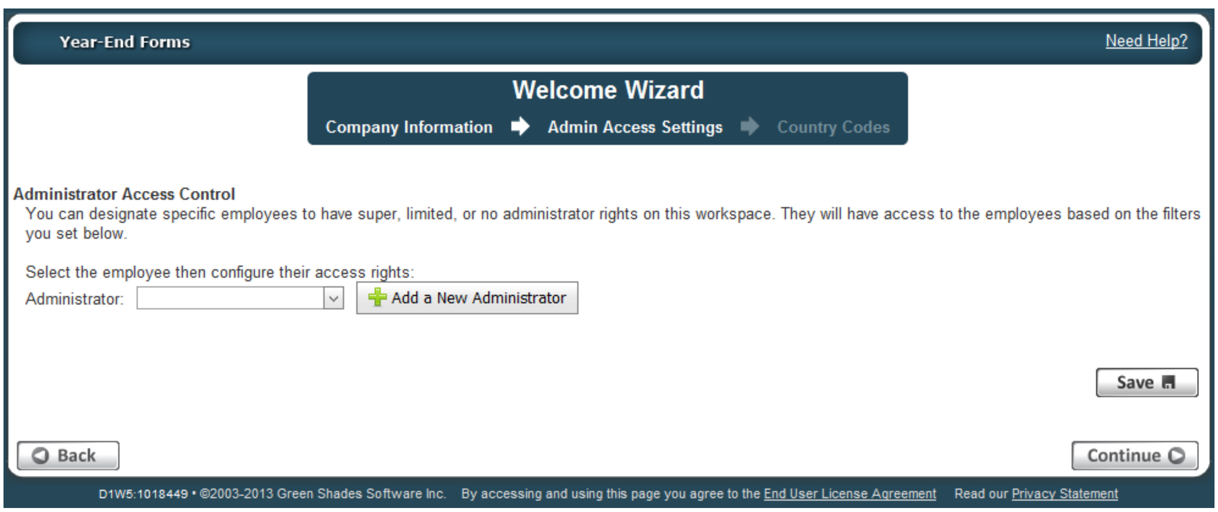


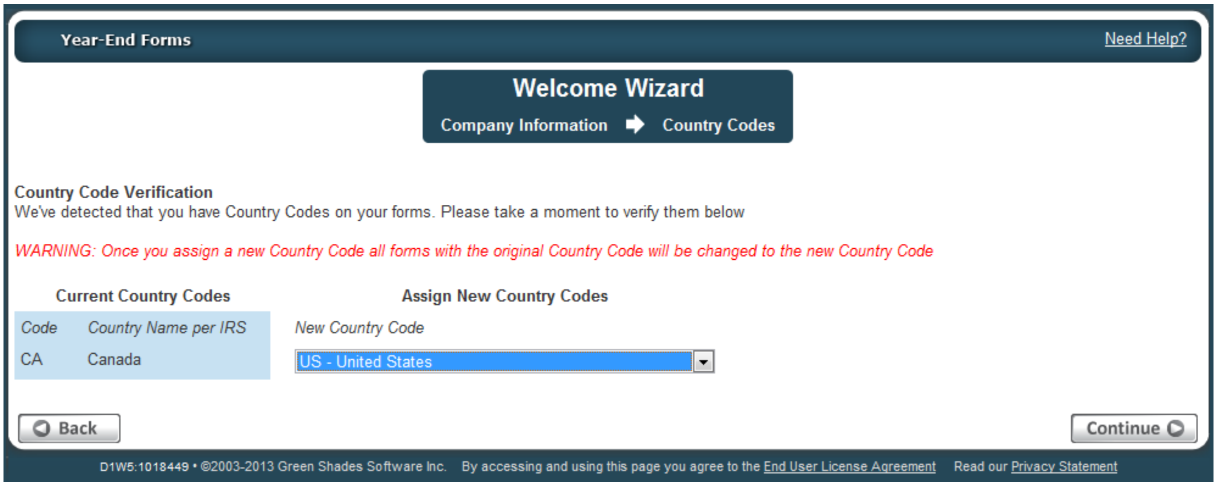
Log in to the web page at www.downloadmyform.com using the user/credentials authorized to administer the 1099 forms

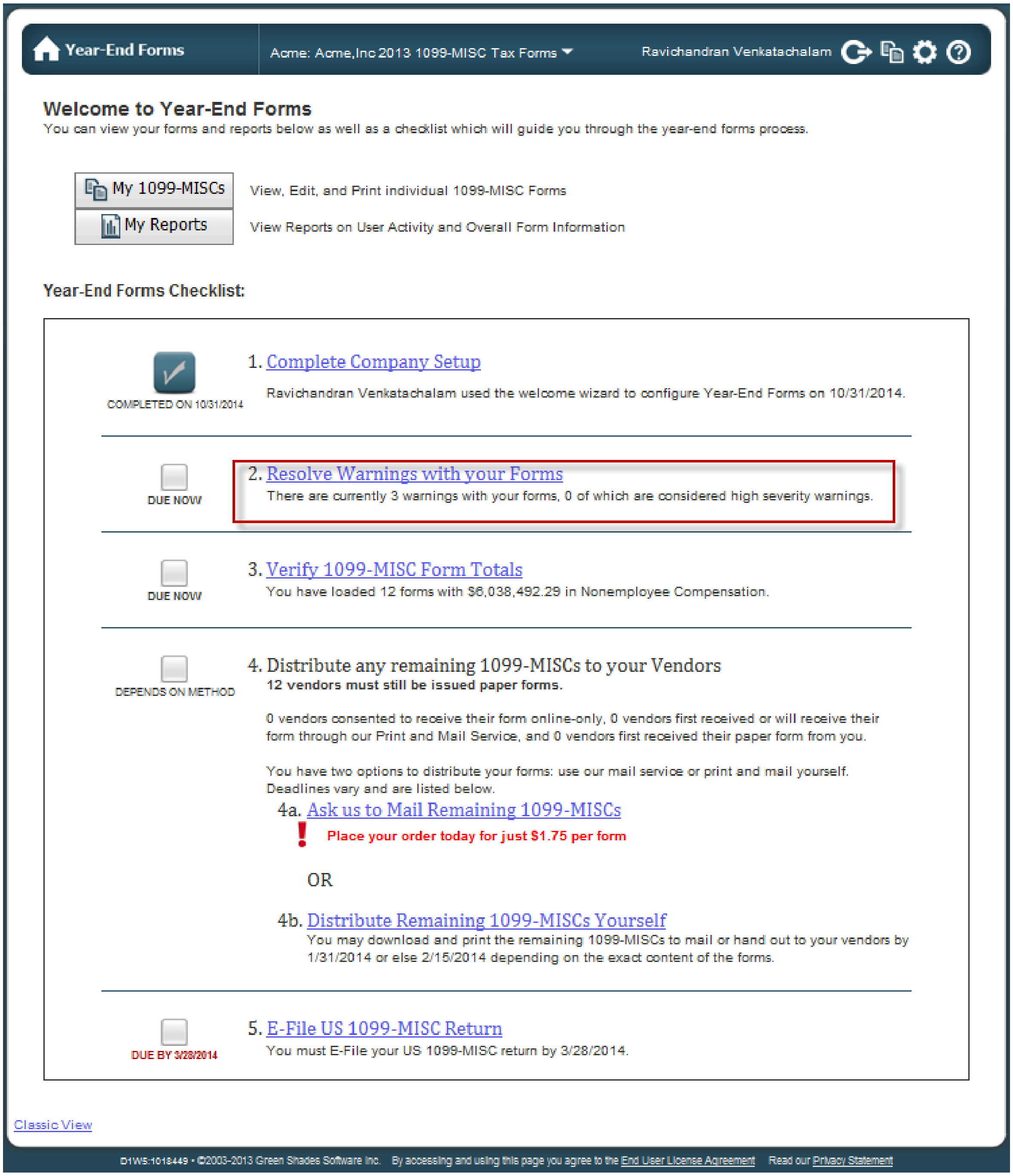

Year-End Forms
Need Help?
Select a workspace below:
Click here to import new tax forms into Year-End Forms
Year: 2013 Sort By: Workspace Title -- A to Z View: Expanded Search:
(Sign Out)
Search for a Form: Form Type: 1099-MISC Tax Year(optional): 2013 Recipient Name/TIN:
You have new workspaces to configure.
ACME: Acme,Inc 2013 1099-MISC Tax Forms New!
12 vendors with $6,038,492.29 in nonemployee compensation
Formset D1W5:1018449
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 - -
RYANNAV: Ryan Test CMiC 2013 1099-MISC Tax Forms New!
Formset D1W5:1018195
ACME: Acme,Inc 2013 W-2 Tax Forms
Formset D1W5:1014057
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

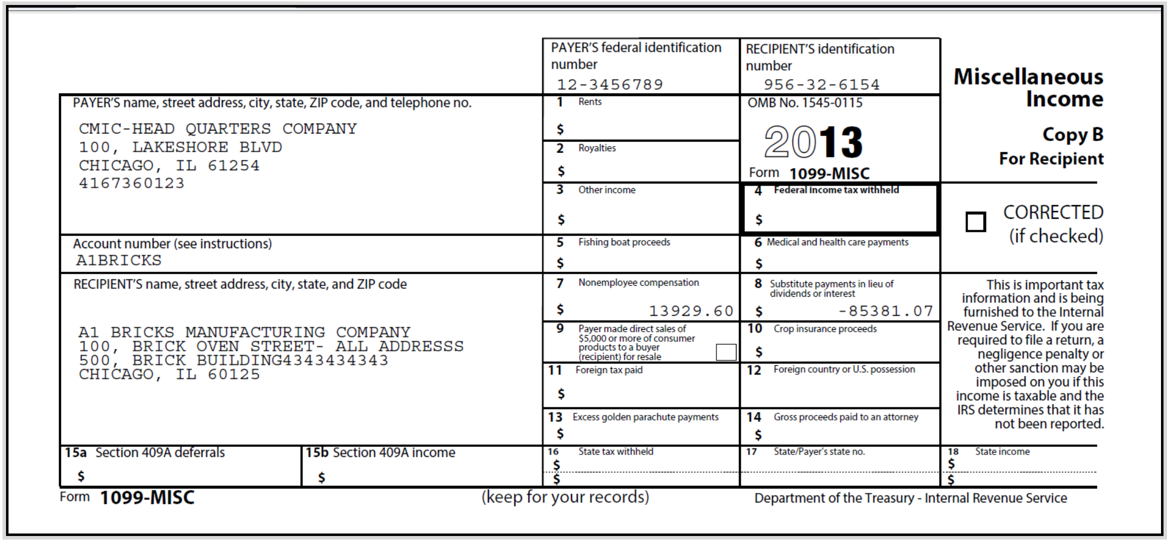

Year-End Forms
Need Help?
It is past the deadline to issue your 1099-MISCs. Are these corrected 1099-MISCs?
Yes, I am uploading corrected 1099-MISC forms.
No, I am uploading new or original 1099-MISC forms.
Continue
D1W5:1018449 • ©2003-2013 Green Shades Software Inc. By accessing and using this page 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.
Company Information
Please review the company information below and make any edits necessary.
Official Company Name
CMiC-Head Quarters Company
Your company's registered name that will appear on your forms
Company EIN
123456789
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
Ravichandran Venkatachalam (CMiC Tester)
Select "[Add a New Contact]" to enter your billing contact's information if it is not listed.
Continue
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:
Add a New Administrator
Save
Back
Continue
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
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
Assign New Country Codes
Code
Country Name per IRS
CA
Canada
New Country Code
US - United States
Back
Continue
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
Acme: Acme,Inc 2013 1099-MISC Tax Forms
Ravichandran Venkatachalam
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
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



PAYER'S federal identification number
12-3456789

RECIPIENT'S identification number
956-32-6154

Miscellaneous Income

Copy B
For Recipient

PAYER'S name, street address, city, state, ZIP code, and telephone no.
CMIC-HEAD QUARTERS COMPANY
100, LAKESHORE BLVD
CHICAGO, IL 61254
4167360123

1 Rents
$

OMB No. 1545-0115

2013

Form 1099-MISC

2 Royalties
$

3 Other income
$

4 Federal income tax withheld
$

CORRECTED (if checked)

Account number (see instructions)
A1BRICKS

5 Fishing boat proceeds
$

6 Medical and health care payments
$

RECIPIENT'S name, street address, city, state, and ZIP code
A1 BRICKS MANUFACTURING COMPANY
100, BRICK OVEN STREET- ALL ADDRESSS
500, BRICK BUILDING4343434343
CHICAGO, IL 60125

7 Nonemployee compensation
$ 13929.60

8 Substitute payments in lieu of dividends or interest
$ -85381.07

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.

9 Payer made direct sales of $5,000 or more of consumer products to a buyer (recipient) for resale

10 Crop insurance proceeds
$

11 Foreign tax paid
$

12 Foreign country or U.S. possession

13 Excess golden parachute payments
$

14 Gross proceeds paid to an attorney
$

15a Section 409A deferrals
$

15b Section 409A income
$

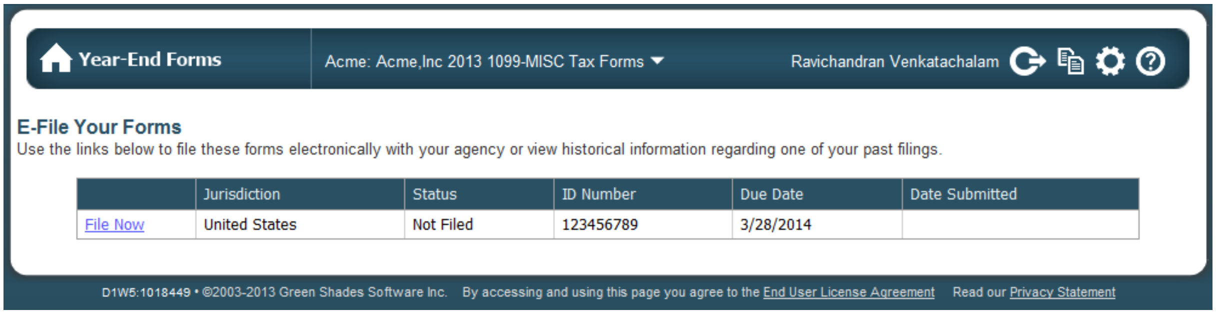
16 State tax withheld
$
$

17 State/Payer's state no.

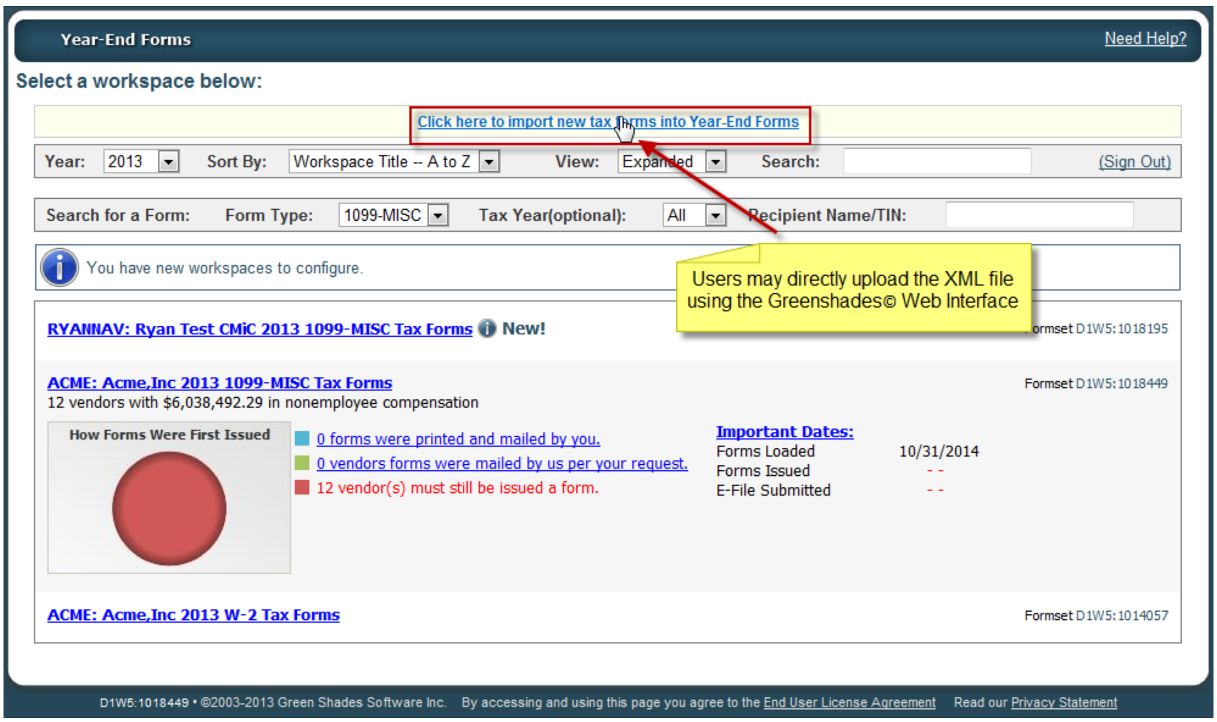
18 State income
$
$

Form 1099-MISC (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.

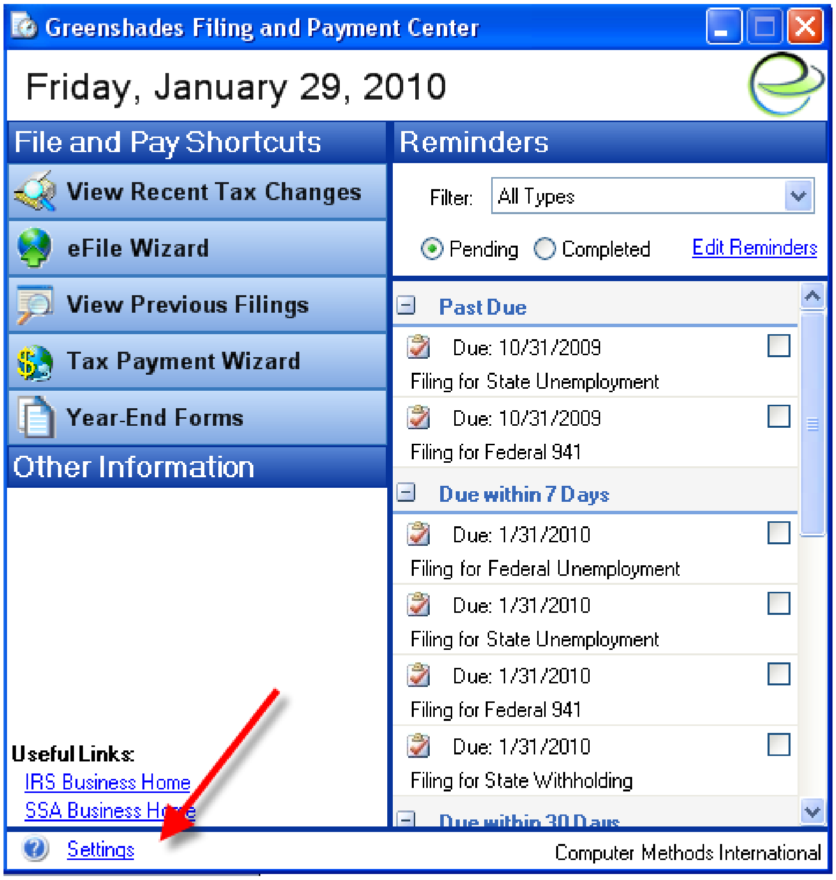


2. Directly Upload the XML file using the Greenshades© Web Application Interface



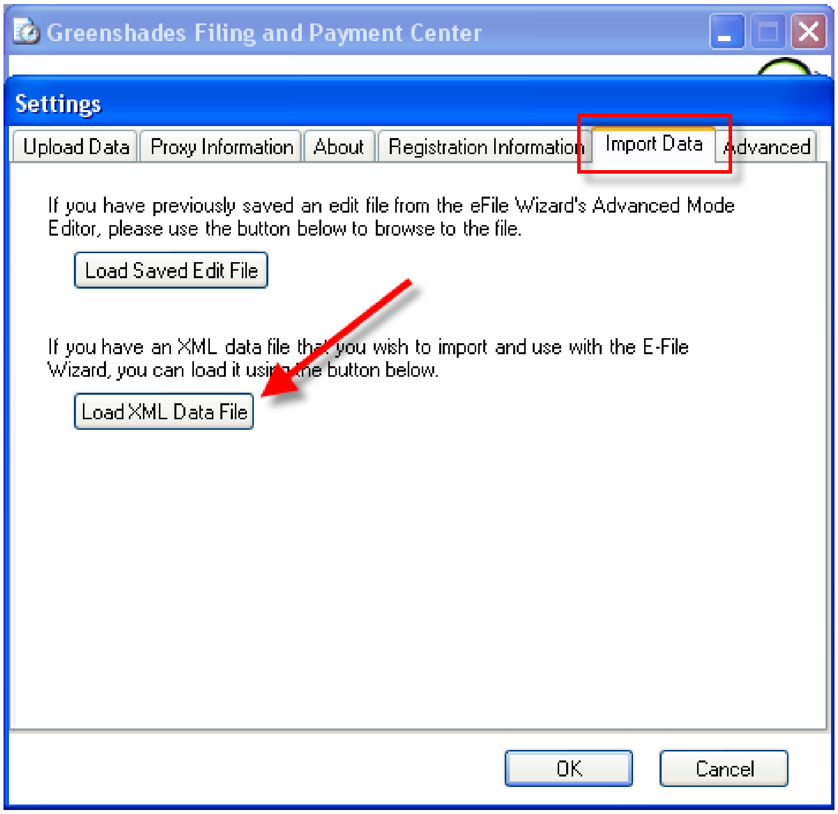
Users may follow on screen instructions for each step to upload an XML file generated by CMIC

941 Reporting



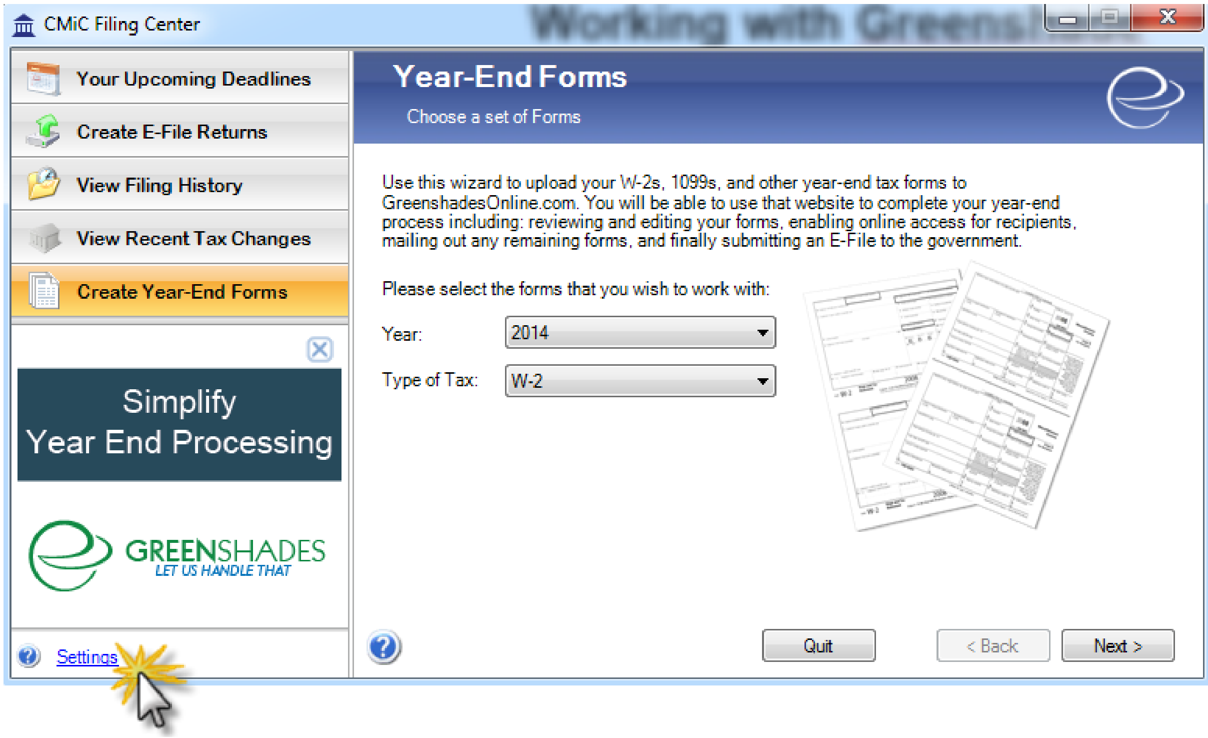
Click the desktop icon created for 941 reporting in step 4 (*Step 4: Icon Setup for Greenshades* section in guide) to bring up the Greenshades screen above.

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

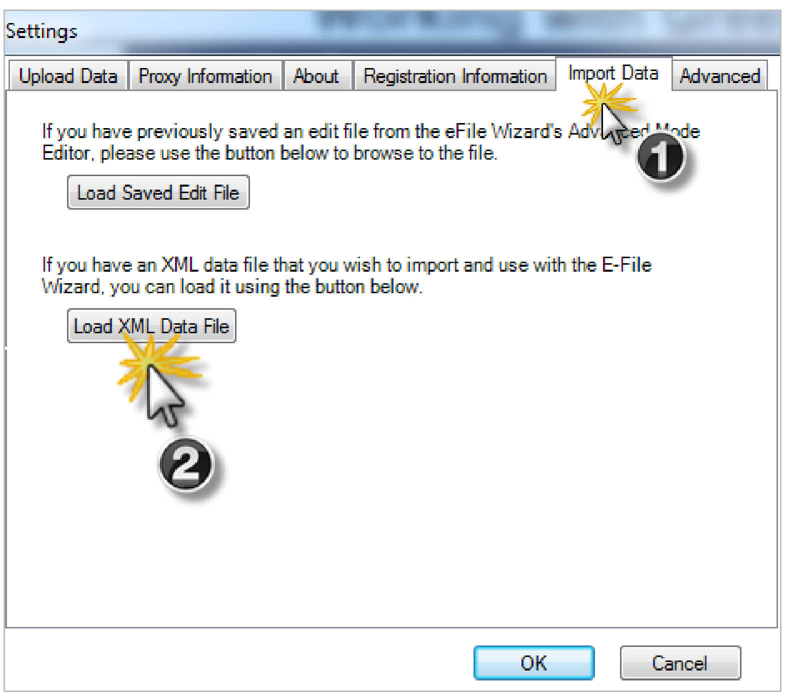


Click the **Import Data** tab and press the **Load XML Data File** button. Greenshades will walk you through the rest of the steps. If you require any assistance, please contact CMiC.

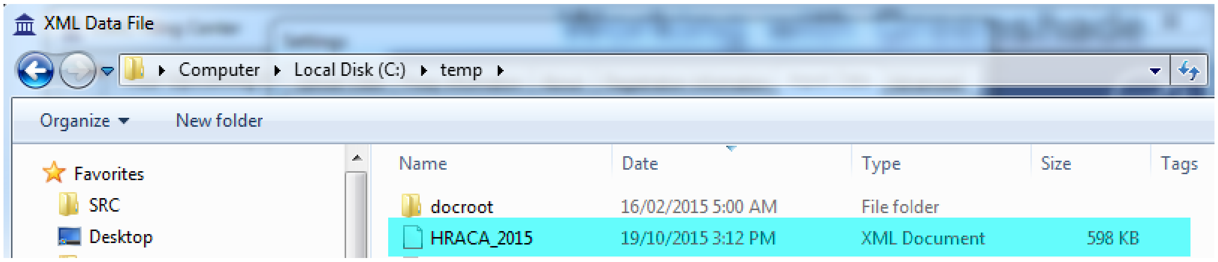
1095 Reporting



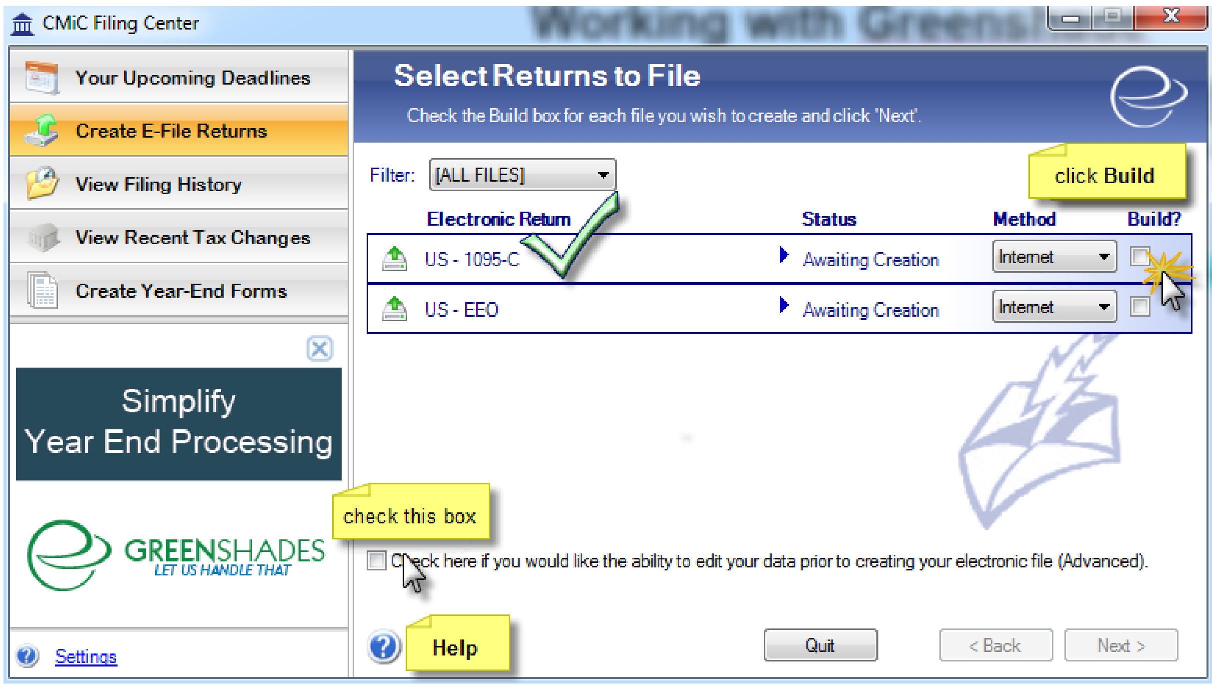
Launch the Greenshades wizard, shown above, and click **Settings** on the bottom-left of the wizard.



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

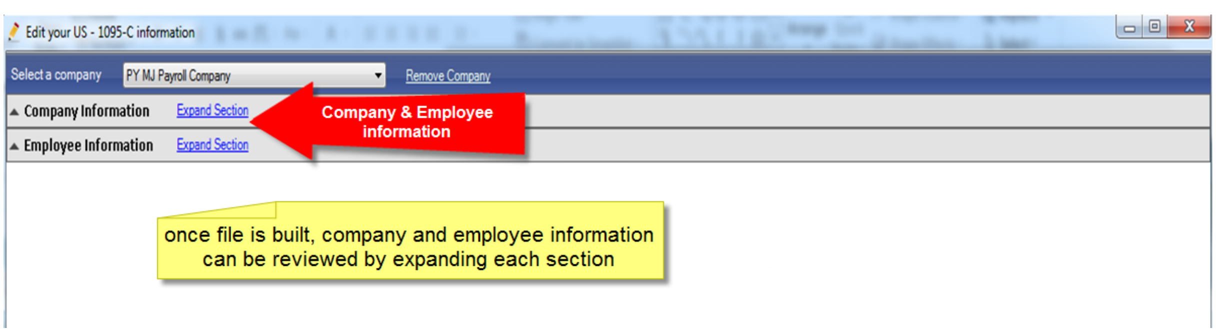


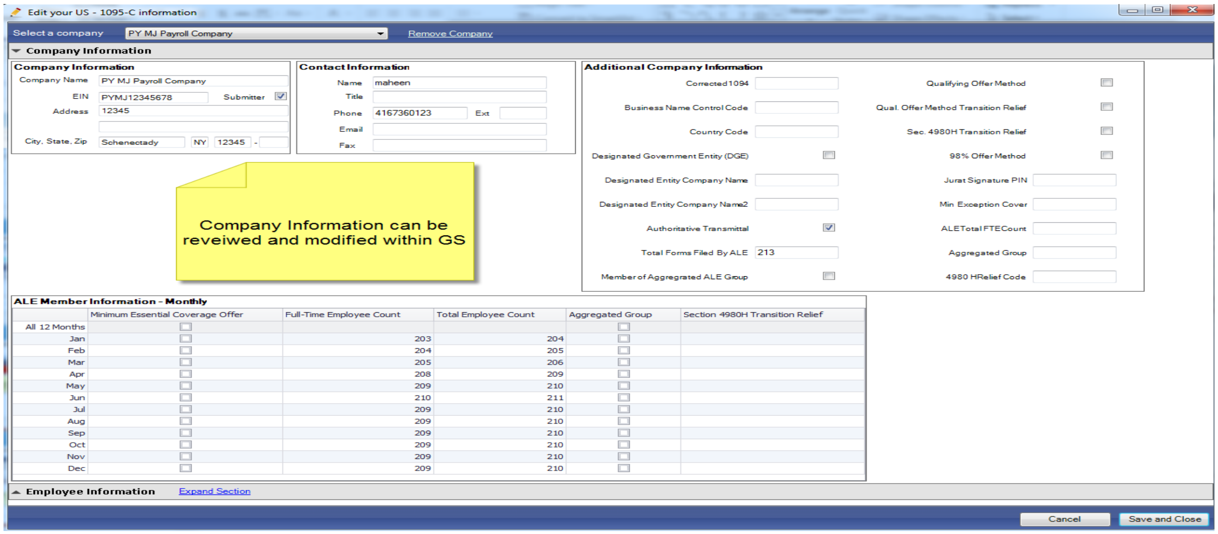
Then, navigate to and select the exported XML file.

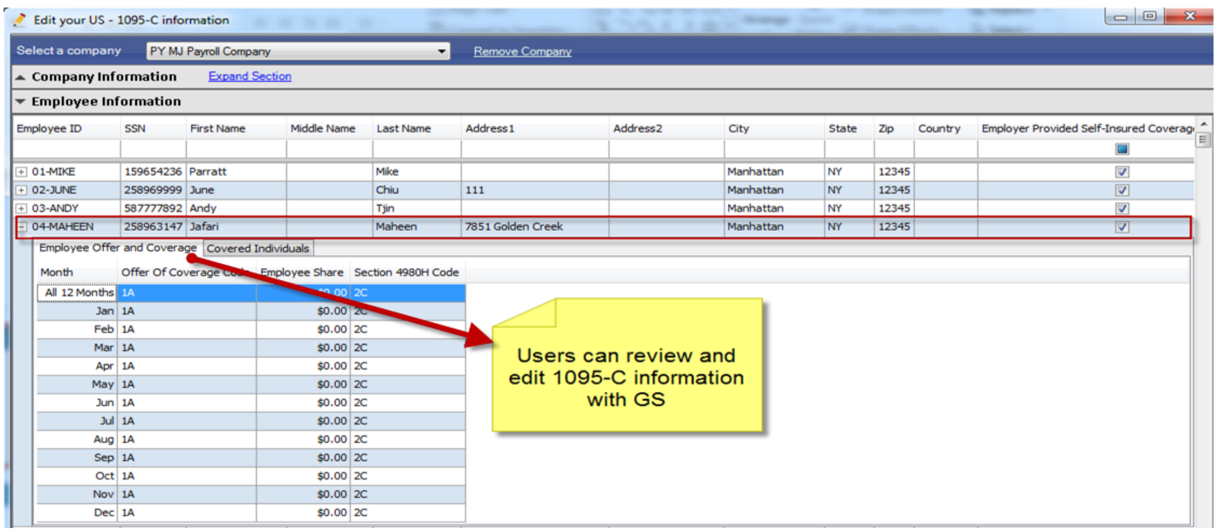


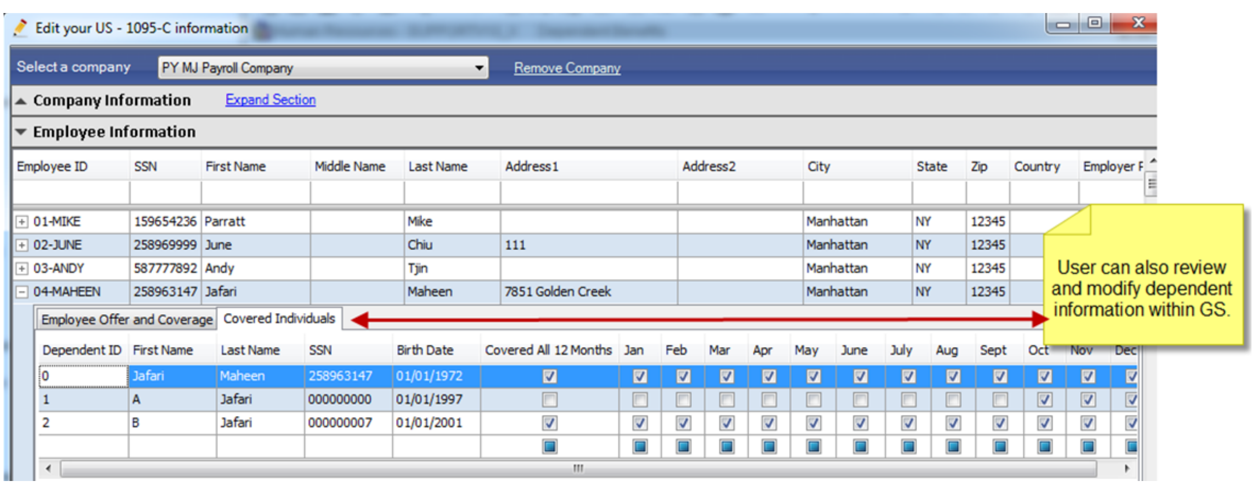
Back in Greenshades, for the 1095-C electronic return, click **Build**, as shown in the above screenshot. Then, check the check-box labeled, "Check here if you would like the ability to edit your data prior to creating your electronic file (Advanced)." Click [**Next**] to proceed.

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

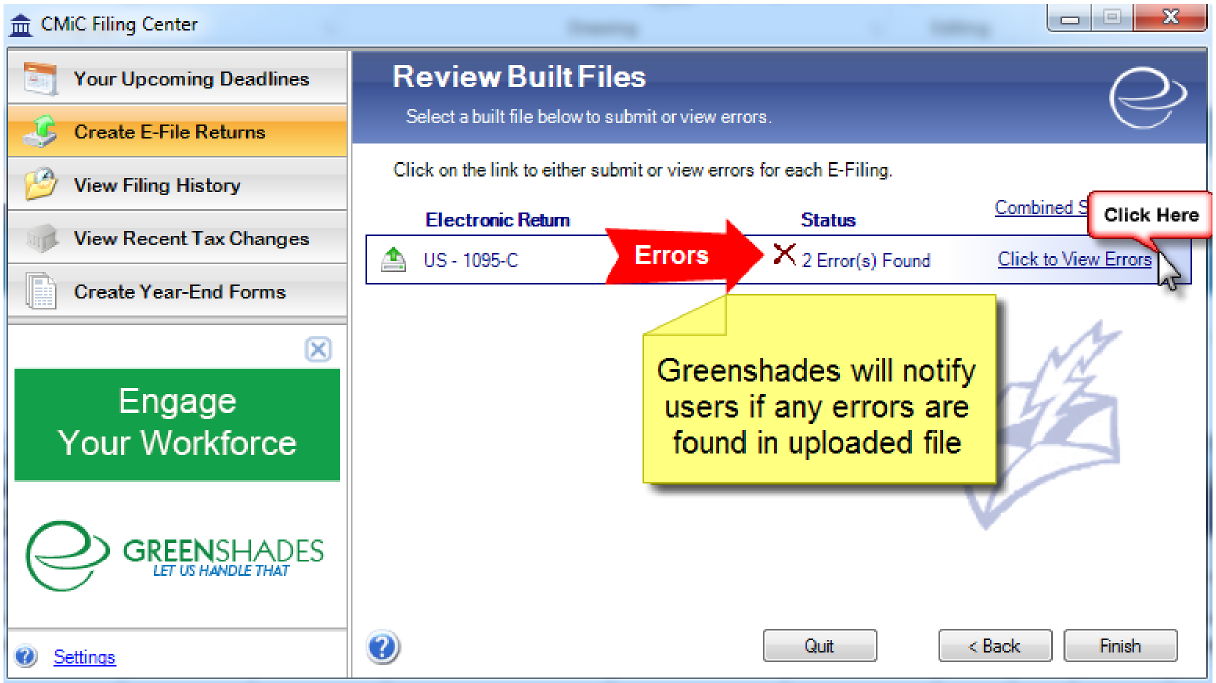



Edit your US - 1095-C information
Company Information can be reveiwed and modified within GS

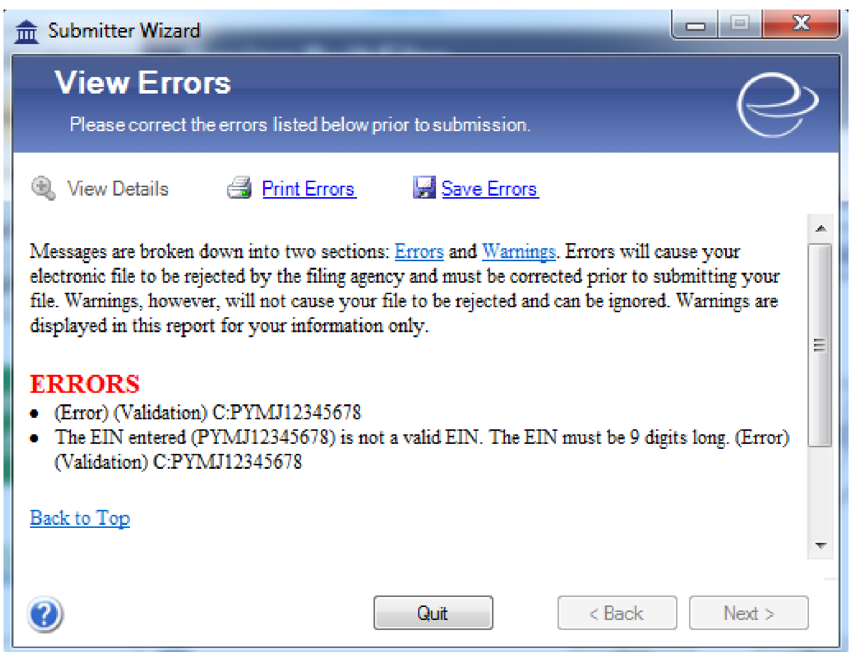

Edit your US - 1095-C information
Users can review and edit 1095-C information with GS


Edit your US - 1095-C information
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

1

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