

# Year-End Forms Release Notes

**Anticipated Release: 10/5/2022**

Year end is coming, and we're getting ready!

If you start poking around in Greenshades online, you will notice an option to begin uploading W-2s for TY 2022. This is the first of many forms we are working to prepare for you and your employees this coming year end.

Home Employees **Payroll** Pay History Tax Service Year-End Forms Reports Settings

## Year-End Forms

Select the year and form type you would like to view.

Year: 2022

Form Type: W-2

You have not loaded any formsets onto Greenshades Online that match the Year and Form Type filters chosen above.

Change the filters to find some of Your existing formsets or else use the "Import Your Forms" option below to upload a new set of forms

[Import Your Forms](#)

a Employee's social security number					
b Employer identification number (EIN)		1 Wages, tips, other compensation	2 Federal income tax withheld		
c Employer's name, address, and ZIP code		3 Social security wages	4 Social security tax withheld		
		5 Medicare wages and tips	6 Medicare tax withheld		
		7 Social security tips	8 Allocated tips		
d Control number		9	10 Dependent care benefits		
e Employee's first name and initial Last name Suff.		11 Nonqualified plans	12a		
		13 Statutory employee Retirement plan Third-party sick pay	12b		
f Employee's address and ZIP code		14 Other	12c		
			12d		
15 State Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name

Form **W-2** Wage and Tax Statement **2022** Department of the Treasury—Internal Revenue Service

Navigation:  
Greenshadesonline.com > Year End Forms

Easier to get a copy for your records!

Now when you use Year End Forms to file your W-2, no need to "manually file" to get a copy, then file again to actually submit – No, no! Now, you can get a copy on the history page when your submission is confirmed.

Navigation:

Greenshadesonline.com > Year End Forms> Steps 8 & 9

**Anticipated Release: 03/09/2022**

Updated Workflow:

Select the year and form type you would like to view.

Year:

Form Type:

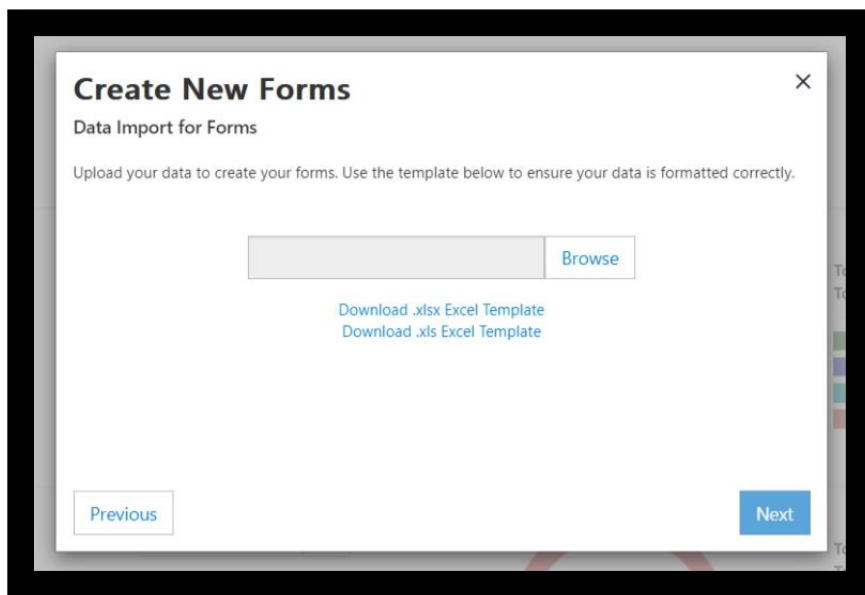
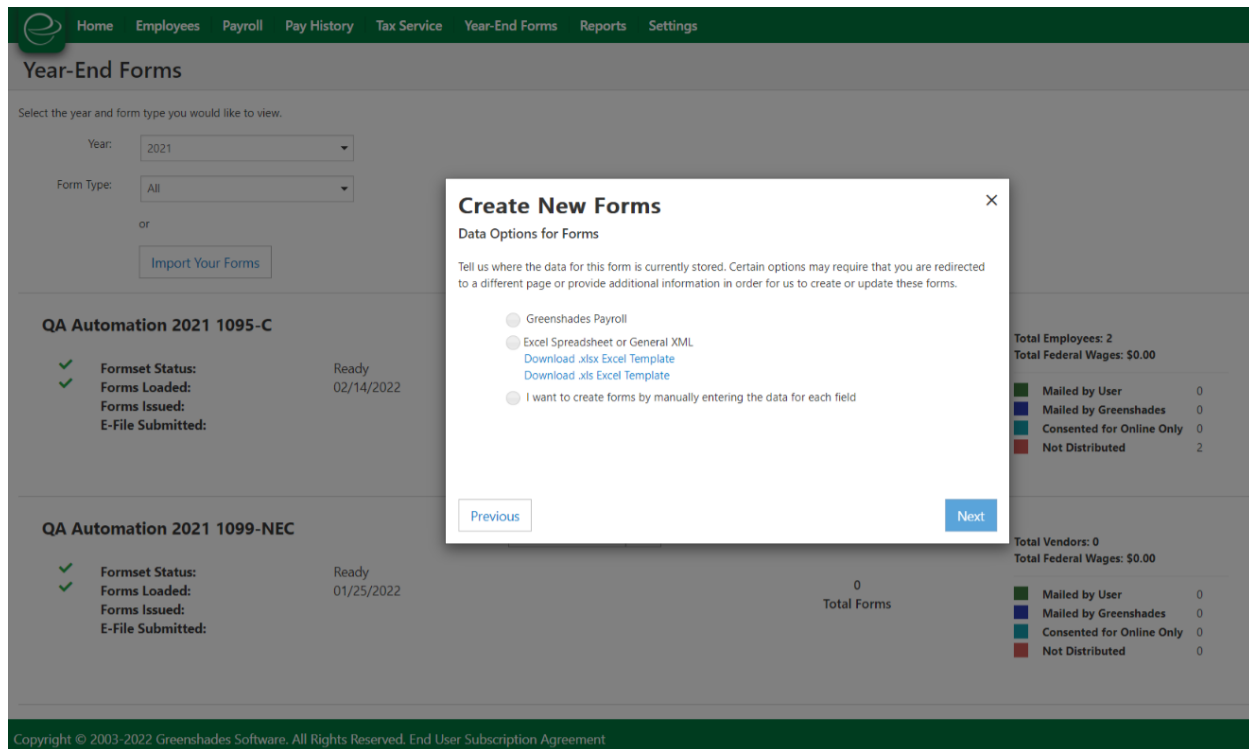
or

You will notice a new button label the next time you are ready to generate annual forms in Greenshades. To help clients navigate to the first steps in the process, a label change was made from “Create new formset” to Import Your Forms.

Navigation:

Greenshadesonline.com > Year End Forms

## Updated Workflow:



Annual import templates are now even more accessible than before! You can also download the appropriate excel template for the version of excel used on your computer.

## Navigation:

Greenshadesonline.com > Year End Forms

**Anticipated Release: 8/04/2021**

**Hawaii W-2 for Annual Withholding is now due to the state by January 31, 2022**




- Hawaii has moved the deadline for filing forms W-2 with the state to January 31, 2022 (formerly the last day of February) which coincides with the Federal W-2 deadline
- This [bill](#) also establishes \$25 penalties for each instance of failing to file Forms W-2, failing to file electronically if required, or for willfully failing to provide Forms W-2 to employees, but with a total maximum penalty of \$50 per employee.


## Anticipated Release: 11/09/2020

# Greenshades Online Year End Forms

## Navigation:



Greenshadesonline.com > Year-End Forms > 1095-C

Year-End Forms | 2020 Test: 2020 Test 2020 1095-C Tax Forms | Jerel Dunnan (impersonated by: NNELSON) |   

FirstName LastName's 1095-C Next Form 


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**Identifiers**  
Account Number and Tax ID

Employee ID	<input type="text" value="12345"/>	SSN/TIN	<input type="text" value="012-34-5677"/>
Hire Date	<input type="text" value="01-02-2018"/> 	Date of Birth	<input type="text" value="01-01-2018"/> 
Age on Jan 1	<input type="text"/>		

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**Contact Information**  
Name and Address

First Name	<input type="text" value="FirstName"/>	Middle Name	<input type="text" value="MiddleName"/>
Last Name	<input type="text" value="LastName"/>	Email	<input type="text" value="email@email.com"/>
Address	<input type="text" value="Add1"/>	Address 2	<input type="text" value="Add2"/>
City	<input type="text" value="CityX"/>	State	<input type="text" value="FL"/> 
Zip (+4)	<input type="text" value="12345"/> - <input type="text" value="1234"/>	Home Phone	<input type="text" value="5555555555"/>

Foreign Country?

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**1095-C Part II: Employee Offer of Coverage**

2020 Plan Start Date    CORRECTED

No health plan under which coverage was offered to this employee in the 2020 year.

<b>Line 14: Offer of Coverage</b> <i>(Enter required code)</i>	<b>Line 15: Employee Required Contribution</b> <i>(For Self-Only Minimum Value Coverage)</i>	<b>Line 16: Applicable Section 4980H Safe Harbor</b> <i>(Enter code, if applicable)</i>	<b>Line 17: ZIP Code</b> <i>(Enter ZIP, if applicable)</i>
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## New Feature

Administrators are now able to utilize 2020 1095-C including support for Health Reimbursement Arrangement (HRA) Line 14 codes, and Line 17 Zip Code. Administrators are now able to download their 2020 1095-C information from Greenshades Online. This template includes the additional fields to support the Health Reimbursement Arrangement (HRA) enhancements added to the 2020 1095-C. For more information on the new fields for the 1095-C, visit <https://www.irs.gov/instructions/i109495c>.

## Navigation:

Greenshadesonline.com > Year-End Forms

Select the year and form type you would like to view.

Year: 2019  
Form Type: All  
or  
[Create New Formset](#)

Formset ID	Total Employees	Total Federal Wages	Mailed by User	Mailed by Greenshades	Consented for Online Only	Not Distributed
FABRIKAM DEMO 2019 W-2	3	\$200.00	0	0	1	2
FABRIKAM DEMO 2019 1095-B	5	\$0.00	0	4	0	1

## New Feature

Administrators are now able to import their tax forms directly from GreenshadesOnline. Administrators are able to view, replace, and append forms from an updated UI for their Year-End Forms module in GreenshadesOnline.com.

## Navigation:

Greenshadesonline.com > Company Dropdown> System Dashboard> Year-End Companies

System Dashboard

Home Employees Syncs

### System Home

**New Child Company**

New Company

**Create or Edit Child Companies**

Company Name

Company ID

[Save Company](#)

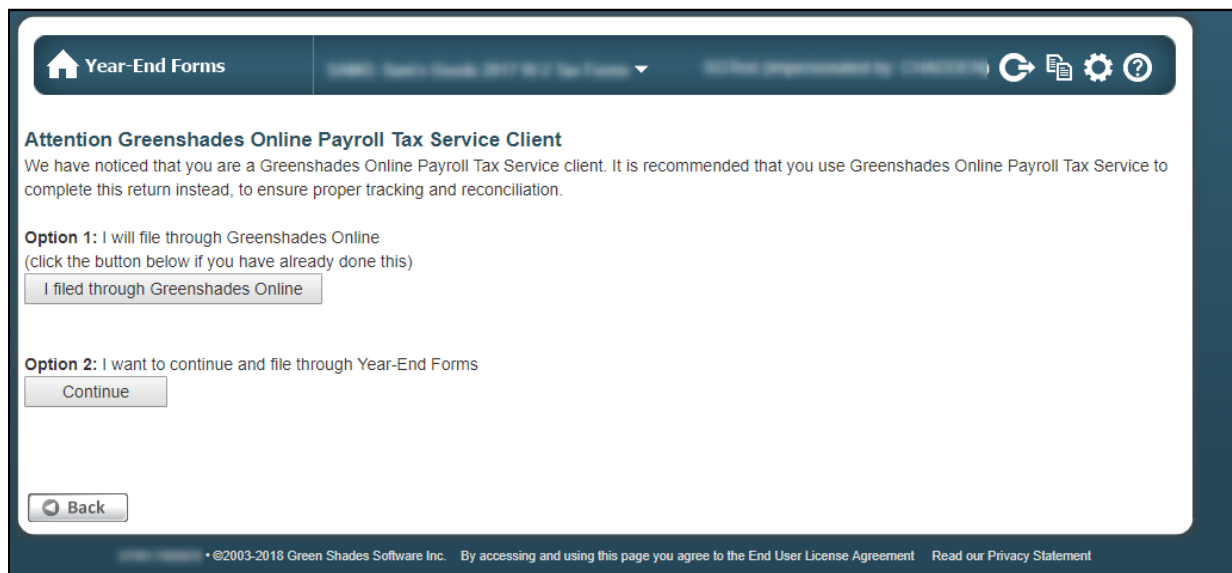
## New Feature

First time, clients who are ONLY creating forms will have the ability to create their company from the system dashboard. This feature is not intended for companies utilizing the Greenshades platform or other GreenshadesOnline modules.

## Release Notes for 09/26/2018

### Prompt Year-End Forms users to submit Federal W-2 information through Payroll Tax Service, when applicable

- For the best possible user and software experience, Payroll Tax Service users are preferred to submit W-2 Federal and state information through Payroll Tax Service, instead of Year-End Forms. Year-End Forms has previously been prompting Payroll Tax Service users to submit the state W-2 return through Payroll Tax Service, however Year-End Forms was not prompting this on Federal returns. This prompt has now been updated, so that Payroll Tax Service users are prompted on either of these returns. Note, users still can ignore this prompt and continue filing through Year-End Forms, if desired.



The screenshot shows a web interface with a dark blue header. On the left, there is a home icon and the text "Year-End Forms". On the right, there are icons for refresh, print, settings, and help. Below the header, the main content area has a title "Attention Greenshades Online Payroll Tax Service Client" and a message: "We have noticed that you are a Greenshades Online Payroll Tax Service client. It is recommended that you use Greenshades Online Payroll Tax Service to complete this return instead, to ensure proper tracking and reconciliation." There are two options: "Option 1: I will file through Greenshades Online (click the button below if you have already done this)" with a button labeled "I filed through Greenshades Online", and "Option 2: I want to continue and file through Year-End Forms" with a button labeled "Continue". At the bottom left, there is a "Back" button. The footer contains copyright information: "©2003-2018 Green Shades Software Inc. By accessing and using this page you agree to the End User License Agreement Read our Privacy Statement".

## Release Notes for 06/29/2018

### W-2 PR User Experience

- The Welcome Wizard's Cease of Operations date and calendar widget will default to the year of the formset.
- The validation text on selecting a date will also demand it is within the year of the formset.

## Release Notes for 06/14/2018

## 1099-B

- The FATCA Filing Requirement checkbox was often difficult to find previously. It is now located at the top of the form.

## Pennsylvania Requirements and E-File Totals

- Because of Pennsylvania requirements, some totals are rounded at the report of employee level. We've provided a note that informs employers of this.

## Release Notes for 12/15/17

### 2017 Compliance:

- W-2: Updated this form per any IRS changes since last year.
- 941: Updated this form per any IRS changes since last year.
- W-2GU: Available for clients who have paid for this form.
- W-2PR: Available for client to print & mail as well as e-filing.

### Year End Forms:

- W2-C Confirmation: When Admins edit information post e-file, a pop-up verifier asking to confirm information is to be 'corrected' will appear.
  - A correction form will be generated and the 'corrected checkbox' will be automatically selected.

## Release Notes for 12/12/17

### Year End Forms:

- Manage Employee Access
  - Step 5 for W-2 and Step 6 for 1095-Cs.
  - This step now displays the form you're on and the status of employee access through GreenEmployee.
  - This setting can be turned off or on either in Year End Forms or Settings → Access Settings → Employee Manage Access within GreenshadesOnline.
- Email Notifications to Employees



- A link to GreenEmployee is now provided in the notification email sent to employees.
- If the ability for employees to access their forms through YEF has been disabled, an email cannot be sent out. An info message will appear directing the admin to enable Employee Access first.

## Release Notes for 12/1/17

### 2017 Compliance:

- 1095-B: Updated this form per any IRS changes since last year.
- 1098: Updated this form per any IRS changes since last year.
- T4: Updated this form per any changes Canada made since last year.
- T4A: Updated this form per any changes Canada made since last year.
- W2: Allowed up to 16 characters to be populated in Box 14's description text box.

## Release Notes for 11/22/2017

### Release Notes

- Any significant updates to this product are not available in the form of release notes.

## Release Notes for 11/17/2017

### Welcome Wizard

- Improve editing Welcome Wizard changes and setting changes by enabling logging of changes made to employee information and which admin made them.

### 2017 Compliance:

- W-2G: Updated this form per any IRS changes since last year.
- 1095-C: Updated this form per any IRS changes since last year.
- 1095-C: Improved functionality of YEF if needing to view more than seven covered individuals

### Release Notes for 08/30/2017

#### W-2 Formset UI Update

- Updated the UI of the Edit form page for the W-2 to be consistent with the look of an actual W-2 form to help guide users through editing the form in a simplified way.

The screenshot shows a web-based interface for editing a W-2 form. The form is titled "EmployeeA EmployeeA's W-2" and is organized into a grid of sections. The top section, "Employee and Employer Information", includes fields for Social Security number, Employer Identification number (EIN), and employee/employer names and addresses. Below this are sections for "Control number", "Employee's first and last name", and "Employee's address and ZIP code". The middle section, "State, Wages, and E-filing information", contains fields for State, wages, and state income tax. The bottom section, "Local Wages", includes fields for local wages, local income tax, and locality name. The right side of the form features a table for "14 Other" items, with columns for Label, Amount, Code, and Amount, and an "Add" button. The interface includes navigation buttons like "Back", "Save", and "Delete".

### Release Notes for 08/09/2017

#### New Form Support: W-2GU (Guam)

- Added new support for the W-2GU within the Year-End Forms portal.
  - Clients may import, edit, print, and distribute forms for the W-2GU.

The image shows a thumbnail of the W-2GU (Guam) form. It is titled "W-2GU Guam Wage and Tax Statement" and is identified as Form 2017. The form is organized into sections similar to the standard W-2, including "Employee and Employer Information", "State, Wages, and E-filing information", and "Local Wages". The form is issued by the Department of the Treasury - Internal Revenue Service and the Guam Department of Revenue and Taxation. The form number is 2017 and the OMB No. is 1545-0028.

### Release Notes for 07/19/2017

## Administrator Access Control Settings Redesign

- GreenshadesOnline.com → Settings → Access Settings → Administrator Access → Access Control tab
  - While accessible through GreenshadesOnline.com rather than the Year-End Forms portal, the Access Control setup indicates which administrators within your company has access to and may work with formsets and their data.
  - The UI was updated to a grid for at-a-glance view of your company’s administrators and their role (super or limited). From the grid you may choose to Edit an existing administrators permissions or add a new administrator.

**Administrator Access**

Use the tabs below to configure Administrator Access

My Account | **Access Control** | Support

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**Administrator Management** + Add Administrator

Manage access rights for administrators using the table below.

	Name	Greenshades Online Role	Employee Group Access	Formsets Administered	Last Login
<a href="#">Edit</a> <a href="#">Remove</a>	GreenshadesQA (formerly ChrisV)	Super Administrator	None	34	2017/10/30 10:32:14 AM
<a href="#">Edit</a> <a href="#">Remove</a>	David Test	Super Administrator	None	13	2015/10/21 04:02:29 PM
<a href="#">Edit</a> <a href="#">Remove</a>	NewUserAdmin4	Limited Administrator	None	16	
<a href="#">Edit</a> <a href="#">Remove</a>	New User 7	Limited Administrator	None	0	2015/10/01 12:52:41 PM

Page 1 of 1 (5 items) Page size: 10

- When editing or adding a new administrator, you may limit access by each tax year and indicate within each year which formset types the administrator has access to, as well as granularly give access to a specific group(s) of employees/vendors.

**Administrator Access Details**

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**Year-End Forms Access**

You can use this section to view and configure access to various formsets for your company.

Showing formsets for tax year: 2016

**Formsets You Administer**  
 You are a super administrator on the following formsets and may therefore configure access for other users. Check the box next to the formsets that Mike Peterman may administer.

**Limit Access to Formsets**

- 1099-K Forms
- 1099-MISC Forms
- 1095-B Forms
- 1095-C Forms
- W-2 Forms

**Limit W-2 Formset Access**

- Super Administrator
- Limited Administrator with Access to All Employees
- Limited Administrator with Access to Groups of Employees

Access will be restricted by UserDef1. [Change](#)

- (Blank)
- PMB

## Release Notes for 06/28/2017

### Local Mappings Improvements

- Improved the logic to parse local codes (reporting Jurisdiction) depending on the source, so the codes do not require manual editing post importing data to the W-2 formset.
- Added support for 2-digit IN County code that is required for display in Box 20.
- Expanded the character limitation for Box 20 from 15 to support 26 characters.

### Administrator Permissions Logic

- Improved the logic to ensure limited access administrators may only add new forms to a form set within the permissions and limitations set through Access Control, therefore limited access administrators may not create and/or save a form that they do not have permissions for.
- Added in information alert of the Year-End Forms homepage indicating if the signed-in user is a Limited Administrator with access to a limited number of forms.

**i** Your account is configured as a limited administrator and has access to only 22 out of 27 total forms. All actions conducted on this account will only apply to the forms your account can access. Please contact your HR administrator for questions regarding your access permissions.

### Release Notes for 12/16/2016

#### 2016 IRS Updates

- Applied 2016 IRS updates to all form types that Greenshades offers support for through the Year-End Forms portal.

### Release Notes for 11/15/2016

#### 1042-S Edit Form Update

- The form displays a percentage value but we were having the client give us a decimal. We've updated the UI to indicate the correct value and avoid confusion this year.

2. Gross income		10000	
3a. Exempt. code	00 ▾	3b. Tax rate	0.05 %
4a. Exempt. code	13 ▾	4b. Tax rate	0.3 %
6. Net income		9500	
7b. Not deposited under escrow procedure		<input type="radio"/> No	
9. Tax assumed by			

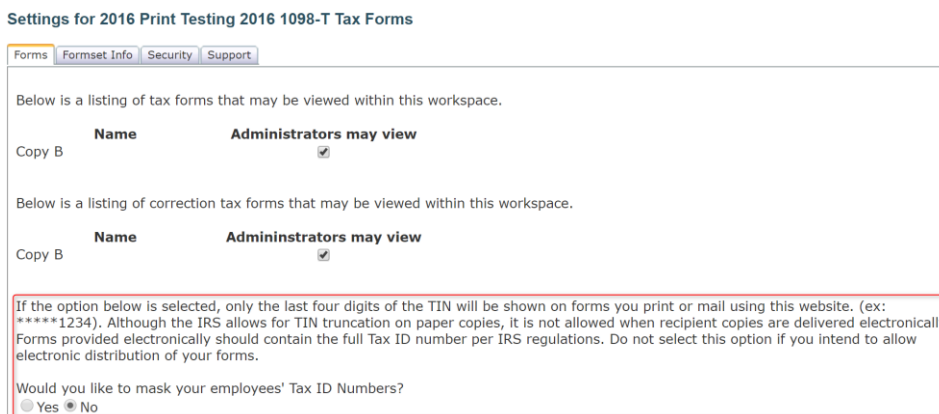
### 'My Forms' Navigation Buttons

- When viewing a specific employee/vendor form, new 'Next' and 'Previous' buttons allow users to navigate through their forms without going back to the 'My Forms' list.



### SSN/TIN Masking

- Added SSN/TIN Masking setting, which will apply mask of \*\*\*\*\*1234 on the recipient's form, when viewing, printing, or submitting a distribution batch.



### Download & Print Distribution Update

- Removed including the advertising coupon sheet as a 2nd page to each form when generating a Download & Print PDF distribution batch.

## Release Notes for 10/31/2016

### 1094-C Authoritative Transmittal Indicator

- Added a non-functional auto-checked checkbox with an explanation window on what Authoritative Transmittal is and Greenshades does not allow disabling to indicate as No on the file submission of the 1094-C.

#### Verify 1094-C Form Totals

The following information was gathered based on your collective 1095-C form data and contains information populated for C form (Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns).

Please review the

**Part I**

**Applicable Large Employer:** An ALE Member may choose to file multiple forms 1094-C, but only one form 1094-C filed by the ALE member must be identified as the Authoritative Transmittal. Each ALE Member must file its own Forms 1094-C and 1095-C under its own separate EIN, even if the ALE member is part of an Aggregated ALE Group.

**Company Name:**

**Address 1:**

**Address 2:** Greenshades and the Year-End Forms portal does not support the filing of partial returns and will submit all forms and data contained in this formset when filed, thus any filed form 1094-C will be indicated as the Authoritative Transmittal and this checkbox may not be unchecked/disabled.

**City:**

**State:**

**ZIP:**

[Click here for more IRS reference regarding the Authoritative Transmittal](#)

**Total # of 1095-C forms:**

Close

Is this the Authoritative Transmittal for this ALE Member?

### 1095-C Welcome Wizard: Self-Insured

- Added an explanation and a link to the IRS page for the official description of identifying as a Self-Insured employer for ACA purposes.
- Updated verbiage to more clearly define between Yes, No, and Mixed Batch.

### 1095-C Welcome Wizard: Total Employees

- Removed the requirement from the Total Employee Count entry fields for each month.
  - These monthly fields are now optional and the user should be able to continue with blank fields.

## Release Notes for 10/18/2016

### 1095-C Welcome Wizard: Transition Relief

- Updated the Transition Relief page with 2016 dates and requirements.
  - Plan start date must be in 2016
- Removed “Non-Calendar Year Transition Relief” as an option; no longer applicable for YE 2016.

### Relocated 1095-C BNC Field

- The Business Name Control field, previously entered on the Contact Information page of the Welcome Wizard, has been moved to the eFiling wizard.

**E-File Wizard**

Submitter Information → Review Totals → Submit File

**Verify Submitter Information**  
Take a few seconds and verify the information below.

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

**Contact Email**  
Enter the email of the employee who should be contacted by the IRS if needed.  
test.user@domain.com

**Contact Phone**  
Enter the phone number and extension of the employee who should be contacted by the IRS if needed.  
[Area Code] [Number] ext. [Extension]

**Business Name Control**  
Enter the **Business Name Control (BNC)** for this company/EIN.  
123456

## Release Notes for 09/19/2016

### 1095-C Welcome Wizard: Aggregate ALE Groups

- Added verbiage to alert clients to the fact that this page/setup is *only* important if they the client is filing through the Year-End Forms portal.
- Added Average Full-Time Employee Count/Average Total Employee Count columns
  - Column displayed (which indicated either FT or Total Employee Count requirement) based on 98% Offer Method Transition Relief indicator.
- Changed the "Remove" button for each member/company row to an X.
- Added ability to allow manual entry for each field (Member/Company Name, EIN, Avg Employee Count).

### Aggregated ALE Group Members

You may verify and edit the other members of the Aggregated ALE Group below:

Member/Company Name	EIN	Avg. Total Employee Count
Test Name	74-1541145	11
San Francisco	99-9555998	41
My Company Inc	44-4552145	22

### Breakdown W-2/1095-C Opt-In Preference

- Added a setting within GreenshadesOnline.com to allow admins to granularly choose whether employees may opt-in to receive electronic W-2 and/or 1095-C statements, viewable through GreenEmployee.com.

#### GreenshadesOnline.com → Settings → Pay History → Employee tab

**Allow employees to pre-set their W-2 and/or 1095-C distribution preference (will apply to all future W-2s and/or 1095-Cs)?**  
Enabling this feature will open up a section under Account Settings -> Notification Options where your employees can choose a preference for how they wish to receive future W-2s and/or 1095-Cs, based on the options you select below. The most common use of this feature is to allow your employees to opt-out of their paper W-2 and/or 1095-C during an earlier time of the year.

Yes  No

Select which form types you would like your employees to be able to pre-set their distribution preference for:

W-2  
 1095-C

### Release Notes for 12/08/2015

#### 2015 IRS Updates

- Applied 2015 IRS updates to all form types that Greenshades offers support for through the Year-End Forms portal.

#### Corrected 1095-B Functionality

- Added Corrected 1095-B form indication, import, and corrected functionality.

#### 1095-C Business Name Control (BNC)

- Changed the MMREFPIN field within the 1095-C set up to the Business Name Control (BNC), which is an optional field that will be passed on to the 1095-C eFile through Year-End Forms.

#### 1095-C Line 14-16 Validations

- Added data validations to individual forms within 1095-C formsets to handle conflicts between codes and amounts reported on Lines 14, 15, and 16.



### 1095-C and 1095-B Distribution Templates

- Added 2015 1095-C and 1095-B form templates for download and mail service distribution.

### Release Notes for 11/03/2015

#### Disabled Pay History Module Impact

- Employees with disabled pay history module who have selected to receive electronic tax forms through GreenEmployee.com will be defaulted back to paper for distribution purposes and reflected as such through the Year-End Forms portal.

#### Country Code Mapping for 1095-Cs

- Added a country codes mapping step within the 1095-C welcome wizard, if applicable.

#### 1095-C Excel Import Template

- Updated language within 1095-C excel template and added warnings on YEF for self-insured plans to include the employee as a covered individual if covered for any month during the year.

#### 1095-C Ability to Import Total Employee Count

- Added the ability to import total employee count, by month, through the 1095-C excel template to YEF

### Release Notes for 10/08/2015

#### NEW: 1095-C Support

- Updated 1095-C support to comply with 2015 IRS updates through Year-End Forms portal.
  - Added initial setup wizard to indicate Plan Start Date, Transition Relief methods (*if applicable*), Aggregated ALE Group Members (*if applicable*), Self-Insured Plans (*if applicable*), ACA Contact Info, DGE designation (*if applicable*), and Total Employee Count.
  - Added a page to handle duplicate SSNs found and combine those entries.

- Verification page containing the coordinating 1094-C data for review
- 1095-C form will be accessible through GreenEmployee.com if an employee has consented to receive electronic tax forms.
- Mail Service/Download & Print distribution options available
- eFile access through the Year-End Forms portal

### NEW: 1095-B Support

- Added full support for the 1095-B IRS form through the Year-End Forms portal.
  - Import of 1095-B data available through an excel template upload accessible through the Import Wizard.
  - Year-End Forms portal will generate the 1095-B forms based on the imported data.
  - Verification page containing the coordinating 1094-B data for review
  - Mail Service/Download & Print distribution options available
  - eFile access through the Year-End Forms portal
  - Reporting access based on 1095-B data