

The Greenshades Center

Federal Withholding Electronic Filing Guide



GREENSHADES
— *Let Us Handle That* —

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General Overview

About the Greenshades Center

The Greenshades Center serves as a single point of access to all of Greenshades' tax filing products. By assembling our E-Filing, Forms, and Archive capabilities into a single application we can provide easier access for our clients and better communication between our services.

Requirements for the Greenshades Center

The Greenshades Center has some basic requirements that must be met in order to function properly. First, the Greenshades Center requires an active internet connection. We require this so that we can ensure that the files we create comply with the very latest government regulations. Greenshades does not offer an "Offline Mode" or any way to operate without an active internet connection. The Greenshades Center can be configured to authenticate with a corporate proxy server, but the responsibility is on the client to ensure that adequate internet access is provided to the Greenshades Center.

Secondly, the Greenshades Center requires an update to Microsoft Windows called the 'Microsoft .NET Framework'. Specifically, the center requires version 2.0 or newer to be installed.

Starting the Greenshades Center

To run the Greenshades Center from Dynamics GP:

The Greenshades Center can be accessed in Dynamics GP version 8.0 and newer by navigating from the top bar menu through: Tools > Routines > Payroll > Greenshades Center. In version 7.5 or older, the Greenshades Center can be started by navigating to either: Routines > Greenshades, or: Routines > Payroll > File and Pay Center.

To run the Greenshades Center from Dynamics SL:


Open Greenshades using the desktop icon placed on your desktop after installation.

To run the Greenshades Center from Thinkware Darwin:

The Greenshades Center can be accessed in Thinkware Darwin by navigating from the top bar menu by selecting: Routines > Greenshades Center.

Filing your Federal W-2 Report

This guide will explain each screen you will encounter as you create your electronic Federal W-2 file. If you have any questions that are not addressed in this guide, please contact our support team.

When using the Greenshades Center, you can also access in-product help by clicking the  icon in the bottom left corner of the wizard.

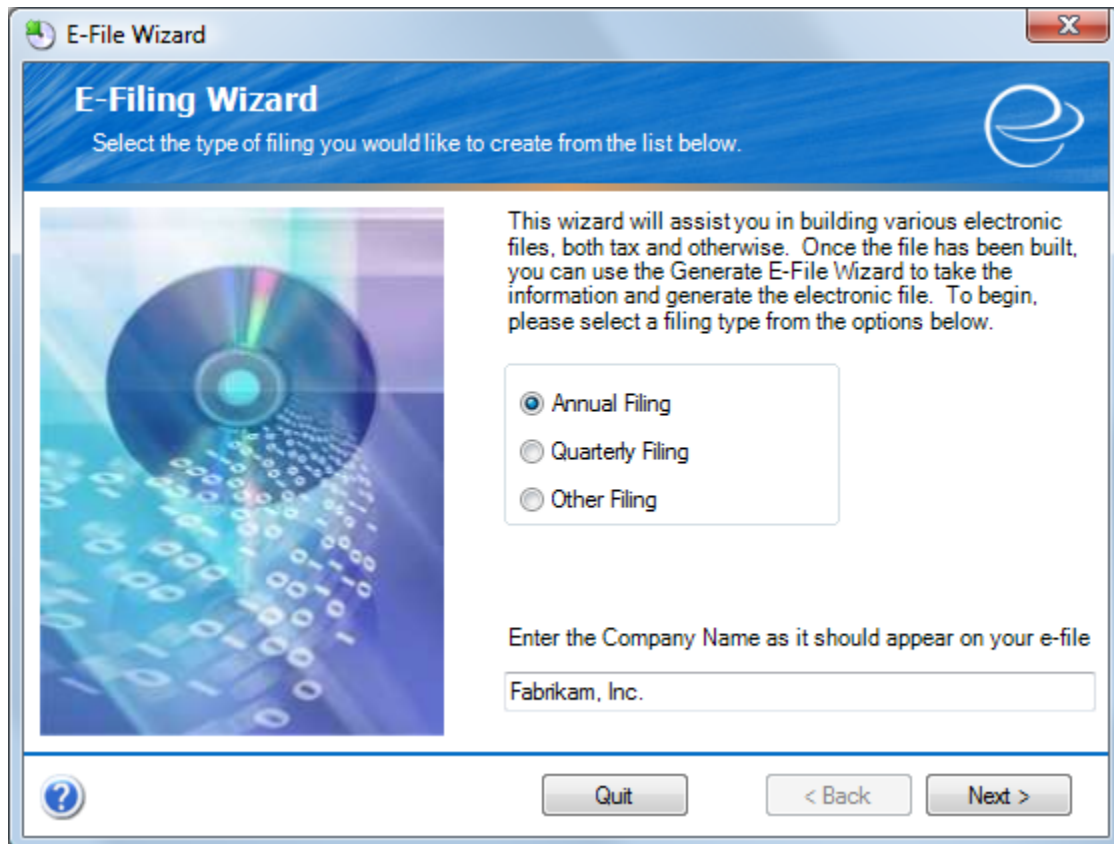
Step 1 – Starting the E-File Wizard

You will use the E-File Wizard to create your electronic Federal W-2 file. You can begin by clicking ‘eFile Wizard’ on the main Greenshades Filing Center page.



Step 2 – E-Filing Wizard

Since Federal W-2 files must be submitted once a year, select the radio button next to ‘Annual Filing’ to begin your annual Federal W-2 filing.



The screenshot shows the 'E-File Wizard' window. The title bar reads 'E-File Wizard'. The main header area is blue with the text 'E-Filing Wizard' and 'Select the type of filing you would like to create from the list below.' Below this is a graphic of a CD with binary code. To the right, there is explanatory text: 'This wizard will assist you in building various electronic files, both tax and otherwise. Once the file has been built, you can use the Generate E-File Wizard to take the information and generate the electronic file. To begin, please select a filing type from the options below.' Below the text are three radio button options: 'Annual Filing' (selected), 'Quarterly Filing', and 'Other Filing'. At the bottom, there is a text input field labeled 'Enter the Company Name as it should appear on your e-file' containing the text 'Fabrikam, Inc.'. Navigation buttons 'Quit', '< Back', and 'Next >' are at the bottom right, and a help icon is at the bottom left.

You will also notice that there is a ‘Company Name’ field. This defaults to the company name retrieved from your accounting package but you can modify it to match the company name you wish to appear in your Federal W-2 E-file.

Click ‘Next’ to continue.

Step 3 – Choosing Annual Filings

E-File Wizard

Choose Annual Filings

Choose which types of file you wish to electronically file as well as the reporting year.

Reporting Year: 2017

Types of Files

<input checked="" type="checkbox"/> Federal Withholding	Data exists for 2017
<input type="checkbox"/> State Withholding	Data exists for 2017
<input type="checkbox"/> Local Withholding	Data exists for 2017
<input type="checkbox"/> 940 (Federal Unemployment)	No valid data exists
<input type="checkbox"/> 1099-R	No valid data exists
<input type="checkbox"/> 1099 (MISC, DIV, INT, PATR, S, OID, etc.)	Data exists for 2017

Additional Options

I would like to combine multiple Dynamics GP companies into a single company for this filing.

Buttons: ? Quit < Back Next >

Since Greenshades pulls all information for your Federal W-2 file from your accounting package you will need to have completed the annual withholding report (or year-end close) before continuing this process. If you have, you should see a corresponding “Data exists for [year]” message, as shown in the above screenshot.

Next, select the types of files you wish to build. It is possible to select multiple options on this screen if you would like to create Federal Withholding and other annual electronic files simultaneously.

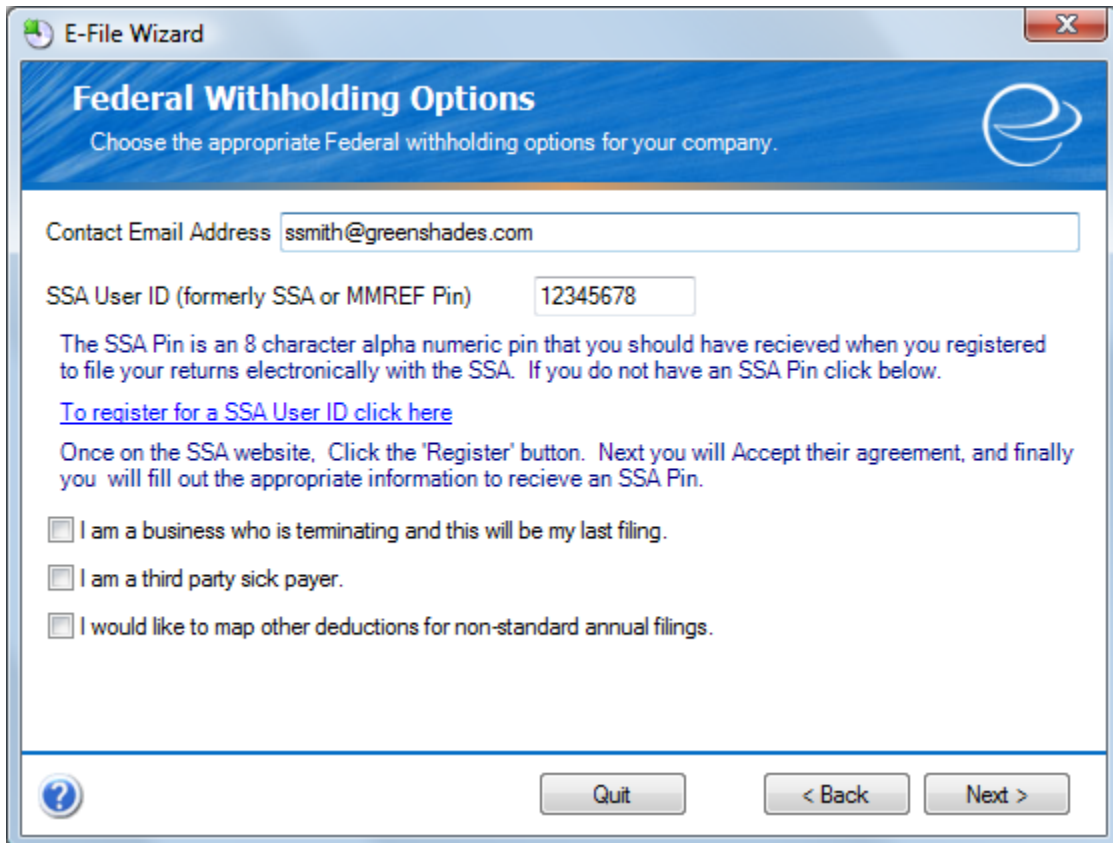
The third option is for combining multiple companies into a single file. This is an additional module and must be purchased for it to be activated. If you are interested in purchasing this feature or if you have any questions about this function please contact our support team.

Once you are satisfied with your selections, click ‘Next’.

Step 4 – Federal Withholding Options

First, enter the appropriate contact email address in the field provided. Next, enter the SSA User ID, (previously known as the SSA or MMREF Pin), which is an 8 character alpha-numeric code you received when you registered to file your returns. If you need to register with the SSA, please click the link provided.

The last 3 options on this screen have been provided per your specific filing requirements.



The screenshot shows a software window titled "E-File Wizard" with a blue header. The header contains the title "Federal Withholding Options" and the instruction "Choose the appropriate Federal withholding options for your company." along with a logo. Below the header, there are three input fields: "Contact Email Address" with the value "ssmith@greenshades.com", "SSA User ID (formerly SSA or MMREF Pin)" with the value "12345678", and a text area containing instructions and a link: "The SSA Pin is an 8 character alpha numeric pin that you should have recieved when you registered to file your returns electronically with the SSA. If you do not have an SSA Pin click below. [To register for a SSA User ID click here](#) Once on the SSA website, Click the 'Register' button. Next you will Accept their agreement, and finally you will fill out the appropriate information to recieve an SSA Pin." Below the text area are three checkboxes: "I am a business who is terminating and this will be my last filing.", "I am a third party sick payer.", and "I would like to map other deductions for non-standard annual filings." At the bottom of the window, there is a help icon (question mark in a circle) and three buttons: "Quit", "< Back", and "Next >".

Once you are satisfied with your selections, click 'Next'.

Step 4.2 – Deduction Mapping

If you selected the option “I would like to map other deductions for non-standard annual filings” from the Federal Withholding Options screen (previous) you will be presented with the Other Deduction Mapping screen, as shown below. This screen allows you to map additional deductions that may apply when filing your Federal W-2.

Type	GP Code	GS Code	Deduction Amount	Municipality Code
OPT	401K	CATCB	DeductionAmount1	
EMST	EPU	YORK	DeductionAmount3	

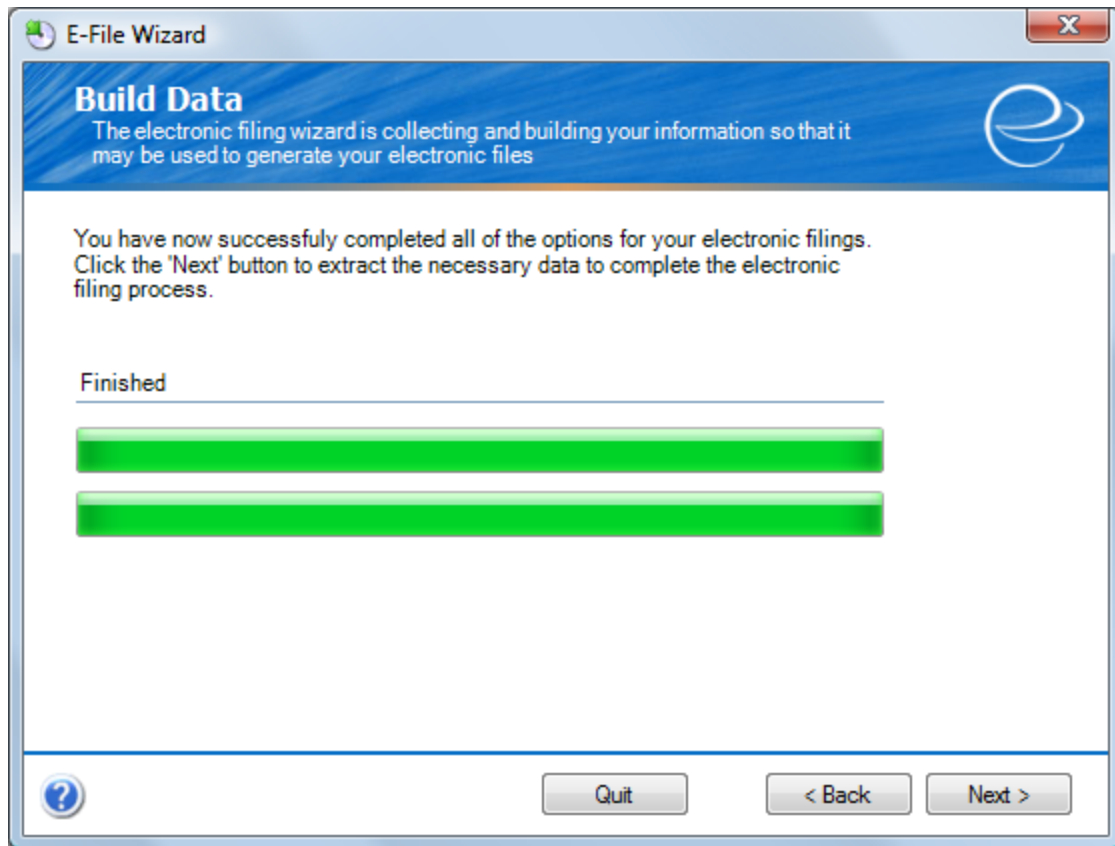
Type: EMST

Quit < Back Next >

Once you are satisfied with your deduction mappings, click Next to continue.

Step 5 – Build Data

The Build Data step extracts your Federal W-2 data from your accounting software with the settings you have previously selected in the E-File wizard. Depending on the number of employees you are exporting, this process may take a few minutes.



Clicking 'Next' will start the extraction process.

Step 6 – Employee Verification

Greenshades offers the ability to electronically cross-reference your employee data (names and SSN's) with the records at the SSA each time you create a file using the E-File Wizard. This verification service is provided to help circumvent any potential filing penalties associated with submitting incorrect employee information to government agencies.

Employee Identity Verification
Read the information below to decide if you wish to verify the identity of your employees.

Would you like to take this opportunity to verify the identity of your employees by having them cross-referenced with the Social Security Administration's records?

The process of verifying names and SSNs is performed free of charge. If inconsistencies are found, you will later be given the option to pay a small, per-employee fee for the detailed report.

Yes, please verify my employee information. I agree to the [Terms of Use](#).

No, do not verify my employee information at this time.

No, do not verify my employee information now and never ask me again.

Quit < Back Next >

If you would like Greenshades to verify your employee identification, you will be informed of the number of discrepancies found. To view the report, there is a charge of \$1.99 per discrepancy.

Once you have made your decision, click 'Next'.

Step 7 – Select Files to Build

Select Files to Build lets you choose which files you would like create and submit at this time.

Next, simply place a check in the “Build?” box next to the file you would like to create.

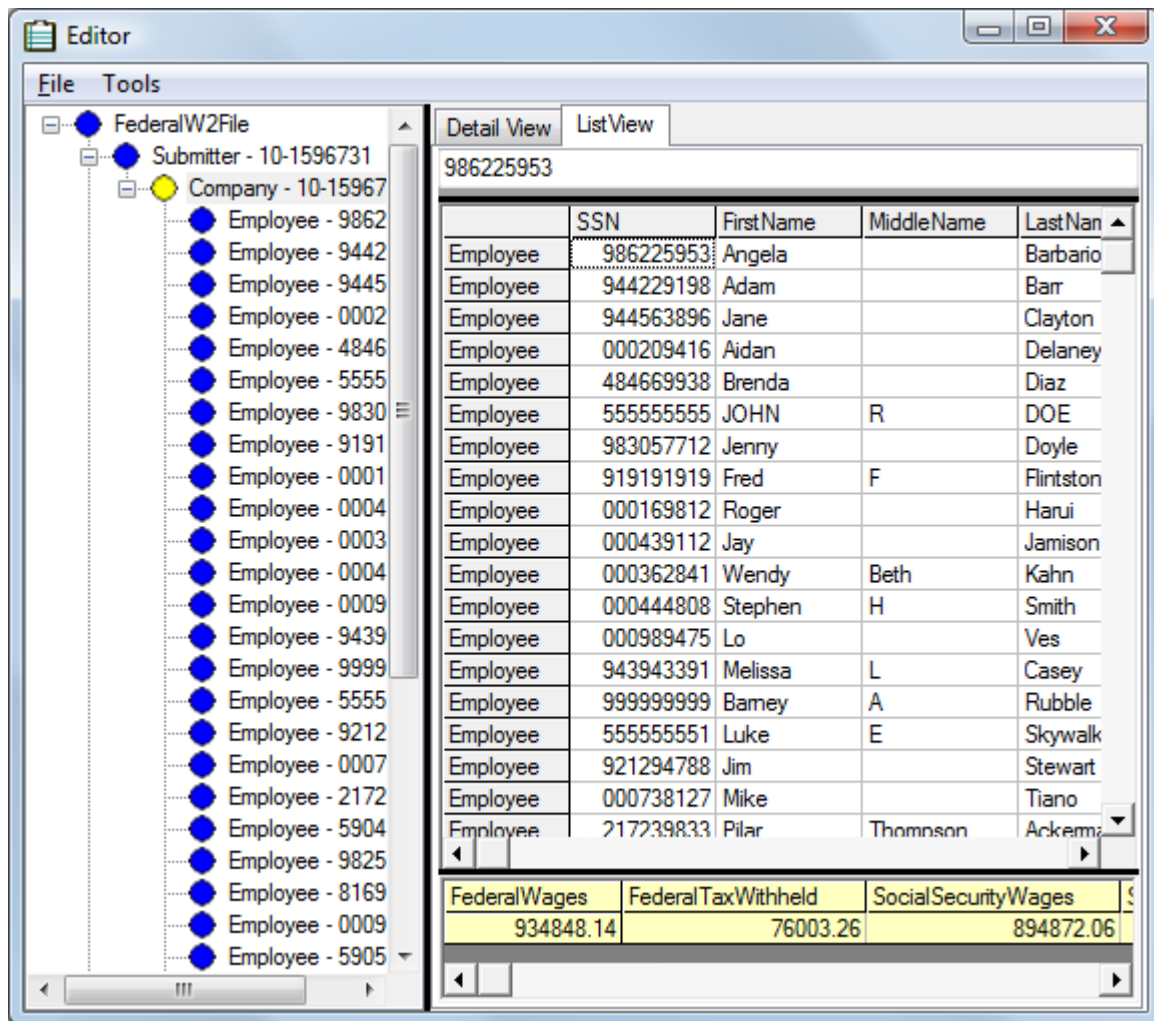
Electronic File	Status	Submission Method	Build?
US - W2	Awaiting Creation	Internet	<input type="checkbox"/>

At the bottom of this screen there is an option that will allow you make any final corrections before creating and filing your E-File. While this functionality is available to you, it is recommended that Federal Withholding edits be made in your accounting package, as correcting the errors using the advanced editor does not correct the errors with the data in your accounting package.

Once you are satisfied with your selections, click ‘Next’.

Step 8 – Advanced Editor (optional)

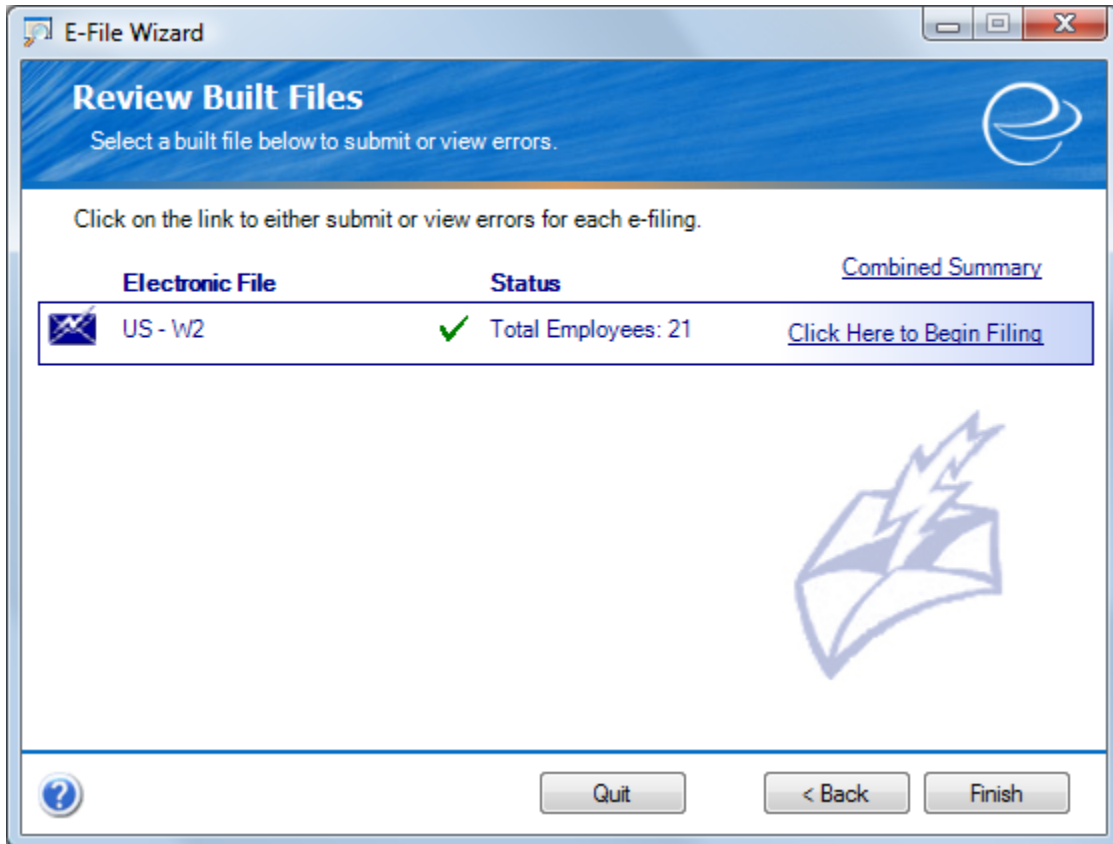
If you selected the option “[Check here if you would like the ability to edit your data prior to creating your electronic file \(Advanced\)](#)” from the Select Files to Build screen, you will be presented with a window which resembles the one shown below. The Advanced Editor allows you to edit or even add rows if needed (right click on any row and select the ‘Add Row’ option), giving you the ability to include employees who have not yet been entered into your accounting package software. Again, keep in mind that these changes do not update your accounting software, and the advanced editor should only be used as a means to correct your E-File if you do not have the ability or time to correct the data within your accounting software.



When you are finished with the advanced editor, select ‘File’ then ‘Done Editing’ if satisfied with your changes, or ‘Discard Changes’ if you would like to cancel any changes you made.

Step 9 – Review Built Files

At this point, your final totals have been calculated and your Federal W-2 file has been created but not submitted. If your file was successfully created you will see a green check (as shown below). Continue the filing process by clicking the “[Click Here to Begin Filing](#)” link. If you have many states to file for, you will need to select ‘Click Here to Begin Filing’ for each.



If your file failed to build a red ‘X’ will appear. You will be able to review the problem by clicking the “Click Here to View Errors” link. Usually these errors are easy to understand, but if you have any questions please contact our support team.

Step 10 – View Totals

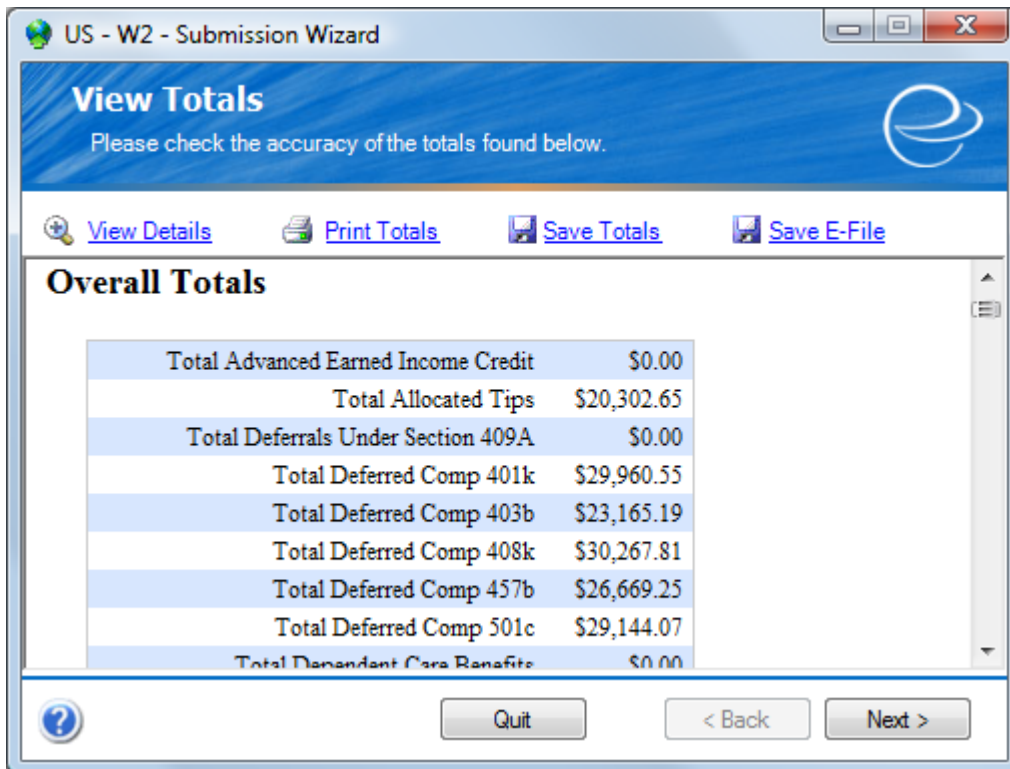
View Totals is an assessment screen providing you with detailed totals for final review before submission. You will notice 4 separate options displayed above the listed totals. The details for each are listed below:

[View Details](#). With View Details, you can export your Federal Withholding data to an Excel file for an even more detailed review. *This is to be read or printed only, and not to be E-filed.*

[Print Totals](#). Print Totals prints the total screen you are currently viewing.

[Save Totals](#). Save Totals will save the total screen you are viewing in an HTML format that can be viewed at a later date in Internet Explorer.

[Save E-File](#). Save E-File allows you to save a copy of the exact electronic file that is going to be submitted to the SSA. Be sure to note where you save it, as you will need it in a moment.



The screenshot shows a window titled "US - W2 - Submission Wizard" with a "View Totals" header. Below the header, there are four buttons: "View Details", "Print Totals", "Save Totals", and "Save E-File". The main content area is titled "Overall Totals" and contains a table with the following data:

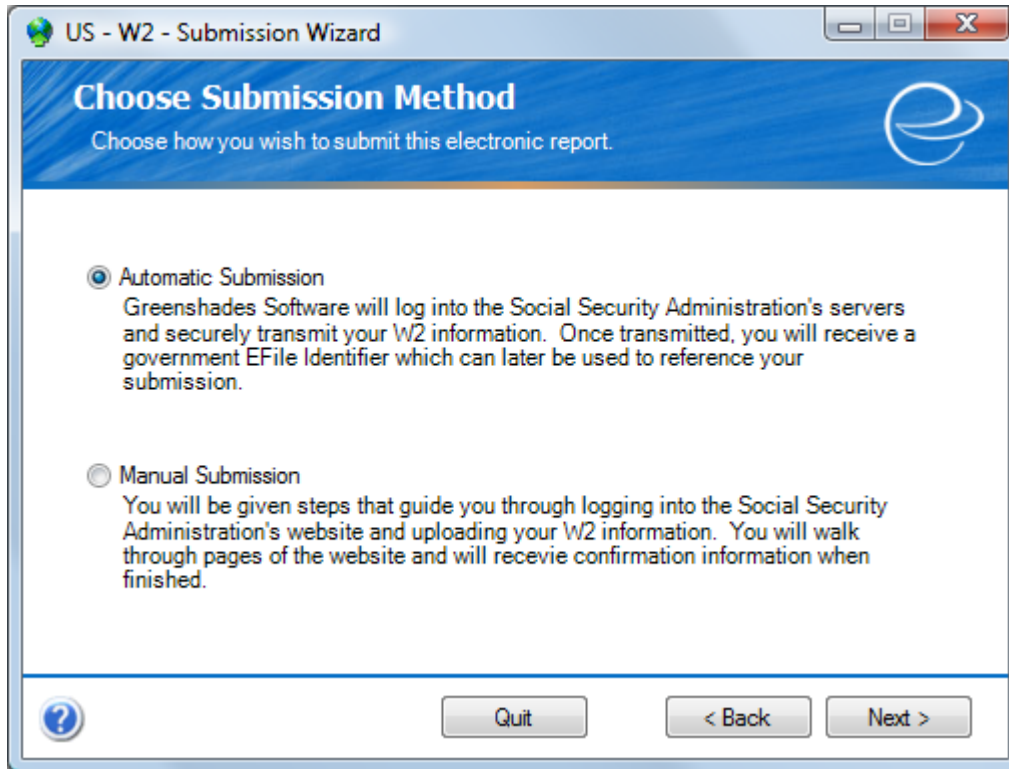
Total Advanced Earned Income Credit	\$0.00
Total Allocated Tips	\$20,302.65
Total Deferrals Under Section 409A	\$0.00
Total Deferred Comp 401k	\$29,960.55
Total Deferred Comp 403b	\$23,165.19
Total Deferred Comp 408k	\$30,267.81
Total Deferred Comp 457b	\$26,669.25
Total Deferred Comp 501c	\$29,144.07
Total Dependent Care Benefits	\$0.00

At the bottom of the window, there are three buttons: "Quit", "< Back", and "Next >".

Once you've reviewed your totals, click 'Next'.

Step 11 – Choose Submission Method

There are 2 options for filing your Federal W-2 electronically, an Automatic submission and a Manual submission.



Once you have selected the method of choice, please click 'Next'.

Step 11A – Verify Contact Information (Automatic Submission Method)

Prior to submitting your Federal W-2 efile, contact information of the person responsible for the accuracy of the file needs to be supplied. This is only used by the SSA in the event that discrepancies are found within the data submitted.

US - W2 - Submission Wizard

Verify Contact Information

Is the contact information below correct?

Please review the contact information below and make any necessary corrections. The contact person is responsible for the accuracy of the electronic submission and should be able to resolve any issues which may arise with the submission.

Name

Phone Ext

Email

Click 'Next' to submit your return.

? Quit < Back Next >

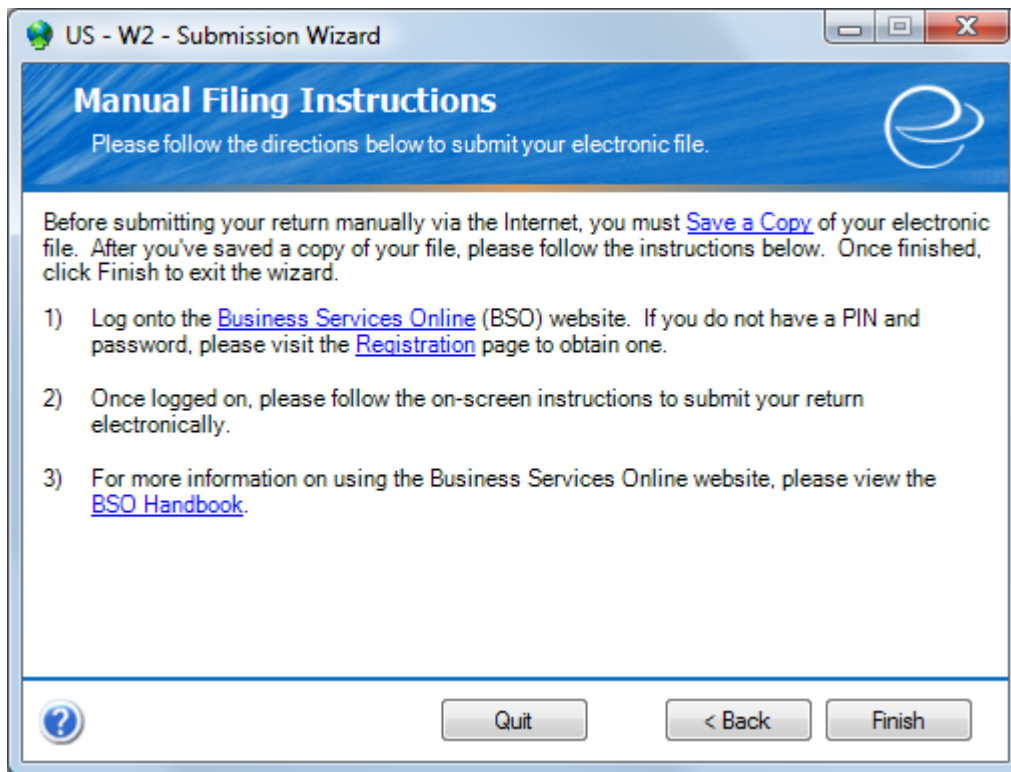
Once you have the appropriate contact information, select 'Next'.

Congratulations! You have completed all the proper steps to submit your electronic file automatically. You will be notified per your contact email of the status of your submission. If you did not receive the email ensure you have checked your email filter. In addition you can contact Greenshades Support at support@greenshades.com or at 888-255-3815 ext. 700.

Step 11B – Manual Filing Instructions

Before uploading your file to the BSO website, you must first select the ‘Save a Copy’ link at the top of this page. It is worth noting that ‘Save E-File’ from the previous screen and ‘Save a Copy’ on this screen produce the exact same E-File, so if you have already saved your E-File you do not need to do this a second time.

Follow the provided instructions and links to upload your file.



Congratulations! You have successfully created and filed your Federal Withholding data.

Click ‘Finish’ here, and once more from the ‘Review Built Files’ screen, and you are done.

Frequently Asked Questions

How can I get live support?

Simple! Call us at (888) 255-3815 ext. 700 or by email us at support@greenshades.com.

How can I review my Federal W-2 totals after I've submitted them?

By clicking on the 'View Previous Filings' button from the opening screen of the Greenshades Center you will be presented with a list of media you previously filed using the Greenshades Center. Simply double click any report you would like to view and you will be presented with the details of file as it was originally created.

Why do my updates keep failing?

Greenshades Software releases updates frequently to make sure our clients are able to create files according to the state and federal government specification. Whenever there are updates available, please apply the updates. If your updates are failing, please download the Greenshades Updater Patch. The updater patch is available from our website. Visit the following link: <http://www.greenshades.com/support/gscenter.aspx> and click the link that reads 'Download the Updater Patch'. You may need to contact your IT department for permission if you do not have administrator rights.

How can I edit my file prior to submitting it?

You can edit your E-File by using the advanced editor we have provided in the Greenshades Center. See Step 8 of this guide, and more specifically, Step 8a on how to access the advanced editor.

Client feedback:

Was this guide helpful to you? We would love to hear your feedback. Was there something else that you feel should have been included? We will do our best to accommodate you! Did this guide make your task easier? Make our day and let us know! Please send all feedback to support@greenshades.com.