

# Greenshades

---

## Greenshades Year-End Overview 2024



**Jeff Meyer**

Director of Sales Development

# About Greenshades

20+ Years  
Experience

4000+  
US Businesses

2M Employees  
Supported

Millions Tax  
Forms Managed  
& Filed Each  
Year

A few of our clients



PRIDESTAFF



A few of our ratings



# Today's Agenda

## **Electronically filing within the tax filing center**

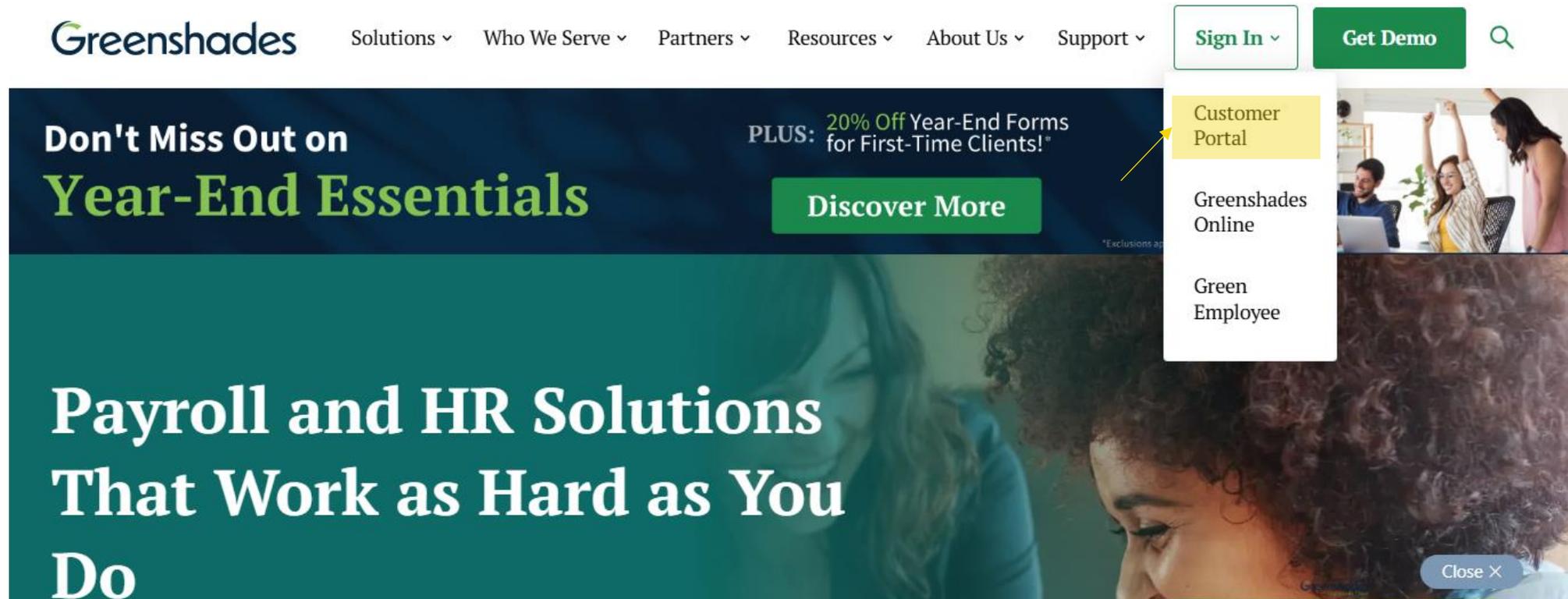
- Managing contacts for filing purposes
- Common errors and troubleshooting steps
- Uploading tax forms from the Tax Filing Center

## **Uploading forms to the Year End Forms website for distribution**

- Going through the Year-End Forms checklist
- Setting up the employee portal
- How to manage administrator access

# Managing Contacts

- Go to [Go.Greenshades.com](https://Go.Greenshades.com), hover over the **Sign In** button and then select '**Customer Portal**'.
- This will take you to 'My Greenshades' where you will enter your credentials to manage your contacts



# Setting Up Customer Portal Account

Once you enter a valid email, an email will be sent with a link to set up password and security questions.



## My Greenshades

### Administrator Account Login

[Login](#)

[Setup Account](#)

[Reset Password](#)

[Not an Administrator? Click here to login to Green Employee](#)

[Official Greenshades Website](#)

By continuing, you agree to our [Terms of use](#).

## My Greenshades

### Password Setup Request

If you have forgotten your password or have never been issued one, you may reset it using this page. Simply enter your registered email address to continue.

[Continue](#)

[Cancel](#)

# Managing Contacts

- Entering the Contacts tab will give you the ability to add or remove contacts and also allow you to update current contact information

The screenshot displays the Greenshades website interface. At the top left is the Greenshades logo with the tagline "LET US HANDLE THAT". To the right, there are links for "Contact | Careers", the phone number "888-255-3815", and the email "sales@greenshades.com". A navigation menu includes "Home", "Solutions", "Partners", "Downloads", "Support", and "About Us". A search bar labeled "Google Custom Search" is present. Below the navigation, a secondary menu contains "Main", "Contacts", "Invoices", "Support", and "FAQ". The "Contacts" tab is highlighted with a red box and a red arrow pointing to it. Below this menu, a contact entry for "Chris Forte" with email "cforte@greenshades.com" is shown, with "View" and "Delete" links. The bottom section shows the "View Contact" form for Chris Forte, with fields for Name, Email, Phone, Fax, Cell Phone, and a "Receives Email" checkbox. A "Cancel" button is at the bottom of the form. The user is logged in as "Sales".

# Why is Updating Contacts Important?

- For E-Filing purposes
- When a form set is uploaded to the year end forms site, you will need to select who has access to view those tax forms. You may add administrators at any time, but we must always have one valid contact at all times.

US W-2

## 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 >

# Common Errors That Occur

---

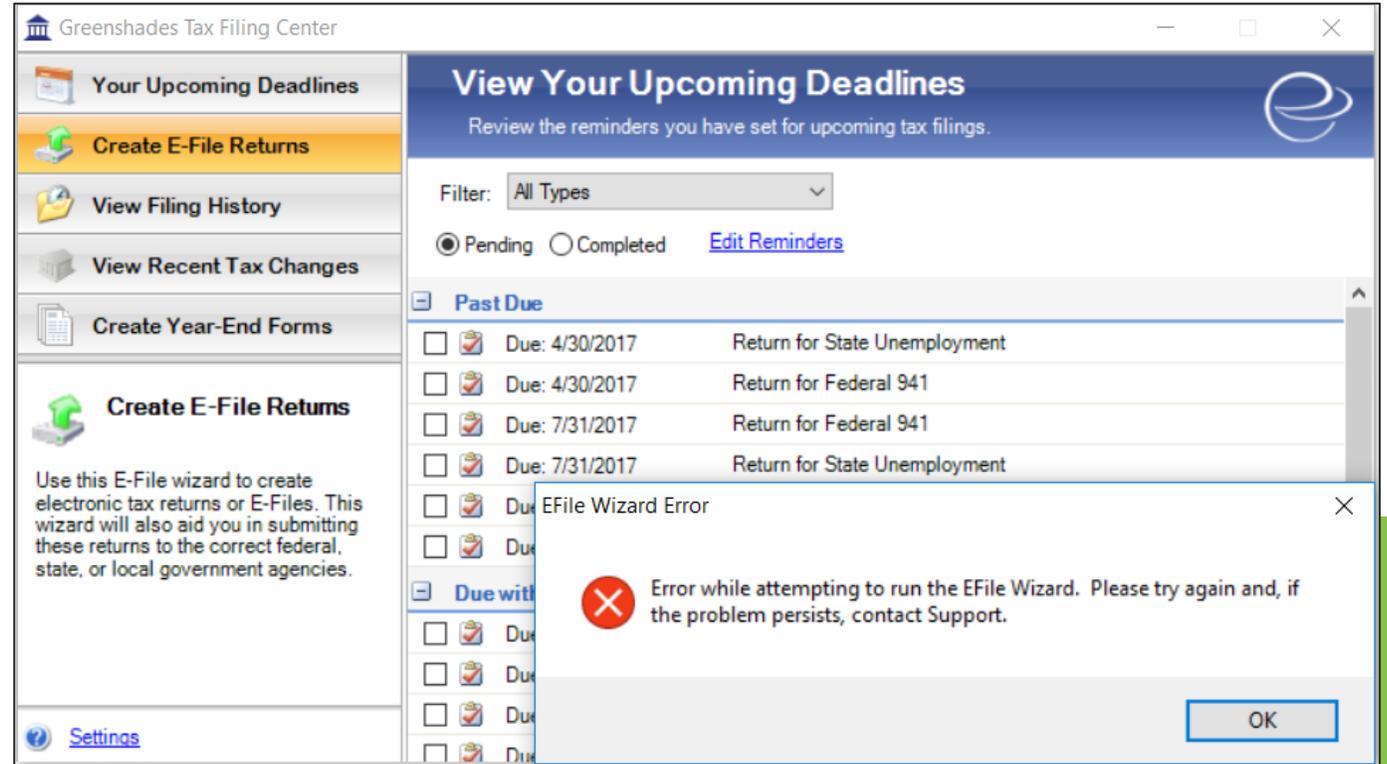
Don't let these errors trip you up



# Building an E-File in the Tax Filing Center

## Errors That can Occur

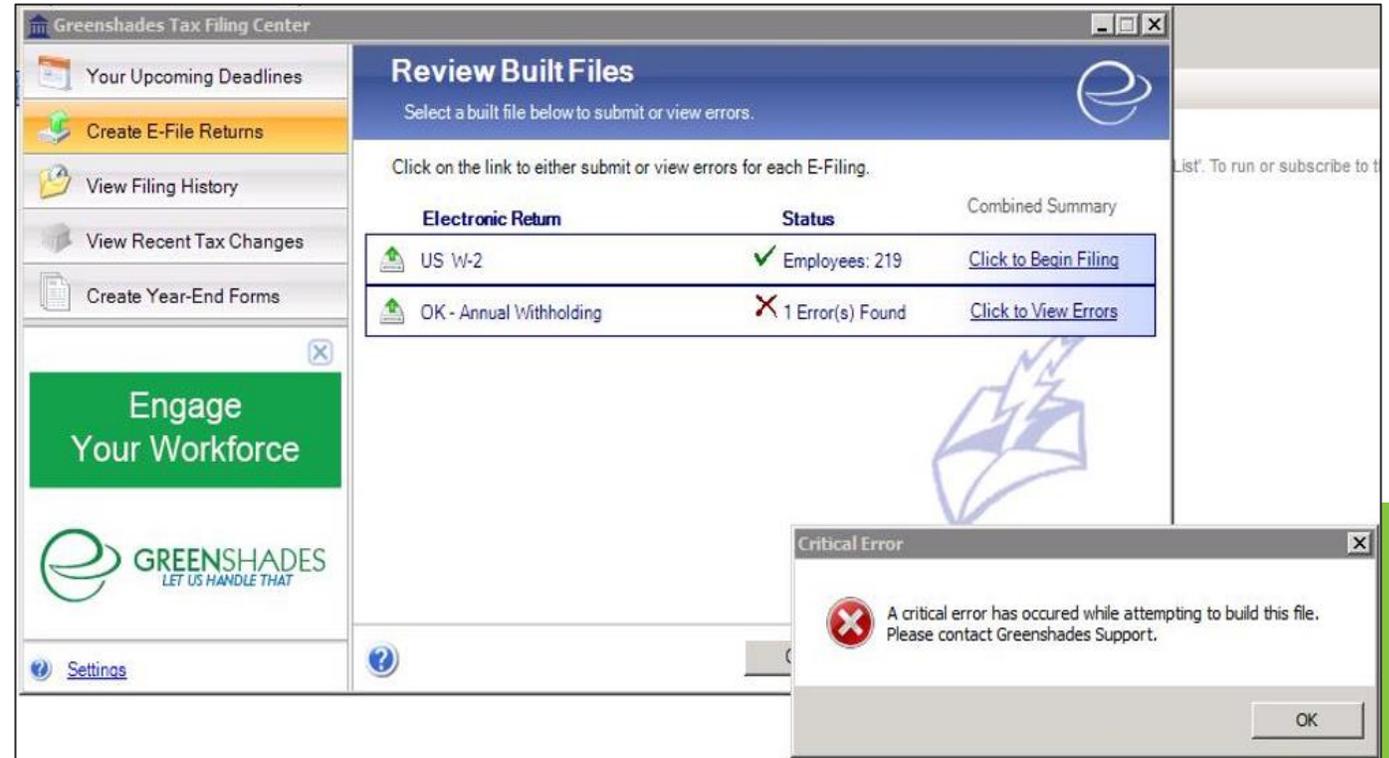
- This is a common error that can occur when you first open the filing center and click on 'Create E-File Returns'
- This means the filing center is unable to read the .xml file
- In this case you would reach out to Avionte support to find out what in the .xml is causing the issue
- As for all errors, be sure to provide a data upload after the error pops up



# Building an E-File in the Tax Filing Center

## Errors That can Occur

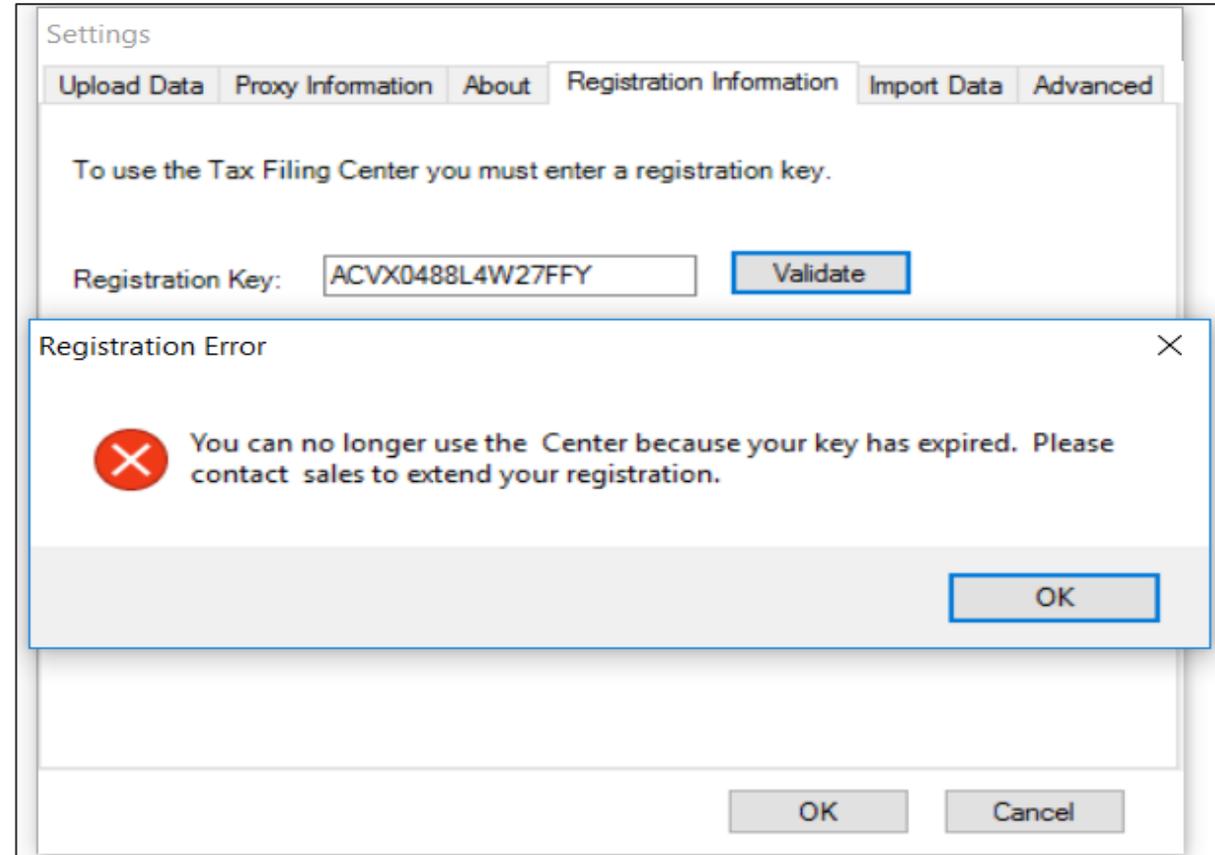
- A critical error occurs when attempting to build an E-File
- Unlike the previous error the filing center was able to read the .xml data, we just found there is some required information that seems to be missing from the file
- This will require you to reach out to Avionte support to find out why the file is unable to build
- As for all errors, be sure to provide a data upload after the error pops up



# Building an E-File in the Tax Filing Center

## Errors That can Occur

- This error should not show up for any client but if for any reason it does, please contact Avionte's support team and they will reach out to us at Greenshades to adjust the registration
- There is nothing you the client or Avionte can do to correct this.
- The turn around for this error is very quick and can be resolved in minutes
- No data upload is needed for this error



# Building an E-File in the Tax Filing Center

## Uploading Data for Troubleshooting

- Providing a data upload whenever an error pops up allows us to see when the error happened and provide steps to correct the error
- Anytime an error pops up please click on the 'Settings' tab in the bottom left
- Once there please be sure the Year is correct and click the highlighted upload button, you can then click ok to close the settings screen and contact Avionte support with a screenshot of your error

Settings

Upload Data Proxy Information About Registration Information Import Data Advanced

If you have contacted Avionte Support and they have requested that you upload your data for support purposes, choose the year for the data you would like to upload and click the 'Upload' button. This will encrypt and send your data to Avionte Support so that they can better assist you with your support request.

Year 2023

Upload  Only Upload Log Files

OK Cancel

# Top 3 things to Send to Avionte Support Team

If you need support and want to help the Avionte support agent have the most comprehensive understanding of what error or problem is happening, here are some things you can do to better help us, help you.

- Screenshot of your error
- Steps that were taken to get the error
- A data upload



# Uploading Tax Forms

---

Uploading to year-end forms



# Creating Year-End Forms

- Always review totals before you upload your forms
- If you see any discrepancies with your form totals, please do not upload forms and contact Avionte's support team

Avionte Filing Center

## Year-End Forms

Choose a set of Forms

Use this wizard to upload your W-2s, 1099s, and other year-end tax forms to GreenshadesOnline.com. You will be able to use that website to complete your year-end process including: reviewing and editing your forms, enabling online access for recipients, mailing out any remaining forms, and finally submitting an E-File to the government.

Please select the forms that you wish to work with:

Year:

Type of Tax:

Simplify Year End Processing

Avionte Filing Center

## Upload 2018 Payroll

We are now ready to upload your 2018 payroll information to GreenshadesOnline.com

Click 'Upload Forms' to securely upload your forms to GreenshadesOnline.com. You will be able to use this website to administer your forms.

1 employees with  
\$69,450.28 in Wages, tips, other compensation and  
\$12,321.23 in Federal income tax withheld

Upload Forms

Quit < Back Next >

# Creating Year-End Forms

- It is important to have a contact checked in this section; This is who will have admin access to the forms being uploaded.
- A hyperlink is available on this screen that will allow you to add a contacts here which will utilize and add to the same contact list from the Greenshades Customer Portal

The screenshot shows a web application window titled "Greenshades Tax Filing Center". On the left is a navigation menu with options: "Your Upcoming Deadlines", "Create E-File Returns", "View Filing History", "View Recent Tax Changes", "Create Year-End Forms" (highlighted), "Engage Your Workforce", and "Settings". The main content area is titled "Choose Payroll Administrators" and asks "Who should be allowed to view/edit your 2017 online year-end forms?". It includes a table with columns for Name, Email, and Authorized. One contact, John Kamilow, is listed with a checked box in the Authorized column and a "Reset Password" link. Navigation buttons at the bottom include "Quit", "< Back", and "Next >". The Greenshades logo and tagline "LET US HANDLE THAT" are visible at the bottom left of the main area.

Name	Email	Authorized
John Kamilow	JKamilow@greenshades.com	<input checked="" type="checkbox"/> <a href="#">Reset Password</a>

# Creating Year-End Forms

- When finally ready to upload, enter an email and click next
- We will notify you once the forms have loaded successfully to the email you enter on this screen
- From there you can work with these tax forms through the Year End Forms site (GreenshadesOnline.com)

The screenshot shows a web browser window titled "Greenshades Tax Filing Center". On the left is a navigation menu with the following items: "Your Upcoming Deadlines", "Create E-File Returns", "View Filing History", "View Recent Tax Changes", and "Create Year-End Forms" (which is highlighted in orange). Below the menu is a dark blue box with the text "Simplify Year End Processing" and the Greenshades logo with the tagline "LET US HANDLE THAT". At the bottom left of the menu area is a "Settings" link.

The main content area is titled "Finalizing Upload" and has the subtitle "Finalizing your online workspace". It contains the following text: "Your form information has been uploaded to GreenshadesOnline.com, but the actual forms are still being created. Until the import process completes, you will not be able to use the DownloadMyForm.com site to review your forms." Below this is another paragraph: "You can leave this page open if you wish, it will refresh every 30 seconds and check to see if the import process has completed. This process typically takes 5 to 15 minutes depending on the quantity of forms being uploaded." A third paragraph says: "Alternatively, you can enter your email address into the field below, click 'Finish', and we will email you when your forms are ready for administration." Below the text is an empty text input field. At the bottom right of the page are three buttons: "Quit", "< Back", and "Finish".

# Need to Re-Upload Tax Forms?

- Need to upload additional employees or new totals?
- The filing center will recognize there are already selected form types loaded onto our website for this company
- We will ask if you would like to work with the already loaded tax forms, or reupload the current data and replace the current forms
- You will only be charged .75 cents for any new employees that were not on the original upload

Avionte Filing Center

Your Upcoming Deadlines

Create E-File Returns

View Filing History

View Recent Tax Changes

Create Year-End Forms

Engage Your Workforce

GREENSHADES LET US HANDLE THAT

Settings

## Year-End Forms

Work with a current formset

Your 2018 W-2 forms have already been uploaded to GreenshadesOnline.com for administration.

Work with these forms through GreenshadesOnline.com

Replace the year-end forms loaded on GreenshadesOnline.com with the information currently in Avionte. All changes made to forms on GreenshadesOnline.com and history of any actions will be lost.

Quit < Back Next >

# Logging into the Year-End Forms Site

- First you will need to sign in to view your forms
- You will have to use the email that Greenshades has under your contact information
- If this is your first time signing into the site, you will need to click the bottom link that says, ‘set up account’ and run through setting up a password and challenge questions



## Greenshades Online

### Administrator Account Login

 Login

[Setup Account](#)

[Reset Password](#)

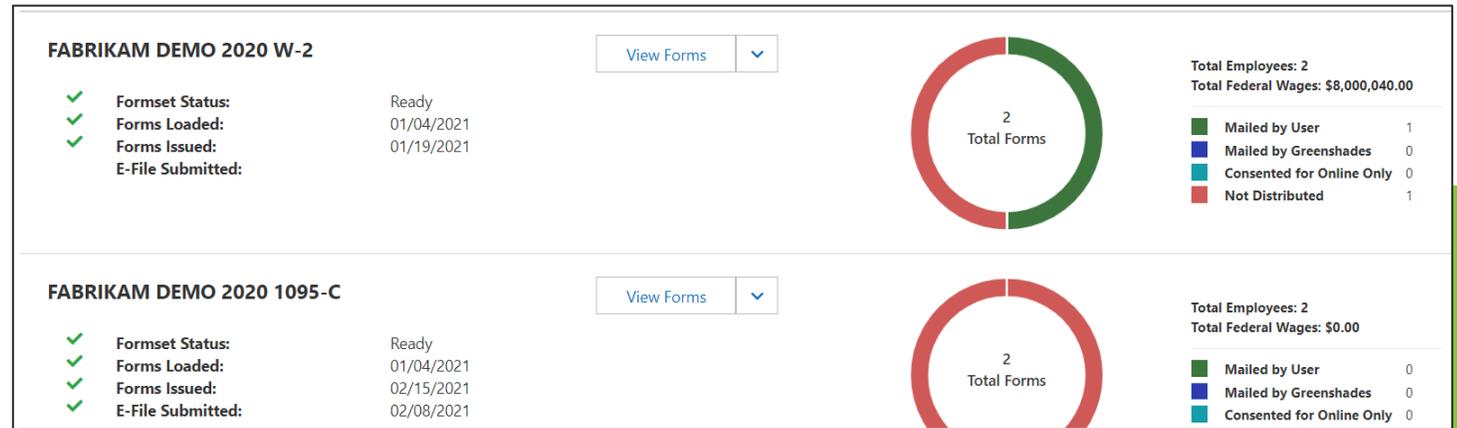
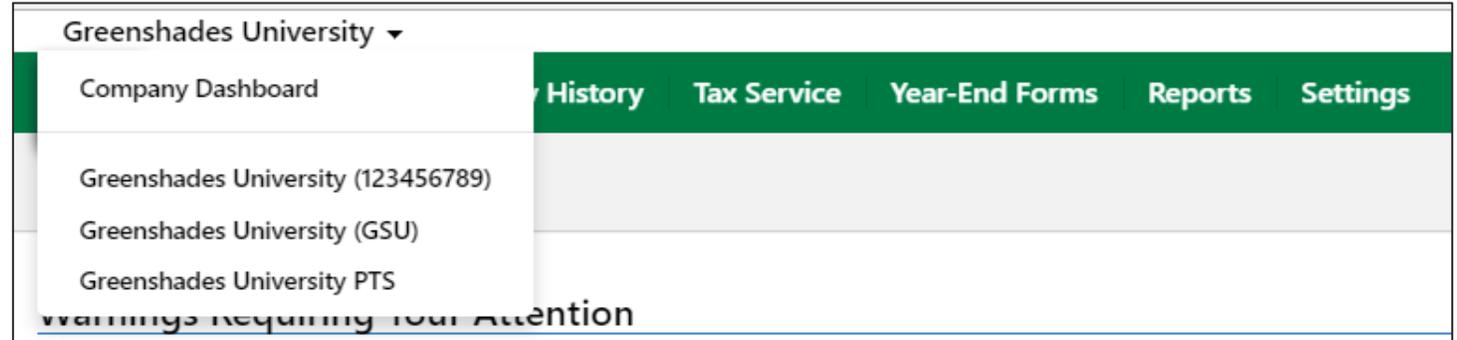
[Not an Administrator? Click here to login to Green Employee](#)

[Official Greenshades Website](#)

By continuing, you agree to our [Terms of use](#).

# Entering Your Form Set

- If you have multiple companies' forms uploaded, you can switch to which company you are working with
- To enter your forms you will click on the 'Year-End Forms' tab on the top of the page
- You can then filter down by year and form type



# Year-End Forms Checklist

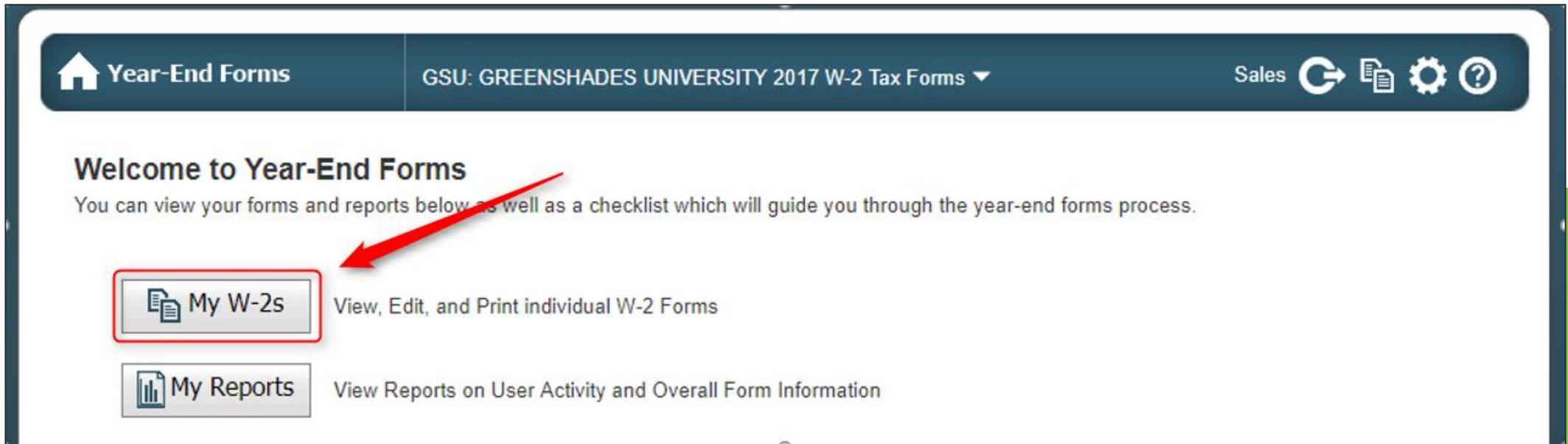
- This is the main Year-End Forms checklist where you will go to edit any of your tax forms along with request distribution through Greenshades
- The check marks next to each step are not required. They are simply letting you know what you have already completed
- In addition, steps do not need to be completed in order to proceed.

The screenshot shows the 'Year-End Forms' dashboard for user John Kamilow. The page title is 'Year-End Forms' and the user's name is 'John Kamilow'. The main heading is 'Welcome to Year-End Forms' with a sub-heading: 'You can view your forms and reports below as well as a checklist which will guide you through the year-end forms process.' There are two main navigation buttons: 'My W-2s' (View, Edit, and Print individual W-2 Forms) and 'My Reports' (View Reports on User Activity and Overall Form Information). Below this is the 'Year-End Forms Checklist' section, which contains six items:

- 1. Complete Company Setup**  
COMPLETED ON 11/16/2017  
John Kamilow used the welcome wizard to configure Year-End Forms on 11/16/2017.
- 2. Employee Identity Verification**  
DUE NOW  
There are 104 identities that need to be verified.
- 3. Resolve Warnings with your Forms**  
DUE NOW  
There are currently 2 warnings with your forms, 0 of which are considered high severity warnings.
- 4. Verify W-2 Form Totals**  
COMPLETED ON 11/16/2017  
John Kamilow verified our totals of 104 forms with \$7,801,454.79 in Federal Wages.
- 5. Manage Employee Access**  
COMPLETED ON 11/16/2017  
0 employees viewed their forms online after John Kamilow activated access on 11/16/2017. [\(View Report\)](#)  
0 employees consented to receive their forms online-only before paper copies were issued. [\(View Report\)](#)
- 6. Email Employees with links to W-2 Forms**

# Editing W-2s

- To edit an individual W2 you will enter the My W-2s option at the top left of the checklist
- This will allow you to edit any employee tax form or change company information along all tax forms in this form set



The screenshot shows a web interface for "Year-End Forms" for "GSU: GREENSHADES UNIVERSITY 2017 W-2 Tax Forms". The top navigation bar includes a home icon, the text "Year-End Forms", the current form set name, and icons for "Sales", refresh, print, settings, and help. Below the navigation bar, a welcome message reads: "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." Two main options are listed: "My W-2s" (with a document icon) and "My Reports" (with a bar chart icon). The "My W-2s" option is highlighted with a red rectangular box, and a red arrow points from the top right towards it. The description for "My W-2s" is "View, Edit, and Print individual W-2 Forms". The description for "My Reports" is "View Reports on User Activity and Overall Form Information".

# Editing W-2s

- Finding your employee
- Click 'Edit' to enter the employee's form
- Also an option to print an individual form

**Year-End Forms** GSU: GREENSHADES UNIVERSITY 2017 W-2 Tax Forms

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

Search for:   
Distribution Status: All Forms   
[More Options](#)

[Excel Export](#)

	SSN	Last Name	First Name	City	State	Zip	Department	Country Code	Domestic Status	Employment Status
<a href="#">Edit</a> <a href="#">Print</a>	527176356	Edwards (Jones)	Julian	Provo	UT	85083		US	Inside the US	Active
<a href="#">Edit</a> <a href="#">Print</a>	601561316	Thornton	Lilliana	Provo	UT	85044		US	Inside the US	Active
<a href="#">Edit</a> <a href="#">Print</a>	601362896	Bryant	Jennifer	JACKSONVILLE	FL	32240		US	Inside the US	Active

# Step 1

## Complete Company Setup

- Step one is the welcome wizard, you will be prompted to run through this wizard the first time you enter the form set
- You can always come back and edit this information later but some of the information will include setting up State W2 IDs, Validating Local codes, and mapping the Locality Name that goes inside of box 20



COMPLETED ON 11/16/2017

### 1. Complete Company Setup

John Kamilow used the welcome wizard to configure Year-End Forms on 11/16/2017.

## Step 2

# Employee Verification

- You can run an SSN verification
- This will compare the employees or vendors SSN/TIN and name with the SSA
- It will report back any discrepancies but will not tell you the correct results



**DUE NOW**

## 2. Employee Identity Verification

There are 45 identities that need to be verified.

# Step 3

## Resolving Warnings

- In step 3 you can see any warnings with your forms
- Some example of these warnings are incorrect address or zip, missing employee first or last name, missing city or invalid state
- To correct these warnings, you can click edit on the left-hand side and it will bring you back into the employees W2 where edits can be made

**3. Resolve Warnings with your Forms**  
There are currently 2 warnings with your forms, 0 of which are considered high severity warnings.

	Form	Warning	Severity
	Filter	Filter	Filter
<a href="#">Edit</a>	Chadwick	Employee has Missing or Invalid Zip Code	High
<a href="#">Edit</a>	Chadwick	Employee is Missing City	High
<a href="#">Edit</a>	Chadwick	Employee is Missing Street Address	High
<a href="#">Edit</a>	Chadwick	Invalid State in Employee Address	High
<a href="#">Edit</a>	Employee with SSN of '123456789'	Missing Name	High
<a href="#">Edit</a>	Employee with SSN of '366728062'	Missing Name	High
<a href="#">Edit</a>	Chadwick	Address May Be Incorrect	Low

# Step 4

## Verifying Totals

- Remember to always come into step 4 and verify your totals, once you confirm the totals are correct you will need to check the box at the bottom acknowledging that you have reviewed the totals and they are correct, after that click finish
- Any numbers you change on an employees' tax form will reflect in the totals

**Totals for W-2 forms for Test 10-1231231** [Download Excel](#)

The following totals were gathered from your W-2 forms. Please review the totals and verify they are correct. [Email Report](#)

Employees Loaded	45	state	State Wages	State Tax	Locality	Local Wages	Local Tax
Forms with Wages	44	AL	\$20,000.00	\$1,100.00	exemption	\$11,490.25	\$246.14
Federal Wages	\$1,741,923.24	IL	\$447,875.56	\$11,413.59			
Federal Tax Withheld	\$143,865.50	IN	\$64,847.78	\$2,099.64			
Social Security Wages	\$1,458,544.89	KY	\$58,646.35	\$146.61			
Social Security Tax Withheld	\$86,149.76	MI	\$19,723.50	\$724.55			
Medicare Wages	\$1,458,544.89	MN	\$44,089.82	\$1,440.24			
Medicare Tax Withheld	\$21,148.86	NC	\$130,323.00	\$326.80			
Social Security Tips	\$0.00	NE	\$68,931.61	\$2,641.19			
Allocated Tips	\$0.00	VA	\$25,770.94	\$1,130.52			
Dependent Care Benefits	\$15,362.64	WI	\$19,357.84	\$1,082.42			
NonQualified Plan 457	\$200.00						
(Box 12 Totals)							
DD	\$1,000.00						
N	\$10,000.00						
(Box 14 Totals)							
401K	\$979.24						
Revenue ru	\$10.00						

Verify these totals

I have reviewed the totals on this screen and verify that they are correct.

[Back](#) [Finish](#)

# Step 5

## Manage Employee Access

- Step 5 is where you can allow your employee to view their tax form on the Green Employee portal (available for W2s and 1095-Cs if uploaded through Greenshades – consent is captured here as well!)
- The first step will allow you to select yes or no
- The next page will ask if you would like to sync info with turbo tax, completely optional but it is available

 <p><b>5. Manage Employee Access</b> 1 employee viewed their form online after Justin Kirkland activated access on 10/25/2017. <a href="#">(View Report)</a> 26 employees consented to receive their forms online-only before paper copies were issued, all of which were pre-consents. <a href="#">(View Report)</a></p> <p>COMPLETED ON 10/25/2017</p>	<h3>Basic Settings</h3> <h4>GreenEmployee Access</h4> <p>Should Employees be able to view 2017 W-2s on GreenEmployee.com?</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>
<h3>Turbo Tax Setup</h3> <p>If you wish, we can synchronize your employee W-2 forms to <a href="#">Turbo Tax</a>. If you choose to synchronize your forms then your employees will then be able to import their W-2 information directly into Turbo Tax while completing their 1040. Any changes you make to your forms will automatically synchronize to Turbo Tax.</p> <p>Please note that the synchronization cannot be turned off once it has been activated; please make sure your forms are ready to be viewed within Turbo Tax before you activate synchronization.</p> <p><input type="button" value="Start Synchronization"/> Turbo Tax is disabled for in-house formsets.</p>	

# Step 5

## Manage Employee Access

- What format would you like your employees to view their tax form in
- You will be able to choose from the drop down and select the preview link to preview the layout.

### Employee Access Wizard

Basic Settings ➔ Turbo Tax Setup ➔ W-2 Settings

#### W-2 Settings

What layout should we use for Employee W-2s?

W-2 Layout  
B2 for 2 Part Paper ▼



Two copies of the W-2 split horizontally:  
Copy B for the employee's federal return  
and a Copy 2 to file with a state or local return.

[Preview](#)

# Step 5

## Manage Employee Access

- Would you like to allow your employees to edit their W2?
- If any of these options are selected, you can then choose which admin will be emailed whenever an employee submits a change on their tax form

**Additional Employee Options**

Check the options you wish to enable

- Provide tax preparation [coupon group headed by H&R Block](#)
- Employees are allowed to edit their addresses
- Employees are allowed to edit their names
- Employees are allowed to edit their social security numbers
- Approval is required for any employee edits

Select which admins will receive employee change emails

Administrators that are selected below will receive a notification email informing them that an employee made an edit to a form.

	Name	Email
<input type="checkbox"/>	Chris Hadden	haddecs@yahoo.com
<input type="checkbox"/>	Dylan	DKantzler@greenshades.com
<input type="checkbox"/>	Full Admin	Fulladmin@greenshades.com123
<input type="checkbox"/>	Harry Hartman	hhartman@greenshades.com
<input type="checkbox"/>	John Collver	jcollver@greenshades.com
<input type="checkbox"/>	Justin Kirkland	jkirkland@greenshades.com
<input type="checkbox"/>	Limited Admin	Limitedadmin@greenshades.com123
<input type="checkbox"/>	Mark Horvath	mhorvath@greenshades.com
<input type="checkbox"/>	molly	mvankampen@greenshades.com
<input type="checkbox"/>	Rob Bright	rojbright@gmail.com
<input type="checkbox"/>	Sales	sales@greenshades.com
<input type="checkbox"/>	Sales Admin	SalesAdmin@greenshades.com
<input type="checkbox"/>	Stacy Collis	scollis@greenshades.com
<input type="checkbox"/>	Test Admin	pjones@greenshades.com3
<input type="checkbox"/>	TestGreenshades	testgreenshades123@gmail.com
<input type="checkbox"/>	Tyler Smythe	tsmythe@greenshades.com
<input type="checkbox"/>	Will DiGiovanni	WDiGiovanni@greenshades.com

# Step 6

## Email Employees Links to View Tax Forms

- If you selected no on the previous step and are not allowing your employees to view their tax form online, you can skip this step
- This step will require an email to be uploaded along with the tax form. You will have the option to exclude who receives this email, we let you know how many employees we have emails for and how many employees still need to be emailed about downloading their W2
- In this sample we are going to exclude any employee who has already viewed their W2 online

### Notification Wizard

Recipients → Message → Send Notifications

#### Send Email Notifications to Employees

43 employees have email addresses, 43 of which still need to be emailed about downloading their W-2.

emails will be sent. [Download Recipient List](#)

- Exclude employees who have already viewed their W-2 online.
- Exclude employees who have already been mailed their W-2s using the Year-End Forms mailing service.
- Exclude employees for whom I have printed and distributed W-2s.
- Exclude employees who have already been notified by email from this page.

[Why don't some of my employees have email addresses on Year-End Forms?](#)

[Home](#)

# Step 6

## Email Employees Links to View Tax Forms

- We populate a generic email with the link an employee can click to log into the Green Employee portal
- This step is optional and if you would like to just copy the link and send out to your employees that will work as well

**Email Message Content**  
Alter and approve the email message that will be sent to your employees.

**Subject**  
Greenshades University Employees - View Your W-2 Online

**Body**

Dear Greenshades University Employee,

This year our W-2 forms will be available online. You can view your W-2 at <http://gssalesefp.greenemployee.com>

To log in you will need to know your Last Name and your custom password OR your Last 4 of SSN + Birth Year. You will be asked to consent to receive an electronic W-2 in place of a paper W-2, and a verification code will be generated that you will need to type in. Once you have consented to receive your W-2 electronically only, you will not receive a paper copy, but you may log in and re-print the electronic copy as many times as you need to.

If you do not access your W-2 this way, you will be issued a paper copy by 1/31/2018.

Sincerely,  
Sales  
Greenshades University

Design Preview

# Step 7

## Distribute Tax Forms

- 7A is to have Greenshades print and mail your forms
- 7B to download a PDF copy for you to print and mail in house, or just for a copy of your records (This option is free to download)



DEPENDS ON METHOD

### 7. Distribute any remaining W-2s to your Employees

**18 employees must still be issued paper forms.**

27 employees consented to receive their form online-only, 0 employees first received or will receive their form through our Print and Mail Service, and 0 employees 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.

#### 7a. [Ask us to Mail Remaining W-2s](#)

OR

#### 7b. [Distribute Remaining W-2s Yourself by 1/31/2018](#)

You may download and print the remaining W-2s to mail or hand out to your employees by 1/31/2018.

# Step 7A

## Distribute Tax Forms

- Click on the 'New Order' option to get started
- The next wizard will allow you to choose which tax forms you would like to distribute

New Order

### Mail Service Wizard

Choose Forms → View Totals → Delivery Options → Advanced Options → Review & Mail

#### How Forms Were First Issued



Method	Count
Mailed by us	0
Printed and mailed by you	0
Not issued by any method above	18
Consented to receive form online only	27

#### Which forms would you like to work with?

- All tax forms in this workspace
- All forms that must still be issued
- Select specific forms by searching for them

# Step 7

## Distribute Tax Forms

- Delivery Options – You will have two different options for distribution
- There is a cost difference for the two options and Avionte can provide the pricing chart

### Delivery Options

- Have Greenshades Software print and mail these forms to your recipients.
- Have Greenshades Software print these forms, insert them into envelopes, and ship them to your location for you to distribute.

# Step 7

## Distribute Tax Forms

- We will provide a summary of your order with information, such as estimated processing date, also a break down of the invoice that will be created
- Once you are all set you will need to enter your name and hit mail forms

### Summary for this Order of Forms

**Order Name**  
Please choose a name for this order. This is the name you will look for when checking the status of this order.

**Estimated Processing Schedule**  
We *estimate* that your forms will be postmarked no later than **Monday December 11, 2017**. This estimate is based on the how many forms you are mailing and the load we are experiencing. The estimate may change as we process your order.

**Authorization**  
Once you click 'Mail Forms', we will begin the process of printing and mailing your tax forms. All recipient addresses are processed through the [United States Postal Service MOVE Update](#) system. This may change the address if the recipient has filed a MOVE Update form in the last 18 months.

You are responsible for reviewing your W-2 forms and ensuring they are correct prior to requesting their mailing. You may view the forms [here](#). Please review our [End User License Agreement](#) and type your name into the box below to agree and authorize us to proceed.

# Step 7

## Distribute Tax Forms

- You can go back and verify the status of your print and mail batch at any time
- Go back into the check list and click on the 7.A option
- You can then click View Details on any of the print and mail batches

The screenshot shows a web interface for 'Year-End Forms'. The breadcrumb trail is 'Year-End Forms > TWO: FABRIKAM DEMO 2017 W-2 Tax Forms'. The page title is 'Mail Service Status Page'. Below the title, there is a section for 'Order New Mail Service' with a 'New Order' button and a message: 'Our mail service is not currently available for W-2 forms.' Below this is a section for 'Status of Previous Mail Service Orders' containing a table with columns for Name, Status, Owner, and Submitted. The table has two rows of data. At the bottom right of the table area, there is a 'Rows per page' dropdown set to 10. A 'Home' button is located at the bottom left of the interface.

	Name	Status	Owner	Submitted
<a href="#">View Details</a>	Fabrikam Demo 1.8.2018 (1 forms)	Processed	Test Testing	1/8/2018
<a href="#">View Details</a>	Fabrikam Demo 1.3.2018 (1 forms)	Cancelled	Test Testing	1/3/2018

# Step 7

## Distribute Tax Forms

**i** According to our initial estimate, these forms should be postmarked within 1 business day of **Monday, 1/15/2018**

**Fabrikam Demo 1.8.2018 (1 forms)**  
**Status:** Processed  
**Contents:** 1 forms for 1 employees  
**Owner:** test@greenshades.com

This batch has been broken down into smaller parts to provide detailed tracking information

This batch is 0.00% complete. See the break-down below:

**Printed:** 0 / 1 (0.00%)  
**Sealed:** 0 / 1 (0.00%)  
**Packaged:** 0 / 1 (0.00%)

**History for this Batch**

Action	Time
Submitted	1/8/2018 5:32 PM
Processed	1/8/2018 5:35 PM

**Legend**

**Submitted** Your order has been received and will be processed shortly.  
**Processed** Your order has been processed and is waiting to be queued for printing.  
**Queued** The forms have been added to the print queue and will begin printing soon.  
**Printed** The forms are printed and are waiting to be pressure sealed or stuffed in envelopes.  
**Sealed** The forms are waiting to be packaged for bulk mail.  
**Packaged** The forms have been packaged and are awaiting delivery to the post-office.  
**Mailed** The forms have been mailed to their recipients.  
**Cancelled** You have asked us to cancel this batch.

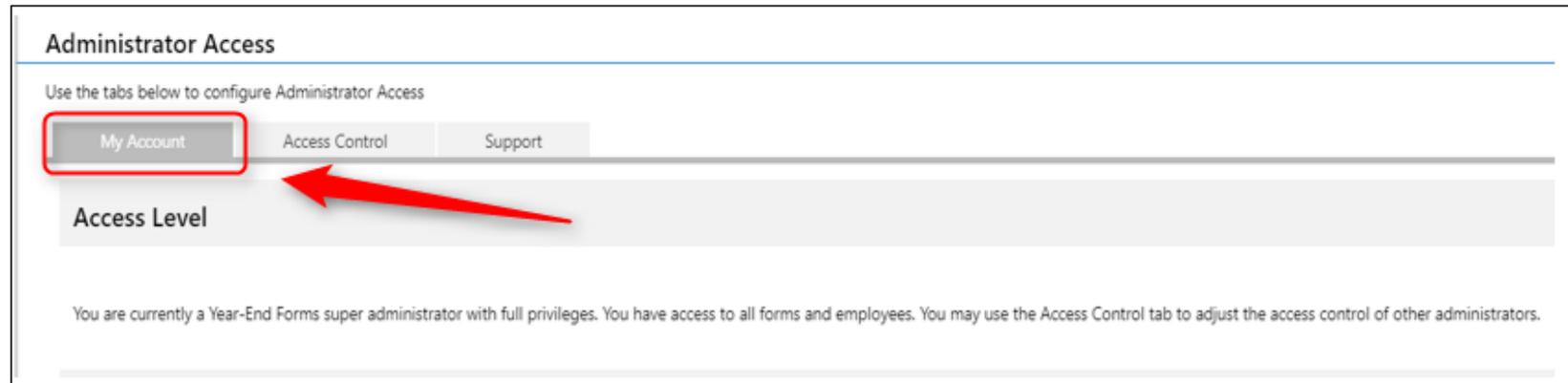
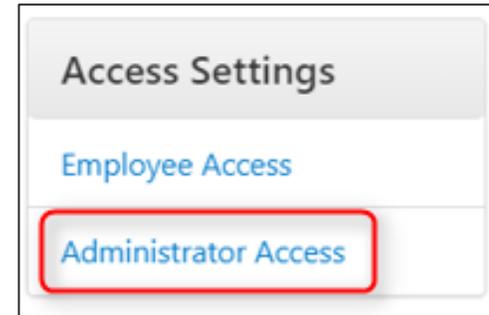
**Preferences for this Batch**

Option	Selection
Shipping	Greenshades Shipping
Coupon	No Preference

[View All Batches](#) [Request Cancellation](#)

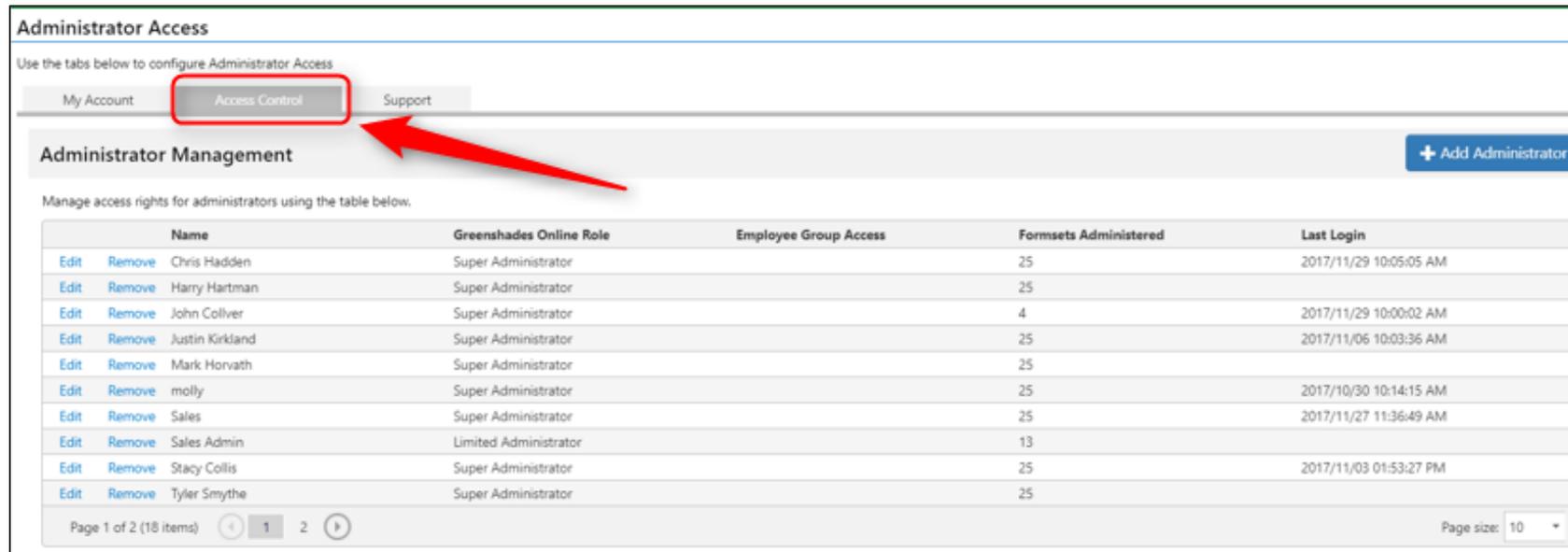
# How to Manage Administrator Access

The “my account” tab will let you know what level of access you have, if you are a super administrator you will have access to all form sets inside of the workspace and be able to grant access to any other contacts



# How to Manage Administrator Access

- The access control tab shows you all administrators and how many form sets they have access to
- Two types of administrator Super Administrator and Limited Administrator



Administrator Access

Use the tabs below to configure Administrator Access

My Account **Access Control** Support

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>	Chris Hadden	Super Administrator		25	2017/11/29 10:05:05 AM
<a href="#">Edit</a> <a href="#">Remove</a>	Harry Hartman	Super Administrator		25	
<a href="#">Edit</a> <a href="#">Remove</a>	John Coliver	Super Administrator		4	2017/11/29 10:00:02 AM
<a href="#">Edit</a> <a href="#">Remove</a>	Justin Kirkland	Super Administrator		25	2017/11/06 10:03:36 AM
<a href="#">Edit</a> <a href="#">Remove</a>	Mark Horvath	Super Administrator		25	
<a href="#">Edit</a> <a href="#">Remove</a>	molly	Super Administrator		25	2017/10/30 10:14:15 AM
<a href="#">Edit</a> <a href="#">Remove</a>	Sales	Super Administrator		25	2017/11/27 11:36:49 AM
<a href="#">Edit</a> <a href="#">Remove</a>	Sales Admin	Limited Administrator		13	
<a href="#">Edit</a> <a href="#">Remove</a>	Stacy Collis	Super Administrator		25	2017/11/03 01:53:27 PM
<a href="#">Edit</a> <a href="#">Remove</a>	Tyler Smythe	Super Administrator		25	

Page 1 of 2 (18 items) [1](#) [2](#) Page size: 10

# How to Manage Administrator Access

- Clicking edit next to the administrators name will allow a super administrator to assign specific form sets to them

My Account | Access Control | Support

### Administrator Management

Manage access rights for administrators using the table below.

	Name	Greenshades Online Role	Employee Group Access	Formsets Administered
<a href="#">Edit</a>	Chris Hadden	Super Administrator		26

### Administrator Access Details

#### Greenshades Online Access for Chris Hadden

Use this section to configure Greenshades Online administrator rights for Chris Hadden. Greenshades Online administrators may log into GreenshadesOnline.com to perform a variety of HR management tasks and to configure how their employees will be able to use GreenEmployee.com. Companies often choose members of their payroll, HR, and/or IT staff to be administrators. Use this tab to add administrators, remove administrators, or edit administrator access rights.

**Greenshades Online Role** ⓘ

Super Administrator

Limited Administrator

# How to Manage Administrator Access

- This section will allow you to choose the year and form type you are granting access too
- In this case I gave our example, Chris, administrator access to the 1095-Cs and W-2s as a limited administrator with access to all employees

### Year-End Forms Access for Chris Hadden

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

Showing formsets for tax year

#### Formsets You Administer

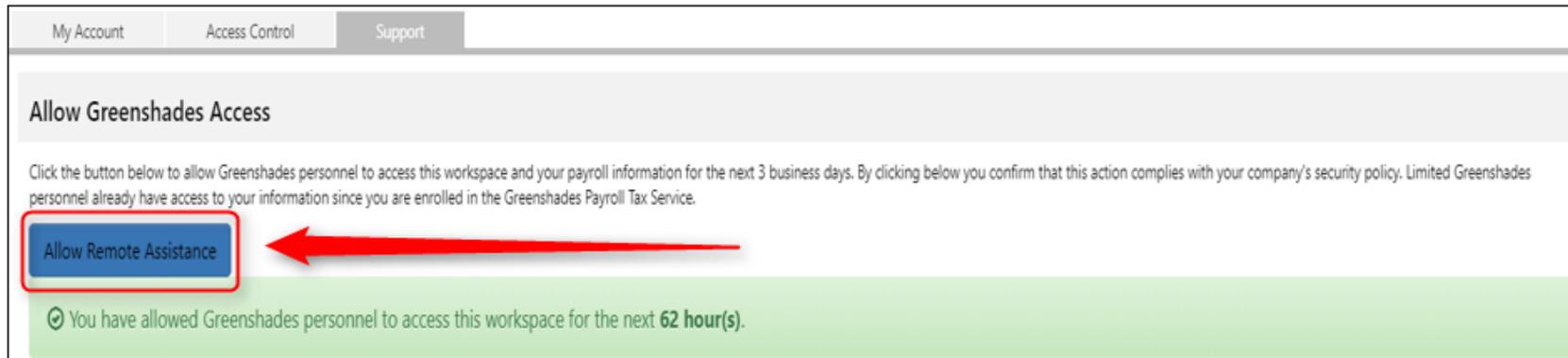
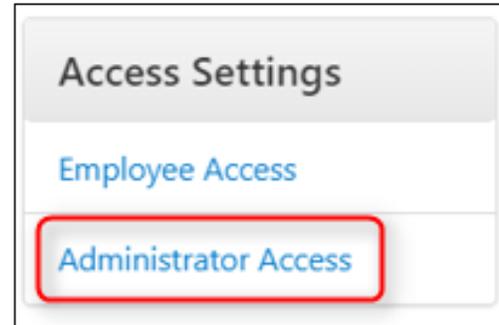
You are a super administrator on the following formsets and may therefore configure access for other users. Check the box next to the formsets that Chris Hadden may administer.

Limit Access to Formsets	Limit W-2 Formset Access <span>?</span>
<input type="checkbox"/> 1042-S Forms	<input type="radio"/> Super Administrator
<input type="checkbox"/> 1095-B Forms	<input checked="" type="radio"/> Limited Administrator with Access to All Employees
<input type="checkbox"/> 1099-DIV Forms	<input type="radio"/> Limited Administrator with Access to Groups of Employees
<input type="checkbox"/> 1099-INT Forms	
<input type="checkbox"/> 1099-MISC Forms	
<input checked="" type="checkbox"/> 1095-C Forms	
<input checked="" type="checkbox"/> W-2 Forms	

[← Back](#)

# Troubleshooting When Setting Up Administrators

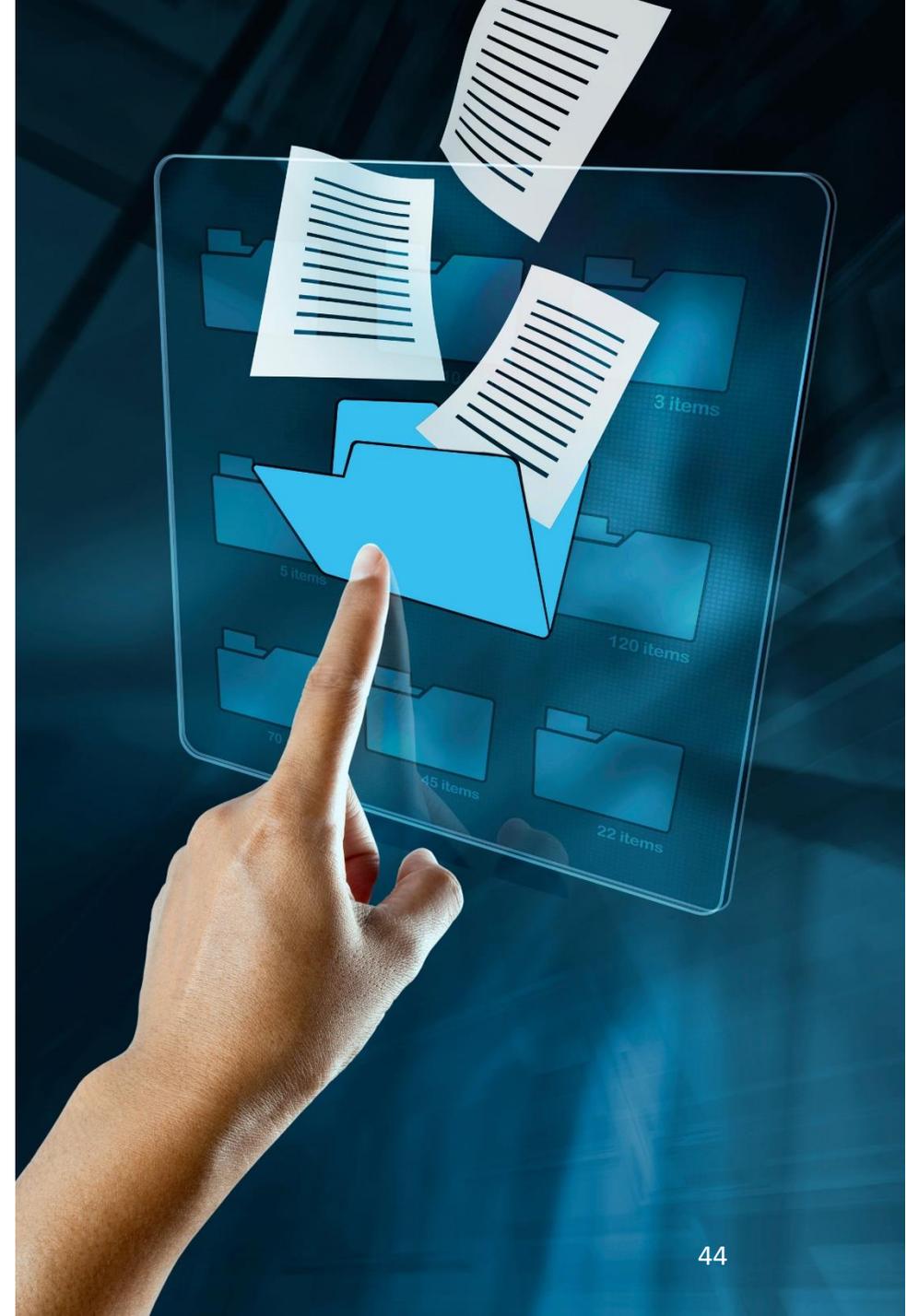
If for any reason there is an error on the page or you run into issues with assigning an administrator, you will need to go into the support tab and click on the Allow Remote Assistance button. This will allow the support team to investigate the issue further.



# W-2C

## Electronic Filings

- The question on if Greenshades can support W-2C filings comes up frequently during Year-End
- The Answer is yes, Greenshades can support a W-2C, but it will go through our professional services team and be charged \$500 per corrected filing
- If a W2-C is needed, you will need to get all the information over to the Avionte team who can get the process started



# Year-End Pricing 2024

## Start Early & Save

Box and Ship	
\$1.25 per form upload fee	
Date Range	Price
01/01/2025 - 01/03/2025	\$0.59
01/04/2025 - 01/07/2025	\$2.19
01/08/2025 - 01/10/2025	\$2.78
01/11/2025 - 01/17/2025	\$3.59
01/18/2025 - 01/24/2025*	\$3.99
01/25/2025 - 02/13/2025	\$4.59
02/14/2025 - onward	\$5.29
*Last date guaranteed for Jan 31 postmark	

Print and Mail**	
\$1.25 per form upload fee	
Date Range	Price
01/01/2025 - 01/03/2025	\$0.74
01/04/2025 - 01/07/2025	\$2.59
01/08/2025 - 01/10/2025	\$3.15
01/11/2025 - 01/17/2025	\$3.99
01/18/2025 - 01/24/2025*	\$4.49
01/25/2025 - 02/13/2025	\$4.99
02/14/2025 - onward	\$5.29
*Last date guaranteed for Jan 31 postmark	
**Additional pages \$0.79 per	

Other Forms and Items	
Item	Price
1095-C Filing Fee	\$385
1099 Filing Fee	\$385
W-2 Filing Fee	\$385
Filing from DownloadMyForm.com	
• Single State	\$385
• Federal	\$385
• Single local	\$385
Foreign Postage Fee	\$1.79
Online Distribution Fee	\$1.25
Customized Delivery	\$0.59

## Simplify Your Year-End

Use one simple solution for all your year-end forms with Greenshades. We support a variety of forms, including W-2s, 1095-Cs, 1099s, 1099-MISC, and 1099-NEC.

Greenshades year-end processing is ERP agnostic and built to handle it all.

Contact us to learn how we can make your year-end workload a breeze.

# When to Contact Greenshades Directly

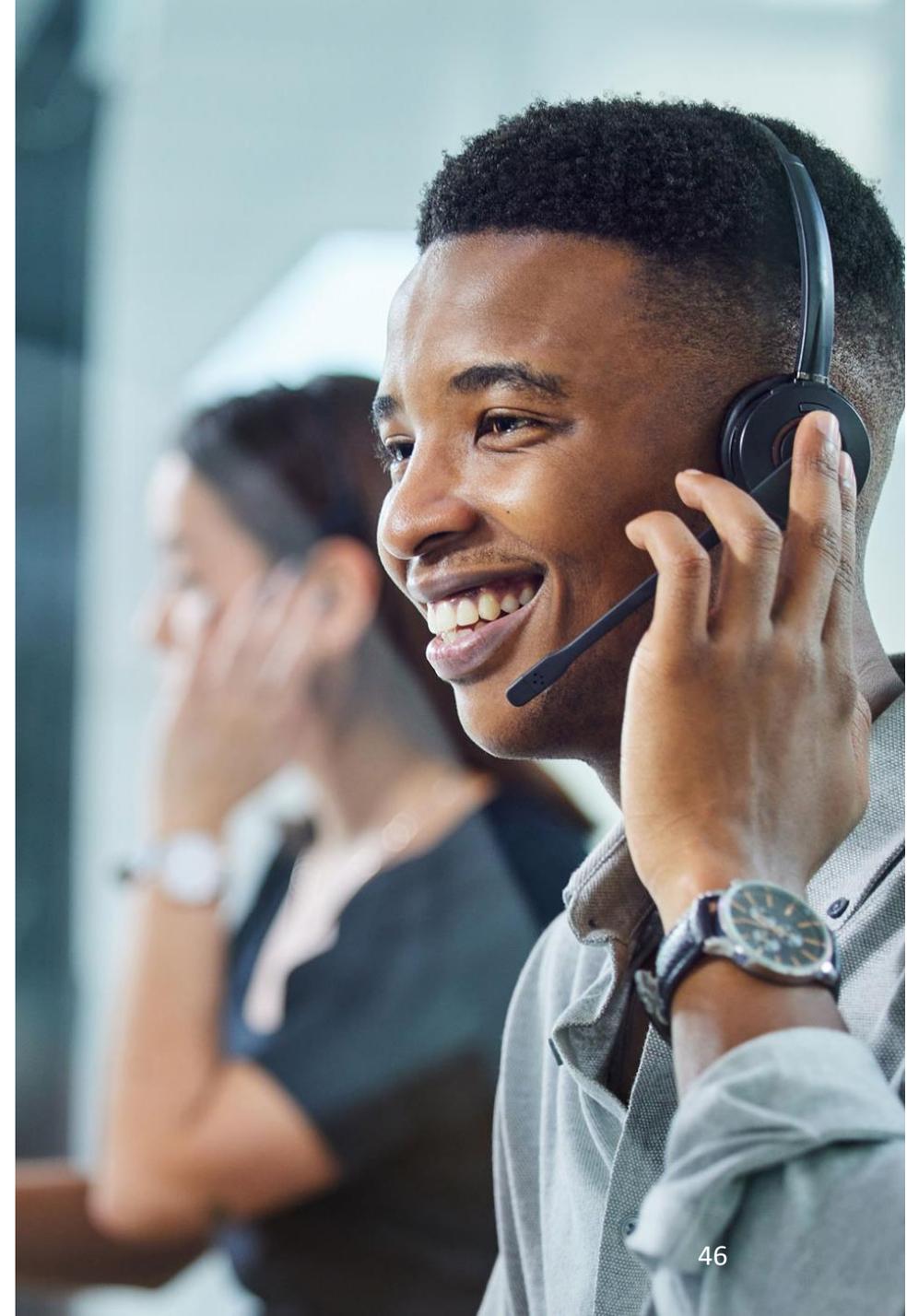
- Contact information at Greenshades.com under the support tab
  - Chat support available once logged into [www.greenshadesonline.com](http://www.greenshadesonline.com)
- If calling -select queue by entering the 1 extension when prompted
- Contact Greenshades Support for Year-End form site or process questions
- **Avionte Support for all Tax Filing Center questions or support**
- For everything else - call Avionte Support

**Greenshades Software. Let Us Handle That!**

**Greenshades Support**

**support@greenshades.com**

**888-255-3815 x 1**



# Questions?

---

# Thank You!

Greenshades