

AVIONTÉ CONNECT



Tax Prep and Year-End Compliance: Stop Scrambling, Start Planning

- A proven quarterly and periodic system for your payroll and back-office team
- 2026 W-2 updates, including new OBBB requirements
- Concrete next steps to implement the moment you are back at your desk

Introductions

Welcome to **CONNECT**! Thank you for joining our session.



Becky Fox

LEAD PRODUCT TRAINER

TRAINING



Kristine Olson

DIRECTOR, COMPLIANCE &
SERVICES

COMPLIANCE

Agenda

- 1 The January Scramble
- 2 What To Do Before Q4
- 3 Reports Walkthrough
- 4 What's New in 2026
- 5 Resources/Knowledge sources



Disclaimer

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The January Scramble

The Annual January Scramble

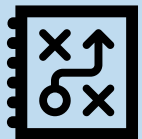
- **The Risk:** Errors compound silently all year, then explode as a Q1 crisis right when time is shortest.
- **The Fix:** Defuse the time bomb by running automated monthly data audits and a mock year-end in November.
- **The Payoff:** Eliminates a chaotic 12-week scramble, protecting your profits, your deadlines, and your team's sanity



Four Common Pain Points

Classification Challenges

W-2 vs. 1099 mismatches create downstream errors in tax reporting. Use Avionté tools to catch them early.



Internal Turnover

Year-end knowledge lives in people's heads. When those people leave, the knowledge goes with them.



Legislative Changes

OBBA changes the W-2 and impacts the 1099 – required for 2026. Keeping up with changes is challenging.



Missing Worker Data

SSNs, addresses, and W-2 consent gaps go unnoticed all year and block your entire process at year-end.



Plan for Success

Organize a Team

Assign deliverables to your team – know who is doing what.

Involve payroll, HR, finance, accounting

Lessons Learned

Talk with your team. What has gone well in the past? What were the challenges?

Utilize Resources

Identify knowledge gaps. Get familiar with available resources

Start Early

Know your data and start reviewing early

Preparation leads to confidence in success.

Strategy 1: Build Your Team

Strategy 1: Build Your Team

Task	HR / Benefits	Back Office Admin	Payroll / Tax	REVIEWER: Ops Lead
Electronic W-2 Consent	✓	—	—	✓
Transaction Types (incl. OBBBA configuration)	—	✓	✓	✓
Insurance Offerings / ACA Companion	✓	—	—	✓
Worker classification review	✓	✓	—	✓
SOC Codes	—	✓	✓	✓
W-2 Audit	—	✓	✓	✓

Strategy 2: Periodic Maintenance

Strategy 2: Periodic Maintenance



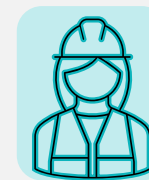
SSN Verification

Run E-Verify and SSN Verification Services. Every unresolved SSN at year-end is a corrected W-2 waiting to happen.



ACA Error Review

Run ACA Companion Employee Sync SSN Errors AQ and Primary Address Error AQ monthly. Unresolved items block your 1095-C process.



SOC Codes

Pull Missing SOC Code AQ. Five minutes to verify and fix missing data catches gaps before tax filings.

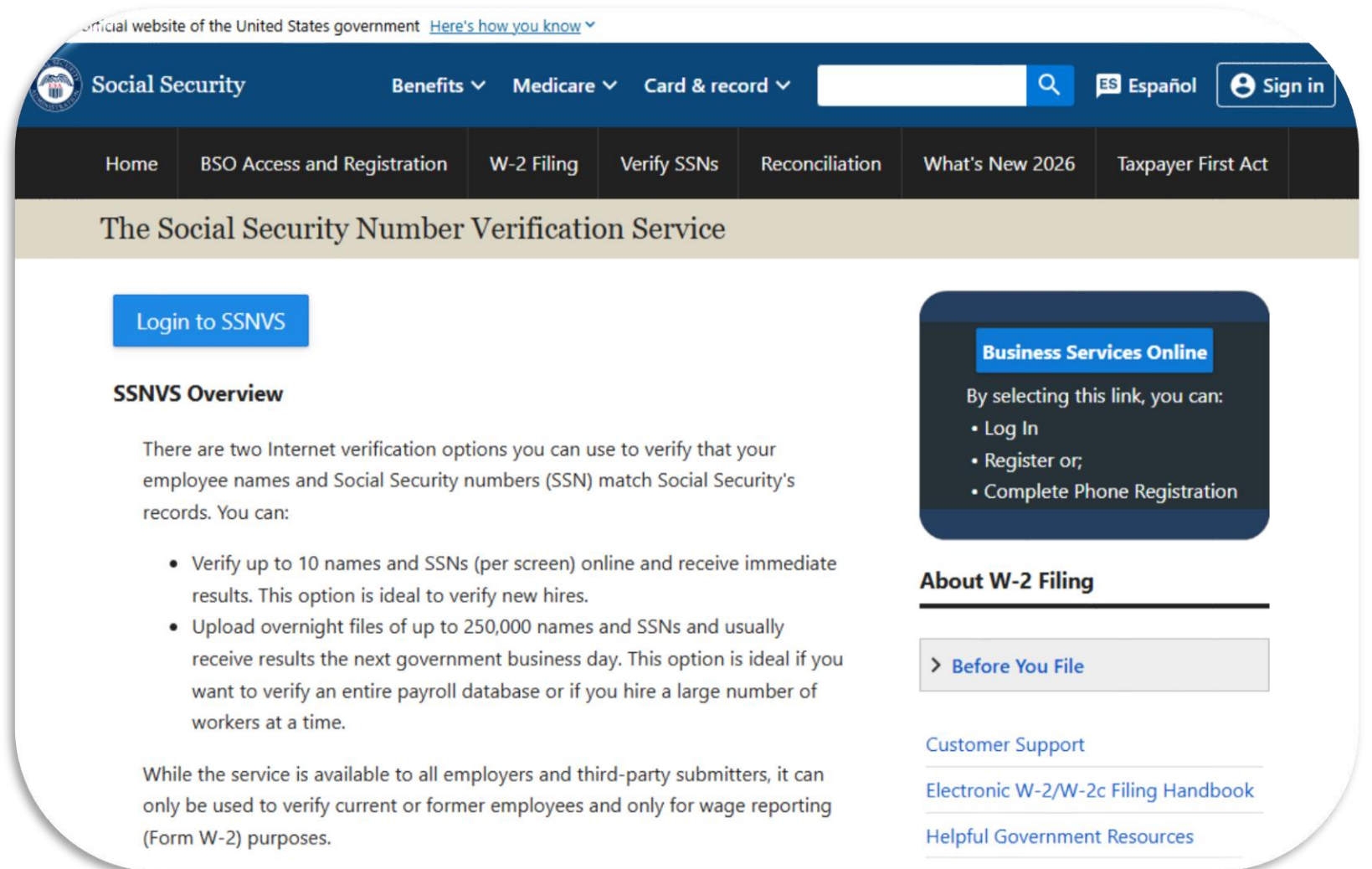
Social Security Number Verification Service (SSNVS)

What does it do?

Verify new and existing employees exactly match the SSA records.

How does it help?

- Ensure accurate Form W-2 reporting
- Avoid IRS penalties for mismatched records
- Ensures employees get proper credit for their earnings



Social Security Verification Service (SSNVS)

User Permission

Grant access in Admin Tools
> Report > Advance Query

Send to SSA

- Run the export in Weekly Process
- Upload data to SSA's BSO website
- Address any discrepancies

The screenshot displays the AVIONTÉ Weekly Process interface. On the left is a 'Main Menu' sidebar with options: Favorites, Back Office, Time Entry, Payroll, Billing, Invoice, Paycheck, AR, AP Check, Weekly Process (highlighted), and Import Export. The main content area is titled 'Weekly Process' and contains the following elements:

- Select Feed:** A dropdown menu with 'SSNVS Export' selected.
- Choose Location:** A text field containing '\\prd-cl-profiles\share\clients\homefol' and a 'Browse' button.
- Enter Parameter:** A table with columns 'DisplayName', 'Value', and 'IsRequired'.

DisplayName	Value	IsRequired
Staffing Supplier		☐
Active Assignments	Yes	☐
Start Date	//	☐
End Date	//	☐
- Action:** A 'Process File' button.

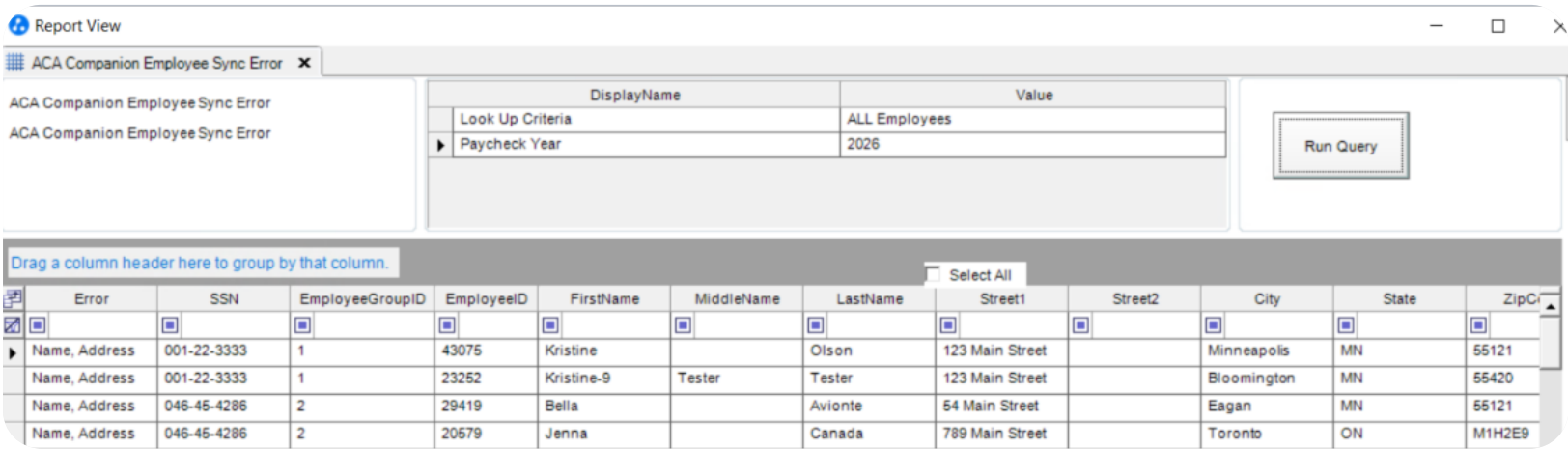
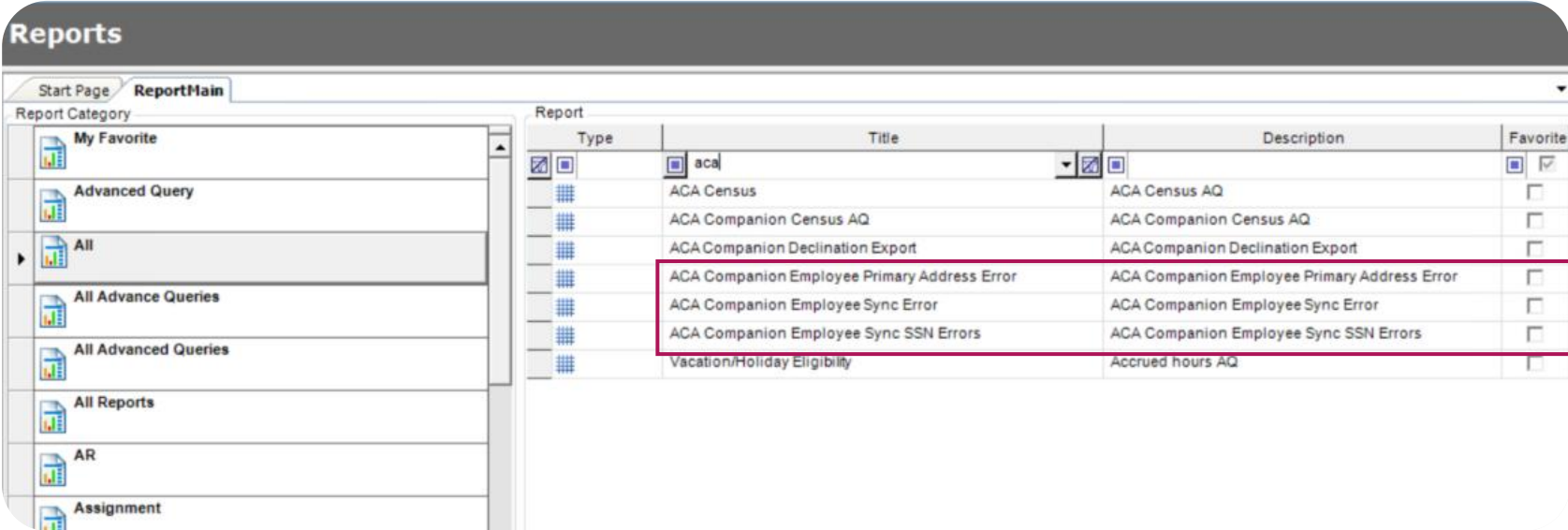
ACA Sync Errors

User Permission

Grant access in Admin Tools
> Report

Multiple AQs:

- ACA Companion Employee Sync Error
- ACA Companion Employee Primary Address Error
- ACA Companion Employee Sync SSN Errors



Standard Occupational Classification (SOC) Codes

What It Is	WA: Required	Other States
• 6-digit BLS code for occupation type • Used on quarterly state UI wage reports • Different from workers' comp risk codes • Saved and reused each quarter once entered	• Required by state law since Q1 2024 • Applies to all UI-taxable employers • SOC code or job title needed per employee • Requires "Detailed" code	• SC also requires Detailed code type • AK, IN, LA, SC, WV – SOC used in these states • Other states: confirm with that state's UI agency

SOC Codes

Report View

Get Missing SOC Data x

Get Missing SOC Data

Get Missing SOC Data

DisplayName	Value
Search Type	Missing Occ. Code
Date Type	Check Date
Start Date	06/22/2026
End Date	06/28/2026
State	ALL

Run Query

Options

Drag a column header here to group by that column.

Select All

Supplier	ConfigSkillCodeID	CategoryName	SkillCode	Description	State	WarningMessage	Sel
Kristine Test Company	377	Training	test job title	test job	IN		☒

User Permission

Grant access in Admin Tools > Report

Run AQ

- Get Missing SOC AQ
 - Run by Check Date
 - Select State (All)

Note: For additional assistance with adding SOC, access our guide – [Standard Occupational Code \(SOC\) Support](#)

Standard Job Titles - Coming to BOLD

Standard Job Titles
Create and manage occupied job titles

[+ Add Job Title](#)

Job Title

Accountant

Administrative Assistant

Assembler

Billing Clerk

Computer Systems Analyst

Creative Director

Customer Service Representative

Data Entry Keyer

Database Administrator

Information Technology

IS-1242

DRK

+ Add New Standard Job Title ×

Job Title *

Job Category *

Select SOC Code

Search for a SOC Code...

Type to search and select a SOC Code

Description *

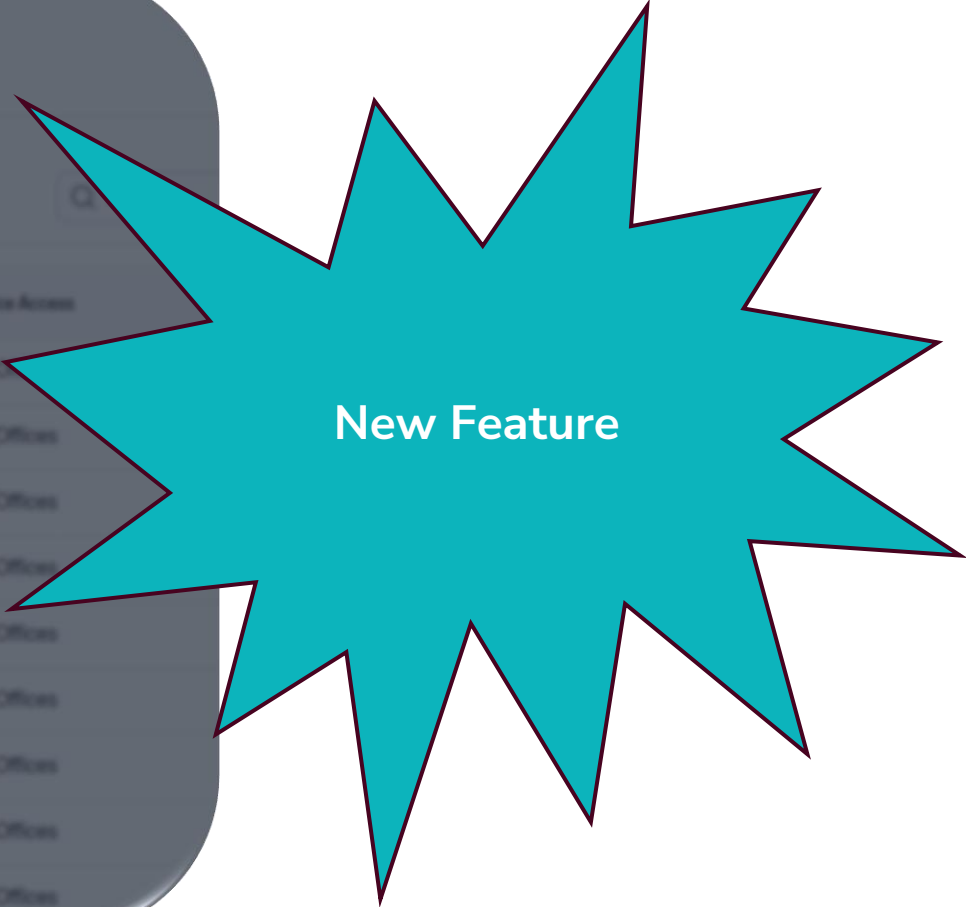
Select Office Access *

Search for an office...

Type to search and select Office Access

Selected Office Access: All Offices ×

Cancel Save



Strategy 3: Quarterly Review

Strategy 3: Quarterly Review



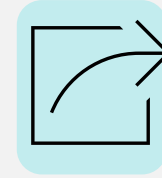
Taxes Summary AQ

Verify tax totals; identify new states and jurisdictions



Review Greenshades Fields

Review details that print on tax returns: Company name, company address, contact name, phone and email.



Generate Greenshades or ADP

Review and resolve all errors.
File 941 quarterly & state unemployment. Pair with Taxes Summary AQ

Taxes Summary AQ

Report View

Taxes Summary AQ [X]

Taxes Summary AQ

Taxes Summary AQ

DisplayName	Value
Start Date	04/01/2026
End Date	06/30/2026
Date Type	Check Date
Show Summary	Tax Summary
Show Local Taxes	Yes

Run Query

Drag a column header here to group by that column.

☐ Select All

SupplierDesc	StateDescription	TaxType	TaxName	MappedTax	TaxEIN	TaxCode	EmployeeTax	ResidentTax	GrossAmount	SubjectGross	TaxableGross	TaxAmount	EmployeeCount	Sele
Kristine Test Com		Federal Income Ta	Federal Income Ta				☒		\$4,994.20	\$4,420.20	\$4,420.20	\$345.39	5	☒
Kristine Test Com		FICA	FICA EE				☒		\$4,994.20	\$4,435.20	\$4,435.20	\$274.98	5	☒
Kristine Test Com		FICA	FICA ER				☐		\$4,994.20	\$4,435.20	\$4,435.20	\$274.98	5	☒
Kristine Test Com		FUTA	FUTA ER				☐		\$4,994.20	\$4,435.20	\$4,435.20	\$26.62	5	☒
Kristine Test Com		MEDICARE	MED EE				☒		\$4,994.20	\$4,435.20	\$4,435.20	\$64.31	5	☒
Kristine Test Com		MEDICARE	MED ER				☐		\$4,994.20	\$4,435.20	\$4,435.20	\$64.31	5	☒
Kristine Test Com	California	SUI	CA EMPLOYMENT				☐		\$720.00	\$720.00	\$720.00	\$0.72	1	☒
Kristine Test Com	California	State FUTA	CA FUTA ER				☐		\$720.00	\$720.00	\$720.00	\$4.32	1	☒
Kristine Test Com	California	SUI	CA SUI ER		0		☐		\$720.00	\$720.00	\$720.00	\$44.64	1	☒
Kristine Test Com	California	State Income Tax	CA WH		87654321		☒		\$720.00	\$720.00	\$720.00	\$0.00	1	☒
Kristine Test Com	California	SDI	CALIFORNIA SDI E				☒		\$720.00	\$720.00	\$720.00	\$9.36	1	☒
Kristine Test Com	Indiana	SUI	INDIANA SUI ER		0		☐		\$165.00	\$165.00	\$165.00	\$15.51	1	☒
Kristine Test Com	Indiana	State Income Tax	INDIANA WH		0		☒		\$165.00	\$165.00	\$165.00	\$4.87	1	☒
Kristine Test Com	Indiana	County	MARION COUNTY	US-IN			☒		\$165.00	\$165.00	\$165.00	\$3.33	1	☒
Kristine Test Com	Kentucky	City	HAZARD	US-KY-HazardCity			☒	Non-Resident Tax	\$373.20	\$373.20	\$373.20	\$4.67	1	☒

User Permission

Grant access in Admin Tools →
Report

Run AQ

- Run by Check Date
- Can see company totals, employee total, or employee detail
- All states or select from options

Note: For additional information, visit our Knowledge Base: [Taxes Summary AQ](#)

Greenshades Preparation

✓ Verify Greenshades properties — confirm company name, EIN and address

Supplier Administration : Avi Staffing

Detail Branch User Wvc Code Bank Tax Locality/Country Accrual Plan Config Year E

Details

Short Name	Full Name	FEIN	Parent Supplier	Next Invoice Number
Avi Staffing	Avi Staffing	123456789	Implementation Release	215

Supplier Info

Short Name	Avi Staffing
Full Name	Avi Staffing
Parent Supplier	Implementation Release
FEIN	123456789
Next Invoice Number	215
Copy Information From	

Address

Country	United States
Street 1	1270 Eagan Industrial Rd
Street 2	
City	Eagan
State	MN
Zip Code	55121-

Logo Invoice Logo Payment Logo

Browse Browse Browse

Contact Method

Type	Value	Is Primary	DoNotTe
*		☒	☒

Supplier Properties

Property	Value	DateEntere
☒ GSXMLFeed		
GSXMLFeed_Contact_ContactEmail		08/19/2019
GSXMLFeed_Contact_ContactFax		08/19/2019
GSXMLFeed_Contact_ContactName		08/19/2019
GSXMLFeed_Contact_ContactPhone		08/19/2019
GSXMLFeed_Contact_ContactPhoneExt		08/19/2019
GSXMLFeed_Contact_ContactTitle		08/19/2019
GSXMLFeed_Contact_PREFERREDNotification	1	08/19/2019
GSXMLFeed_Contact_PreparerCode	O	08/19/2019
*		07/17/2022

Save

Greenshades Preparation

✓ Verify Supplier Properties

Administration : Avi Staffing

Detail Branch User Wc Code Bank Tax Locality/Country Accrual Plan Config Year

Details

Short Name	Full Name	FEIN	Parent Supplier	Next Invoice Number
Avi Staffing	Avi Staffing	123456789	Implementation Release	215

Supplier Info

Short Name	Avi Staffing
Full Name	Avi Staffing
Parent Supplier	Implementation Release
FEIN	123456789
Next Invoice Number	215
Copy Information From	

Logo Invoice Logo Payment Logo

Browse Browse Browse

Contact Method

Type	Value	Is Primary	DoNotTe
*		☒	☒

Address

Country	United States
Street 1	1270 Eagan Industrial Rd
Street 2	
City	Eagan
State	MN
Zip Code	55121-

Supplier Properties

Property	Value	DateEntere
☒ GSXMLFeed	☒	☒
GSXMLFeed_Contact_ContactEmail		08/19/2019
GSXMLFeed_Contact_ContactFax		08/19/2019
GSXMLFeed_Contact_ContactName		08/19/2019
GSXMLFeed_Contact_ContactPhone		08/19/2019
GSXMLFeed_Contact_ContactPhoneExt		08/19/2019
GSXMLFeed_Contact_ContactTitle		08/19/2019
GSXMLFeed_Contact_PREFERREDNotification	1	08/19/2019
GSXMLFeed_Contact_PreparerCode	0	08/19/2019
*		07/17/2022

Save

Generate Greenshades

✓ Generate Feed & XML – review all errors before producing your final file

The screenshot shows the 'Generate Greenshades' application window. It has a sidebar with 'Details' and 'Error' tabs. The main area is divided into 'Company & Date' and 'File Type' sections. The 'Company & Date' section has dropdowns for 'STAFFING SUPPLIER' (Kristine Test Company), 'YEAR ID' (2026), and 'QUARTER' (Q2). The 'File Type' section has checkboxes for 'Yearly' (W2, 940, 1099) and 'Quarterly' (941, SUTA). An 'Error Generating Feed' dialog box is open in the center, asking 'There are 25 errors while generating feed. Would you like to see the errors?'. The 'Yes' button is highlighted with a red box. Below the dialog, there are buttons for 'Generate XML', 'Flag as Complete', and 'Email W2 Employees'.

Company & Date

STAFFING SUPPLIER: Kristine Test Company

YEAR ID: 2026

QUARTER: Q2

File Type

Yearly	Quarterly
W2 ☒	941 ☒
940 ☒	SUTA ☒
1099 ☒	

Error Generating Feed

? There are 25 errors while generating feed. Would you like to see the errors?

Yes No

Flag as Complete

Email W2 Employees

Best practice:

- Do not bypass errors without reviewing.
- Resolve them first to produce a clean file for upload to Greenshades.

Generate Greenshades

✓ Review and resolve all errors before generating your final Greenshades file

The screenshot shows the 'Green Shades' application window with a tab labeled 'ErrorMessage'. Below the tab, there is a section titled 'ErrorType : Severe (7 items)'. The list of errors is as follows:

- There are payment batches that are not posted or discarded.
- Staffing Supplier Property :GS_Company_CompanyID is not properly configured.
- Staffing Supplier Property :GS_Company940_DesigneeName is not properly configured.
- There are StateW2 Info Missing in ConfigTaxStaffingSupplier table.
- There are SUTA ID Info Missing in ConfigTaxStaffingSupplier table.
- Employee ID: 20858 has a null or blank last name. Please update and regenerate the feed.
- Employee ID: 20406 has a null or blank SSN. Please update and regenerate the feed.

Callouts provide additional context for some errors:

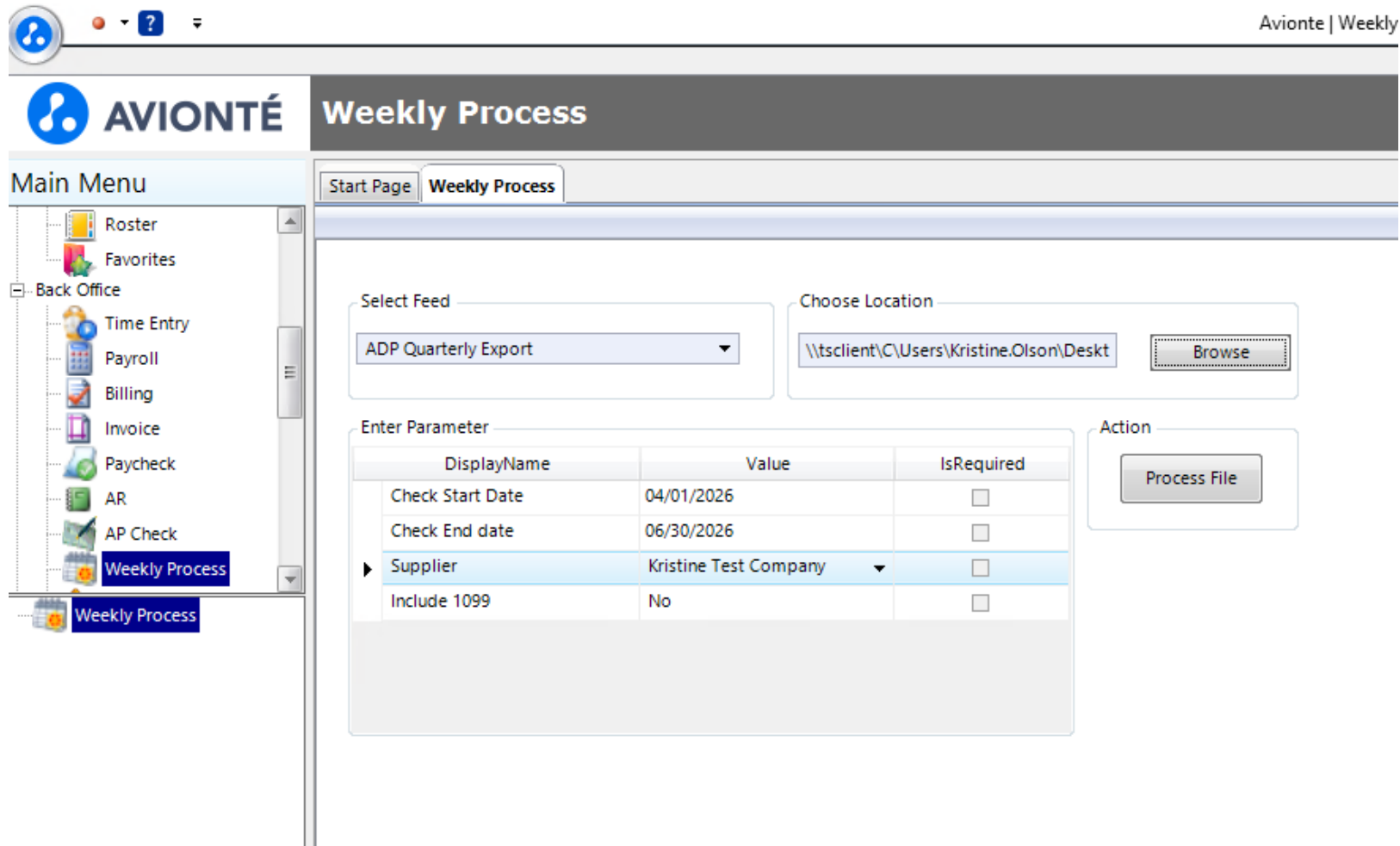
- All payrolls must be closed prior to generating the feed.** (Points to the first error)
- The Company ID is your registration key that Greenshades assigned to you. Call Support if you cannot find it.** (Points to the second error)
- These errors explain what is missing on the employee ID.** (Points to the sixth and seventh errors)
- This error is telling you that there are missing State and/or SUI ID numbers in Admin tools>Employer>Tax** (Points to the fifth error)

Pro Tip:

Use the View Greenshades Errors AQ to export a list of the errors

Generate ADP Quarterly File

✓ Know the ADP quarterly schedule for file submission



The screenshot shows the Avionté Weekly Process interface. The top bar includes the Avionté logo and the text "Avionté | Weekly". The left sidebar contains a "Main Menu" with icons for Roster, Favorites, Back Office, Time Entry, Payroll, Billing, Invoice, Paycheck, AR, AP Check, and Weekly Process. The "Weekly Process" option is highlighted. The main content area has tabs for "Start Page" and "Weekly Process". Below the tabs, there are two sections: "Select Feed" and "Choose Location". The "Select Feed" section has a dropdown menu with "ADP Quarterly Export" selected. The "Choose Location" section has a text box with the path "\\tsclient\C\Users\Kristine.Olson\Desktop" and a "Browse" button. Below these sections is an "Enter Parameter" table with columns "DisplayName", "Value", and "IsRequired". The table contains four rows: "Check Start Date" with value "04/01/2026", "Check End date" with value "06/30/2026", "Supplier" with value "Kristine Test Company" (highlighted), and "Include 1099" with value "No". To the right of the table is an "Action" section with a "Process File" button.

Avionté | Weekly

AVIONTÉ Weekly Process

Main Menu

- Roster
- Favorites
- Back Office
- Time Entry
- Payroll
- Billing
- Invoice
- Paycheck
- AR
- AP Check
- Weekly Process**
- Weekly Process

Start Page Weekly Process

Select Feed

ADP Quarterly Export

Choose Location

\\tsclient\C\Users\Kristine.Olson\Desktop Browse

Enter Parameter

DisplayName	Value	IsRequired
Check Start Date	04/01/2026	☐
Check End date	06/30/2026	☐
Supplier	Kristine Test Company	☐
Include 1099	No	☐

Action

Process File

Pro Tip:

Use the Taxes Summary AQ to compare to ADP

Strategy 4: Annual Maintenance

Review Set Up - Transaction Types

CLASSIC

Admin
Tools

Transaction
Types

Detail
Tab

WHAT TO CHECK

W2 Box & Label

Controls what displays on your W-2 forms.

Verify box number and label for each transaction type before year-end.

Config Transaction Type

Detail Property Category Groups

Transaction Type	ConfigTransactionTypeID	Name	Description	Deduction Category
☒	38	Health Care Medicaid	Health Care Medicaid	Health Care
☒	40	Health Care Non Qualified	Health Care Non Qualified	Health Care
☒	41	Health Care Plan1	Health Care Plan1	Health Care
☒	42	Health Care Plan2	Health Care Plan2	Health Care
☒	43	Health Care Plan3	Health Care Plan3	Health Care
☒	44	Health Care Plan4	Health Care Plan4	Health Care

Add New Cancel

Detail Tier Formula

Transaction Type Details

Name	Health Care Plan1
Description	Health Care Plan1
System Name	HealthCarePlan1

Type Deduction + Contribution

☒ Is Adjustment	☒ Is Permanent	☐ Allow Negative
☐ Is Transactional	☒ Is ER Contribution	
☐ Is Tiered	☒ Show ER Contribution on Paycheck	
☐ Allow Web Time Entry	☒ Is Healthcare	
☐ Is Equipment	☐ Allow Multiple Entry	
☐ Is Discretionary Bonus	☐ Synced To Front Office	

Deduction Category Health Care

Vertex Ded Code 125 Reg

Vertex Pay Code

W2Box	12
W2Label	DD

Shared By

Site	Staffing Supplier	
☒	☒	☒
Eagan	Implementation Release	☒
Eagan	Staffing	☒
Minneapolis	Staffing	☒
Bismark	Staffing	☒
Sioux City	Staffing	☒
Chicago	Staffing	☒
avisupport1	ABC Staffing Inc.	☒
St. Pauls	ABC Staffing Inc.	☒
St. Paul	Staffing new name	☒
San Francisco	ABC Staffing Inc.	☒
Testing - Branch	Testing	☒
New office test	Test Create	☒
Test number two	Test Create	☒
test four	Test Create	☒
Test fail	Test Create	☒
Office Space	Test Division	☒

Save

Review Set Up - Transaction Types

WHAT TO CHECK

Include in ACA Hours

Toggle ON for transaction types that count toward ACA hour tracking — Reg, OT, Holiday, etc.

Units to Hours Multiplier

Sets how units convert to hours for ACA. Salary = 40, Daily = 8. Must be correct or hours calculation will be inaccurate.

System | Config Transaction Type

Detail Property Category Groups

Select Branch: Eagan Go

Fetch ☐ Apply changes to all Branches

ConfigTransactionTypeID	Name	IncludeInACAHours	UnitsToHoursMultiplier	IsAdjustment	AllowInputDetailTime	BillRequired	CalculateWorkerCo
128	ACA Admin Fee	True	1	☐	False	True	True
4	DT	True	1	☐	False	True	True
281	FFCRA - Dependent Care	True	1	☐	True	True	True
282	FFCRA - Emergency FMLA	True	1	☐	True	True	True
280	FFCRA - Employee	True	1	☐	True	True	True
129	FMLA	True	1	☐	False	True	True
89	FSREG	True	1	☐	False	True	True
87	Holiday	True	1	☐	False	True	True
241	Holiday Test	True	1	☐	False	True	True
121	Jury Duty	True	1	☐	False	True	True
3	OT	True	1	☐	False	True	True
2	Reg	True	1	☐	True	True	True
26	Retro Pay	True	1	☒	False	True	True
25	Salary	True	40	☐	False	True	False
278	Salary - Daily	True	8	☐	False	True	True
230	Salary Weekly	True	40	☐	False	True	True
6	vac	True	1	☐	False	True	True
142	WC	True	1	☐	False	True	True

Gather Electronic Consent

BEST PRACTICE

Present Consent During Onboarding

The best time to collect electronic consent is at onboarding — before talent ever reaches year-end. Covers both W-2s and 1095-Cs.

Why It Matters

Chasing consent in January delays W-2 and 1095-C delivery. Consent collected at hire = zero scramble at year-end.

avionteboldsupport.zendesk.com/hc/en-us/articles/360045904594-Adobe-Sign-Mapping-AviontéBOLD

Articles in this section

Adobe Sign Mapping: AviontéBOLD

I-9 and E-Verify Process

Install and use Echo Plug-in

Adobe Sign Document Audit: AviontéBOLD

Adobe Sign in AviontéBOLD

Adobe Sign Mapping: Heritage Compas

ADP - Work Opportunity Tax Credit (WOTC)

Asurint Background Check Integration (v1)

Asurint Background Check Integration (v2)

Choice Screening Integration

[See more](#)

Adobe Sign Mapping: AviontéBOLD

14 days ago · Updated

Tags: [echo](#) [e-](#) [Adobe](#) [Sign](#) [Document](#) [Canada](#) [Video](#)

Overview

Updated 6/29/2022

[Introduction](#)

[Video](#)

[Onboarding Basic Mappings](#)

[Onboarding Employer Mappings](#)

[Talent Direct Deposit Setup Mappings](#)

[File Attachment Field Mapping](#)

[Custom Job Details](#)

[Federal W4 Mappings](#)

[Canada TD1 Mappings](#)

[2020 Federal W4 Mappings](#)

[State W4 Mappings](#)

[Local W4 Mappings](#)

[W2 Consent Mappings](#)

[Contract Basic Mappings](#)

[Updates to Adobe Sign](#)

[1095-C Consent Mappings](#)

[Talent Non-Resident Reciprocity Mappings](#)

Related articles

[Onboarding Utilizing the Adobe](#)

Gather Electronic Consent

AVIONTÉ

myDashboardJobsTalentTimesheetInvoicesCompaniesDocumentsBack OfficeAnalyzeAutomation

SearchAdd New TalentUnclaimed TalentImport TextImport ResumeImport MultipleSpotlight

Talent TermsConsentType to Search...TempType to Search...

Consent

Electronic W-2 Consent:
☐ Yes
☐ No
☒ No Response

Electronic 1095-C Consent:
☐ Yes
☐ No
☐ No Response

Electronic 1099 Consent:
☐ Yes
☐ No
☐ No Response

Done

Name	Email Address	Mobile Phone	Address 1	Address 2	City	State	Zip Code
zzfake@no...	1115551235	700 Maple ...	Bloomington	MN	55420		
cjwinters...	+1 651 555...	515 Willow ...	Eagan	MN	55123		
zzasterzjo...	5152883764	515 BlueVi...	Eagan	MN	55121		
daisy.cant...	5154843828	515 Sycam...	Eagan	MN	55121		
dianabarr...	5152249876	515 White ...	Eagan	MN	55121		
zzcandy@f...	5559991111	789 Gold T...	Eagan	MN	55121		
zzjack@fa...	46950002...	123 Plain St...	Eagan	MN	55121		
zzsarah@f...	55599988...	2847 Mea...	Frisco	TX	75034		
zzjoanna...	55599944...	5000 Smit...	Eagan	MN	55121		
zzdavid@f...	+1 905 555...	2135 Gran...	Eagan	MN	55121		
zzsamuel.z...	+1 508 555...	5879 W. B...	Eagan	MN	55121		
zzmikross...	5556664521	1923 Long ...	Eagan	MN	55121		
zzionzzmill	46950002	525 Willia	Eagan	MN	55121		

Total Unique: 17 (Selected Items: 17)

Mass Send Onboarding Tasks

Employers

Onboarding Workflows

Onboarding Packets

Profile Tasks

E-Signature Documents

Add E-Signature Documents

Select an E-Signature Document

w2 consent

Talent Assessments

Integration Tasks

CancelSend

Reports to Run Now

#	Report	Steps and What to Look For
1	Taxes Summary AQ	Set date range to current quarter. Review for negative values, mismatched tax codes, or missing state taxes. Run quarterly with Greenshades, ADP or your tax partner.
2	Overtime Qualified Overtime Premium AQ 2026	Verify qualifying premium figures are present for each worker who received FLSA overtime. If amounts are missing, check that your OBBB transaction types are configured correctly in Back Office.
3	Comprehensive Talent OR Talent Search	Filter to active workers. Review the W-2 Electronic Consent column. Workers showing No or blank have not consented. Use the 24/7 Onboarding workflow to re-send consent requests. Build a re-consent campaign into your Q3 calendar.

Run and verify tax reports

Reports to Run

- ✓ Get Employee Fed W2 w/ Box Totals
- ✓ Get Employee State W2
- ✓ Get Employee Local W2

The screenshot shows a software interface for generating tax reports. At the top, there's a header area with a title bar 'Employee Fed W2' and a subtitle 'Get details of Employee Fed Wages'. To the right of the header is a configuration panel with fields for 'Supplier' (ABC), 'Year' (2014), 'SSN' (%), 'Data Source' (Avionte), 'Return Type' (Results), and 'Sort By' (Name). A 'Run Query' button is located to the right of this panel. Below the configuration panel is a table with columns for employee information and tax amounts. The table has a header row with columns: SSN, LastName, FirstName, MiddleName, FullName, GrossWages, FedTaxableGross, FedTaxAmount, FICATaxableGross, FICATaxAmount, MedTaxableGross, MedTaxAmount, and a 'Select' column. The table contains 20 rows of employee data, each with a checkbox in the 'Select' column. The data includes employee names, addresses, and various tax amounts.

SSN	LastName	FirstName	MiddleName	FullName	GrossWages	FedTaxableGross	FedTaxAmount	FICATaxableGross	FICATaxAmount	MedTaxableGross	MedTaxAmount	Select
473824738	Alabama	Albert	B	Albert B Alabama	\$2,119.00	\$2,119.00	\$70.82	\$2,119.00	\$131.38	\$2,119.00	\$30.72	☒
458818118	Alabama	Allyson		Allyson Alabama	\$600.00	\$600.00	\$59.56	\$600.00	\$37.20	\$600.00	\$8.70	☒
589785441	Allison	Steven		Steven Allison	\$997.00	\$997.00	\$85.36	\$997.00	\$61.82	\$997.00	\$14.46	☒
563483938	Arizona	Andrea		Andrea Arizona	\$823.50	\$733.50	\$12.69	\$733.50	\$45.48	\$733.50	\$10.64	☒
489320943	Arkansas	Arlene	B	Arlene B Arkansas	\$1,250.00	\$1,250.00	\$110.91	\$1,250.00	\$77.50	\$1,250.00	\$18.13	☒
631357415	bee	busy		busy bee	\$974.10	\$974.10	\$76.79	\$974.10	\$60.39	\$974.10	\$14.11	☒
840840808	Brady	Thomas		Thomas Brady	\$750.00	\$750.00	\$82.06	\$750.00	\$46.50	\$750.00	\$10.88	☒
516515161	Brother	Brennen		Brennen Brother	\$5,877.38	\$5,877.38	\$976.42	\$5,877.38	\$364.41	\$5,877.38	\$85.22	☒
325655465	Bush	Angela	M.	Angela M. Bush	\$536.00	\$536.00	\$36.68	\$536.00	\$33.23	\$536.00	\$7.77	☒
532852852	Bush	Angela	M.	Angela M. Bush	\$1,490.00	\$1,490.00	\$242.78	\$1,490.00	\$92.38	\$1,490.00	\$21.61	☒
856932563	Caffey	Daniel		Daniel Caffey	\$1,048.50	\$1,048.50	\$113.02	\$1,048.50	\$65.01	\$1,048.50	\$15.20	☒
493049854	California	Calvin		Calvin California	\$2,839.74	\$2,754.54	\$231.72	\$2,839.74	\$176.06	\$2,839.74	\$41.16	☒
166498465	Christmas	Loyd		Loyd Christmas	\$897.00	\$897.00	\$80.34	\$897.00	\$55.61	\$897.00	\$13.00	☒
293847382	Colorado	Cooper		Cooper Colorado	\$1,760.00	\$1,670.00	\$0.42	\$1,670.00	\$103.54	\$1,670.00	\$24.20	☒
238572930	Connecticut	Candice		Candice Connecti	\$904.00	\$904.00	\$0.00	\$904.00	\$56.05	\$904.00	\$13.11	☒
897895412	Data	Dana		Dana Data	\$1,112.30	\$1,112.30	\$47.30	\$1,112.30	\$68.96	\$1,112.30	\$16.13	☒
396859484	Delaware	Danny		Danny Delaware	\$5,523.95	\$5,523.95	\$443.07	\$5,523.95	\$342.49	\$5,523.95	\$80.10	☒
547856985	Depass	Annette		Annette Depass	\$180.00	\$180.00	\$13.77	\$180.00	\$11.16	\$180.00	\$2.61	☒
235785687	Eagan	Ernie		Ernie Eagan	\$364.00	\$334.00	\$0.00	\$334.00	\$20.71	\$334.00	\$4.84	☒
456476547	Edina	Eddie		Eddie Edina	\$180.00	\$180.00	\$0.00	\$180.00	\$11.16	\$180.00	\$2.61	☒
248392483	Florida	Frank		Frank Florida	\$2,259.75	\$2,259.75	\$233.11	\$2,259.75	\$140.11	\$2,259.75	\$32.77	☒
420934	Georgia	Greg		Greg Georgia	\$444.00	\$444.00	\$0.00	\$444.00	\$27.53	\$444.00	\$6.44	☒
	Gerry	Megan		Megan Gerry	\$380.00	\$380.00	\$25.21	\$380.00	\$23.56	\$380.00	\$5.52	☒

What's New in 2026

Updates for 2026



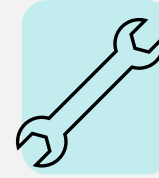
OBBBA: Form W-2

Changes to boxes and new codes for tips, overtime and Trump Accounts.



OBBBA: 1099-NEC

Threshold update for 2026



New State PFML

Record PFML contributions on the Form W-2

Resources

Knowledge Sources



AVIONTÉ UNIVERSITY

Interactive on-demand
eLearning.



SUPPORT CENTER

Articles, guides, checklists
and support tickets for
issues.



WEBINARS

Live virtual training hosted
monthly.



BOLD BULLETIN

Weekly newsletter with
training events and
compliance updates.

Resources

Resource	Where to Find It	Notes
Year-End Payroll Checklist (US)	support.avionte.com	Updated to include OBBBA configuration
Taxes Summary AQ	BO Reports	Run quarterly to understand your tax liabilities
SOC Code Management	BO Reports	Ensure SOC codes are entered
OBBA Qualified Overtime Premium AQ 2026 – COMING SOON	BO Reports	NEW for 2026. Run to confirm qualified overtime amounts for the W-2.
Qualified Tips Report	BO Reports	NEW Dec 2025. Requires separate transaction type in Back Office
Duplicate Talent Report	Analyze	Run by SSN and email before year-end payroll
Greenshades Errors	BO Reports	KB article about how to resolve Greenshades errors
Get Fed W2 Details w/ Box Totals	BO Reports	Non-INSIGHTS alternative for W-2 consent review and used for W-2 audit
SSN Verification Services	BO Reports	Run with payroll. Fix mismatches before Q4
ACA Sync Errors	BO Reports	Monthly ACA health check
Year-End Webinar Series	Avionté University	Includes W-2 Prep webinar and OBBBA overview
Electronic W-2 Consent	BOLD	Use to trigger and re-send electronic W-2 consent

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