



AVIONTÉ

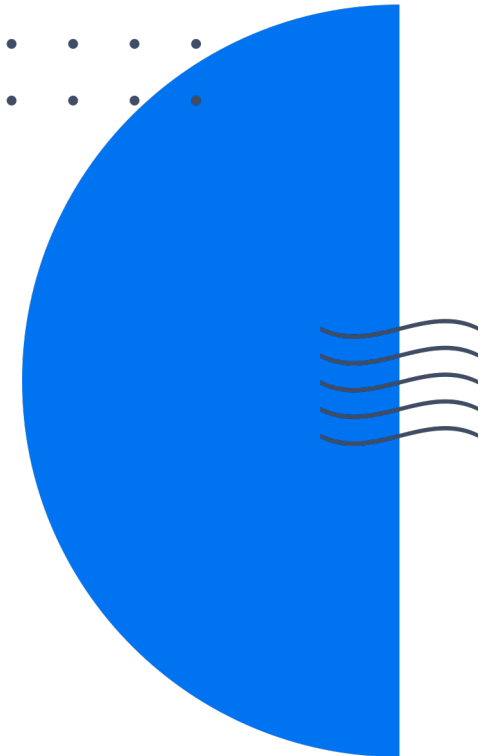
W-2s AND GREENSHADES



Agenda

WE'RE GOING TO COVER...

- | | | | |
|----------|----------------------|----------|-------------------|
| 1 | Year-end preparation | 4 | Helpful resources |
| 2 | W-2/ tax filing | 5 | Q&A |
| 3 | Troubleshooting | | |





It's nice to meet you!

BECKY FOX

SR. PRODUCT TRAINER



Disclaimer

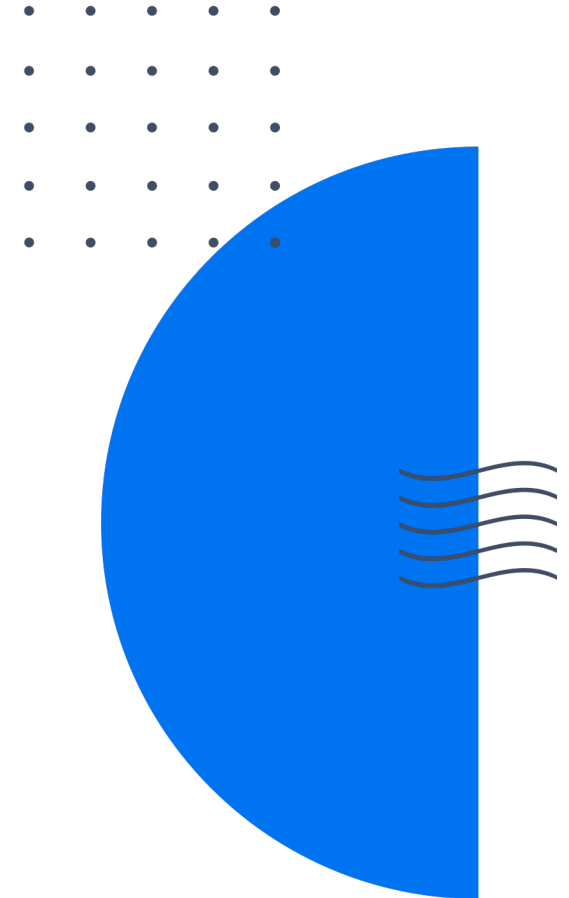
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Expectations

ENSURE SUCCESS BY...

- ✓ Attending at least one full year-end tax and W-2 filing webinar
- ✓ Planning ahead and being aware of due dates
- ✓ Consulting the Knowledge Base
- ✓ Staying in the know



Year-end preparation



Quick check

BEFORE YOU GET STARTED...



Must use Avionté as your Back Office/ Payroll

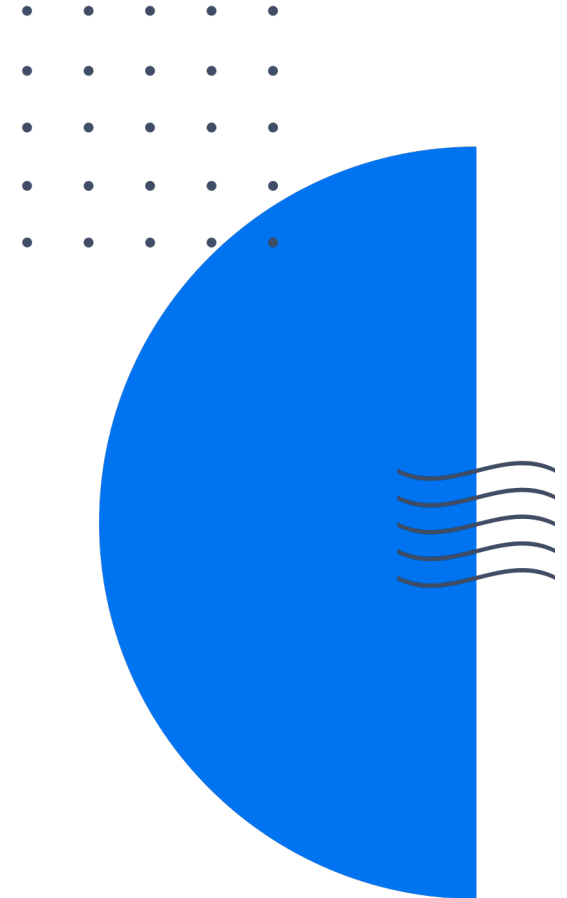


Must track information properly in your database



Must be on Greenshades Basic Package with Avionté

- Allows you to pass XML file to Greenshades for quarterly and annual filings
- Can sign up with your AD/AM if needed





GREENSHADES

Trusted payroll tax filing solutions

FEATURED

Who is Greenshades?

- Payroll Tax Filing Solution
- Avionté partner accessed from the core application
- Can e-File quarterly and year-end Federal forms like 1095-Cs, W-2s, 940 & 941
- Can build quarterly and year-end state and local filings like unemployment and W-2s
- Optional additional service for printing/mailing employee year-end forms



Important date:
JANUARY 31

- W-2s due to employees
- W-2s filed with the SSA
- 940 and Schedule A due to IRS
- 1099s mailed and filed



JANUARY 2023

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				



OUTSOURCING:



Distribution

PRINT IN HOUSE

- Order 4up Blank paper for W-2s
- Preferred vendor: Nelco
- Run [W-2 4up Blank report](#) in Report section of Avionté

ELECTRONIC FORMS

- Post W-2s on Avionté Employee Portal
 - AviontéBOLD: [Electronic W2 Access and Consent](#)
 - AviontéCLASSIC: [Electronic W2 Access](#)
- Employees must give consent for electronic W-2 only





GREENSHADES

Trusted payroll tax filing solutions

FEATURED

Distribution pricing** 2023

DATE RANGE	PRICE
JAN 1 – JAN 4	\$0.75
JAN 5 – JAN 09	\$2.19
JAN 10 – JAN 15	\$2.74
JAN 16 – JAN 20	\$3.29
JAN 21 – JAN 23*	\$3.84
JAN 24 – FEB 13	\$4.17
FEB 14 - ONWARD	\$4.39

There is an additional \$0.99 upload fee per form.

***Last date for guaranteed January 31st delivery: 01/23/2023**

****Additional pages \$0.75 per page**



Generate Q4 data



Generate Greenshades feed and XML



PROCESS

Generate Greenshades weekly.



SELECT

Select Supplier, Year, and Quarter.



GENERATE

Generate feed & XML.



RESOLVE

Review and resolve errors.



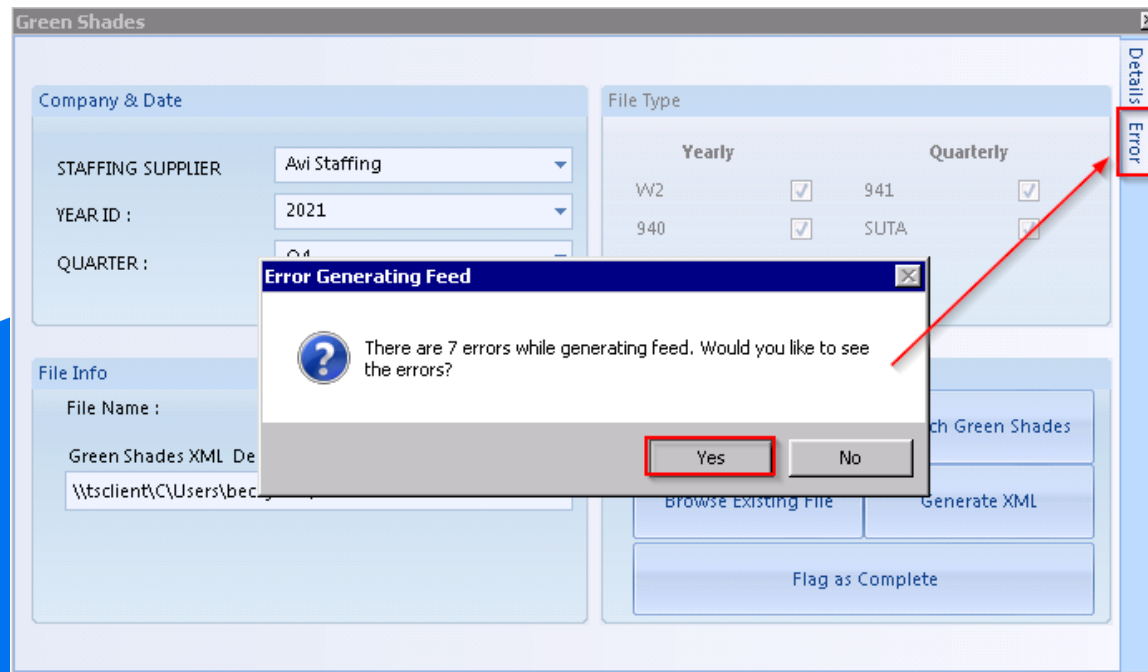
Generate Feed & XML

- First step in the year-end process!
 - Must follow this process even if you are using a different vendor
- **Feed:** Captures most up-to-date information in the database to populate reports such as the W-2; checks for errors
- **XML:** File type to pass to Greenshades to print and/or e-File your reports; contains data for ALL quarterly filings

The screenshot displays the AVIONTE Weekly Process software interface. The main window is titled 'Green Shades' and shows the 'Accounting Period Summary' for the period ending 03/21/2021. The interface includes a 'Main Menu' on the left with 'Weekly Process' highlighted. The main window contains several sections: 'Accounting Period Summary' with a dropdown for '03/21/2021', 'Company & Date' with fields for 'STAFFING SUPPLIER' (Avi Staffing), 'YEAR ID' (2021), and 'QUARTER' (Q4); 'File Type' with checkboxes for 'Yearly' (W2, 940, 1099) and 'Quarterly' (941, SUTA); 'File Info' with a 'File Name' field and a 'Browse' button; and 'File Action' with buttons for 'Generate Feed & XML', 'Launch Green Shades', 'Browse Existing File', 'Generate XML', and 'Flag as Complete'. The 'Generate Feed & XML' button is highlighted with a red box.



Review errors



Review and resolve errors

GREENSHADES ERRORS

- State W2/SUTA ID info missing
- Employee has more than one address marked 'IsResidentAddress'
- Employee missing SUI wages
- Negative SUI Wages for employee

The screenshot shows a window titled "Green Shades" with a sub-header "ErrorMessage". Below this, it lists "ErrorType : Severe (7 items)". The error messages are:

- 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 State W2 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 the following explanations:

- "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 and third errors.
- "These errors explain what is missing on the employee ID." points to the fourth and fifth errors.
- "This error is telling you that there are missing State and/or SUI ID numbers in Admin tools>Employer>Tax" points to the sixth and seventh errors.

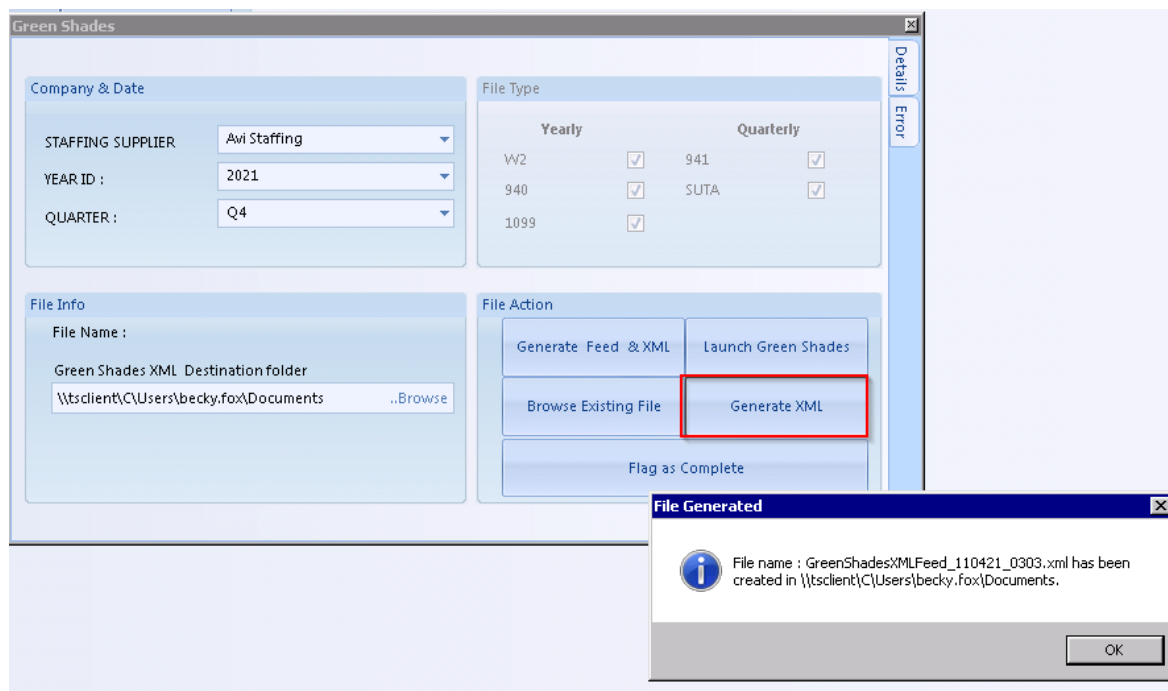
[Greenshades Error Resolutions & Troubleshooting article](#)



COMMON ERRORS	RESOLUTION
<p>State W2/SUTA ID info missing</p>	<p>Means a new state was added in this period</p> <ol style="list-style-type: none"> 1. Fix in Admin Tools > Employer > Tax > Tax EIN tab <ol style="list-style-type: none"> I. Add ID # for State or SUI II. Enter 0 for states in which you do not do business 2. Regenerate Greenshades Feed & XML
<p>Employee has more than one address marked 'IsResidentAddress'</p>	<ol style="list-style-type: none"> 1. Navigate to Employee profile 2. Determine which address is correct 3. Alter incorrect/duplicate Address Type and uncheck Is Resident Address 4. Click Save Address 5. If needed, re-enter Employee > Address screen, right click on incorrect/duplicate address and Delete 6. Regenerate Greenshades Feed & XML
<p>Employee missing SUI wages</p>	<ol style="list-style-type: none"> 1. Means there may have been converted data or issues with transitioning 2. Contact Avionté Support – we will need to troubleshoot
<p>Negative SUI Wages for employee</p>	<ol style="list-style-type: none"> 1. Means a check was reversed/voided in one quarter when the Employee was paid/working in that state in a previous quarter 2. Can ignore or amend ALL returns <ol style="list-style-type: none"> I. Employee will not show on Unemployment return II. 941, State WH, quarter-end filings unaffected



Generate XML File



- Can skip if Feed & XML generates without errors!
- Will create XML file saved in XML Destination folder
 - Allows you to “bypass” expected errors
- XML will automatically be created if no errors are found after clicking Generate Feed & XML



Reviewing and distributing W-2s



W-2 REPORT 4UP BLANK

Printable W-2 format



PRESSURED W2

Printable W-2 format



EMPLOYEE W2 INFO AQ

AQ version to review in bulk

* Q4 2022 Greenshades feed must be generated before these reports can be run.



Truncate SSN

W2 Report 4 up blank

- Ability to truncate the SSN
- Parameter “Show ONLY Last 4 SSN”
- If True, only last 4 of the SSN will display when printing W-2s
- If False, full SSN will display

Report View

W2 Report 4 up blank

Year: 2021 | ABC Staffing Inc. | Branch: ALL

Primary Mailing Address: Primary Address | Primary Order By: Last Name

SSN: % | Local Tax: %

VH Tax State: % | Employee Status: All

Include Electronic W2s: True False

Show ONLY Last 4 SSN: True False

Show Corrected: True False

Copy B -- To Be Filed With Employee's FEDERAL Tax Return.		2021	38-2099803 OMB No. 1545-0008
a Employee's social security number	1 Wages, tips, other compensation	2 Federal income tax withheld	
6128	600.00	39.21	
b Employer ID number (EIN)	3 Social security wages	4 Social security tax withheld	
50-5305303	600.00	37.20	
	5 Medicare wages and tips	6 Medicare tax withheld	
	600.00	8.70	
c Employer's name, address, and ZIP code			
ABC Staffing Inc. 123 Main St. Suite 1 Eagan, MN 55122			
d Control number			
26598			
e Employee's name, address, and ZIP code			
Pat Wright 434 street Eagan, MN 55123			

Copy 2 -- To Be Filed With Employee's State, City, or Local Income Tax Return.		2021	38-2099803 OMB No. 1545-0008
a Employee's social security number	1 Wages, tips, other compensation	2 Federal income tax withheld	
6128	600.00	39.21	
b Employer ID number (EIN)	3 Social security wages	4 Social security tax withheld	
50-5305303	600.00	37.20	
	5 Medicare wages and tips	6 Medicare tax withheld	
	600.00	8.70	
c Employer's name, address, and ZIP code			
ABC Staffing Inc. 123 Main St. Suite 1 Eagan, MN 55122			
d Control number			
26598			
e Employee's name, address, and ZIP code			
Pat Wright 434 street Eagan, MN 55123			

Standard Report – W2 Report 4 up blank



Other Useful Reports

TAXES SUMMARY

- Taxes Summary Lite sums by supplier/branch, shows tax due amounts in summary form
- Taxes Summary sums by supplier/branch, broken down by state and jurisdiction

TAX REMITTANCE ER

- Shows detailed list of employees associated with an employer tax
- Broken down by tax type

GET W2 DETAILS AQ

- Shows totals for W-2s and employee related taxes
- Can filter by total W-2 count or EE/ER Summary

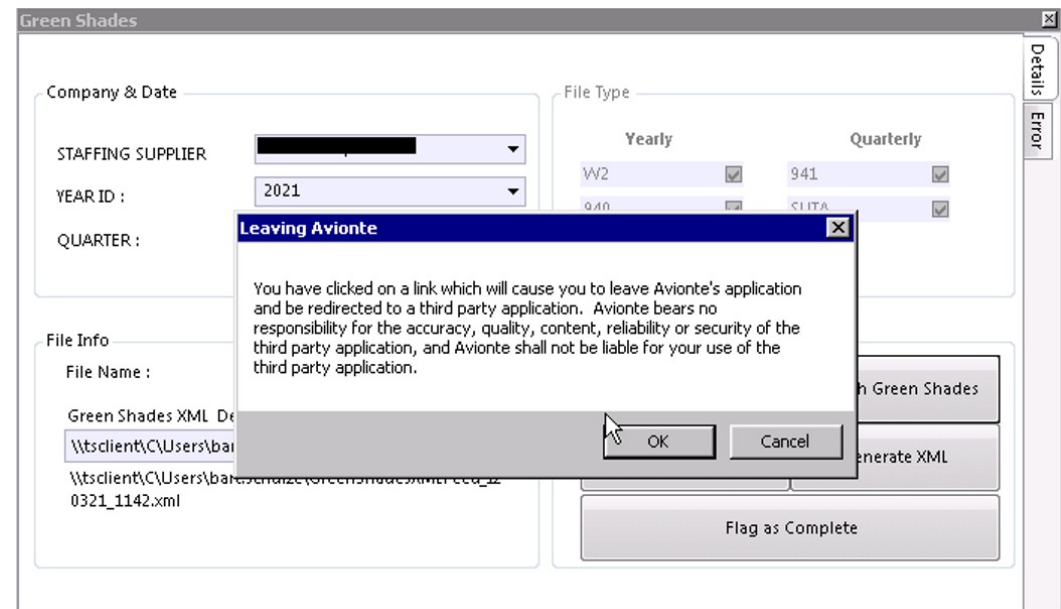


e-Filing State W-2



Launch Greenshades Message

- When launching Greenshades, you will receive a message indicating that you are being redirected to a 3rd party application.



Launch Greenshades

- Greenshades Tax Filing Center application opens in a separate window
- May be prompted for Registration Key
 - Copy/paste from GS_Company_CompanyID property in Admin Tools > Employer
 - Click Validate

The screenshot shows the 'Green Shades' application window with the following sections:

- Company & Date:** STAFFING SUPPLIER: Awi Staffing; YEAR ID: 2021; QUARTER: Q4.
- File Type:** A table with columns for Yearly and Quarterly filing types and their respective codes.
- File Info:** File Name: Green Shades XML Destination folder; Path: \\tsclient\C\Users\becky.fox\Documents\GreenShadesXMLFeed_110421_0303.xml.
- File Action:** Buttons for 'Generate Feed & XML', 'Launch Green Shades', 'Browse Existing File', 'Generate XML', and 'Flag as Complete'.

	Yearly	Quarterly
WV2	<input checked="" type="checkbox"/>	941 <input checked="" type="checkbox"/>
940	<input checked="" type="checkbox"/>	SUTA <input checked="" type="checkbox"/>
1099	<input checked="" type="checkbox"/>	



Greenshades: Tax Filing Center

The screenshot displays the 'Greenshades Tax Filing Center' interface. On the left, a sidebar contains navigation options: 'Your Upcoming Deadlines', 'Create E-File Returns', 'View Filing History', 'View Recent Tax Changes', and 'Create Year-End Forms'. The main area is titled 'View Your Upcoming Deadlines' and includes a filter dropdown, radio buttons for 'Pending' and 'Completed', and a link for 'Edit Reminders'. The content is organized into two sections: 'Due within 3 Months' and 'Due within a Year', each listing specific tax filing deadlines with checkboxes for each item.

Due Date	Item
Due: 1/31/2022	Return for State Unemployment
Due: 1/31/2022	Return for Federal 941
Due: 1/31/2022	Return for Federal Year End W-2
Due: 4/30/2022	Return for State Unemployment
Due: 4/30/2022	Return for Federal 941
Due: 7/31/2022	Return for State Unemployment
Due: 7/31/2022	Return for Federal 941
Due: 10/31/2022	Return for State Unemployment
Due: 10/31/2022	Return for Federal 941

E-FILE RETURNS

Build Federal, State and Local E-files to submit

YEAR-END FORMS

- Build year-end forms to provide to employees
- Have Greenshades print and mail forms to employees
- Incurs additional cost



Create: e-File returns

Greenshades Tax Filing Center

Your Upcoming Deadlines

Create E-File Returns

View Filing History

View Recent Tax Changes

Create Year-End Forms

Simplify Year End Processing

GREENSHADES
LET US HANDLE THAT

Settings

Select Returns to File

Check the Build box for each file you wish to create and click 'Next'.

Filter: [ALL FILES] Select All

Electronic Return	Status	Method	Build?
US - 94x (940)	Awaiting Creation	Internet	<input type="checkbox"/>
US - 94x (941)	Awaiting Creation	Internet	<input type="checkbox"/>
US W-2	Awaiting Creation	Internet	<input type="checkbox"/>
CO - Suta	Awaiting Creation	Internet	<input type="checkbox"/>
CO W-2	Awaiting Creation	Internet	<input checked="" type="checkbox"/>
IA - Suta (CSV)	Awaiting Creation	Internet	<input type="checkbox"/>

Check here if you would like the ability to edit your data prior to creating your electronic file (Advanced).

Quit < Back Next >

E-FILE RETURNS

- Create E-File Returns
- Select the Build? Checkbox next to State W-2
- Click Next



State W-2

Greenshades Tax Filing Center

Your Upcoming Deadlines

Create E-File Returns

View Filing History

View Recent Tax Changes

Create Year-End Forms

Simplify Year End Processing

GREENSHADES
LET US HANDLE THAT

Review Built Files

Select a built file below to submit or view errors.

Click on the link to either submit or view errors for each E-Filing.

Electronic Return	Status	Combined Summary
CO W-2	✓ Employees: 292	Click to Begin Filing

Quit < Back Finish

STATE W-2

- Select the Click to Begin Filing link



State W-2

Greenshades Tax Filing Center

Your Upcoming Deadlines

Review Built Files

CO W-2

View Totals

Please check the accuracy of the totals found below.

[View Details](#) [Print Totals](#) [Save Totals](#) [Save E-File](#)

CO - W2

Overall Totals

Total Employees	292
Total Employers	1
Total State Income Tax Withheld	\$26,270.00
Total State Taxable Wages	\$1,828,307.63

ABC Staffing

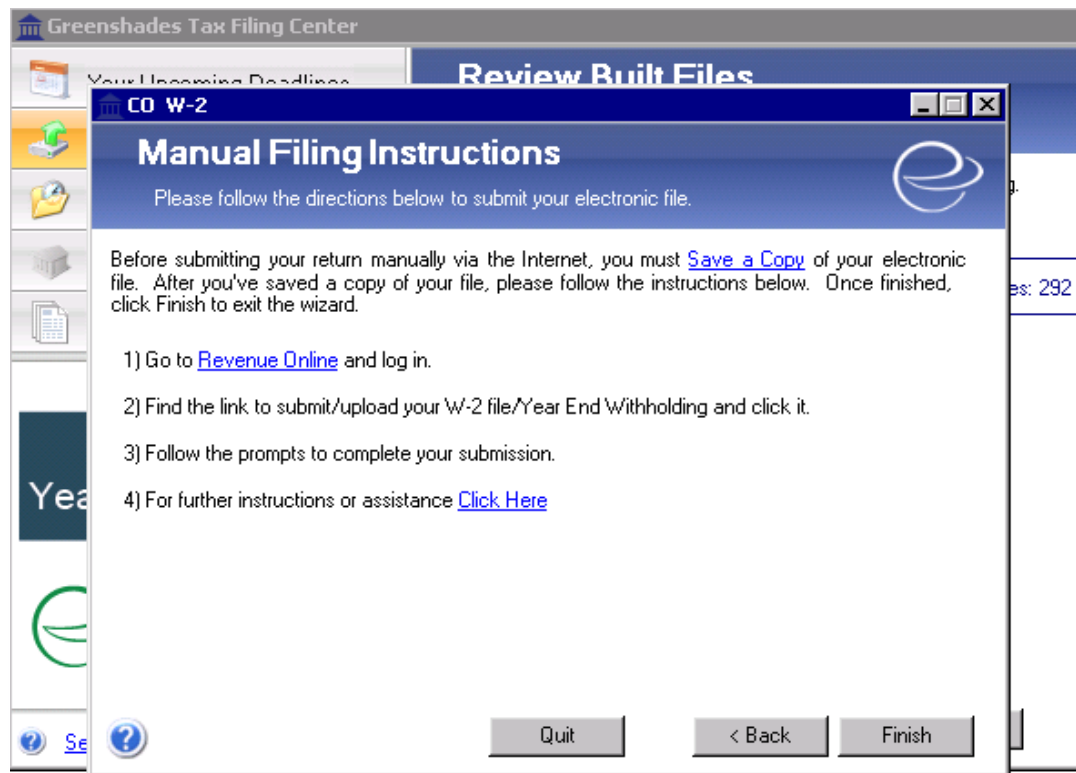
Quit < Back Next > < Back Finish

STATE W-2

- Review & Save Totals
 - Review overall details against taxes summary reporting
- Save E-File
 - Save E-File to manually upload file to State website
- **DO NOT change file name or type of E-File!**



State W-2



STATE W-2

- When you save the E-File, instructions for Manual Filing will be provided
- Click Finish to go back to Create E-File



E-Filing Federal W-2



Create e-File returns

Avionte Filing Center

Your Upcoming Deadlines

Create E-File Returns

View Filing History

View Recent Tax Changes

Create Year-End Forms

Create E-File Returns

Use this E-File wizard to create electronic tax returns or E-Files. This wizard will also aid you in submitting these returns to the correct federal, state, or local government agencies.

[Settings](#)

Select Returns to File

Check the Build box for each file you wish to create and click 'Next'.

Filter: [ALL FILES] Select All

Electronic Return	Status	Method	Build?
US - 94x (940)	Awaiting Creation	Internet	<input type="checkbox"/>
US - 94x (941)	Awaiting Creation	Internet	<input type="checkbox"/>
US - W-2	Awaiting Creation	Internet	<input checked="" type="checkbox"/>
AL - Suta	Awaiting Creation	Internet	<input type="checkbox"/>
AL - W-2	Awaiting Creation	Internet	<input type="checkbox"/>
AR - Suta	Awaiting Creation	Internet	<input type="checkbox"/>

Check here if you would like the ability to edit your data prior to creating your electronic file (Advanced).

Quit < Back Next >

E-FILE RETURNS

- Launch Greenshades
- Create E-File Returns
- Select the Build? Checkbox next to US W-2
- Click Next



Federal W-2

Avionte Filing Center

Review Built Files

Select a built file below to submit or view errors.

Click on the link to either submit or view errors for each E-Filing.

Electronic Return	Status	Combined Summary
US W-2	✓ Employees: 126	Click to Begin Filing

Simplify Year End Processing

GREENSHADES
LET US HANDLE THAT

Settings

Quit < Back Finish

FEDERAL W-2

- Confirm number of employees in the file
- Select the Click to Begin Filing link



Federal W-2

US W-2

View Totals

Please check the accuracy of the totals found below.

[View Details](#) [Print Totals](#) [Save Totals](#) [Save E-File](#)

US - W2

Overall Totals

Total 457b Roth Contributions	\$0.00
Total Advanced Earned Income Credit	\$0.00
Total Allocated Tips	\$0.00
Total Deferrals Under Section 409A	\$0.00
Total Deferrals Under Section 83	\$0.00
Total Deferred Comp 401k	\$228.00

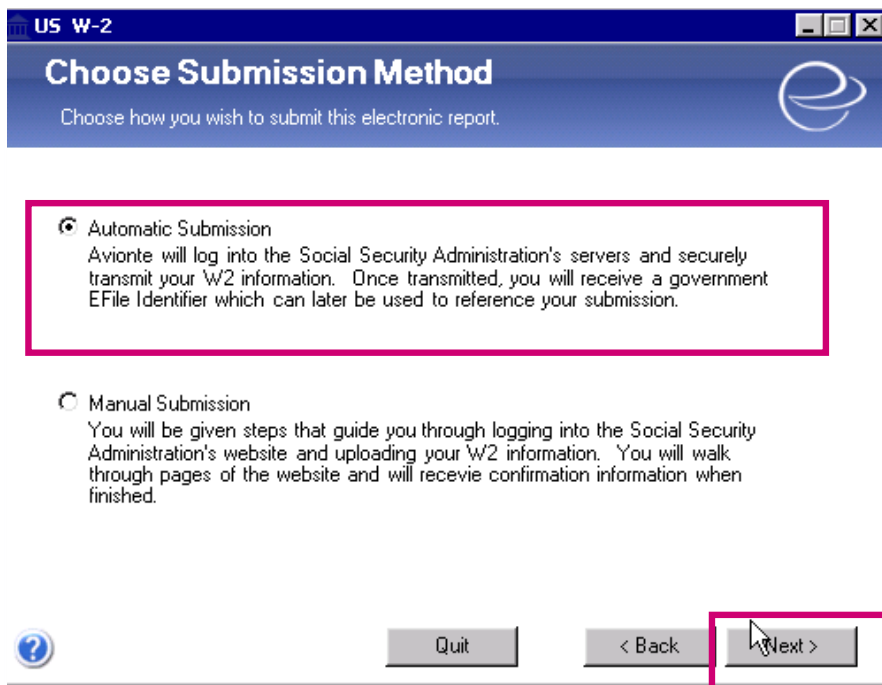
Quit < Back Next >

FEDERAL W-2

- Review & Save Totals
 - Review overall details against taxes summary reporting
- Save E-File
- DO NOT change file name or type of E-File!



Federal W-2



The screenshot shows a web browser window titled "US W-2" with a sub-header "Choose Submission Method". Below the sub-header is the instruction "Choose how you wish to submit this electronic report." and the Avionte logo. There are two radio button options: "Automatic Submission" (selected) and "Manual Submission". The "Automatic Submission" option is highlighted with a red box. At the bottom of the window, there are three buttons: "Quit", "< Back", and "Next >". The "Next >" button is also highlighted with a red box.

US W-2

Choose Submission Method

Choose how you wish to submit this electronic report.

Automatic Submission
Avionte will log into the Social Security Administration's servers and securely transmit your W2 information. Once transmitted, you will receive a government EFile Identifier which can later be used to reference your submission.

Manual Submission
You will be given steps that guide you through logging into the Social Security Administration's website and uploading your W2 information. You will walk through pages of the website and will receive confirmation information when finished.

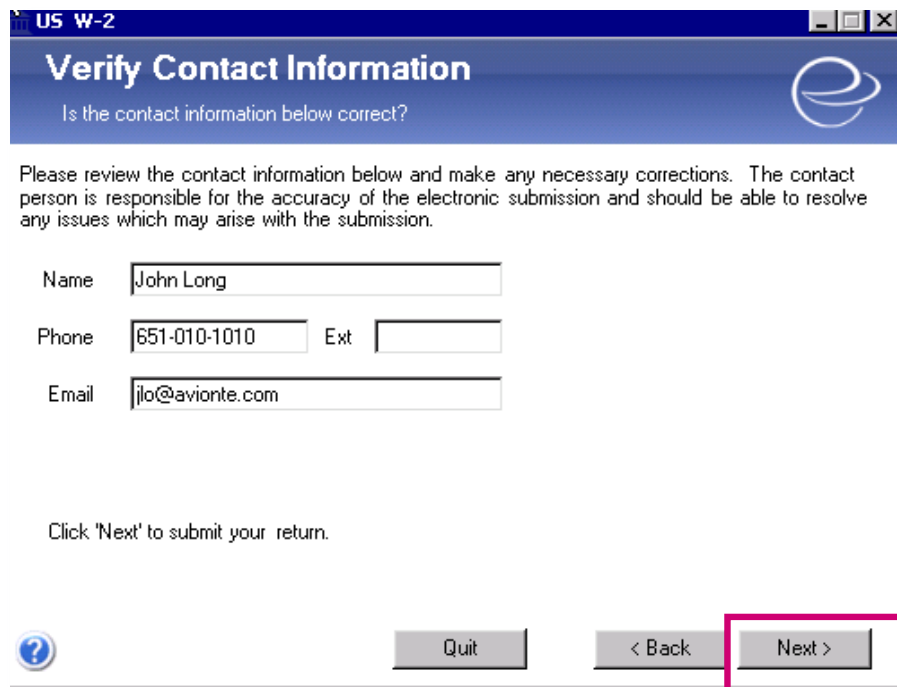
Quit < Back Next >

FEDERAL W-2

- 2 options for submission
- Select 'Automatic Submission' for Greenshades to file your US W2
- Select 'Manual Submission' to upload the file to SSA on your own
- Select Next



Federal W-2



The screenshot shows a web browser window titled "US W-2" with a sub-header "Verify Contact Information". Below the header, it asks "Is the contact information below correct?". A paragraph of instructions follows: "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." There are three input fields: "Name" with "John Long", "Phone" with "651-010-1010" and an empty "Ext" field, and "Email" with "jlo@avionte.com". At the bottom, there are three buttons: "Quit", "< Back", and "Next >". The "Next >" button is highlighted with a red border. A help icon is visible in the bottom left corner.

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.

[?](#)

FEDERAL W-2

- Verify Contact Information
- Select Next
 - Once you select 'Next,' you are finished and have submitted your forms to the SSA. You will be directed to the initial page where you build your files.



e-Filing 940



Create: e-File returns

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

Select Returns to File

Check the Build box for each file you wish to create and click 'Next'.

Filter: [ALL FILES] Select All

Electronic Return	Status	Method	Build?
US - 94x (940)	Awaiting Creation	Internet	<input checked="" type="checkbox"/>
US - 94x (941)	Awaiting Creation	Internet	<input type="checkbox"/>
US W-2	Awaiting Creation	Internet	<input type="checkbox"/>
AL - Suta	Awaiting Creation	Internet	<input type="checkbox"/>
AL W-2	Awaiting Creation	Internet	<input type="checkbox"/>
AR - Suta	Awaiting Creation	Internet	<input type="checkbox"/>

Check here if you would like the ability to edit your data prior to creating your electronic file (Advanced).

Quit < Back Next >

E-FILE RETURNS

- Launch Greenshades
- Create E-File Returns
- Select the Build? Checkbox next to US – 94x (940)
- Click Next



e-File 940

Avionte Filing Center

Your Upcoming Deadlines

Create E-File Returns

View Filing History

View Recent Tax Changes

Create Year-End Forms

Simplify Year End Processing

GREENSHADES
LET US HANDLE THAT

Settings

Select Returns to File

Check the Build box for each file you wish to create and click 'Next'.

Filter: [Selected for Build] Cancel Build

Electronic Return	Status	Method	Build?
US - 94x (940)	▶ Building . . .		

Check here if you would like the ability to edit your data prior to creating your electronic file (Advanced).

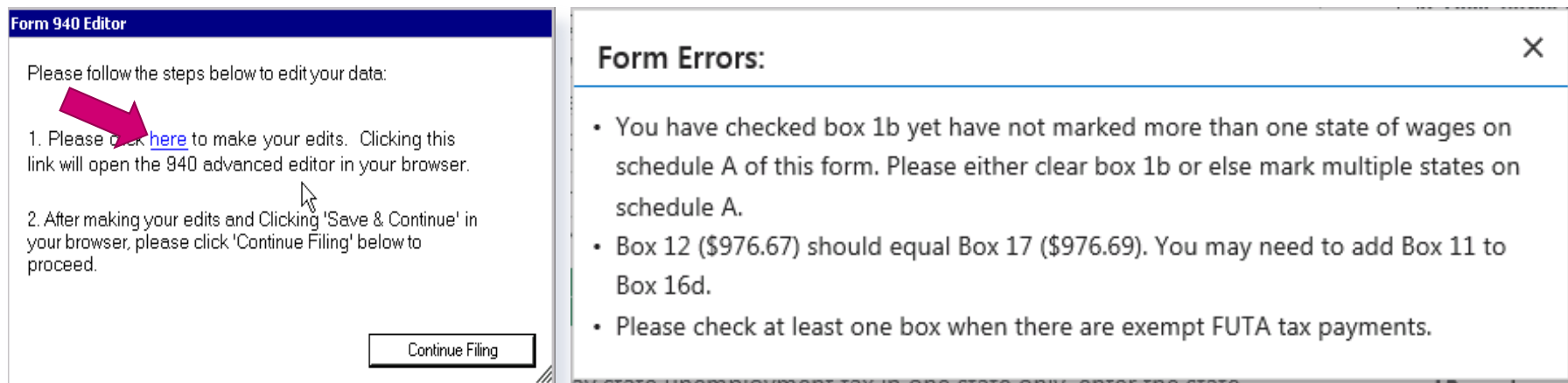
Quit < Back Next >

940

- As the file is being built, select the check box at the bottom



e-File 940



The screenshot shows two side-by-side windows from a tax software application. The left window is titled "Form 940 Editor" and contains instructions for editing data. A pink arrow points to a blue hyperlink labeled "here". Below the instructions is a "Continue Filing" button. The right window is titled "Form Errors:" and lists three specific errors related to state unemployment tax reporting.

Form 940 Editor

Please follow the steps below to edit your data:

1. Please click [here](#) to make your edits. Clicking this link will open the 940 advanced editor in your browser.
2. After making your edits and Clicking 'Save & Continue' in your browser, please click 'Continue Filing' below to proceed.

Form Errors:

- You have checked box 1b yet have not marked more than one state of wages on schedule A of this form. Please either clear box 1b or else mark multiple states on schedule A.
- Box 12 (\$976.67) should equal Box 17 (\$976.69). You may need to add Box 11 to Box 16d.
- Please check at least one box when there are exempt FUTA tax payments.

940

- Click the 'Here' link to make edits
- You will then see the form errors that need to be resolved



e-File 940

Part 1: Tell us about your return. If any line does NOT apply, leave it blank. See instructions before completing part 1.

1a	If you had to pay state unemployment tax in one state only, enter the state abbreviation	1a	<input type="text" value="MN"/>
1b	If you had to pay state unemployment tax in more than one state, you are a multi-state	1b	<input type="checkbox"/> Check here. Complete schedule A (Form 940)
2	If you paid wages in a state that is subject to CREDIT REDUCTION	2	<input type="checkbox"/> Check here. Complete schedule A (Form 940)

940

- Resolve errors
- You have checked box 1b yet have not marked more than one state of wages on schedule A of this form. Please either clear box 1b or else mark multiple states on schedule A.



Ⓢ Error: 1 error on the page. Errors must be resolved before continuing. [Click Here](#) to view.

Part 4: Determine your FUTA tax and balance due or overpayment. If any line does NOT apply, leave it blank.

12	Total FUTA tax after adjustments (lines 8 + 9 + 10 + 11 = line 12)	12	\$976.67
13	FUTA tax deposited for the year, including any overpayment applied from a prior year	13	\$0.00
14	Balance due (if line 12 is more than line 13, enter the excess on line 14.) - If line 14 is more than \$500, you must deposit your tax. - If line 14 is \$500 or less, you may pay with this return. (See Instructions)	14	\$976.67
15	Overpayment (If line 13 is more than line 12, enter the excess on line 15 and check a box below) -> You MUST complete both pages of this form and SIGN it. Check one: <input type="radio"/> Apply to next return <input type="radio"/> Send a refund	15	\$0.00

Form 940 for 2020: Employer's Annual Federal Unemployment (FUTA) Tax Return
Department of the Treasury - Internal Revenue Service

Part 5: Report your FUTA tax liability by quarter only if line 12 is more than \$500. If not, go to Part 6.

16	Report the amount of your FUTA tax liability for each quarter; do NOT enter the amount you deposited. If you had no liability for a quarter, leave the line blank.		
16a	Quarter 1 (January 1 - March 31)	16a	\$348.50
16b	Quarter 2 (April 1 - June 30)	16b	\$315.05
16c	Quarter 3 (July 1 - September 30)	16c	\$277.04
16d	Quarter 4 (October 1 - December 31)	16d	\$36.10
17	Total tax liability for the year (lines 16a + 16b + 16c + 16d = line 17)	17	\$976.69
		✘	Total must equal line 12.

E-File 940

940

- Resolve errors
- Box 12 (976.67) should equal box 17 (976.69). You may need to add Box 11 to Box 16c.
 - Please check at least one box when there are exempt FUTA tax payments
- Once errors are resolved, file will be built and ready to file through Greenshades.



W-2 troubleshooting



Copy 2 -- To Be Filed With Employee's State, City, or Local Income Tax Return.		2021	38-2099803 OMB No. 1545-0008
a Employee's social security number 343-43-4535	1 Wages, tips, other compensation 1622.95	2 Federal income tax withheld 222.19	
b Employer ID number (EIN) 12-3456789	3 Social security wages 1622.95	4 Social security tax withheld 100.62	
	5 Medicare wages and tips 1622.95	6 Medicare tax withheld 23.53	
c Employer's name, address, and ZIP code Avi Staffing 123 fake street duluth, MN 55805			
d Control number 272			
e Employee's name, address, and ZIP code Frank Anderson 123 1st St Eagan, MN 55121			
7 Social security tips	8 Allocated tips	9	
10 Dependent care benefits	11 Nonqualified plans	12a Code See inst. for box 12	
13 Statutory employee	14 Other	12b Code	
Retirement plan		12c Code	
Third-party sick pay		12d Code	
MN	123456789	1622.95	97.77
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

2021

Dept. of the Treasury -- IRS

“Box 12 isn’t populating the appropriate data.”

Admin Tools > Transaction Type
W2 Box, W2 Label

Vertex CMP Code	
W2Box	12
W2Label	DD



“The employer contact information is incorrect.”

GREENSHADES PROPERTIES IN ADMIN TOOLS > EMPLOYER > DETAIL

- GS_Company_CompanyID =
Registration Key!
 - Missing info? Contact Account Manager!
- GSXMLFeed_Contact_ContactName
- GSXMLFeed_Contact_ContactPhone
- GSXMLFeed_Contact_ContactPhoneExt
- GSXMLFeed_Contact_ContactEmail

The screenshot shows the 'Supplier Administration: Avi Staffing' window. It features a top navigation bar with tabs for 'Detail', 'Branch', 'User', 'Wc Code', 'Bank', 'Tax', 'Locality/Country', 'Accrual Plan', 'Config Year', and 'Email'. Below this is a 'Details' section with a table showing the following information:

Short Name	Full Name	FEIN	Parent Supplier	Next Invoice Number
Avi Staffing	Avi Staffing	123456789	Implementation Release	262

The main area is divided into several sections:

- Supplier Info:** Fields for Short Name (Avi Staffing), Full Name (Avi Staffing), Parent Supplier (Implementation Release), FEIN (123456789), and Next Invoice Number (262). There are also fields for Copy Information From and three 'Browse' buttons for Logo, Invoice Logo, and Payment Logo.
- Address:** Fields for Country (United States), Street 1 (123 fake street), Street 2, City (duluth), State (MN), and Zip Code (55805-).
- Contact Method:** A table with columns for Type, Value, Is Primary, and DoNotT.
- Supplier Properties:** A table with columns for Property, Value, and DateEntered. The first row is highlighted in orange and has a red box around it:

Property	Value	DateEntered
GS_		
GS_Company940_DesigneeName		08/19/2019
GS_Company940_DesigneePhone		08/19/2019
GS_Company940_DesigneePhoneExt		08/19/2019
GS_Company940_DesigneePin		08/19/2019
GS_Company1099Info_ReplacementAlphaC...		08/19/2019
GS_Company941_DesigneeIndicator		08/19/2019
GS_Company941_DesigneeName		08/19/2019
GS_Company941_DesigneePhone		08/19/2019
GS_Company941_DesigneePin		08/19/2019
GS_Company_PACombinedLocalRemittanc...		08/19/2019

A 'Save' button is located at the bottom right of the window.



Helpful resources



Additional resources



AVIONTÉ UNIVERSITY

Interactive on-demand
eLearning.



SUPPORT CENTER

Tickets and guide articles.



WEBINARS

Live virtual training hosted
monthly. (NUC)



BOLD BULLETIN

Weekly newsletter.

NOTE: Your account manager is always happy to help. If you have questions, be sure to reach out!



Knowledge Base highlights

1

ACA DIRECTORY

Links to helpful ACA year-end articles and training modules

CHECK IT OUT

2

TAXES DIRECTORY

Links to articles about W-2 production and distribution, training modules, and Greenshades resources

TAKE A LOOK

3

YEAR-END

Collection of KB articles specifically related to producing year-end reporting in Avionté

LEARN MORE

4

ACA SECTION

Collection of all articles related to the Avionté ACA solution

GET STARTED





Additional training

1

Year-End Taxes/W-2 Process

- Avionté Year-End Taxes/W-2 Process webinars
- Recommended for those completing year-end for the first time
- Registration Links: Bold Bulletin
- Pre-registration is required
- Recordings available in the KB

2

Greenshades Year-End Forms

- Hosted By Avionté & our partner Greenshades
- For those outsourcing (or considering outsourcing) form distribution to Greenshades
- Registration Links: Bold Bulletin
- Pre-registration is required
- Recordings available in the KB

* All other dedicated training session requests are billable



Q&A



Thanks!

