

AVIONTÉ
CONNECT

Mastering Year-End Tax Preparations

ESSENTIAL STRATEGIES FOR FINANCIAL
CONFIDENCE AND PRECISION

Meet the Team



Becky Fox

Senior Product Trainer



Clarissa Fischer

Support Center Supervisor

The Agenda

1

Why Start Now?

2

Create a Plan

3

Take Action

4

Working Together

5

Questions & Answers



Disclaimer

- The information in this session is being presented by Avionté as a general informational and educational service to its clients and prospective clients.
- This information should not be construed as, and does not constitute, legal advice nor accounting, tax, or other professional advice or services on any specific matter.
- Participants should consult with their counsel or other professional advisor before acting on any information contained in this session.
- Avionté expressly disclaims all liability in respect to actions taken or not taken based on the contents of this session.



Why Start Now?



January 2025

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	

January 31

Winter Is Coming

- W-2s due to employees
- W-2s e-filed with the SSA
- 940 and Schedule A due to IRS
- 941 and Schedule B due to the IRS
- 1099s emailed to workers
- 1099s e-filed with the IRS
- State unemployment filings
- State annual reconciliations/W-2s



ACA Important Dates

January 31st

- 1095-C forms delivered to employees (automatic extension to March 2nd)
- State filing mandates for DC, NJ, MA, RI, CA (due dates vary)

February 28th

- Paper filing of 1094-C with IRS
 - *Note: As of January 1, 2024, aggregation rule applies (W-2s and 1095-Cs). Any employer that files 10 or more tax forms must electronically file all forms.*

March 31st

- Electronic filing of 1094-C with IRS
 - Any corrections must also be e-filed.
 - Increase in TCC (5-digit code) requests.
 - IR Applications for TCC



February 2025

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	

February 28

Oh Canada

The filing due date is the last day of February after the preceding calendar year.

- T4 returns
- T4A returns
- T4A-NR returns
- T4A-RCA returns



General Timeline



AUGUST, SEPTEMBER, OCTOBER

- Confirm Transaction Type set up
- Verify SSNs
- Gather electronic consent
- Review benefit packages and update offers

NOVEMBER & DECEMBER

- Update minimum wage, WC, and UI rates
- Run year-end reports to audit W2 info
- Generate Greenshades feeds and resolve any errors
- Prepare for print & mail services

JANUARY

- Complete final payroll corrections
- Compare forms with reporting
- Post forms to talent portal and/or mail to employees
- Update state and federal W-4s



What makes a successful year-end team?

Year-end can be a stressful time for many organizations, especially since there are many tasks to balance.

What can you do now to reduce the rush at year-end?

- Organize a year-end team.
- Reflect on last year.
- Address challenges with resources.
- Start early.
- Bonus: Stock up on plenty of coffee, chocolate, and snacks!



Pro Tips



WEBINARS & TRAINING

Participate in year-end webinars annually, even if you are an expert.



TIMELINES

Create your own internal deadlines for getting forms out well before January 31st to allow time to resolve issues before the IRS deadlines.



MAINTENANCE

Keep data balanced within quarters to avoid amended quarterly tax returns.

This is advice from experienced Avionté clients!



Year-End Checklist

A guide to assist in organizing tasks to prepare for year-end.

- Step-by-step process starting in August
- Includes direct links to Knowledge Base articles and external resources

Want to save time and reduce stress in January? Use our checklist to keep on track and ensure you are prepared!

AUGUST, SEPTEMBER, OCTOBER

- [Confirm transaction type set up](#)
 - Add/review W2 box and label
 - [Ensure transaction type is set up to include in ACA tracking](#)
- [Verify employee SSNs](#)
- Gather consent for electronic delivery of W-2s, 1095-Cs and 1099s
 - [Create Adobe electronic consent form](#) and distribute to employees not yet consented
- Confirm you are receiving the weekly Avionté BOLD Bulletin
 - Register [HERE](#) if you aren't subscribed!
- Review 2022 insurance plan(s) and benefit package(s) set up in the ACA Companion
 - [Add or update insurance plans as needed](#)
 - [Add or update benefit packages as needed](#)
- Review ACA Full Time status of employees using [ACA Companion Census AQ](#)
- Review insurance offers for ACA reporting using the [ACA Companion Employee Offers AQ](#) to view 2022 enrollments and declinations
- Review [ACA Full Time w/o Offer](#) counter to determine if current ACA full time employees need an insurance offer.
- Need to enter offers in the ACA Companion? Make a plan to enter insurance offers: [manual entry](#) or [data import](#)
- Learn about [entering in dependents](#)

- Update insurance offer dates in the ACA Companion as employees terminate
 - If missing declinations in the ACA Companion, learn about the [ACA Declination Export](#) option.
- Start and end assignments with accurate dates; correct as needed
- Review Greenshades properties in Admin Tools
- Review company EIN and address in Admin Tools
- Verify your company BNC as this will be needed for Greenshades tax filings
 - Need to determine the BNC? [View IRS help](#)

NOVEMBER & DECEMBER

- Plan for mailing your W-2s and 1095-Cs. In-house or outsource?
 - Review BOLD Bulletin for Greenshades print and mail pricing
 - Learn more about the [Greenshades print & mail process](#).
- [Generate Feed & XML](#) in Weekly Process
 - [Resolve any errors](#)
- Identify tax filings you are required to file, (such as W-2s, 940, 1095-Cs, etc.) and document the filing deadlines
- Review states you do business in for changes to minimum wages
 - [Update minimum wage in Admin Tools](#)
- Review states you do business in for changes to paid sick leave plans

Easy to print and share!



Tax Filing With Greenshades

What is Greenshades?

- Integrated partner
- Solution for payroll tax filings
- Quarterly & annual returns
- Based on number of FEINs

State additions

- Any new states?
- Create a Support ticket to request those are added to your Greenshades account
- Include a list of the states that need to be added or removed

BNC

- Business Name Control
- [IRS information on BNC](#)
- If the wrong BNC is used when completing filings, the filing may be rejected



ACA Tracking

HRLogics

- White Glove Compliance Service with ACA Experts
- Print, Form Fulfillment, and E-file to the IRS with Filing Receipt
- Behind-the-scenes monitoring: measures all employees, regardless of status
- Look-back method, monthly, and annual affordability

ACA Companion

- Avionté Classic add-on application
- Compatible with Greenshades
- Utilizes the look-back method
- Requires annual review and admin maintenance
- E-file or print 1095s for employees



Gathering Consent

Best practice is to gather employee consent throughout the year.

- Includes W-2 forms and 1095-Cs
- Those that consent to electronic delivery don't require a mailed copy
- Present during onboarding through use of Adobe form (AviontéBOLD)
- Can mass send onboarding task now to talent (AviontéBOLD)



ELECTRONIC CONSENT

Adobe Integration

Using our integration with Adobe, BOLD clients can send out an onboarding task to gather consent to post to talent portal.

- Create form to gather consent
- Talent profile > Onboarding tab
- Choose and send form
- Once talent completes, see results on Talent Tax tab

analyze QuickPlace

Type to search

zzzRoberto zzzValdez - Send Onboarding Tasks

Employers

Onboarding Packets

Profile Tasks

E-Signature Documents

Add E-Signature Documents

Select an E-Signature Document

W2 Consent Form Rev01-0...

Talent Assessments

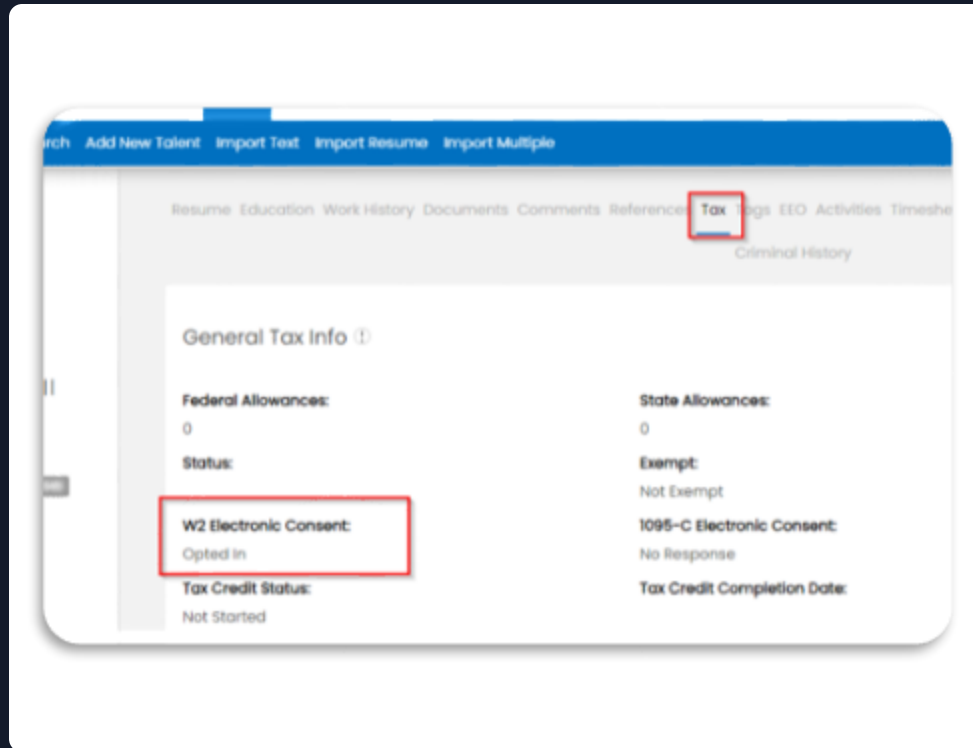
Integration Tasks

Cancel Send

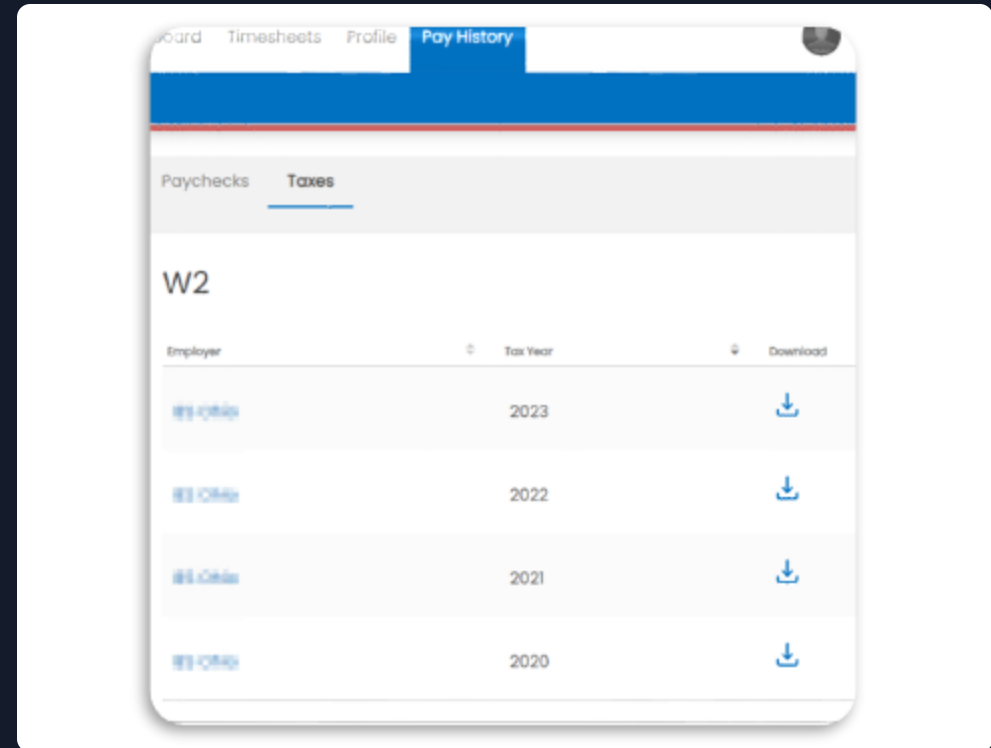


Confirming Talent Consent

Recruiter view



Talent portal



W2 BOX AND LABEL

Verify Setup

- Set Transaction Types to auto-populate W2s
- Reflects different kinds of compensation or benefits
- Easy to modify and update

The screenshot shows the 'System | Config Transaction Type' window with the 'Detail' tab selected. The main table lists transaction types, with '401k PreTax' (ID 55) highlighted. Below the table, the 'Transaction Type Details' section shows the configuration for '401k PreTax', including fields for Name, Description, System Name, Type (Permanent Deduction), and various checkboxes. The 'W2Box' field is set to '12' and the 'W2Label' field is set to 'D', both highlighted in yellow with a red arrow pointing to them. The 'Shared By' section on the right shows a list of sites and suppliers, with 'Eagan' and 'Implementation Release' selected.

ConfigTransactionTypeID	Name	Description	Deduction Category
63	401k	401k	Retirement
55	401k PreTax	401k PreTax	Retirement
45	ACAAdminFee	ACAAdminFee	
14	Administrative Fee	Administrative Fee	Expense
34	Advance	Advance	Expense

Transaction Type Details		
Name	401k PreTax	
Description	401k PreTax	
System Name	401k PreTax	
Type	Permanent Deduction	
<input checked="" type="checkbox"/> Is Adjustment	<input checked="" type="checkbox"/> Is Permanent	<input type="checkbox"/> Allow Negative
<input type="checkbox"/> Is Transactional	<input type="checkbox"/> Is ER Contribution	<input type="checkbox"/> Apply Reg Rate
<input type="checkbox"/> Is Tiered	<input type="checkbox"/> Show ER Contribution on Paycheck	<input type="checkbox"/> Is Non-Cash Benefit
<input type="checkbox"/> Allow Web Time Entry	<input type="checkbox"/> Is Healthcare	
<input type="checkbox"/> Is Equipment	<input type="checkbox"/> Allow Multiple Entry	
<input type="checkbox"/> Is Discretionary Bonus	<input type="checkbox"/> Synced To Front Office	
Deduction Category	Retirement	
Vertex Ded Code	401K Deferral Reg	
Vertex Pay Code	Cash	
W2Box	12	
W2Label	D	

Site	Staffing Supplier
Eagan	Implementation Release
Branch A-1	Test Supplier 1
Branch A-2	Test Supplier 2
Branch A-3	Test Supplier 3
Branch A-4	Test Supplier 4
Branch A-5	Test Supplier 5
Branch A-6	Test Supplier 6
Branch A-7	Test Supplier 7
Branch A-8	Test Supplier 8
Branch A-9	Test Supplier 9
Branch A-10	Test Supplier 10
Branch A-11	Test Supplier 11
Branch A-12	Test Supplier 12



Supplier Administration : ABC Staffing Inc.

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

Details

Short Name	Full Name	FEIN	Parent Supplier	Next Invoice Number
ABC Staffing Inc.	ABC Staffing Inc.	45454444445	Implementation Release	50

Supplier Info

Short Name: ABC Staffing Inc.

Full Name: ABC Staffing Inc.

Parent Supplier: Implementation Release

FEIN: 45454444445

Next Invoice Number: 50

Copy Information From: [Dropdown]

Logo: [Browse]

Invoice Logo: [Browse]

Payment Logo: [Browse]

Address

Country: United States

Street 1: 1234 s

Street 2: [Empty]

City: Eagan

State: CA Zip Code: 90001-

Supplier Properties

Property	Value	DateEntere
<input checked="" type="checkbox"/> GS_Company940_DesigneeName		10/16/2019
<input checked="" type="checkbox"/> GS_Company940_DesigneePhone		10/16/2019
<input checked="" type="checkbox"/> GS_Company940_DesigneePhoneExt		10/16/2019
<input checked="" type="checkbox"/> GS_Company940_DesigneePin		10/16/2019
<input checked="" type="checkbox"/> ADP - Company Code		10/16/2019
<input checked="" type="checkbox"/> ADP - Client ID		10/16/2019
<input checked="" type="checkbox"/> web_CompanyCopyrightHtml		10/16/2019
<input checked="" type="checkbox"/> web_CompanyName		10/16/2019
<input checked="" type="checkbox"/> web_CSSFileName		10/16/2019
<input checked="" type="checkbox"/> EmailAfterImportApplicantSP		10/16/2019
<input checked="" type="checkbox"/> GS_Company1099Info_ReplacementAlph		10/16/2019

Contact Method

Type	Value	Is Primary	DoNotT
Phone	(454) 444-4444	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save

COMPANY INFORMATION

Verify Company Details

Admin Tools > Supplier Properties

- Company Name
- FEIN
- Address
- Greenshades properties

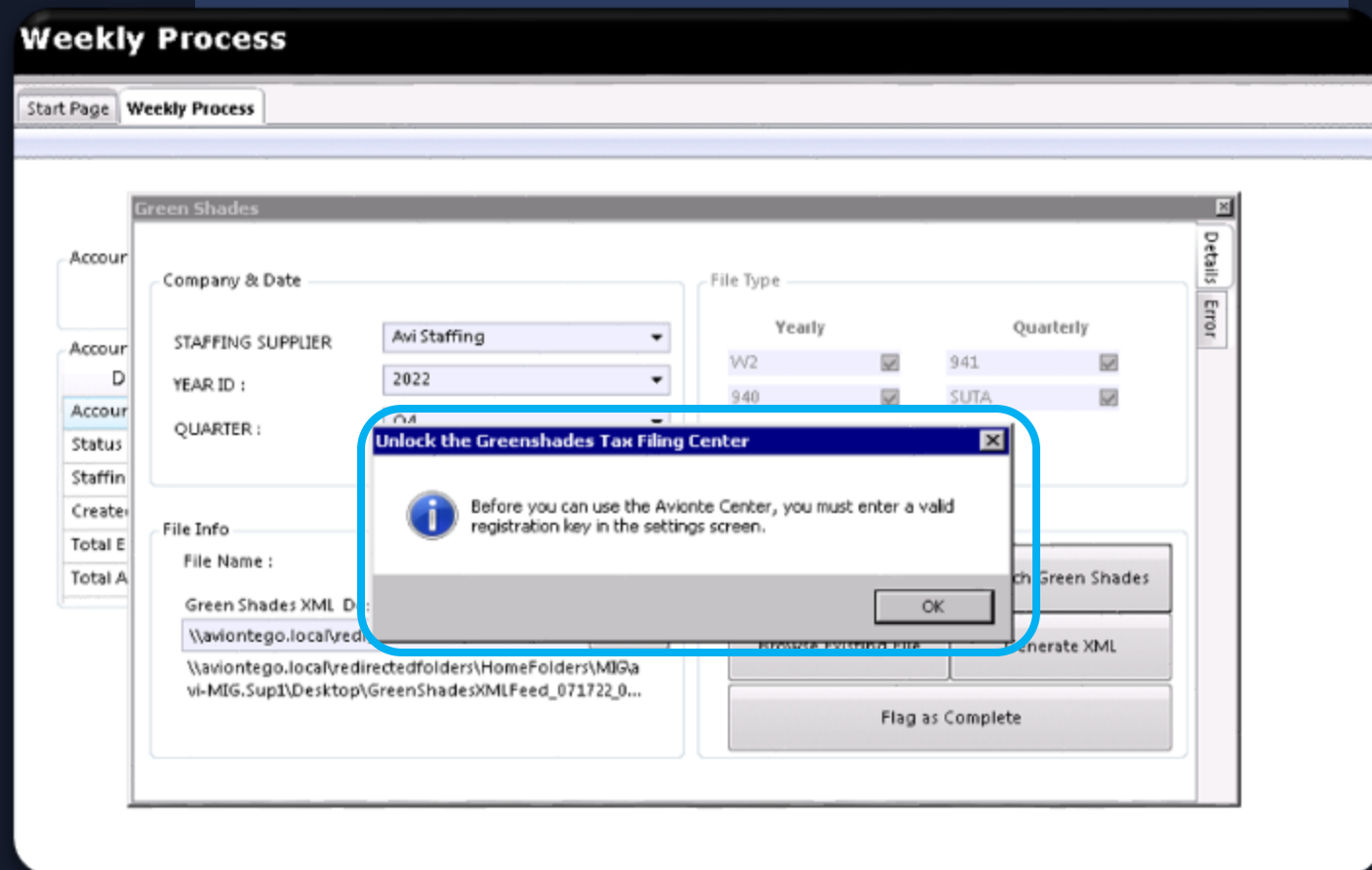


GREENSHADES REGISTRATION

Registration Key

Your Greenshades Registration Key is a unique ID provided as a security measure to validate account for tax filings.

- Enter periodically
- Housed in Supplier Properties



Standard Occupational Codes

Required for filing in AK, IN, LA, SC, WA, and WV

Green Shades

ErrorMessage

ErrorType : Severe (1 Item)

Skill Codes are missing an Occupational Code (req. for AK, IN, LA, WA, and WV SUI). Skills: 1438,1758,1833,1868,1887,1914,1988,

Get Missing SOC Data

Get Missing SOC Data

DisplayName	Value
Search Type	Missing Occ. Code
Date Type	Active Assignment
Start Date	01/01/2024
End Date	06/01/2024
State	ALL

Run Query

Drag a column header here to group by that column.

Supplier	ConfigSkillCodeID	CategoryName	SkillCode	Description	State
Implementation Release	4	Admin	Data Entry	Data Entry	AK

System | Config Skill Code

ConfigSkillCode | Category

Category	Skill Code ID	SkillCode	Description	Occupational Code
Accounting	75	10 Key Data	10 Key Data	
	76	Accts Pay/Rac	Accts Pay/Rac	
	77	Bookkeeper	Bookkeeper	
	78	Cashier	Cashier	
	79	Payroll	Payroll	
Admin	80	Reconciliations	Reconciliations	
	8	Accounts Receivable	Accounts Receivable	
	4	Data Entry	Data Entry	
	7	Executive level Support	Executive level support	
	6	None	None	

Add New Cancel

Skill Code | Certification

Skill Code Details

Category: Accounting
Skill Code: Cashier
Description: Cashier

SOC Lookup: Title

Grouping	Occupational Code	Occupation Title	Inactive	Version
Broad	41-2010	Cashiers	<input type="checkbox"/>	System.Byte[]
Detailed	41-2011	Cashiers	<input type="checkbox"/>	System.Byte[]
Detailed	41-2012	Cashier Charge Per	<input type="checkbox"/>	System.Byte[]

Shared By

Site	Staffing Supplier	Select	IsOccPositio	IsWebVisior	IsSki
Branch A-25	Florida	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Branch B-25	Florida	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Day Star Test	Florida	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test	Florida	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eagan	Implementation Release	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Branch A-1	Test Supplier 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save

Run our standard AQ at your convenience to stay compliant!



SSN Verification

E-Verify

- Integrated partners
- Matches the information provided by talent on the Form I-9 against SSA records

SSNVS

- Standard export and AQ
- Offered free through SSA Business Services Online (BSO)
- Import up to 250,000 names and SSNs
- Receive results within a day

Greenshades

- Integrated partner
- Option to run SSN verification within Greenshades



Tax Reports

Taxes Summary

- Taxes Summary
- Taxes Summary Lite
- Used to check all tax details for filing
- Includes FICA< FUTA, SUI, State WH, Federal
- Match state setup & totals

Get Employee AOs

- Get Employee Fed W2
- Get Employee State W2
- Get Employee Local W2
- Used to verify SSN, Names, and tax amounts
- Review information ahead of time

W2 Report

- W2 Report 4Up Blank
- Generate W-2 forms for talent
- Includes all info that populates on the W-2 form
- Review in advance for errors



Partners at CONNECT



maximus



EQUIFAX[®]



Team Resources

Client Management

- Provide information on products available and pricing
- Guidance in next steps
- Point of escalation for urgent issues

Payroll Tax Assistance

- Augments back office with team of Avionté tax experts
- Offers electronic withholding & unemployment tax filings for federal, state, and local jurisdictions on your behalf

Support

- Supports the year-end process through ticket response
- Assist with troubleshooting errors during year-end process
- Identify helpful guides or articles from Knowledge Base



Action Items



Next Steps for your Team

- Start discussions about year-end.
- Create a plan.
- Review compliance requirements.
- Conduct year-end reviews.
- Ensure your data accuracy.
- Register for year-end webinars at www.avionte/training
- Monitor your progress and adjust plans.



Knowledge Base Appendix



Year-End Acronyms

- **[F]EIN:** [Federal] Employer Identification Number
- **IRS:** Internal Revenue Service
- **SSA:** Social Security Administration
- **CRA:** Canada Revenue Agency
- **DOR:** Department of Revenue
- **ACA:** Affordable Care Act
- **SOC:** Standard Occupational Code
- **BNC:** Business Name Control
- **SUTA:** State Unemployment Tax
- **SUI:** State Unemployment Insurance
- **SSN:** Social Security Number
- **SIN:** Social Insurance Number
- **BSO:** Business Services Online
- **SSNVS:** Social Security Number Verification Service
- **FICA:** Federal Insurance Contributions Act
- **FUTA:** Federal Unemployment Tax



Questions & Answers

Thank You

Rate the session



Leave further feedback...

SEND

Cancel

Rate This Session

IN THIS BIZZABO APP:

- Open the Bizzabo app
- Select the Agenda tab from the main screen
- Locate this session by Name, Date and Time
- Rate the session
- Optional to leave further feedback

THANK YOU FOR YOUR FEEDBACK