GREENSHADES
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Year End Forms Excel Upload Guide

Form 1095-C

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1 About the Greenshades Year-End Form Process

The Greenshades Year-End Forms process uses a combination of software, web sites and government E-File services to ensure that employers can complete all of their year-end tax form requirements quickly and easily.

Most administrators have W-2s, 1099s, T4s, or other forms stored in a corporate accounting package or perhaps Microsoft Excel. The first step of the year-end forms process is to import that information into a web portal called Year-End Forms (formally Year-End Forms) by signing in at www.GreenshadesOnline.com. This information will be turned into digital tax forms which can be edited, accessed by employees/vendors, automatically printed and mailed, and also E-Filed to the appropriate government agency. Administrators will use Year-End Forms to easily handle all of the headaches that are typically associated with year-end forms.

Accessing the Year-End Forms Portal

After you have uploaded your form information to the Year-End Forms portal, you can access it on the internet at www.greenshadesonline.com. The sign-in page will appear first and ask for your email address and password.

If this is your first time logging in, you may not have a password. If you don't have a password or have forgotten your password, simply click the 'First time here or need password help?' link and follow on-screen instructions.

2   Getting Started with the Year-End Forms

Year-End Forms allows you to complete your year-end process using year-end form data which is managed by your accounting system or possibly stored in Microsoft Excel. To get started, you will need to upload this data into a Year-End Forms workspace. A workspace contains all forms of a specific type for any individual company and year.

1.1   Uploading Forms

There are multiple ways to upload your forms into a Year-End Forms workspace based on the accounting package you use. This guide will provide assistance with using the Microsoft Excel (Section 1.1.2) option.

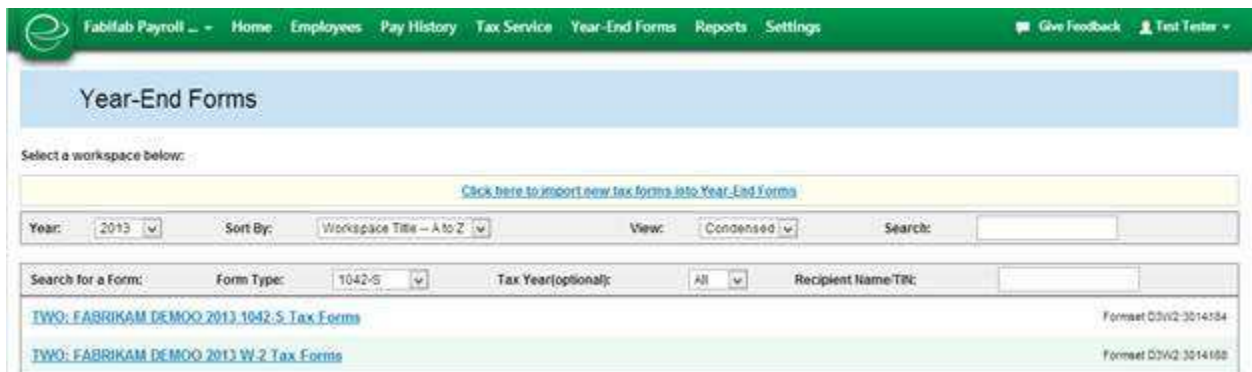## 2.1   1.1.2   Uploading forms using Microsoft Excel
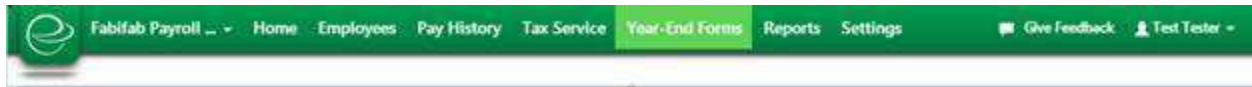
Once your Excel file is ready and you've signed in, and click the link centered at the top of the page that reads, "Click here to import new tax forms into Year-End Forms" (shown below outlined in red on both Year-End Forms and GreenshadesOnline Portals).
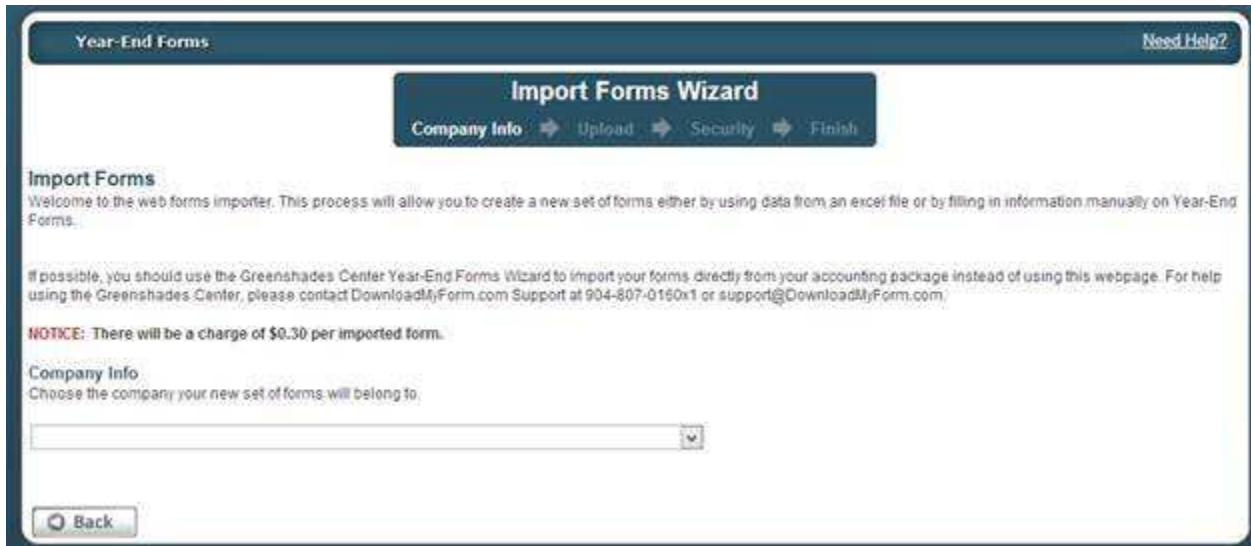
Figure 1: Year-End Forms Portal

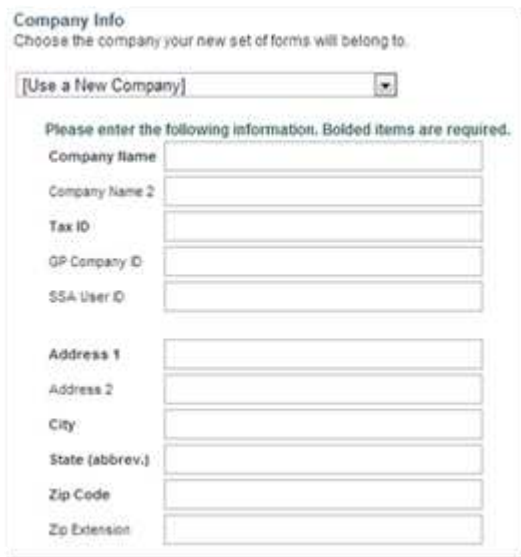**Figure 2: GreenshadesOnline Portal**

Note: GreenshadesOnline Portal users will be transitioned in the Year-End Forms portal once that link has been clicked.

You will now begin the upload process. Year-End Forms will first gather information from you about your company. If you already have forms on Year-End Forms, you may use your existing company's information by selecting your company from the drop down menu.

If you would like to setup a new company, select [Use a New Company] from the drop down and complete the required information.

All bolded items are required.

Once you have selected a company to work with, you will select the year and type for your forms.

If you are using a company with existing forms, you may be asked to choose whether you want to add-on your excel file or erase the existing forms.

Next, you will upload your completed Microsoft Excel template file. It is possible to skip this step and fill in your forms manually on Year-End Forms, however for the purpose of this guide we will cover the next steps as if that option has not been selected.

Click the 'Choose File' button, locate your completed Excel file for import, and click "OK", then click the 'Continue' button.

Next you'll be presented with the option to grant other individuals within your company access to the forms. If you do not already see their name and email address listed, you may add it at this time by clicking "Add Administrator".

Year-End Forms may take several minutes to prepare your new set of forms based on the size of your excel file and your position in line. Please be patient.

If you wait on the current screen, you will be provided a continue option when your forms are uploaded. This will open up the Welcome Wizard for your new workspace.

If you leave the import screen, your new workspace will appear at the top of the Change Workspace page and listed as New when it is finished. When you are ready, select the workspace and complete the Welcome Wizard as described in section 1.2 below.

₃ 1.2 Configuring a New Workspace

Once your form information has been uploaded into a new workspace on Year-End Forms, any authorized Administrator can start completing the year-end form process.

The first time that you log into a new workspace on Year-End Forms, you will be presented with a Welcome Wizard. The steps for the Welcome Wizard are explained below. Once you have completed the Welcome Wizard, you can return to it at any time from the workspace homepage.

1.2.1 Company Information

For the first step of the Welcome Wizard, you must verify the basic company information and designate a billing contact. This page will ask you for your Official Company Name, EIN, and a billing contact. If the billing contact drop down does not contain the person you wish to designate, select "[Add a New Contact]" to enter the correct contact's information. Adding the appropriate billing contact is important as this contact will be used for contact regarding billable services on Year-End Forms. Billable services include:

Step 1 of the Year End Forms wizard collects data which pertains to 1095C forms -- specifically any available transition relief, Aggregated ALE Group configuration, Self-Insured coverage, contact information, and employee count.

Welcome Wizard

Transition Relief   **Aggregated ALE Group**   Self-Insured Indicator   Contact Information   Employee Count

Aggregated ALE Group

Are you a member of an Aggregated ALE Group?

◉ Yes   ○ No

Aggregated ALE Group Members

You may verify and edit the other members of the Aggregated ALE Group below:

Member/Company Name	EIN

[Add ALE Member]

Note: *Any company added, edited, or removed as a member here will not update or recalculate the aggregated employee data imported for the 1095-C forms.*

[Back]   [Skip, No Changes]   [Save & Continue]

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Welcome Wizard

Transition Relief   Aggregated ALE Group   **Self-Insured Indicator**   Contact Information   Employee Count

Self-Insured Indicator

Do you offer Self-Insured Health Coverage?

○ Yes   ◉ No   ○ Changes Made to Individual Forms

Note: As a self-insured health coverage employer, you are required to complete Part III of the 1095-C, detailing the Covered Individuals coverage information for each applicable employee.

The "Yes" indicator will apply to all forms within this formset, however it may be changed at the individual employee/form level.

Back   Skip, No Changes   Save & Continue

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Welcome Wizard

Transition Relief   Aggregated ALE Group   Self-Insured Indicator   **Contact Information**   Employee Count

Contact Information

Please enter the name and phone number of the person to contact who is responsible for answering any questions pertaining to your 1095-C submissions.

Contact Name
Stacy Collis

Phone Number   **Ext.**
(855) 255-3815

MMREF PIN
12345678

Designated Governmental Entity

Are you a Designated Government Entity (DGE) filing on behalf of the employer?

◉ Yes   ○ No

Name of DGE   **EIN (xx-xxxxxxx)**

Street Address

City   **State**   **Country**   **ZIP or Foreign Postal Code**
                                                                   ▼

Contact Name   **Phone Number**   **Ext.**

Back   Skip, No Changes   Save & Continue

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Welcome Wizard

Transition Relief   Aggregated ALE Group   Self-Insured Indicator   Contact Information   **Employee Count**

Employee Count

Designate one of the options below as the consistent determination for the total number of employees reported for each month.

First Day of Each Month ▼

NOTE: *Changing your determination designation above will not recalculate your employee totals. It is your responsibility to accurately record your employee count consistently based on your selection.*

Enter the total number of employees, including full-time employees and non-full-time employees and employees in a Limited Non-Assessment Period, for each calendar month.

	Total Employee Count		**Total Employee Count**
Jan	Employee Count	July	Employee Count
Feb	Employee Count	Aug	Employee Count
Mar	Employee Count	Sept	Employee Count
Apr	Employee Count	Oct	Employee Count
May	Employee Count	Nov	Employee Count
Jun	Employee Count	Dec	Employee Count

Back   Skip, No Changes   Save & Continue

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.

📑 My 1095-Cs   View, Edit, and Print individual 1095-C Forms

📊 My Reports   View Reports on User Activity and Overall Form Information

Year-End Forms Checklist:

✔ COMPLETED ON 9/11/2015

1. **Complete Company Setup**

   Stacy Collis used the welcome wizard to configure Year-End Forms on 9/11/2015.

☐ DUE NOW

2. **Duplicate Employees**

   We found 1 SSN with duplicate form entries

☐ DUE NOW

3. **Employee Identity Verification**

   There are currently 51 invalid SSNs (according to SSA) that need to be fixed.

☐ DUE NOW

4. **Resolve Warnings with your Forms**

   There are currently 103 warnings with your forms, 57 of which are considered high severity warnings.

☐ DUE NOW

5. **Verify Employer-Provided Insurance Information**

   You have loaded 53 forms.

✔ COMPLETED ON 4/14/2015

6. **Manage Employee Access**

   0 employees viewed their forms online after Stacy Collis activated access on 4/14/2015. (View Report)
   0 employees consented to receive their forms online-only before paper copies were issued. (View Report)

☐ DUE NOW

7. **Email Employees with links to 1095-C Forms**

   51 employees have email addresses, 51 of which have yet to be notified about downloading their 1095-C.

☐ DEPENDS ON METHOD

8. **Distribute any remaining 1095-Cs to your Employees**

   37 employees must still be issued paper forms.

   17 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.

   8a. **Ask us to Mail Remaining 1095-Cs**

   ❗ **Place your order today for just $1.75 per form**

   OR