



**GREENSHADES**  
*LET US HANDLE THAT*

**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](http://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](http://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.



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# GreenshadesOnline

## Account Login

Email Address

Password

 Login

[First time here or need password help?](#)

Please let us know what you think of these new sign in pages by [sending us an email](#). If you are experiencing issues, the previous sign in pages are available for a limited time. [Go to old sign in page.](#)

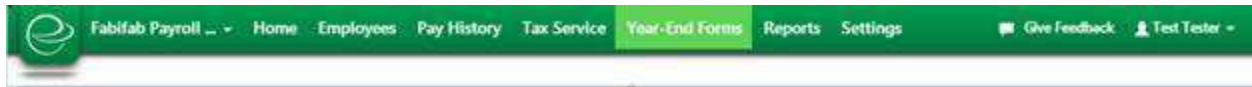
## 2 Getting Started with the Year-End Forms

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

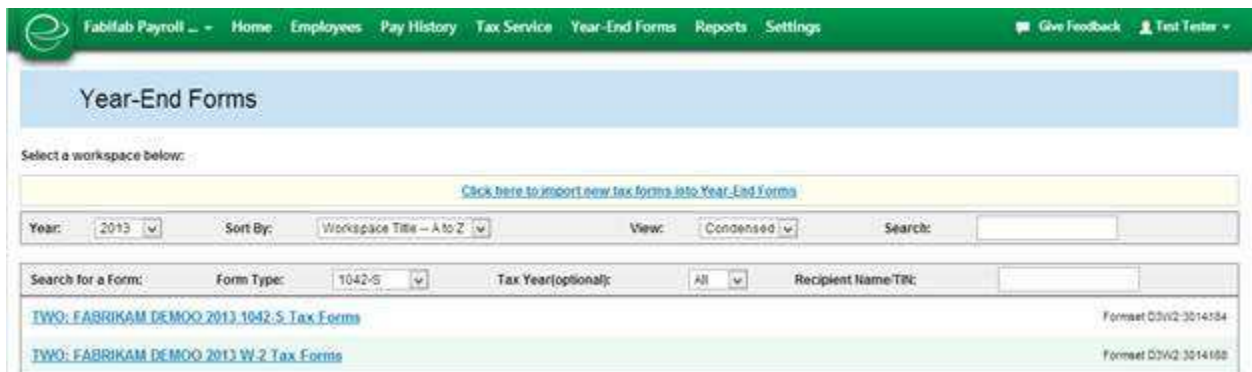


Once your Excel file is ready and you've signed in, and click the link centered at the top of the page that reads, "Click here to import new tax forms into Year-End Forms" (shown below outlined in red on both Year-End Forms and GreenshadesOnline Portals).

Figure 1: Year-End Forms Portal

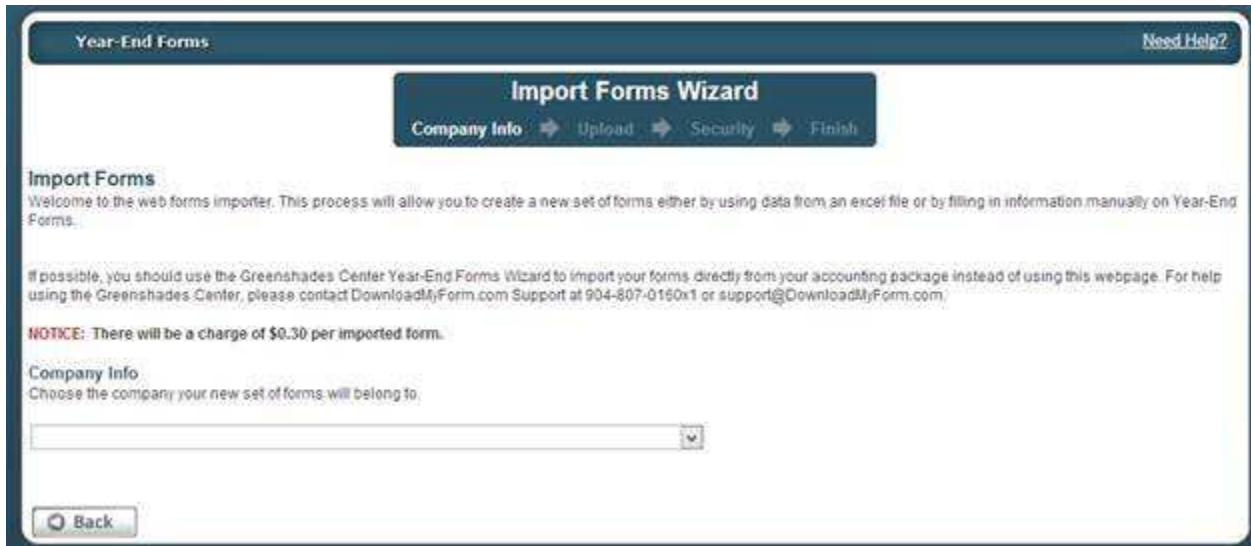


Figure 2: GreenshadesOnline Portal

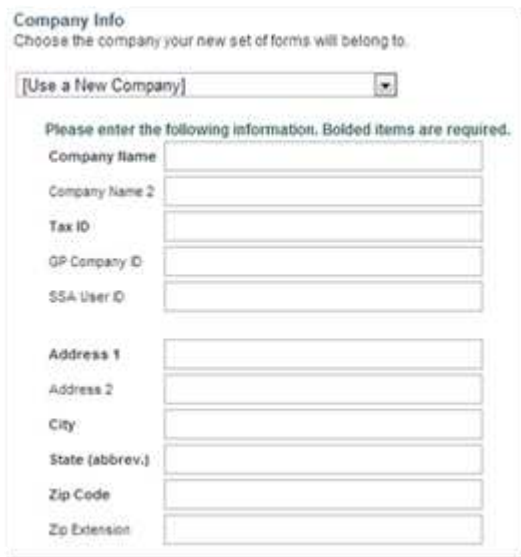


Note: GreenshadesOnline Portal users will be transitioned in the Year-End Forms portal once that link has been clicked.

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.



The screenshot shows the 'Year-End Forms' portal with a 'Need Help?' link in the top right. The main heading is 'Import Forms Wizard' with a progress bar showing 'Company Info' as the current step, followed by 'Upload', 'Security', and 'Finish'. Below the heading, there is a section titled 'Import Forms' with a welcome message and instructions. A notice states: 'NOTICE: There will be a charge of \$0.30 per imported form.' The 'Company Info' section prompts the user to 'Choose the company your new set of forms will belong to' and features a dropdown menu. A 'Back' button is located at the bottom left.



This is a detailed view of the 'Company Info' form. It starts with the instruction 'Choose the company your new set of forms will belong to.' and a dropdown menu currently set to '[Use a New Company]'. Below this, a note says 'Please enter the following information. Bolded items are required.' The form contains several input fields: 'Company Name', 'Company Name 2', 'Tax ID', 'QP Company ID', 'SSA User ID', 'Address 1', 'Address 2', 'City', 'State (abbrev.)', 'Zip Code', and 'Zip Extension'. The labels for 'Company Name', 'Tax ID', 'QP Company ID', 'City', 'State (abbrev.)', and 'Zip Code' are bolded.

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.

**Choose the year and type for your forms.**

Year  ▾

Form Type  ▾

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.

**There is already a set of forms loaded for that company, year, and type. What would you like us to do with these new forms?**

**Replace:** I want to erase the existing forms and start fresh.

**Append:** I want to add my excel file to 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.



Year-End Forms Need Help?

**Import Forms Wizard**

Company Info ➔ Upload ➔ Security ➔ Finish

**Upload**

Click below to select the excel file containing your forms.

No file chosen [Download a 2013 W-2 Excel Template](#)

I want to fill in forms manually using Year-End Forms.

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

### Security

Who do you want to have access to the new formset?

Bill Biller (bill@greenshades.com)

Test Tester (test@greenshades.com)

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.

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### Welcome Wizard

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

#### 2015 Plan Start Date

Enter your 2015 Plan start date:  

Apply this Plan Start Date to all 1095-C forms  
 Only apply this Plan Start Date to 1095-C forms that have not had the Plan Start Date manually modified

#### Transition Relief Indicator

Are you eligible to use and/or using one of the Qualifying Offer Methods and/or Transition Relief to indicate on your 1094-C?

Yes  No

**Select all that apply:**

Qualifying Offer Method  Section 4980H Transition Relief  
 Qualifying Offer Method Transition Relief  98% Offer Method





#### Non-Calendar Year Plans

Did you sponsor a non-calendar year plan?

**Note:** This is only for employers that maintained non-calendar year plans as of December 27, 2012 and only if the plan was not modified thereafter. If "Yes" is indicated, Line 16 will be updated to code 2I for months prior to the plan start date for all forms within this formset.

Yes  No



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## Welcome Wizard

[Transition Relief](#) **Aggregated ALE Group** [Self-Insured Indicator](#) [Contact Information](#) [Employee Count](#)

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### 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](#)

## 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

## 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

(855) 255-3815

#### Ext.

#### 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

## 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
Jan	Employee Count
Feb	Employee Count
Mar	Employee Count
Apr	Employee Count
May	Employee Count
Jun	Employee Count

	Total Employee Count
July	Employee Count
Aug	Employee Count
Sept	Employee Count
Oct	Employee Count
Nov	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