The Greenshades Center

SUTA Electronic Filing Guide





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The Greenshades Center	3
Filing your Quarterly Unemployment or Wage Report (SUTA)	3
Step 1 – Starting the E-File Wizard	3
Step 2 – Company Name and Period Selection	4
Step 3 – Choosing your File Type and Reporting Period	4
Step 4 – Verify SUTA Report Information	5
Step 5 – Verify Unemployment Tax IDs	6
Step 5a – Set Advanced SUTA Options (Optional)	8
Step 5b – Additional Special Information (Optional)	9
Step 6 – Build Data	10
Step 7 – Employee Verification	11
Step 8 – Select Files to Build	12
Step 8a – Advanced Editor (optional)	14
Step 9 – Review Built Files	15
Step 10 – View Totals	16
Step 11 (Internet Submission) – Manual Filing Instructions	17
Step 11 (Media Submission) – Save E-File	18
Step 12 (Media Submission) – Print Labels	19
Step 13 (Media Submission) – Transmittal Forms	20
Step 14 (Media Submission) – Submission Completed	21

THE GREENSHADES CENTER

The Greenshades Center has a Basic Product Guide that explains the basic functionality of this software and how to navigate to its various areas. Please consult that guide for general help. This guide will focus on the steps to complete an unemployment return.

FILING YOUR QUARTERLY UNEMPLOYMENT OR WAGE REPORT (SUTA)

This guide will explain each screen you will encounter as you create your electronic SUTA file. If you have any questions that are not addressed in this guide, please contact our support team.

When using the Greenshades Center, you can also access in-product help on many screens by clicking the (2) icon in the bottom left corner of the wizard.

STEP 1 - STARTING THE E-FILE WIZARD

You will use the E-File Wizard to create your electronic quarterly SUTA file. You can begin either by clicking the "Create E-File Returns" button on the left side of the Greenshades Center or else clicking an "E-File Return" link on the tax calendar that occupies the main area of the Greenshades Center homepage on many accounting packages.

0	Greenshades Filing Center -							
Your Upcoming Deadlines	Your Upcoming Tax Deadlines							
🥩 Create E-File Returns	Review the deadlines for upcoming tax reports and payments. (Experimental Featur							
	You are currently trac	cking deadlines for	13 returns and 13 payments Change)					
💯 View Filing History		Jurisdiction	Payments/Returns	Due	*			
View Recent Tax Changes								
	Pay Tax	California	Withholding Liability of \$23,877.29 (DE 88ALL)	2/14/2012				
Create Year-End Forms	A Pay Tax	Indiana	Withholding Liability of \$2,655.35 (WH-1)	2/29/2012				
Create E-File Returns	Pay Tax	United States	Withholding Liability of \$15.24	3/1/2012				
	E-File Form	Indiana	Withholding Form WH-1	11/30/2012				
	🧼 Pay Tax	Wyoming	Unemployment Liability of \$178.41 (WY-O056)	1/30/2013				
Use this E-File wizard to create	🧼 Pay Tax	Arizona	Withholding Liability of \$45,449.96 (A1-APR)	1/30/2013	U			
electronic tax returns or E-Files. This	📤 E-File Return	Indiana	Annual Withholding Form WH-3	2/28/2013				
wizard will also aid you in submitting these returns to the correct federal.	📤 E-File Return	United States	Withholding Form 941 with Schedule B	4/30/2013				
state, or local government agencies.	📤 E-File Return	Colorado	Unemployment Form UITR-1	4/30/2013				
	Eile and Pay	Indiana	Unemployment Form UC-5A/UC-5B	4/30/2013				
	E-File Form	Alabama	Withholding Form A-1/A-6	6/15/2013				
	File and Pay	Arkansas	Withholding Report	6/17/2013				
	📤 E-File Return	California	Unemployment-Withholding Form DE 9 and DE9c	7/30/2013	-			
<u>Settings</u>	Show Classic Calend	<u>lar</u>						

STEP 2 - COMPANY NAME AND PERIOD SELECTION

Since SUTA files must be submitted once a quarter, select the radio button next to 'Quarterly Filing' to begin your quarterly SUTA filing.

2	Greenshades Filing Center – 🗖 💌
Your Upcoming Deadlines	E-File Wizard
Create E-File Returns	Select the type of filing you would like to create from the list below.
🤔 View Filing History	This wizard will assist you in building various electronic return files, both tax and otherwise. It will also assist you in filing this return to the appropriate agency. To begin, please select a
View Recent Tax Changes	type of return from the options below.
Create Year-End Forms	Annual Return
Weather for Park City, Utah	Quarterly Return
Currently: Partly Cloudy	O Monthly Return
Feels Like: 65°F Wind: 8 mph NW	
65° Humidity: 34%	Enter the Company Name as it should appear on your e-file
Tomorrow: Partly Cloudy	Green Shades Inc.
Low: 35°F High: 65 °F Chance of precipitation: 0%	
Useful Links:	
IRS Business Home SSA Business Home	
Ø <u>Settings</u>	Quit < Back Next >

You will also notice that there is a 'Company Name' field. This defaults to the company name retrieved from your accounting package but you can modify it to match the company name you wish to appear in your SUTA file.

Once you are satisfied with your selections, click 'Next'.

STEP 3 - CHOOSING YOUR FILE TYPE AND REPORTING PERIOD

On this screen select the quarter and year that you are filing your SUTA for first. Make sure you select the quarter and year that payments were made.



Since Greenshades pulls all information for your SUTA file from your accounting package you will need to have run a SUTA report in your accounting package before continuing this process. If you have not done so, the next screen will prompt you to do this.

Next, select the types of files you wish to build. It is possible to select multiple options on this screen if you would like to create SUTA and other quarterly electronic files simultaneously.

The third option is for combining multiple companies into a single file. This is an additional module and must be purchased for it to be activated. If you are interested in purchasing this feature or if you have any questions about this function please contact our support team.

Once you are satisfied with your selections, click 'Next'.

STEP 4 - VERIFY SUTA REPORT INFORMATION

This screen displays the wage information gathered from the SUTA report in your accounting package and displays it for you to verify. The wage totals for all states are displayed on the right while the wage breakdowns by state are on the left. The Greenshades Center will warn you if it believes any of your wagebases may be incorrect in your accounting package. If you are unhappy with the wage totals or wagebases then you will need to go back into your accounting package, edit the necessary data, re-run your unemployment report, and then restart the Greenshades Center. Depending on which accounting

package you use, you may have an option to automatically correct wagebases in your accounting package from within the Greenshades Center (shown below):

8		Greenshad	es Filing Cente	er	_ □	×			
Your Upcoming Deadlines	Verify SUTA Report Information								
Create E-File Returns	Verify SUTA report information for the filing quarter that you have chosen. If this data is incomplete or inaccurate, re-run the SUTA report in Dynamics GP.								
🤒 View Filing History	State	Suta ID	Wage Base	Suta Wages	Taxable Wages	^			
View Recent Tax Changes	AK	1447254	\$36,900.00	\$3,090.00	\$3,090.00				
view Recent Tax Changes	AL	0029528527	\$8,000.00	\$4,495.71	\$1,418.00				
Create Year-End Forms	AR	234703	\$12,000.00	\$2,923.38	\$2,923.38				
Weather for Deals Office Utab	AZ	00583006	\$7,000.00	\$918,613.25	\$255,452.47				
Weather for Park City, Utah Currently: Partly Cloudy	CA	35231984	\$7,000.00	\$2,596,883.90	\$577,314.22				
Feels Like: 65°F	CO	341125000001	\$11,300.00	\$1,247,336.18	\$415,037.12				
Wind: 8 mph NW 65° Humidity: 34%	СТ	9284013	\$15,000.00	\$127,349.06	\$47,258.07				
65° Humidity: 34% Tomorrow: Partly Cloudy	DC	077639	\$9,000.00	\$68,288.68	\$40,570.08				
Low: 35°F High: 65 °F	DE	08539-1	\$10.500.00	\$85.367.37	\$38.096.68	~			
Chance of precipitation: 0%	-				cords and may be incorrect	È.			
Useful Links: IRS Business Home SSA Business Home	<u>Click he</u>	re to view the corre	ect wage bases for	the states that are incor	rect.				
Ø Settings				Quit	< Back Nex	t >			

Once you are satisfied with your selections, click 'Next'.

STEP 5 - VERIFY UNEMPLOYMENT TAX IDS

This screen displays the unemployment tax IDs gathered from the SUTA report and displays it for you to verify. This screen allows you to edit the unemployment IDs and wage bases if necessary. Please take a moment to ensure the accuracy of the state unemployment ID's.

) E-File	e Wizard			×			
110		oyment Tax IDs enter and verify your Unemp	ployment Tax IDs.	Q			
State	Description	Unemployment ID	Wage Base				
IA	lowa	23-0216-345	14200.00	*			
IL	Illinois	5027-8310	12200.00				
IN	Indiana	391735836017	7000.00				
MI	Michigan	23-0216-T251	9500.00	=			
MN	Minnesota	8264017	15300.00				
MO	Missouri	00 509353472	8500.00				
NE	Nebraska	23-0216-0023	7000.00				
WI	Wisconsin	916385-5	10500.00	~			
Do you need advanced options like specifying Officers to be reported or the ability to exclude certain Employee Classes?							
?			Quit	< Back Next >			

It is important to note that edits made to this screen will not affect data and information stored within your accounting package.

Once you are satisfied with your selections, click 'Next'.

STEP 5A - SET ADVANCED SUTA OPTIONS (OPTIONAL)

You may have noticed the Yes or No question at the bottom of the previous screen. Selecting 'Yes' before clicking 'Next' provides a few advanced options such as allowing you to exclude certain employee classes, or to identify certain employees as officers, should you need to do so.

E-File Wizard	×								
Set Advanced SUTA Options Choose the appropriate advanced SUTA options	a for your company.								
Would you like to retrieve Hours Worked from history instead of summary? O Yes O No Choose your New Mexico Workers Comp Deduction Code.									
Exclude the following Employee Classes Employee Class ACCT SUPP ADMN	Mark the following Employees as Officers Employee ID BARR0001 CLAY0001 CLAY0001								
Click here to edit special information that is not oth									

Additional options are accessed by clicking the link at the bottom of this screen. These options are covered on the next page of this guide.

STEP 5B - ADDITIONAL SPECIAL INFORMATION (OPTIONAL)

Clicking the '<u>Click here to edit special information that is not otherwise included in this wizard</u>' link located at the bottom of the previous window will bring you to the following screen and provides you with the ability to edit non-standard fields, should you need to. Depending on the number of states or types of files you are creating, this screen could have many entries listed. The three drop-down menus shown will allow you to filter the entries displayed to only those you need to work with. It is worth noting that some states require you to specify a location code with your filing. This screen provides that ability, where you would simply type in the code, next to the 'LocationCode' field, under the 'Value' column.

Jurisd	anyID iction Media Type	two IA	informati	ct a line in the g	able in the grid	below. You can		
ingr	CompanyID	Jurisdiction	MagMediaTyp	FieldName	Length	Value		
	two	IA	NewHire	IowaEINSuffix	3	(null)		
•	two	IA	Suta	MagneticAuth	6	(null)		
	two	IA	NewHire	DependentHe	1	(null)		
	two	IA	Suta	LocationCode	3	(null)		
	two	IA	Suta	PlantCode	15	(null)		
Description								

To save your changes, click the 'OK' button, and you will return to the 'Set Advanced SUTA Options' screen, where you can click the 'Next' button to continue.

STEP 6 – BUILD DATA

The Build Data step extracts your SUTA data from Dynamics with the settings you have previously selected in the E-File wizard. Depending on the number of employees you are exporting, this process may take a few minutes.

S E-File Wizard
Build Data The electronic filing wizard is collecting and building your information so that it may be used to generate your electronic files
You have now successfuly completed all of the options for your electronic filings. Click the 'Next' button to extract the necessary data to complete the electronic filing process.
Click Next to Export
Quit < Back Next >

Clicking 'Next' will start the extraction process.

STEP 7 – EMPLOYEE VERIFICATION

Greenshades offers you the opportunity to electronically verify your employee identification each time you create a file using the E-File Wizard. The electronic employee verification service is provided to prevent any potential filing penalties associated with submitting incorrect employee information to government agencies.

S E-File Wizard	X
Employee Identity Verification Read the information below to decide if you wish to verify the identity of your employees.	<u>ې</u>
Would you like to take this opportunity to verify the identity of your employees by having them cross-referenced with the Social Security Administration's records?	
The process of verifying names and SSNs is performed free of charge. If inconsistancies are found, you will later be given the option to pay a small, per-employee fee for the detailed report.	
Yes, please verify my employee information. I agree to the <u>Terms of Use.</u>	
No, do not verify my employee information at this time.	
No, do not verify my employee information now and never ask me again.	
Quit < Back Next >	

If you would like Greenshades to verify your employee identification, you will be informed of the number of discrepancies found. To view a detailed report, there is a charge of \$1.99 per discrepancies. Greenshades will process the employees you selected and then show you how many employees were found to be incorrect. Once presented with that information, you can choose whether or not to purchase a report listing the problems. You are not obligated to purchase this report.

Once you have made your decision, click 'Next'.

STEP 8 – SELECT FILES TO BUILD

Select Files to Build lets you choose which files you would like create and submit at this time. First, select the method that you would like to use to submit the file. Some states will accept both media and internet submissions and others will accept only internet or media submissions. This will vary from state to state, as each state has their own set of specifications.

Next, simply place a check in the "Build?" box next to the file you would like to create.

ilter:	Suta 👻			٢	Select All
mer.	Electronic File		Status	Submission Method	Build?
×	IA - Suta	•	Awaiting Creation	Media 🔻	
×	IL - Suta	•	Awaiting Creation	Internet 🔹)
×	IN - Suta	•	Awaiting Creation	Media 🗸)
×	MI - Suta	•	Awaiting Creation	Internet 🔻)
×	MN - Suta	•	Awaiting Creation	Internet 🔻)
×	MN - Suta (With Location)	•	Awaiting Creation	Internet 👻	

At the bottom of this screen there is an option that will allow you make any final corrections before creating and filing your E-File. While this functionality is available to you, it is recommended that SUTA edits be made in your accounting package, as correcting the errors using the advanced editor does not correct the errors with the data in your accounting package.

Once you are satisfied with your selections, click 'Next'.

STEP 8A - ADVANCED EDITOR (OPTIONAL)

Shown below is an example of the advanced editor when used while building your SUTA E-File.Virtually every field you see can be edited. You can even add rows if needed (right click on any row and select the 'Add Row' option), giving you the ability to include employees who have not yet been entered into your accounting package software. Again, keep in mind that these changes do not update your accounting software, and the advanced editor should only be used as a means to correct your E-File if you do not have the ability to correct the data within your accounting software.

Tools							
ILSutaFile	Detail View	ListView					
SubmitterA - 55-55555	317239833						
	317233633						
B- 🔶 CompanyE - 55-55555		SSN	LastName	FirstName	MiddleInitial	QuarterlySutaWages	QuarterlySutaExcessWages
 EmployeeS - 317239833 	EmployeeS	317239833	Ackeman	Pilar	J	2897.4300	0.00
	EmployeeS	982581991	Bonifaz	Luis	J	3569.3200	0.00
	EmployeeS	000922390		John	J	1811.5100	
EmployeeS - 000209416	EmployeeS	000209416		Aidan		2257.9300	
EmployeeS - 983057712	EmployeeS	983057712		Jenny	J	2418.2500	
EmployeeS - 831195071	EmployeeS	831195071		Kathie	8	2081.7100	
EmployeeS - 000439112	EmployeeS	000439112		Jay	-	3804.3700	
	EmployeeS	000362841		Wendy	B	2432.2300	
EmployeeS - 983373903	EmployeeS	983373903		Kevin		2447.2700	
EmployeeS - 000444808	EmployeeS	000444808		Steven	8	3358.8300	
Employees - 360673414	EmployeeS EmployeeS	980673414 000552831		Jenny		1898.2200	
Employees - 000352831	EmployeeS	912129448		Salmon		2077.6800	
EmployeeS - 000989475	EmployeeS	000989475		Suanne		2378.3800	
EmployeeS - 943943391	EmployeeS	943943391		Randy		2852.7800	
EmployeeS - 921294788	EmployeeS	921294788		Jim		5321.0400	
EmployeeS - 000642921	EmployeeS	000642921		Diane		2558.4100	
EmployeeS - 000943444	EmployeeS	000943444		Paul		10051.1500	
EmployeeS - 000559183	EmployeeS	000559183		Rob		2144.8300	
└ ◆ FinalF -							
	4 QuarterlySut	aWages Qi 58329.89	uarterlySutaE	xcessWages	SutaTaxableWa	ges (29,89	

When you are finished with the advanced editor, select 'File' then 'Done Editing' if satisfied with your changes, or 'Discard Changes' if you would like to cancel any changes you made.

STEP 9 - REVIEW BUILT FILES

At this point, your final totals have been calculated and your SUTA file has been created but not submitted. If your file was successfully created you will see a green check (as shown below). Continue the filing process by clicking the "<u>Click Here to Begin Filing</u>" link. If you have many states to file for, you will need to select 'Click Here to Begin Filing' for each.

🖲 E-Fil	e Wizard			×	٢					
	Review Built Files Select a built file below to submit or view errors.									
Clic	k on the link to either submit or	view	errors for each e-filing.							
	Electronic File		Status	Combined Summary						
	IA - Suta	~	Total Employees: 1	Click Here to Begin Filing	-					
\bowtie	IL - Suta	~	Total Employees: 19	Click Here to Begin Filing	=					
	IN - Suta	~	Total Employees: 2	Click Here to Begin Filing						
	MI - Suta	~	Total Employees: 1	Click Here to Begin Filing						
\mathbf{X}	MN - Suta	~	Total Employees: 1	Click Here to Begin Filing						
\bowtie	MN - Suta (With Location)	~	Total Employees: 1	Click Here to Begin Filing	÷					
?			Quit	< Back Finish						

If your file failed to build a red 'X' will appear. You will be able to review the problem by clicking the "Click Here to View Errors" link. Usually these errors are easy to understand, but if you have any questions please contact our support team.

STEP 10 - VIEW TOTALS

View Totals is an assessment screen providing you with detailed totals for final review before submission. You will notice 4 separate options displayed above the listed totals. The details for each are listed below:

<u>View Details</u>. With View Details, you can export your SUTA data to an Excel file for an even more detailed review. *This is to be read or printed only, and not to be E-filed.*

Print Totals. Print Totals prints the total screen you are currently viewing.

<u>Save Totals</u>. Save Totals will save the total screen you are viewing in an HTML format that can be viewed at a later date in Internet Explorer.

<u>Save E-File</u>. Save E-File allows you to save a copy of the exact electronic file that is going to be submitted to the state. Be sure to note where you save it, as you will need it in a moment.

🧐 IA	🧐 IA - Suta - Submission Wizard						
	View Tota Please check	(\bigcirc				
٩	View Details	🛃 Print Totals	🛃 Save	<u>e Totals</u>	📓 <u>Save E-File</u>		
		Employees Month 1	1			*	
		Employees Month 2	1				
		Employees Month 3	1				
		Total Employees	1			=	
		Total Employers	1				
		Total Quarterly Tips	\$0.00				
		Total State Wages	\$0.00				
	Total Suta Q	uarterly Excess Wages	\$0.00				
		Suta Quarterly Wages	\$4,944.70				
	To	al Suta Taxable Wages	\$4,944.70			-	
?)		Quit		< Back Ne	xt >	

Once you've reviewed your totals, click 'Next'.

STEP 11 (INTERNET SUBMISSION) - MANUAL FILING INSTRUCTIONS

While some states offer 'Automatic' internet filing (think "one-click filing"), most states have their own website and instructions for manually uploading your E-File. If the automated E-File upload is not an option, the Greenshades Center will provide you with a direct link to the state website and instructions on uploading your file to the state. Before uploading your file to the state website, you must first select the 'Save a Copy' link at the top of this page. It is worth noting that 'Save E-File' from the previous screen and 'Save a Copy' on this screen produce the exact same E-File, so if you have already saved your E-File you do not need to do this a second time.

Follow the provided instructions and links to upload your file. These instructions can vary from state to state so make sure you follow these steps closely.

🔮 IL - Suta - Submission Wizard					
Manual Filing Instructions Please follow the directions below to submit your electronic file.					
Before submitting your return manually via the Internet, you must <u>Save a Copy</u> of your electronic file. After you've saved a copy of your file, please follow the instructions below. Once finished, click Finish to exit the wizard.					
 Log into the Illinois <u>TaxNet</u> website using your username and password. 					
 If you do not have a username and password, please click the Obtain Digital ID button to obtain one. 					
 Once you have obtained your user name and password, you will need to contact IL electronic filing customer service at 1-866-274-5697 to register for the UI340 File Upload option. 					
After you have logged into the IL website, select the Administration button. Then select Upload UI340 Report option and browse to the Greenshades ICESA file.					
5) For more information, please review the <u>frequently asked questions</u> .					
Quit < Back Finish					

Congratulations! You have successfully created and filed your SUTA data.

Click 'Finish' here, and once more from the 'Review Built Files' screen, and you are done. If additional states remain, return to Step 8 until all states have been completed.

STEP 11 (MEDIA SUBMISSION) - SAVE E-FILE

If the state you are submitting SUTA for does not accept files via internet submission, you will need to save your E-File to diskette or CD and mail it to the state. The Greenshades Center will automatically detect any drives installed on your computer, which you can then select using the dropdown menu, assuming you have more than one. Once you have selected the drive you wish to use, click the 'Save' button. If you do not have a CD or diskette drive, contact your network administrator for assistance with saving your SUTA file to computer with one of these drives via the network, or possibly to connect an external diskette or CD drive to your computer.



After saving your file to CD or diskette, click 'Next.'

STEP 12 (MEDIA SUBMISSION) - PRINT LABELS

Greenshades provides you with the information that you will need to put on your diskette or CD and mailing address. You can select and copy this information into a program that can print diskette and mailing labels, or simply use the old fashioned method of labeling by hand via pen-and-ink.

🤫 IN - Suta - Submission Wizard							
Print Labels Print the labels for your file and envelo	ope.						
Below is the label for your Diskette as well as a label for your mailing envelope. There are two ways that you can print these out: First, you may copy the text from the boxes below into a program that can print diskette labels (such as Microsoft Word). Alternatively, if you wish to pr multiple sets of labels at the same time, you can use the 'Mail Merge' option on the last screen of the previous wizard. This feature will create separate documents that contain diskette and mailing labels for all of the efiles you have created today.							
Diskette Label	Mailing Label						
Fabrikam, Inc. 4277 West Oak Parkway Chicago, IL 60601 391735836017 Diskette FileName: UIWAGE.TXT Production	Indiana Department of Workforce Development Attn: Data Center, Rm SEOO3 10 N. Senate Ave Indianapolis, IN 46204-2277						
	Quit < Back Next >						

Once you have your media and mailing package labeled, click 'Next'.

STEP 13 (MEDIA SUBMISSION) – TRANSMITTAL FORMS

A few states require transmittal letters be included with your diskette or CD. If the state you're filing for requires a transmittal letter, we will provide you with a link to this form.

🧐 IN - Suta - Submission Wizard					
Transmittal Forms Print out forms that must be included in the envelope along with your E-File					
When sending your E-File through the mail, you must also include a form inside your envelope. Information about this form can be found below.					
Quarterly Contribution Report (UC-1)					
This is the quarterly contribution report for Indiana.					
Indiana's UC-1					
Partially Completed Form					
Quit < Back Next >					

Follow the link, print and fill out the form, and then include it in your mailing package.

STEP 14 (MEDIA SUBMISSION) - SUBMISSION COMPLETED

Congratulations! You have successfully created and saved your SUTA data to media. You have now completed all the steps in creating and filing your SUTA E-File. Make sure it is properly labeled and packaged before mailing.

🔮 IA - Suta - Submissio	n Wizard	
Submission C	ompleted	Q
File to the government.	e now completed all of the neces Simply send all of the materials ke you back to the screen with a	into your reporting agency.
0	Quit	< Back Finish

Once ready, you may click 'Finish'. If you have additional states to file for, click 'Finish' to return to the Review Built Files screen, then continue at Step 8 until all states have been completed.