

Year-End Guide (2025)

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Introduction

This guide walks you through the Year-End Process, including:

- Processing a Summary Diagnostic
- Creating a Transmission File
- Sending the Transmission File to Greenshades for Processing.

Sending fourth quarter reports for the year is not covered by this Guide. Please follow your normal procedures for creating quarterly reports. If you are not familiar with creating quarterly reports, please see Adapt's Online Help.

Process Summary Diagnostic

The Process Summary Diagnostic feature gathers together tax information for a corporation and reporting period in order to perform diagnostics and to make the information available for the creation of a transmission file. This process must be successfully run for the corporation and reporting period BEFORE creating the transmission file.

To process a summary diagnostic:

1. On the Government Reporting Process Search Results page, click **Process Summary Diagnostic**.
2. The Government Reporting Process Summary window displays.
3. In the *Corporation* field, use the drop-list to select the corporation for which you want to perform a summary diagnostic.
4. In the *Period Begin* field, enter the first day of the period for which you are processing a summary diagnostic. Since this is for the full year 2025, use the calendar control to select **1/1/25**.
5. In the *Period End* field, enter the last day of the period for which you are processing a summary diagnostic. Since this is for the full year 2025, use the calendar control to select **12/31/2025**.
6. In the *Reporting Type* field, use the drop list to select **Annual**.
7. Click **Confirm**. The summary diagnostic is sent to the queue, and a Queue Confirmation window displays.
8. Click **Close**.

The Government Reporting Process Search Results grid displays the just created process. The following columns are displayed in the grid:

- **Process ID:** Internal ID to track the government reporting process.
- **Status:** Current status of the process. You can refresh the screen to get an updated status. When the Status column displays *Completed*, the process has finished. If the Status column displays *Failed*, the process is completed and you need to view the diagnostic messages (see details on the next page) to find out how to correct the problem that caused the process to fail.
- **Submit Date:** The date upon which the process was submitted.
- **Submitter:** The user who initiated the process.
- **Period Begin:** The Period Begin date entered on the Process Summary Diagnostic window.
- **Period End:** The Period End date entered on the Process Summary Diagnostic window.
- **Corporation:** The Corporation selected on the Process Summary Diagnostic window.
- **Process:** The process being run (Annual, Quarterly, etc.).
- **Process Type:** The type of process being run (for example, Process Summary).

To see more details on the process, click the ID link in the Process ID column.

The Summary segment displays basic information about the process. The Diagnostic segment displays warnings and messages. Some of the messages are informational (for example, the number of employees and contractors selected). Some of the messages are warnings about missing or mismatched data (for example, a required local tax setting is missing or an employee does not have an address).

Review the diagnostic messages and make corrections to your data as needed. For example, if the diagnostic message notes that an employee does not have an address, add an address to the employee record.

Once you have made all of your corrections, re-process the Summary Diagnostic (using the instructions on the previous page). There is no harm in re-running a summary process. Once this process has completed, you can again check Diagnostic messages and make any needed corrections.

Once you have run a summary process in which no further corrections are needed, you are ready to create the Transmission File.

Creating a Transmission File

The Create Transmission File workflow takes the information gathered by the Summary Diagnostic (see page 3) and generates an XML file that can be uploaded to Greenshades. You must first successfully create a Summary Diagnostic for the Corporation and Reporting Type before using the Create Transmission File functionality.

To create a Transmission File:

1. On the Government Reporting Process Search Results page, click **Create Transmission File**.
2. The Create Transmission File window displays.
3. In the *Corporation* field, use the drop-list to select the corporation for which you want to create a transmission file.
4. In the *Period Begin* field, enter the first day of the period for which you are creating a transmission file. Since this is for the full year 2025, use the calendar control to select **1/1/25**.

5. In the *Period End* field, enter the last day of the period for which you are creating a transmission file. Since this is for the full year 2025, use the calendar control to select **12/31/2025**.
6. In the *Reporting Type* field, use the code selection icon to select **Annual Reporting**.
7. **Click** Confirm.
8. The Transmission File is sent to the queue and a Queue Confirmation window displays. Click **Close**.

The system creates a file in the same folder where your quarterly and/or monthly transmission files are located. This is the file you will upload to Greenshades in the next section.

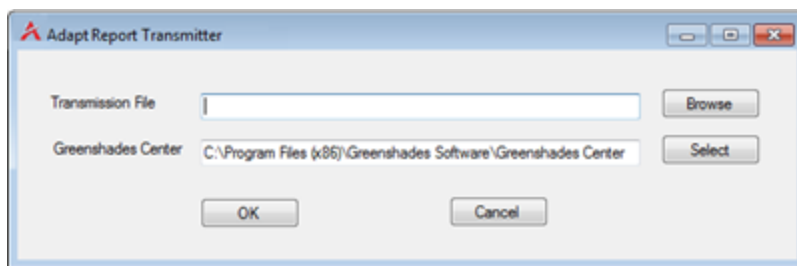
Sending the Transmission file to Greenshades

Note: The following section assumes you have installed Greenshades. If you are having difficulty with the installation, please have your liaison contact Bullhorn Support.

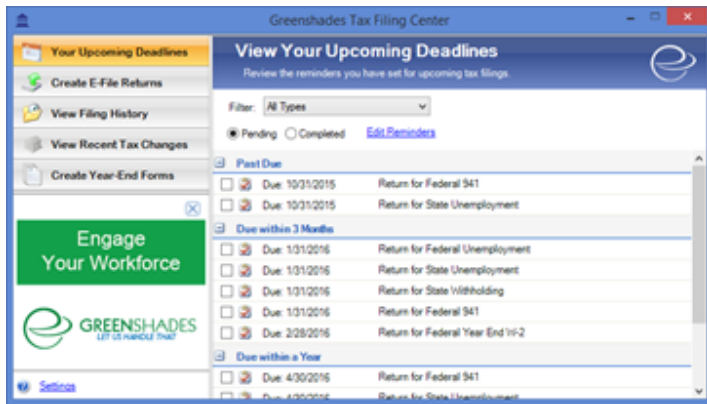
Note: As of the publication of this document, Greenshades had not yet released their most recent updates. Thus, it is possible that a screen or workflow may slightly change with the update. If this is the case, follow the instructions in this document as best you can for each screen. If you are unsure of what to do, please have your liaison contact Adapt Support.

Transmitting the File

1. Open the Adapt Report Transmitter.



2. Click **Browse** and navigate to the directory where the Transmission File (see page 5) was created. Select the Transmission File and click **Open**.
3. On the Adapt Report Transmitter window, click **OK**.
4. Greenshades' Welcome to Tax Filing Center window displays. Click **Close**.
5. You may receive a message that updates have been found. If so, click the **Update Now** button. If you do not see the message, skip to Step 7.
6. When the update is complete, Greenshades does not automatically restart. Return to Step 1 to restart Greenshades.
7. The Greenshades Tax Filing Center appears.



8. Click on the **Create Year-End Forms** bottom on the left-side menu.

9. The Year-End Forms page displays.

In the *Year* field, use the drop-list to select **2025**.

In the *Type of Tax* field, use the drop-list to select either **W-2** or **1099-NEC**, depending on which type of form to be imported. Select **Next**.

10. The Upload 2025 Payroll page displays.

This page displays a summary of the information contained in your Transmission file. Make sure the information matches your records, and click the **Upload Forms**. This uploads the Transmission File to Greenshades. Click **Next**.

11. The Choose Payroll Administrators page displays.

Name	Email	Authorized
Aaron Myerson	aaron.myerson@bond-us.com	☐ Reset Password
Alex Evans	alex.evans@bond-us.com	☐ Reset Password
Christopher Vigil	christopher.vigil@bond-us.com	☐ Reset Password
Christopher Vigil	christopher.vigil@bond-us.com	☐ Reset Password
David Public	bill.bahr@bond-us.com	☐ Reset Password
Greenshades Test	test0@greenshades.com	☐ Reset Password
Jane Doe	jane.doe@anywhere.com	☐ Reset Password
Janet Jones	Janet.jones@testcompany.com	☐ Reset Password
John Public	bbahr@vogsoftware.com	☐ Reset Password

This page allows you to indicate individuals who are authorized to administer your W-2 forms and payroll data. The users selected here will be able to log into Greenshades Online to administer the associated W-2 forms and payroll data.

To authorize a user, place a check in the box in the Authorized column. Click the box toggles it between checked and unchecked.

You can add a user to the list by clicking the **“add a new contact”** link.

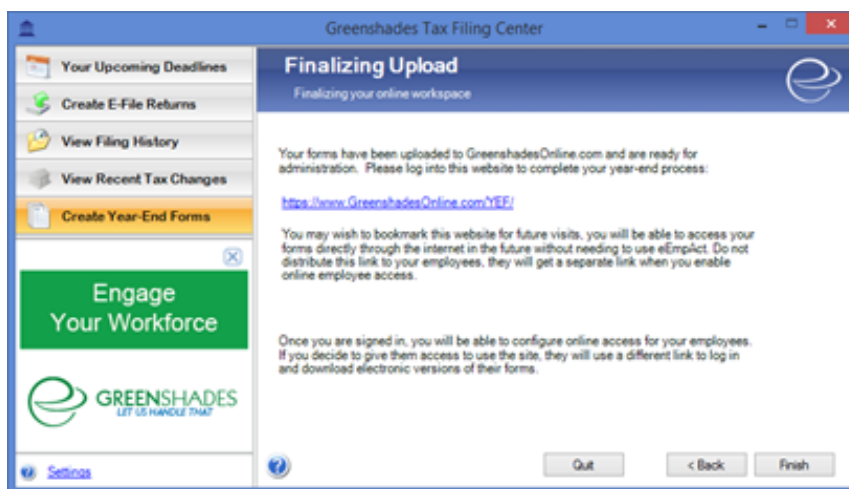
When you are satisfied with your selection of users, click **Next**.

12. The Finalizing Upload page displays.



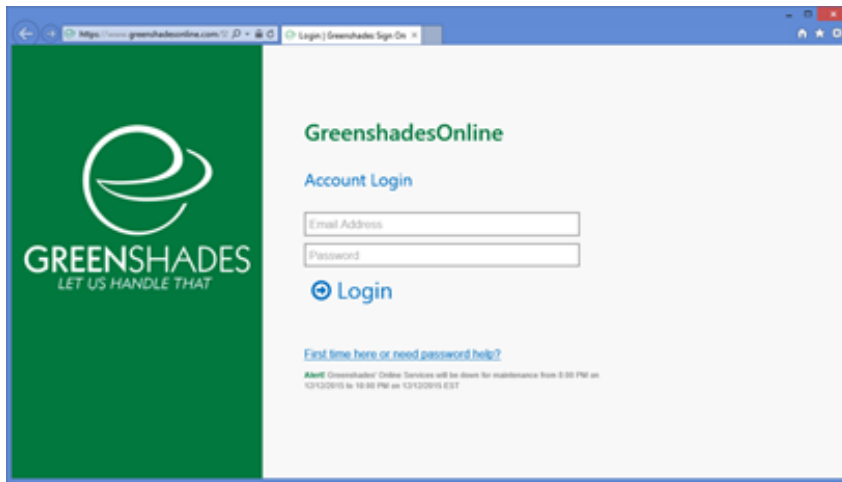
Depending on the number of employees in your transmission file, this process may take a while. The page refreshes every 30 seconds so if you wish, you can simply wait until the process completes. If you prefer not to wait, you can enter your email address in the field and click **Finish**. Greenshades will notify you via the entered email address when the process has completed.

13. Once the process is complete, the Finalizing Upload page refreshes to display the following:



The page provides a link to GreenshadesOnline.com to complete the process. Click on the link to go to the next step in the transmission process. Clicking **Finish** returns your user to the Your Upcoming Deadlines page.

14. After clicking the link, a new browser window opens.



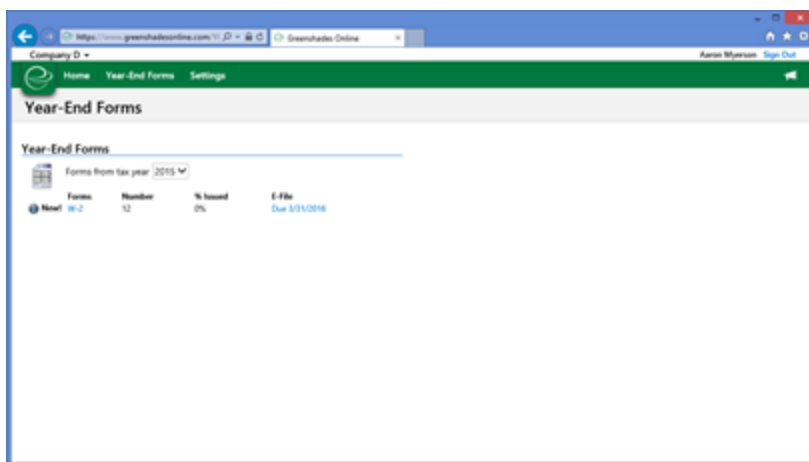
Enter an email address and password that match the credentials created either during the initial Greenshades signup or if you added a new contact in step 11.

15. Click **Login**. The Company Information page displays. If the company was previously set up in Greenshades, both the Name and EIN default. If the company was not previously set up, you will need to add this information. You can also change the default information, if needed. When you are satisfied with the information on the page, click **Continue**. Go to Step 18.

16. The Logo page displays allowing you to display a logo that can be seen by employees when they log in. This is optional. If you want to add a large and/or small logo, click the **Browse** button and navigate to the logo's graphic file. When you are satisfied with the information added to this page, click **Continue**.

17. The Primary Billing Contact page displays. Select a Contact from the droplist to be the primary billing contact. Once selected, make sure the name, phone number and email address is correct. Change the information if needed. When you are satisfied with the displayed information, click **Finish**.

18. The Year-End Forms page displays.



Click on the W-2 or 1099-NEC link (in the Forms column).

19. This launches the DownloadMyForm page in a new browser window.

State	State W-2 ID Number	Errors
Georgia	GA-kshelm	ID must be in the format: 7 numeric digits - 2 alphanumeric characters (XXXXXXXX-AA)
Michigan	0000001	ID must be in the format: 9 numeric digits or 2 letters followed by 7 numeric digits (XXXXXXXXXX or AA00000000)
Ohio	Oh037436	ID must be in the format: 8 numeric digits or 8 numeric digits - 2 numeric digits - 1 numeric digit (XXXXXXXX or XXXXXXXX-XX-X)

If there are any issues in the uploaded state information, you will be presented with a list of the errors. Click the Pencil icon to edit the information presented. If the error is corrected, the Error column goes away. When you are satisfied with the information presented, click **Continue**.

If there are any issues in the uploaded local codes, you will be presented with a list of errors. Click the Actions column to tell the system what action to take on the locality. When you have successfully selected an action, click **Continue**.

If there are any issues with local naming conventions, you will be presented with a list of corrections to be made. You can click the Pencil to edit any individual locality names. You can also click **Add Locality** to add a locality to the list. When you are satisfied with the information displayed, click **Continue**.

If there are no errors at a level, the page for that level does not display.

20. The Welcome to Year-End Forms page displays.

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 W-2s View, Edit, and Print Individual W-2 Forms
My Reports View Reports on User Activity and Overall Form Information

Year-End Forms Checklist:

- 1. Complete Company Setup**
COMPLETED ON 12/20/15
Aaron Myerson used the welcome wizard to configure Year-End Forms on 12/20/2015.
- 2. Employee Identity Verification**
DUE SOON
There are 12 identities that need to be verified.
- 3. Resolve Warnings with your Forms**
DUE SOON
There are currently 31 warnings with your forms, 22 of which are considered high severity warnings.

This is a checklist of things that need to be accomplished to complete the year-end forms process. When a step has been completed, a check appears in the box to the left of the step. To complete an unchecked step, click the step's link. For example, if you have employee identities that need to be verified, click **Employee Identity Verification**.

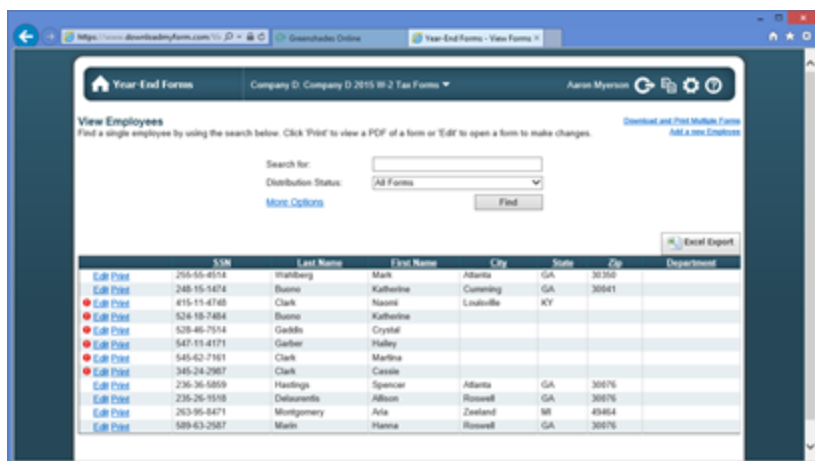
Since now all of the steps are required, the steps are explained below:

- **Employee Identity Verification:** Not Required. Allows you to verify employees against Social Security records. This helps reduce errors and penalties from submitting forms to the Social Security

Administration with incorrect employee information. To perform this step, click the **Start Verification** button on the Recipient Identify Verification page.

- **Resolve Warnings with your Forms:** This may or may not be required, depending on the type of errors found. Typically, you will want to correct any warning with a High Severity. To correct a warning, click **Edit** to the left of the row with the warning message.
- **Verify W-2 / 1099-NEC Forms Totals:** This is required. The page shows totals gathered from your W-2 or 1099-NEC forms. Review the totals and verify they are correct. If they are, click the **I have reviewed the totals on this screen and verify that they are correct** checkbox and then click **Finish**.
- **Manage Employee Access:** This contains three parts. The first part is optional and allows your employees to get their forms through GreenEmployee.com.
 - NOTE: At this time, this first option is only enabled for clients who use the Web Portal. If you want employees to view their W2 via the Web Portal, make sure this option is selected. This option will be made available to all users in an upcoming release.
 - The second part creates a Turbo Tax file for your employee to import directly into TurboTax.
 - The third part has some additional settings: W-2 form layout, additional employee editing options, users who should be notified if an employee edits their W-2 form.
- **Distribute Any Remaining W-2s to Your Employees:** By a certain date, if employees have not downloaded their W-2 forms, Greenshades offers two options: 1) Greenshades will print and mail your remaining forms to your employees for a fee or 2) Greenshades allows you to print the forms and distribute them.
- **E-File State W-2 Returns:** Allows you to file state forms electronically (or view historical information regarding a past filing).
- **E-File Federal W-2 Return:** Allows you to file federal forms electronically (or view historical information regarding a past filing).
- **E-File Federal 1099 Returns.** Allows you to file federal forms electronically (or view historical information regarding a past filing).

21. If you click the **My W-2s / My 1099s** button on the checklist page, the View Employees page displays.



	SSN	Last Name	First Name	City	State	Zip	Department
Print	254-65-4514	Frankberg	Mark	Atlanta	GA	30308	
Print	345-15-1474	Burns	Katharine	Cumming	GA	30041	
Print	415-11-4743	Clark	Nicole	Louisville	KY		
Print	526-18-7484	Burns	Katharine				
Print	528-46-7514	Gardner	Crystal				
Print	547-11-4171	Gardner	Halley				
Print	545-62-7181	Clark	Marlene				
Print	345-24-2987	Clark	Cecile	Atlanta	GA	30075	
Print	235-35-5859	Hastings	Spencer	Roswell	GA	30075	
Print	235-26-1518	Delaworth	Alison	Roswell	GA	30075	
Print	263-95-4471	Montgomery	Aria	Zeebald	MS	49464	
Print	589-63-2587	Martin	Hanna	Roswell	GA	30075	

This page displays all the information related to your uploaded W-2 forms. Any form with an issue will be shown with a red exclamation point. You can either click **Edit** to open a form and make changes or click **Print** to view a PDF of the form.

Editing displays a W-2 form.

Naomi Clark's W-2

The following problems were found with this form:

- Employee has Missing or Invalid Zip Code
- Employee is Missing Street Address
- Address May Be Incorrect
- A state wage or tax is at \$0
- This form has a mailing address with a U.S. State but may not be a U.S. Zipcode

a. Employer identification number (EIN)		b. Wages, tips, and other compensation		c. Federal income tax withheld	
123456789		2076.41		909.09	
d. Employer's name, address, and ZIP code		e. Social security wages		f. Social security tax withheld	
Company B 1234 Company Rd. Atlanta, GA 30300 7705551145		2004.00		245.50	
g. Control number		h. Medicare wages and tips		i. Medicare tax withheld	
		2004.00		27.36	
j. Employer's first name and initial		k. Social security tips		l. Allocated tips	
Naomi		0.00		0.00	
m. Employer's address and ZIP code		n. Unqualified plan		o. Dependent care benefits	
Louisville, KY United States		0.00		0.00	
		p. Qualified plan		q. Rollover	
		☐		☐	

State T2 State T6 State Wages Local Wages

State ID Wages Tax Localities State Wages Tax

GA 123456789 912.34 912.34 123456789 GA 912.34 912.34

You can edit both the employee and employer information on the form.

22. Clicking the **My Reports** button on the checklist page displays a list of reports allowing you to check on the status of your Year-End forms. To run a report, simply click the report name's link. Click the **Home** button to return to the checklist page.