

Quarterly Processing for Adapt & Greenshades

April 2023

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Introduction

The Quarterly Processing for Adapt & Greenshades guide is intended for the user who prepares and submits quarterly government tax reports. The tax reporting process in Adapt is managed through an integration with Greenshades Software. This guide should be used as a reference when completing the quarterly processing cycle within Adapt and Greenshades.

Included within this guide is the following helpful information:

- **Checklist for Quarter End** which lists the necessary steps involved in quarterly processing.
- **Frequently Asked Questions** provide answers to common questions.
- **Adapt State and Local Fields** lists the fields within Adapt that may need to be completed, based on the specific requirements of your state and local tax authorities.
- **Installing Greenshades Software** provides instructions for installing the software on the user's local workstation.
- **Creating a Summary Diagnostics File** describes the process of organizing payroll data for reporting purposes. This process also creates a diagnostic report listing status information and alerts to possible problems.
- **Transmitting a Greenshades File** provides instructions for creating a file of payroll data and transmitting it to Greenshades.
- **Creating a SUTA e-File** describes the process, in Greenshades, of reviewing the payroll data then submitting quarterly government reports to the tax authority.
- **Social Security Number Verification** provides the ability to electronically verify Social Security Numbers with the Social Security Administration.

Checklist for Quarter End

1. Process and update all payrolls and direct deposits for the quarter.
2. Confirm the accuracy of the fields detailed on Page [Adapt State and Local Fields](#).
3. If you do not already have Greenshades software installed on the workstation that will be used to transmit government reporting data, follow the directions [here](#).
4. Run the Process Summary Diagnostic to create a diagnostic report displaying alerts to possible problems. Investigate the alerts and make any necessary corrections. Follow the instructions [here](#).
5. Create a Greenshades file. Follow the instructions [here](#).
6. File SUTA reports for the quarter follow the directions [here](#).

Note: If you have multiple corporations, the data within the Greenshades file will reflect that.

Some states may require reporting for state wages, SDI or other taxes in addition to quarterly SUTA reporting. The Greenshades Center Reminders area should list any other necessary reporting.

Frequently Asked Questions

How does Adapt calculate the number of employees that worked on the 12th of the month?

Adapt counts the employees who worked the week of the 12th (6th to the 12th of each month) based on the work week ending date.

I have more than one federal ID. How will that be reported?

The tax information within Greenshades is separated by Federal Employer ID number. Each employee record is associated with the correct FEIN. You will only receive one email from the government indicating they have accepted your file.

How can I verify my file has been successfully filed to the IRS?

If you used the automatic website submission method, you will receive a confirmation email from Greenshades Software. This email contains your E-File ID which you can use to track your submission status.

If you used the manual website submission method, Greenshades is unable to track your submission. When you submit your file to the IRS FIRE site, you will receive a confirmation number from their website.

Will Greenshades file my State Unemployment forms?

Yes, Greenshades accommodates all state SUTA file formats.

My computer doesn't have a floppy drive. How do I save my media file?

Save the file to your computer and then either burn a CD or find a computer with a floppy drive to copy the file.

How can I review my SUTA / W2, etc. totals after I've submitted them?

By clicking on the 'View Previous Filings' button from the opening screen of the Greenshades Center you will be presented with a list of media previously filed within Greenshades. Double click the report to be viewed.

Adapt State and Local Fields

Based on the requirements of your state and local tax authorities, data in one or more of the following fields may be necessary.

For each state, complete the following fields in Administration -> State -> Corporation -> State W2 Reporting:

- State Tax ID number
- State Minimum Wage
- Active button

For each state, complete the following fields in Administration -> State -> Corporation -> Manage State Unemployment Information:

- State Unemployment ID number
- Effective Date
- State Rate
- SUI Wage Base

For any state with SDI, complete the following fields in Administration -> State -> Corporation -> Manage State Disability Information:

- State Disability ID number
- Employer State Rate

Complete any necessary, state-specific, fields in Administration -> State -> Corporation -> State/Local Reporting. These may include:

- ND (North Dakota) Provider ID #
- NJ (New Jersey) Family Leave Plan #
- ME (Maine) Employer Assessment Rate
- WA (Washington) Employer Assessment Rate

Complete any necessary, state-specific, fields in Administration -> State -> Corporation -> Local Tax Settings. These may include:

State	Field	Definition
IN (Indiana)	Local Worksite Name	Unique Name to identify the worksite to be used for your corporation.

KY (Kentucky)	Local Worksite Name	Unique Name to identify the worksite to be used for your corporation.
MD (Maryland)	Local Worksite Name	Unique Name to identify the worksite to be used for your corporation.
OH (Ohio)	Local Worksite Name	Unique Name to identify the worksite to be used for your corporation.
PA (Pennsylvania)	Local Worksite Name	Unique Name to identify the worksite to be used for your corporation.
WV (West Virginia)	Local Worksite Name	County Name to be used as Default in the file if the County is not designated on the Worksite of the Job/Assignment.

For any state with local taxes, set up the necessary local tax authorities and worksites in Administration -> Corporation -> Local Tax Settings. The Adapt Support Center will provide the spreadsheets "PALocalityInfo" and "NonPALocalityInfo" which detail the Greenshades-specific Municipality Code, Municipality Name, and Local Code fields.

For any state whose New Hire reporting requires EEOC information, complete the following fields in Employee -> Personal Information -> Confidential Information:

- Gender
- Date of Birth

Complete any necessary, state-specific, fields in Employee Financial -> Payroll / Taxes -> Corporation -> State Unemployment & SDI. These may include:

- Wage Plan
- Seasonal Indicator
- Probationary Code
- Plant Code
- Unit #
- Unit Code
- Occupational Code
- Officer Code
- WC Class Code

- Geographic Code

Installing Greenshades Software

The Adapt Reporting Transmitter and Greenshades software will need to be installed on the workstation that will be used to transmit government reporting data.

Prerequisites

A Greenshades Registration key is required and can be obtained from the Adapt Support Center.

The Greenshades System Requirements include:

- Latest version of Microsoft .NET Framework (Full version)
- An active business class internet connection that is not blocked by an internal firewall, proxy or other security
- Latest version of Microsoft Silverlight

More detail regarding the Greenshades System Requirements can be viewed on the Greenshades website.

<http://www.greenshades.com/support/gscenter.aspx>.

Getting Started

Download the Greenshades software and the Adapt Reporting Transmitter using the link provided by the Adapt Support Center.

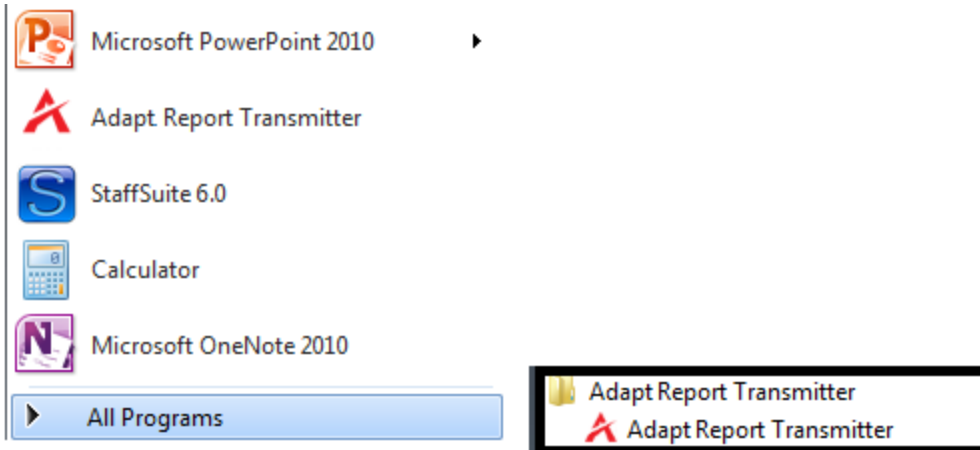
Once the package is downloaded, initiate the install by selecting the setup.cmd file.

Make note of the installation location for Greenshades Center.

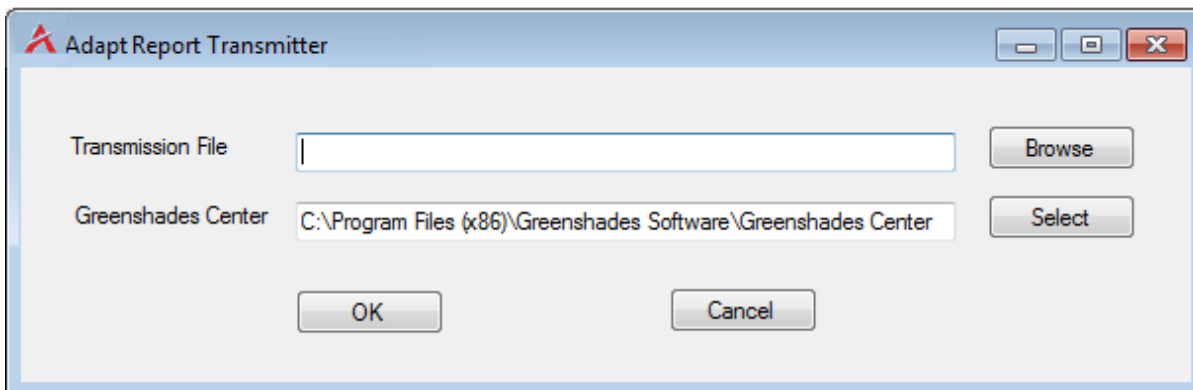
Name	Date modified	Type
 GreenshadesCenterForAdapt.msi	5/6/2013 6:01 PM	Windows Installer ...
 ReportingTransmitter.msi	5/24/2013 1:04 PM	Windows Installer ...
 setup.cmd	5/8/2013 10:38 AM	Windows Comma...

Launching the Adapt Reporting Transmitter

Once you have completed the installation, you will be able to access the Adapt Report Transmitter from the Start -> All Programs Menu.



When you launch the Adapt Reporting Transmitter you will be prompted to enter the following information:



- Transmission File – Enter the location of the compressed and encrypted government reporting file to be transmitted.
- Greenshades Center – If this is the first time you have launched the Report Transmitter, you will be prompted to enter the installation path for the Greenshades programs.

Once you click OK, the Greenshades Center will automatically check for any updates, extract the reporting data, and launch the Greenshades Filing Center application.

Note: If this is your first time launching the application, you will be prompted to enter the Greenshades registration key.

Creating a Summary Diagnostics File

The Process Summary Diagnostics function gathers all payroll information for the reporting period, organizes it for reporting purposes, and creates a diagnostic report which lists status information and alerts regarding possible problems. Perform Summary Diagnostics must be run prior to creating a transmission file.

(Note: New Hire reporting does not require Diagnostics.)

- Go to Financials -> General -> Government Reporting -> Process Summary Diagnostic.
- Select the Corporation, the Report Type (Month, Quarter, Annual), and enter the reporting dates.
- Click Confirm. The Summary Process is then submitted to the queue. Make a note of the Process ID.
- When complete, select the Process ID from the Government Reporting Process Search Results list.
- Click Diagnostics to review a list of status information and alerts regarding possible problems.
- Review the diagnostics and take appropriate action.
- Once all issues have been resolved, perform the Process Summary Diagnostic function again.

Creating a Greenshades Transmission File

Once the summary process has been completed, the next step is Create Transmission File. Create Transmission File must be completed for New Hire, Monthly, Quarterly, or Annual reporting. This process creates a compressed and encrypted XML file which is stored on the server (similar to a Direct Deposit transmission) and later transmitted to Greenshades.

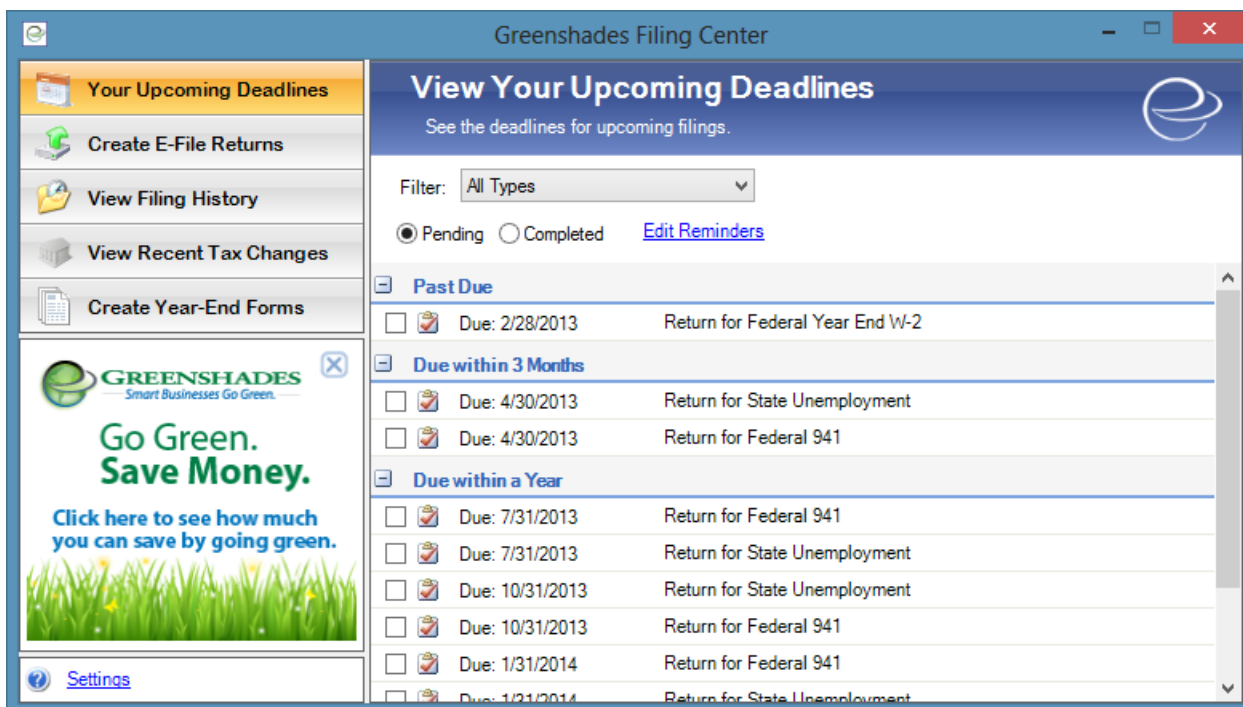
- Go to Financials -> General -> Government Reporting -> Create Transmission File.
- Select the Corporation, Reporting Type (Monthly, Quarterly, Annual, New Hire), and enter the reporting dates.
- Click Confirm. The Transmission File is then submitted to the queue. Make a note of the Process ID.
- Once complete, an XML file is created and stored on the server (similar to a Direct Deposit transmission).
- An email is sent to the designated client contact with a compressed and encrypted file folder and contents.
- Open and save the Transmission File to a location/directory on the local machine or network.

Transmitting a Greenshades File

Once the XML File has been saved, it is ready to be transmitted to Greenshades.

- Open the Adapt Report Transmitter from the computer's Start menu.
- Browse to the location of the XML file.
- Enter the location for the Greenshades software on the local computer by clicking Select. (This step is only necessary the first time; after that, the path will default.)
- Click OK.
- Enter the Greenshades Registration Key when prompted. (This step is only necessary the first time; after that, it is defaulted.)
- The data contained in the XML is uncompressed and un-encrypted then uploaded into the Greenshades Filing Center.
- If prompted, allow any updates to install. After updates install, the window closes. Repeat the steps of selecting Start -> Adapt Report Transmitter, browse to locate the XML file, and select the location for the Greenshades software.
- When the process completes, the Greenshades Filing Center opens. A "Welcome to the Greenshades Center" overview screen may display; review this screen then close it in order to view the Greenshades Filing Center.

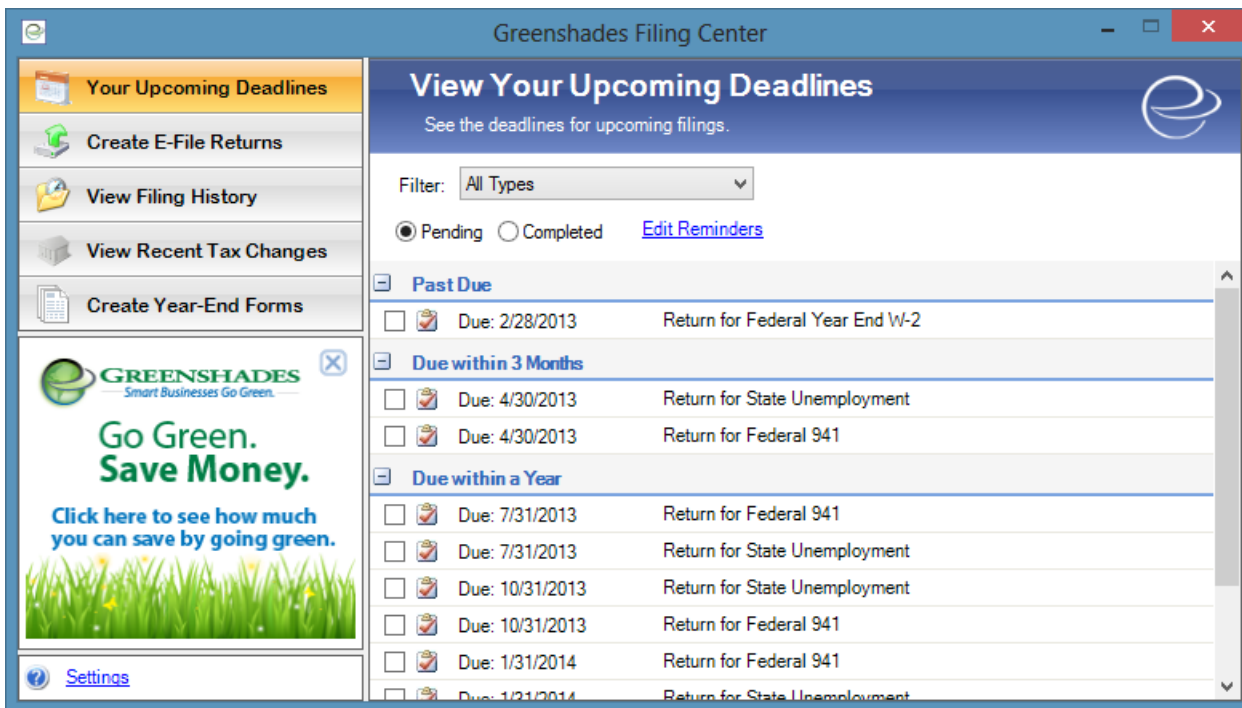
Once the window below appears, you are ready to begin the e-File process.



Creating a SUTA e-File

Greenshades does not make any calculations to produce the electronic file but instead relies on the data being pulled from the source accounting package. It is important to review the data being extracted for validity before submitting e-Files. There are some things to note about the e-File that is being created. State tax reporting agencies do not accept negative values in the electronic files. Reporting of negative wages or requests for a credit must be performed separately from creating the e-File and must be created outside of Greenshades. Greenshades encourages online filing whenever available, but will make information regarding filing on CD/diskette available for states that still support it or do not support online filing.

Use the **Create E-File Returns** option to create electronic quarterly SUTA files. Begin by clicking **Create E-File Returns** on the main Greenshades Filing Center page.



On the **Select Files To Build** screen, in the **Filter** field, select **SUTA**

Greenshades will display a list of the states that require SUTA reporting for which data exists.

Greenshades Filing Center

Select Files to Build

Check the Build box for each file you wish to build.

Filter: Suta Select All

Electronic File	Status	Method	Build?
IL - Suta	Awaiting Creation	Internet	☐
IL - Suta (CSV)	Awaiting Creation	Internet	☐
IN - Suta	Awaiting Creation	Internet	☐
KY - Suta	Awaiting Creation	Internet	☐
MI - Suta	Awaiting Creation	Internet	☐

☐ Check here if you would like the ability to edit your data prior to creating your electronic file (Advanced).

< Back Next >

Useful Links:
[IRS Business Home](#)
[SSA Business Home](#)
[Settings](#)

For the state whose e-File is to be created, make a selection in the following fields:

- **Submission Method:** Select either Internet or Media.
 - Depending on the state's requirements, SUTA can either be filed through the internet or on media (sending a disk or CD).
- **Build:** Click to select the Build box.
- **Check Here If You Would Like The Ability To Edit Your Data Prior To Creating Your Electronic File (Advanced).** Check this box at the bottom of the screen to preview and edit your SUTA data prior to submitting the e-File.

Once selections have been made in all fields for the selected state, click **Next**.

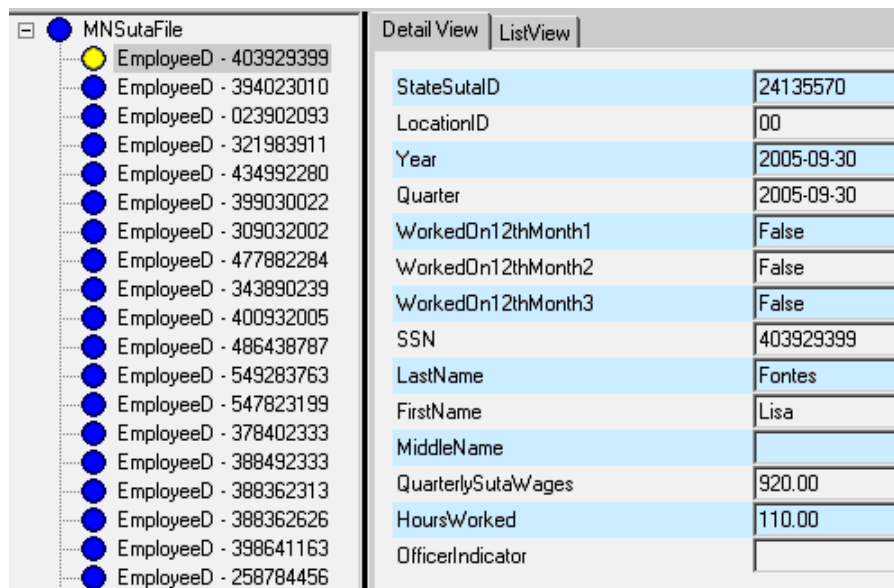
Advanced Editor (optional)

If the “Check Here If You Would Like The Ability To Edit Your Data Prior To Creating Your Electronic File (Advanced)” button was selected on the previous screen, a screen similar to the one below will be displayed.

The Advanced Editor screen provides the ability to validate the SUTA data prior to submitting the e-File.

NOTE: while the Advanced Editor allows SUTA data to be revised within Greenshades, changes made here will not be reflected within Adapt. Adapt recommends that data be revised within Adapt and a new Greenshades file created and uploaded into Greenshades.

Most fields can be edited. Select any employee to review the specific data for that one employee. Additional employee rows can be added by right clicking on any row and selecting the ‘Add Row’ option, providing the ability to include employees who have not yet been entered into Adapt. Again, keep in mind that these changes do not update Adapt, 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 Adapt.

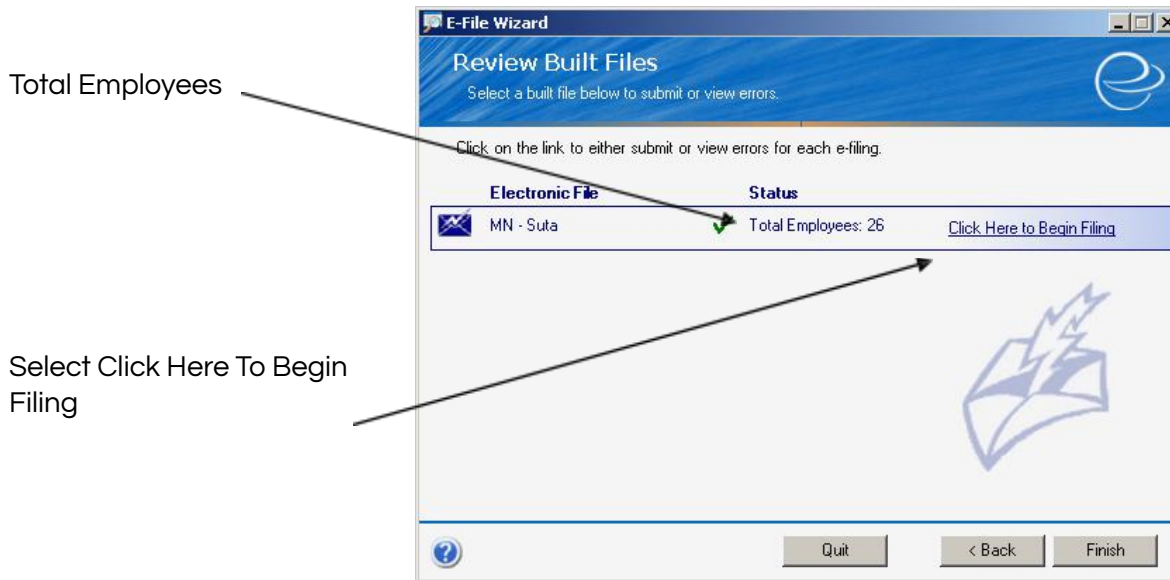


The screenshot displays the 'Advanced Editor' interface. On the left, a tree view under 'MNSutaFile' lists 20 employees, each with an 'EmployeeD' number. The first employee, 'EmployeeD - 403929399', is selected. On the right, the 'Detail View' tab is active, showing a form for the selected employee's SUTA data. The fields and their values are as follows:

Field	Value
StateSutaID	24135570
LocationID	00
Year	2005-09-30
Quarter	2005-09-30
WorkedOn12thMonth1	False
WorkedOn12thMonth2	False
WorkedOn12thMonth3	False
SSN	403929399
LastName	Fontes
FirstName	Lisa
MiddleName	
QuarterlySutaWages	920.00
HoursWorked	110.00
OfficerIndicator	

Once review of the SUTA data is complete, select ‘File’ then ‘Done Editing.’ To cancel any changes, select ‘Discard Changes.’

If the **“Check Here If You Would Like The Ability To Edit Your Data Prior To Creating Your Electronic File (Advanced)”** button was not selected on the Select Files To Build screen or once the Advanced Editor screen is closed, a screen similar to the one below will be displayed.



View Totals

View Totals is an assessment screen providing detailed totals for final review before the e-File submission. The options are:

- **View Details:** Use this option to export 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:** This option prints the total screen.
- **Save Totals:** This option allows the total screen to be saved in an HTML format that can be viewed at a later date in Internet Explorer.
- **Save E-File:** 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.

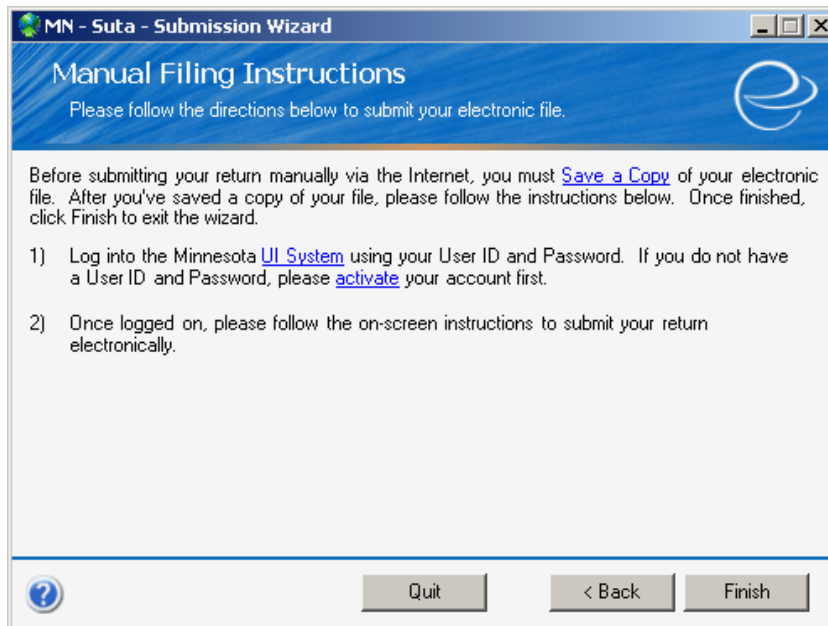
Overall Totals	
Total Employees	26
Total Suta Quarterly Wages	\$44,080.63

Employees Month 1: 4

Once the data has been reviewed, click **Next**.

While some states offer 'automatic' internet filing (think "one-click filing"), most states have their own website and instructions for manually uploading the 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 the 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 the page. Note, the **Save E-File** from the previous screen and **Save a Copy** on this screen produce the same E-File, so it is only necessary to save it once.

Follow the provided instructions and links to upload the e-file. These instructions can vary from state to state so be sure to follow the steps closely.

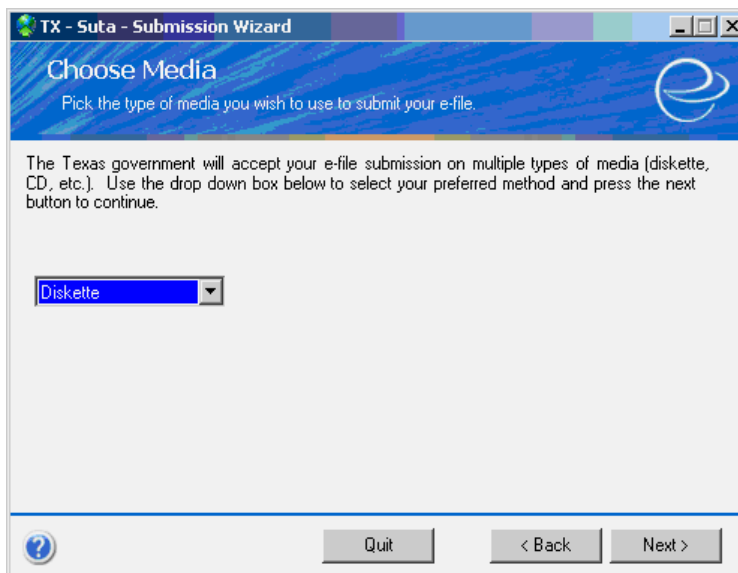


Click **Finish** here, then once again from the **Review Build Files** screen.

Congratulations! The SUTA e-File has been completed for the selected state. If SUTA must be filed for other states, return to the **Select Files To Build** screen and repeat the steps above.

Save E-File To Media

If the state for which the SUTA e-File was created does not accept files via internet submission, save the e-File to disk or CD and mail it to the state. The Greenshades Center will automatically detect any drives installed on your computer; select the desired drive from the dropdown menu. Once the drive has been selected, click **Save**.



Print Labels

Greenshades provides the information for labelling the diskette or CD as well as the mailing address. Select and copy the information into a program that can print diskette and mailing labels or complete the labels by hand via pen-and-ink.

TX - Suta - Submission Wizard

Print Labels
Print the labels for your file and envelope.

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 print 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
[NOT AVAILABLE]

Mailing Label
Controller Department
P.O. Box 149037
Austin, TX 78714-9037

Quit < Back Next >

Transmittal Forms

Some states require transmittal letters to be included with the disk or CD. If the state being filed requires a transmittal letter, Greenshades will provide a link to the form.

TX - 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.

Texas Magnetic Media Transmittal

The form can be found near the end of the document listed below.

[Magnetic Media Reporting Specifications Manual](#)

To work with Greenshades' partially completed version of the form, click below:

[Partially Completed Form](#)

Quit < Back Next >

Congratulations! The SUTA data has been successfully created and saved to media. Ensure it is properly labeled and packaged before mailing.

Social Security Number Verification

Greenshades provides the ability to verify Social Security Numbers through the Social Security Administration. After clicking on the Create E-file Returns option, the screen below will appear. Select one of the three options:

1. Yes, verify employee info
2. No, not at this time
3. No, never ask me again

Click **Next**.

The screenshot shows a web application window titled "Greenshades Filing Center". On the left is a sidebar with navigation links: "Your Upcoming Deadlines", "Create E-File Returns" (highlighted in orange), "View Filing History", "View Recent Tax Changes", "Create Year-End Forms", "Useful Links" (with sub-links for "IRS Business Home" and "SSA Business Home"), and "Settings". The main content area is titled "Employee Identity Verification" and includes the instruction: "Read the information below to decide if you wish to verify the identity of your employees." It asks: "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?" Below this, it states: "The process of verifying names and SSNs is performed free of charge. If inconsistencies are found, you will later be given the option to pay a small, per-employee fee for the detailed report." To the right of the text is a graphic of a Social Security card for "JOHN DOE" with SSN "000 00-0000". Three radio button options are provided: "Yes, please verify my employee information. I agree to the 'Terms of Use.'", "No, do not verify my employee information at this time." (which is selected), and "No, do not verify my employee information now and never ask me again." At the bottom right are "< Back" and "Next >" buttons.

If **No** is selected above, the system will proceed to the e-filing screen. If **Yes** is selected, the following screen will display.

E-File Wizard

Verifying Employees

Your employee information is now being verified

I wish to verify employee information for:

Verify

All Employees Hired After
All Active Employees
All Employees Hired After
Employees with W2 Wages

6/14/2006

Collecting Employee Information...

Verifying Employees...

Quit < Back Next >

Choose the employees for which to check Social Security Numbers by selecting from the three options. If invalid Social Security Numbers are found, Greenshades charges a small fee to display the names of the employees.