

New Hire Reporting for Adapt & Greenshades

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Introduction

The New Hire Reporting for Adapt & Greenshades guide is intended for the user who prepares and submits New Hire reports to the state(s). New Hire reporting in Adapt is managed through an integration with Greenshades Software. This guide should be used as a reference when completing the New Hire reporting cycle within Adapt and Greenshades.

Included within this guide is the following helpful information:

- **Checklist for New Hire Reporting** which lists the necessary steps involved in new hire reporting.
- **Adapt State Fields** lists the fields within Adapt that may need to be completed, based on the specific requirements of your state tax authorities.
- **Installing Greenshades Software** provides instructions for installing the software on the user's local workstation.
- **Transmitting a Greenshades File** provides instructions for creating a file of new hire data and transmitting it to Greenshades.
- **Creating a New Hire e-File** describes the process, in Greenshades, of reviewing the new hire data then submitting New Hire reports to the state.

CheckList for New Hire Reporting

1. Confirm the accuracy of the fields detailed on Page in [Adapt State Fields](#).
2. If you do not already have Greenshades software installed on the workstation that will be used to transmit new hire reporting data, follow the directions [here](#).
3. Create a Greenshades Transmission file. Follow the instructions [here](#).
4. File New Hire reports following the directions [here](#).

Note: If you have new hires in multiple states, the data within the Greenshades file will reflect that.

Adapt State 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

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 Team..

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.

<https://www.greenshades.com/tax-filing-center-download/>

Getting Started

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

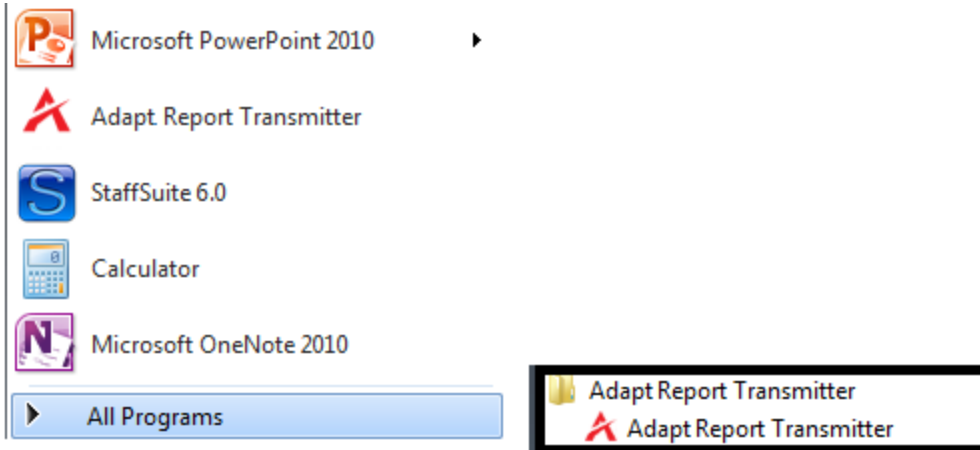
Once the package is downloaded, initiate the install by selecting the setup.cmd file.

Make note of the installation location for Greenshades Center.

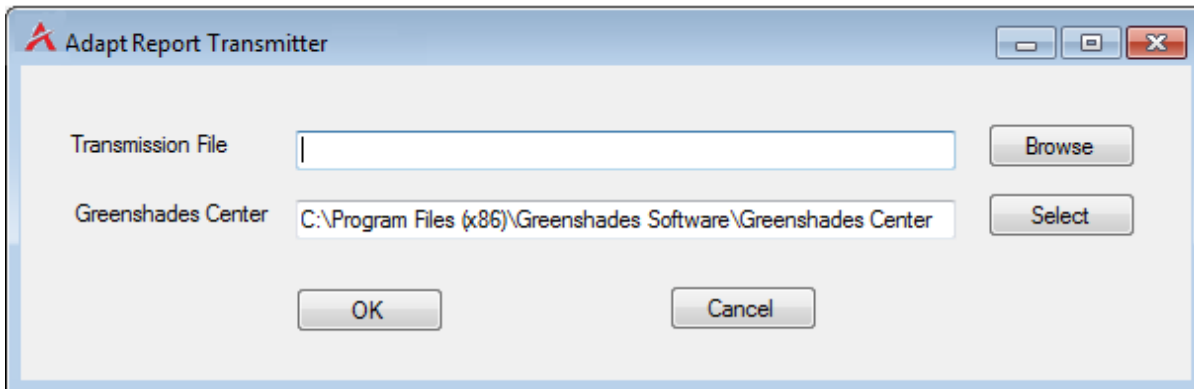
Name	Date modified	Type
 GreenshadesCenterForAdapt.msi	5/6/2013 6:01 PM	Windows Installer ...
 ReportingTransmitter.msi	5/24/2013 1:04 PM	Windows Installer ...
 setup.cmd	5/8/2013 10:38 AM	Windows Comma...

Launching the Adapt Report 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 Greenshades Transmission File

The next step in the New Hire Reporting process is to *Create Transmission File*. 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. This file contains New Hire data for all states.

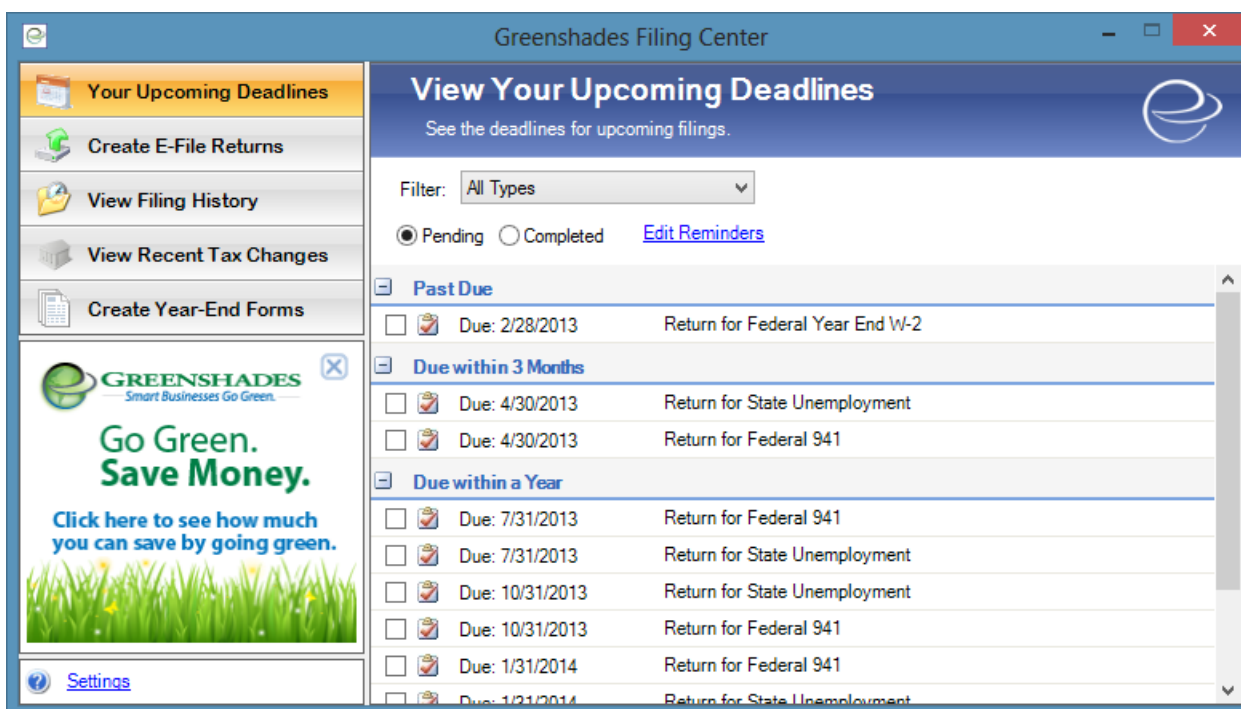
- Go to Financials -> General -> Government Reporting -> Create Transmission File.
- Select the Corporation, Reporting Type of New Hire, and enter the reporting dates.
- Click Confirm. The Transmission File is then submitted to the queue. Make a note of the Process ID.
- Once complete, an XML file is 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.

Uploading a Greenshades Transmission File

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

1. Open the Adapt Report Transmitter from the computer's Start menu.
2. Browse to the location of the XML file.
3. 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.)
4. Click OK.
5. Enter the Greenshades Registration Key when prompted. (This step is only necessary the first time; after that, it is defaulted.)
6. The data contained in the XML is uncompressed and unencrypted then uploaded into the Greenshades Filing Center.
7. If prompted, allow any updates to install. After updates are installed, 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.
8. 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.

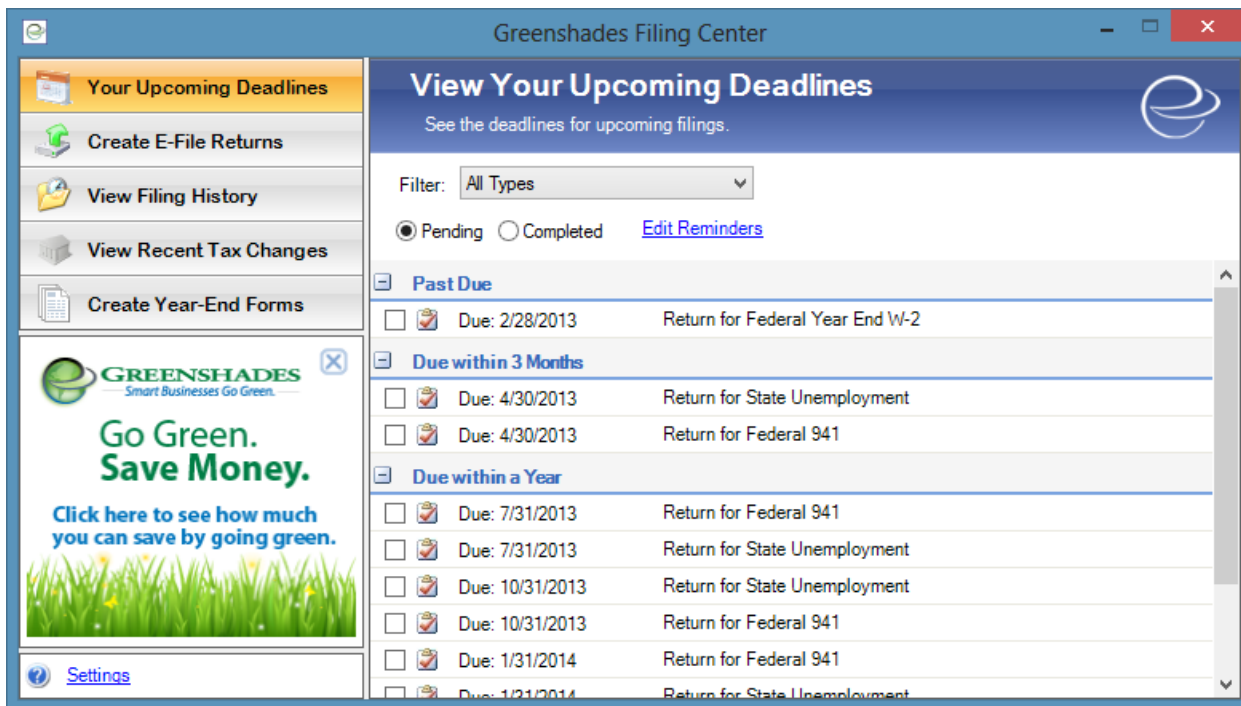
Once the window below appears, you are ready to begin the e-File process.



Creating a New Hire 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. 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 New Hire Reporting 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 **NEW HIRE**.

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

Note: a New Hire Reporting file will display for each state in which New Hire data existed in the transmission file you uploaded. However, the data in each of those files is identical; each file contains data for all New Hires for the reporting period. You may file to each state or to a single state, depending on your registration with the states.

Select Returns to File
Check the Build box for each file you wish to create and click 'Next'.

Filter: New Hire Select All

Electronic Return	Status	Method	Build?
DC - New Hire	Awaiting Creation	Internet	☐
MD - New Hire	Awaiting Creation	Internet	☐
MS - New Hire	Awaiting Creation	Internet	☐
OH - New Hire	Awaiting Creation	Internet	☐

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

Quit < Back Next >

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, New Hires 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 New Hire data prior to submitting the e-File.

Select Returns to File
Check the Build box for each file you wish to create and click 'Next'.

Filter: New Hire Select All

Electronic Return	Status	Method	Build?
DC - New Hire	Awaiting Creation	Internet	☐
MD - New Hire	Awaiting Creation	Internet	☒
MS - New Hire	Awaiting Creation	Internet	☐
OH - New Hire	Awaiting Creation	Internet	☐

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

Quit < Back Next >

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 New Hire data prior to submitting the e-File.

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. 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.

Edit your MD - New Hire information

Select a company: LW-Midwest Corporation

▲ Company Information [Expand Section](#)

▼ Employee Information

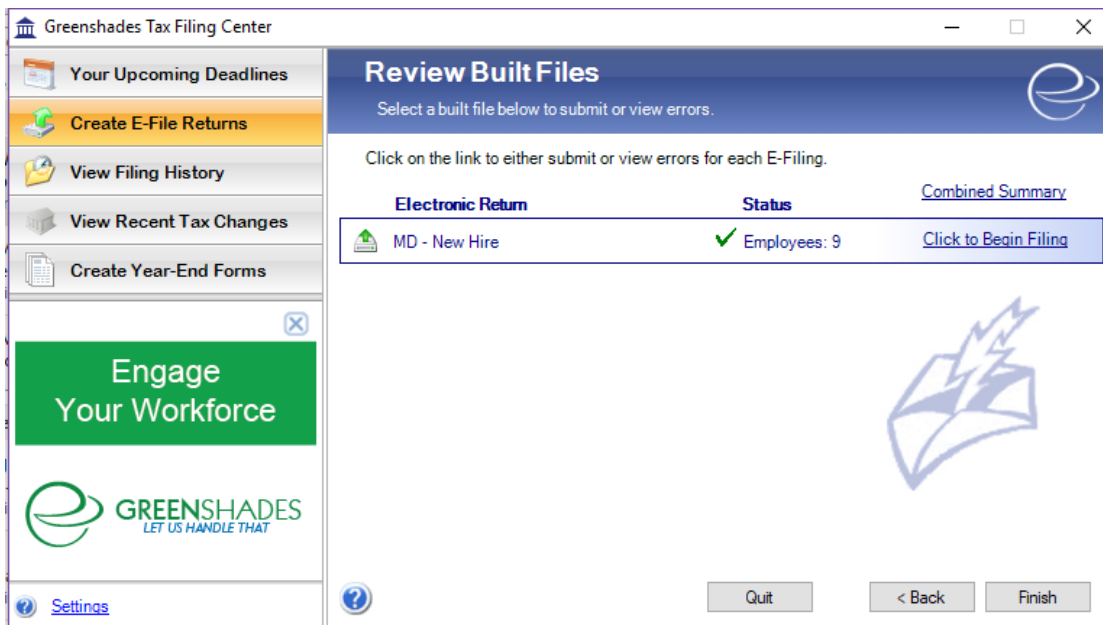
Export to Excel

First Name	Middle Name	Last Name	SSN	Address3	County Code	Country Code	Address1	Address2	City	State	Zip	Zip Extension
Non-Res	N.	Maryland	665-22-5887			US	4452 Maple Ave.	Apt. 222	Silver Spring	MD	20910	
Mary		Landers	554-11-5887			US	6123 North Main Street, Apt. 33F		Silver Spring	MD	20910	
Mary		Bi-Weekly	541-88-7889			US	6123 North Main Street, Apt. 36F		Silver Spring	MD	20910	
Mary		Semi-Monthly	425-15-2114			US	6123 North Main Street, Apt. 46F		Silver Spring	MD	20910	
Mary		Quarterly	521-54-2158			US	6123 North Main Street, Apt. 86F		Silver Spring	MD	20910	
Missy		Sippi	426-68-4759			US	6123 North Main Street, Apt. 321F		Jackson	MS	39204	
Missy		Daily	754-15-4778			US	6123 North Main Street, Apt. 221F		Jackson	MS	39204	
Missy		Monthly	120-33-0225			US	6123 North Main Street, Apt. 111F		Jackson	MS	39204	
Missy		Semi-Annual	334-66-7884			US	6123 North Main Street, Apt. 121F		Jackson	MS	39204	

Cancel Save and Close

Once review of the New Hire data is complete, select ‘Save and Close.’ To cancel any changes, select ‘Cancel.’

On the Review Built Files screen, select **Click To Begin Filing**.



While some states offer 'automatic' internet filing (think "one-click filing"), other 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.

Note: The instructions below will vary based on the current requirements of the state for which you are reporting.



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

Congratulations! The New Hire e-File has now been completed for the selected state.

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**.