

E-Filing (W2's, 1099's, 1094's and 1095's) with Shelby Financials and Nelco

Welcome

Please take a moment to locate the Zoom Webinar controls. Feel free to say hello or ask a question using the Q & A feature.

What we'll cover today...

How to E-File with Nelco...

- 1099s
- W2's
- 1094s and 1095s (ACA Reporting)

E-file Threshold Change

Proposed IRS regulations were released last year, recommending that the **e-file threshold for information returns be lowered from 250 to 100** for Tax Year 2021.

This new regulation includes the total for all aggregated forms filed.

- Taxpayer First Act allows IRS / SSA to lower threshold:
 - Allowed to drop to 10 for Tax Year 2022.
 - Formal regulations released last year, but not yet with final approval.

For more information: www.NelcoSolutions.com/E-File-Threshold

Nelco's E-file Services

- Meets all IRS and State E-file requirements
- Completely paperless solution
- Covers all year-end form types

Before E-filing

- Check that your information is accurate!
- Run an Edit Report for both 1099's and w-2's and verify ...
 - Name
 - Address
 - Social Security or EIN
 - Wages/Non-Employee Compensation Amounts
 - Taxes (State and Local if applicable)
- We've included a Help Document if you find you need to make any changes before E-filing.

How to run a 1099 Edit Report

- Accounts Payable > Reports > 1099
- Most customers will use Type NEC (Non-Employee Compensation).
- Enter as shown.
- Click Run Report.

FILTERS	COMPANY IN	OPTIONS	ELECTRONIC FILE INFO			
	Calendar Year	2022 🕶				
	Companies	Not Filtered		▼		
	Report Type	Edit List	v 6	Use Combine	d Federal/State Filing Program	?
		☐ Include Address?				
	Туре	NEC 🗸				
		Print Only Vendors	s Meeting Minimum Dollar	Amounts?		
Mini	mum Amounts					
	Interest	\$0.00	Miscellaneous Box 1	\$0.00	Miscellaneous Box 2	\$0.00
	Retirement	\$0.00	NEC	\$600.00	Reset Minimums	

1099 Edit Report

- Verify the Name, Address,
 Social Security or Federal ID,
 and Amounts are correct.
- If you need to make any corrections, please see the Help Document provided in the Chat box and at the end of this presentation.

1099 Edit List - NEC 1 First Church Calendar Year 2021

<u>Vendor</u> Anders, Grace (#31) 6036 Ivawood Dr Bartlett TN 38134-5560	<u>Federal ID</u> 294-78-1245	<u>Amount</u> \$700.00	Box # NEC 1
Astaire, Fred (#40) 1133 Gordon St Memphis TN 38122-2050	293-67-0849	\$610.00	NEC 1
Barnes, George (#48) 6036 Ivawood Dr Bartlett TN 38134-5560	408-78-4589	\$700.00	NEC 1
Severinsen, Doc (#175) 9110 Valkrie Ln Lakeland TN 38002-9228	545-23-1045	\$625.00	NEC 1
Totals: (4 vendors printed)		\$0.00 \$2,635.00	NEC 1



Run the 1099 E-File for Nelco

• Change the report type to E-File Service and click Run Report.

FILTERS COMPAN	NY INFO OPTIONS	ELECTRONIC FILE INFO			
Calendar	Year 2022 ∨				
Compa	Not Filtered		_		
Report	Type Use E-File Service	v •	Use Combine	d Federal/State Filing Program	?
	Type NEC ✓				
	Print Only Vendor	s Meeting Minimum Dollar A	Amounts?		
Minimum Amo	ounts				
Inte	erest \$0.00	Miscellaneous Box 1	\$0.00	Miscellaneous Box 2	\$0.0
Retirer	ment \$0.00	NEC	\$600.00	Reset Minimums	

Filing Home How It Works Help Manage Account

Create an Account or Login



SHELBY SYSTEMS E-FILE ACCOUNT LOG IN

shelby**systems**.

Enter your Log In information to access your Shelby Systems E-File account and begin filing.

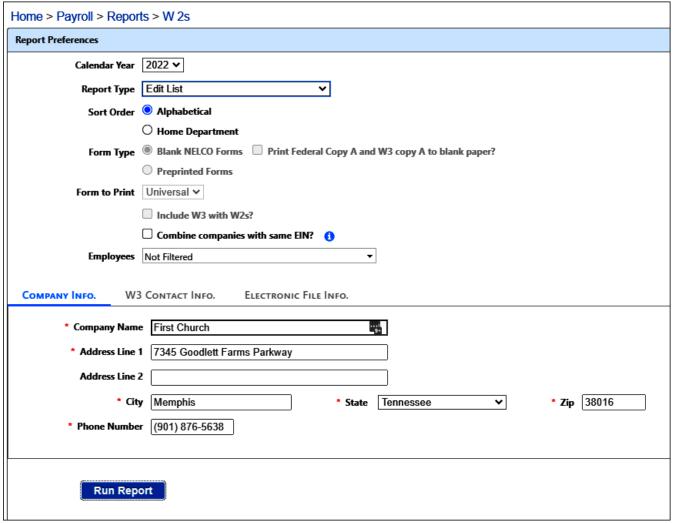
Either you are logged out, or your session has expired. Please login to Shelby Systems E-File in order to continue to fill out tax forms.

Email: Password:	···I LOGIN	
-	Forgot Password Create Account	

Payroll > Reports > W-2s

How to run W-2 Edit Report

- Enter as shown.
- Click Run Report.





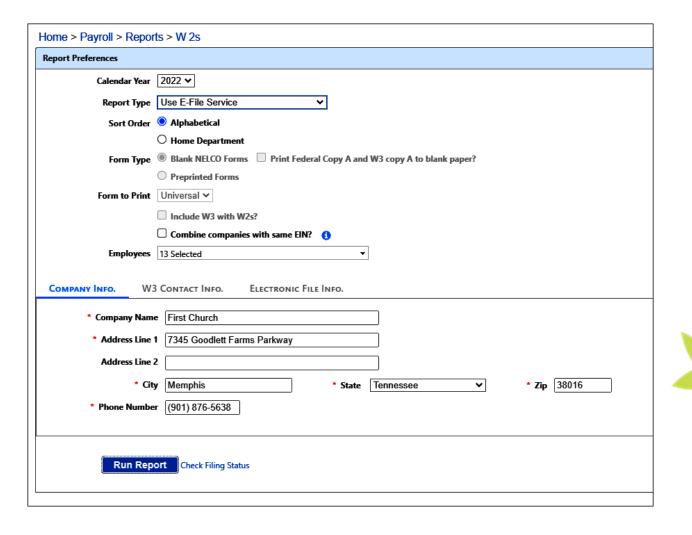
W2 Edit Report

- Verify the Name, Address,
 Social Security and Amounts are correct.
- If you need to make any corrections, please see the Help Document provided in the Chat box and at the end of this presentation.

Edit List Of W2s Company#: 1 Name: First Church					
Company#: 1 Marne: First Church Calendar Year 2022					
alelidar fear 2022					
Employee		Box	Amount	Box	Amoun
Jim Anderson 400 Market Blvd Collierville TN 38017-6516		_		_	
	256-84-9874	1	\$3,672.00	2	\$150.0
		3	\$4,080.00	4	\$252.9
			\$4,080.00	6	\$59.1
		12E	\$408.00		
Rebecca Atlas 6001 Cottage Hill Dr Millington TN 38053-811	9				
	526-85-9345	1	\$1,824.00	2	\$0.0
		3	\$1,824.00	4	\$113.1
		5	\$1,824.00	6	\$26.4
	State CA	Wages	\$1,824.00	Tax	\$0.0
Sill Black 6476 Stone Lake Dr Bartlett TN 38135-2578					
	106-58-5369	1	\$12,821,16	2	\$0.0
		12E	\$60.00		
		14Auto allowanc	\$1,725.00	14Housing allow	\$6,000.0
Blake Edwards 1025 Crosswinds Cv Collierville TN 38017-86	19				
	425-08-7777	1	\$8,649,94	2	\$727.1
	30 ****	3	\$8,649.94	4	\$536.2
		5	\$8,649.94	6	\$125.4
	State WA	Wages	\$8,649.94	Tax	\$0.0
Matt Hascher 201 Poplar Ave Memphis TN 38103-1945					

Run the W2 E-File for Nelco

- Change the report type to E-File Service and click Run Report.
- To check on previously submitted E-Filings, click the Check Filing Status link.





Filing Home How It Works Help Manage Account

Create an Account or Login



shelby**systems**.

Enter your Log In information to access your Shelby Systems E-File account and begin filing.

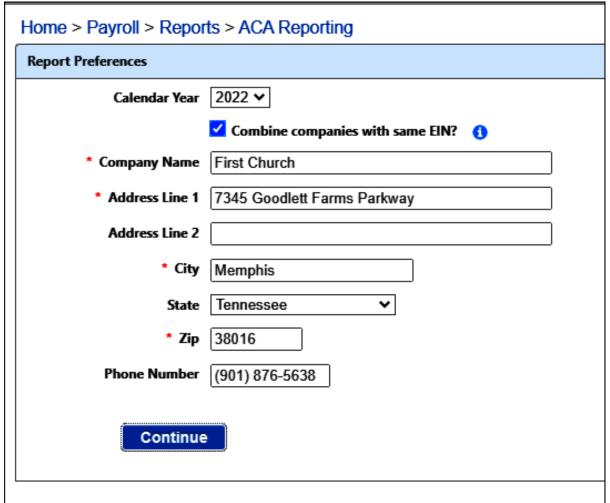
Either you are logged out, or your session has expired. Please login to Shelby Systems E-File in order to continue to fill out tax forms.

Email:		
Password:	··· LOGIN	
	Forgot Password	

Create Account

How to run a 1094s and 1095s

- Payroll > Reports > ACA
 Reporting
- Click Continue and you'll be redirected to the ACA website.

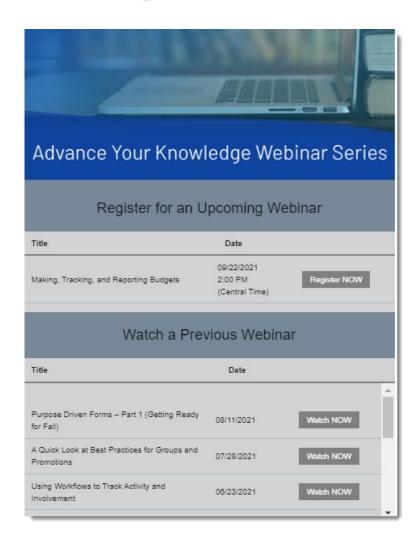




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Working to Make Your Organization More Recession Resistant

Date: 11/16/2022

Time: 3pm E/2pm C/12pm P

Led by:

Mark Crain (Staff Trainer) and Kristen Foster (Giving Success)

Sign up today!