

The background of the slide features a blurred image of a laptop on the left and a stack of several books on the right. The overall color scheme is light blue and white, with a bokeh effect from light sources in the background.

SHELBY SYSTEMS®

Advance Your Knowledge

Webinar Series

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 recently released 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:**
 - Most likely dropping to **100 for Tax Year 2021 returns**
 - Allowed to drop to **10 for Tax Year 2022**
 - Formal regulations released (pending final approval)

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

E-file Threshold Change

The e-file threshold would no longer apply per form type, but rather filers that have a **combined total of 100 or more** information returns would be required to electronically file all information returns.

Example:

65 W-2's

53 1095-C Forms

+ 10 1099 Forms

118 total Forms = E-file required for ALL form types

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.

Home > Accounts Payable > Reports > 1099s

Report Preferences

FILTERS OPTIONS ELECTRONIC FILE INFO

Calendar Year

Report Type ⓘ Use Combined Federal/State Filing Program?

Include Address?

Type

Print Only Vendors Meeting Minimum Dollar Amounts?

Minimum Amounts

Interest	<input type="text"/>	Miscellaneous Box 1	<input type="text"/>	Miscellaneous Box 2	<input type="text"/>
Retirement	<input type="text"/>	NEC	<input type="text" value="\$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>	<u>Federal ID</u>	<u>Amount</u>	<u>Box #</u>
Anders, Grace (#31) 6036 Ivawood Dr Bartlett TN 38134-5560	294-78-1245	\$700.00	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)		<hr/> \$0.00 \$2,635.00	<hr/> NEC 1

Run the 1099 E-File for Nelco

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

[Home](#) > [Accounts Payable](#) > [Reports](#) > [1099s](#)

Report Preferences

FILTERS OPTIONS ELECTRONIC FILE INFO

Calendar Year

Report Type ⓘ Use Combined Federal/State Filing Program?

Type

Print Only Vendors Meeting Minimum Dollar Amounts?

Minimum Amounts

Interest	<input type="text"/>	Miscellaneous Box 1	<input type="text"/>	Miscellaneous Box 2	<input type="text"/>
Retirement	<input type="text"/>	NEC	<input type="text" value="\$600.00"/>	Reset Minimums	

Create an Account or Login

shelbysystems.

Filing Home How It Works Help Manage Account

SHELBY SYSTEMS E-FILE ACCOUNT LOG IN

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:

[Forgot Password](#)

[Create Account](#)

How to run W-2 Edit Report

- Payroll > Reports > W-2s
- Enter as shown.
- Click Run Report.

Home > Payroll > Reports > W 2s

Report Preferences

Calendar Year

Report Type

Sort Order Alphabetical
 Home Department

Form Type Blank NELCO Forms Print Federal Copy A and W3 copy A to blank paper?
 Preprinted Forms

Form to Print

Include W3 with W2s?

Employees

COMPANY INFO. W3 CONTACT INFO. ELECTRONIC FILE INFO.

* Company Name

* Address Line 1

Address Line 2

* City * State * Zip

* Phone Number

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					
Calendar Year 2021					
Employee		Box	Amount	Box	Amount
Jim Anderson 400 Market Blvd Collierville TN 38017-6516					
	256-84-9874	1	\$27,540.00	2	\$1,117.72
		3	\$30,600.00	4	\$1,897.20
		5	\$30,600.00	6	\$443.70
		12E	\$3,060.00		
Rebecca Atlas 6001 Cottage Hill Dr Millington TN 38053-8119					
	526-85-9345	1	\$5,520.00	2	\$0.00
		3	\$5,520.00	4	\$342.24
		5	\$5,520.00	6	\$80.04
	State CA	Wages	\$5,520.00	Tax	\$0.00
Bill Black 6476 Stone Lake Dr Bartlett TN 38135-2578					
	106-58-5369	1	\$49,619.79	2	\$0.00
		12E	\$250.00		
		14Auto allowanc	\$6,770.83	14Housing allow	\$24,500.00
Blake Edwards 1025 Crosswinds Cv Collierville TN 38017-8619					
	425-08-7777	1	\$27,083.31	2	\$2,682.93
		3	\$27,083.31	4	\$1,679.19
		5	\$27,083.31	6	\$392.69
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.

Home > Payroll > Reports > W 2s

Report Preferences

Calendar Year: 2021

Report Type: Use E-File Service

Sort Order: Alphabetical
 Home Department

Form Type: Blank NELCO Forms Print Federal Copy A and W3 copy A to blank paper?
 Preprinted Forms

Form to Print: 2 Up

Include W3 with W2s?

Employees: Not Filtered

COMPANY INFO. W3 CONTACT INFO. ELECTRONIC FILE INFO.

* Company Name: First Church

* Address Line 1: 7345 Goodlett Farms Parkway

Address Line 2:

* City: Memphis * State: Tennessee * Zip: 38016

* Phone Number: (901) 876-5638

Run Report Check Filing Status

Close Report

Create an Account or Login

shelbysystems

Filing Home How It Works Help Manage Account

SHELBY SYSTEMS E-FILE ACCOUNT LOG IN

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:

[Forgot Password](#)

[Create Account](#)

How to run a 1094s and 1095s

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

Home > Payroll > Reports > ACA Reporting

Report Preferences

Calendar Year

Combine companies with same EIN? ⓘ

* Company Name

* Address Line 1

Address Line 2

* City

State

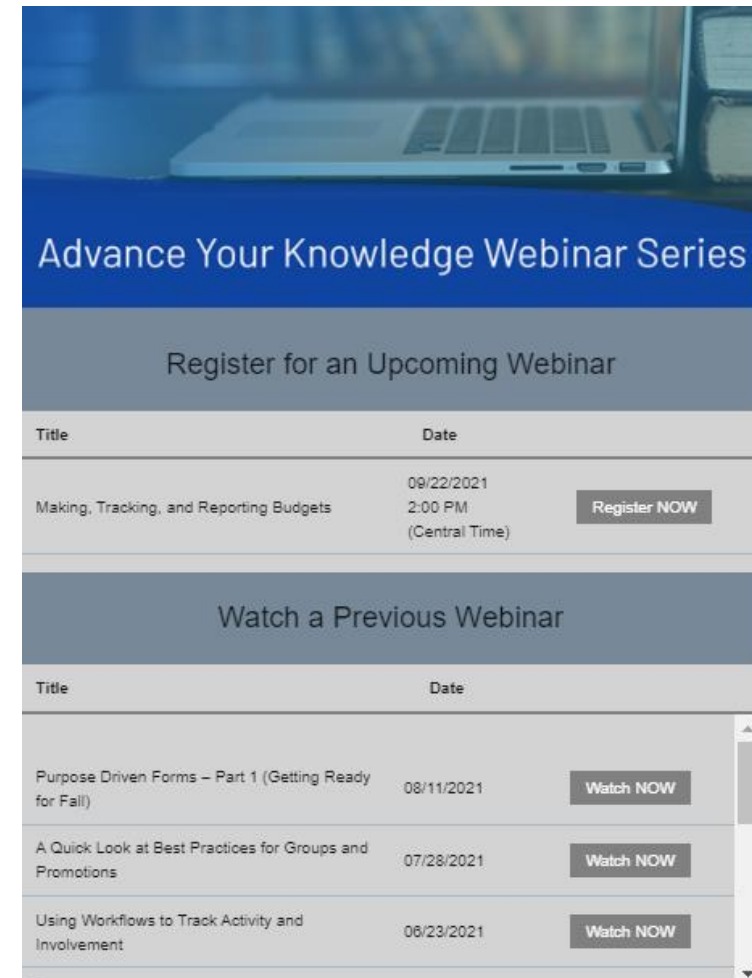
* Zip

Phone Number

Where can I watch this video again?

**Watch or Register to attend
Webinars**

@ Community.Shelbysystems.com



Advance Your Knowledge Webinar Series

Register for an Upcoming Webinar

Title	Date	
Making, Tracking, and Reporting Budgets	09/22/2021 2:00 PM (Central Time)	Register NOW

Watch a Previous Webinar

Title	Date	
Purpose Driven Forms – Part 1 (Getting Ready for Fall)	08/11/2021	Watch NOW
A Quick Look at Best Practices for Groups and Promotions	07/28/2021	Watch NOW
Using Workflows to Track Activity and Involvement	06/23/2021	Watch NOW

Next “Advance Your Knowledge” Webinar

- Topic: Purpose Driven Forms - Part 2 (Giving, Events, and More)
- Date: October 27, 2021
- Time: 2:00 pm Central Time
- Led by: Mark Crain and Staci Sampson

Mark Crain and Staci Sampson return to continue covering just a few of the awesome tools available in your Forms. Some of the many things we will cover are using ticketing, sign up slots, setting early bird rates, creating events with a size limit, and digital signatures. It is not necessary to have seen **Purpose Driven Forms – Part 1** to attend this webinar, but you will certainly want to view both webinars to get all the tips and tricks possible.

[Click Here to Register](#)

Virtual Workshops are here!

- Enrollment is now open for November classes
- 4 days of online classroom instruction
- 3 hours each day
- Financial and Membership Workshops
- Detailed workbooks included
- Quizzes and discussion
- Lots of great ideas and skill building lessons



[Click Here to Register](#)

Questions about purchasing Financials or anything else



To have a representative contact you about Shelby Systems or Shelby Financials, open the camera on your phone and scan the QR code to the left or go to:

<https://www.surveymonkey.com/r/ShelbySys>