FILEGUARDIAN EOY FEATURES

W2/1099 DELIVERY SETTINGS AND MANAGEMENT TOOLS

SHUGO

GUARDING YOUR BUSINESS INFORMATION

COMPONENTS OF EMPLOYEE W2/1099 DELIVERY

Generation

- Creation of the employee specific W2/1099 delivery based on the W2 files received by FileGuardian

Release/ Delivery

- Release/delivery of the W2/1099 download email and link
  - Manual release – your team conducts the release
  - Automatic release – deliveries are ushered into the queue when the source W2/1099 file is received
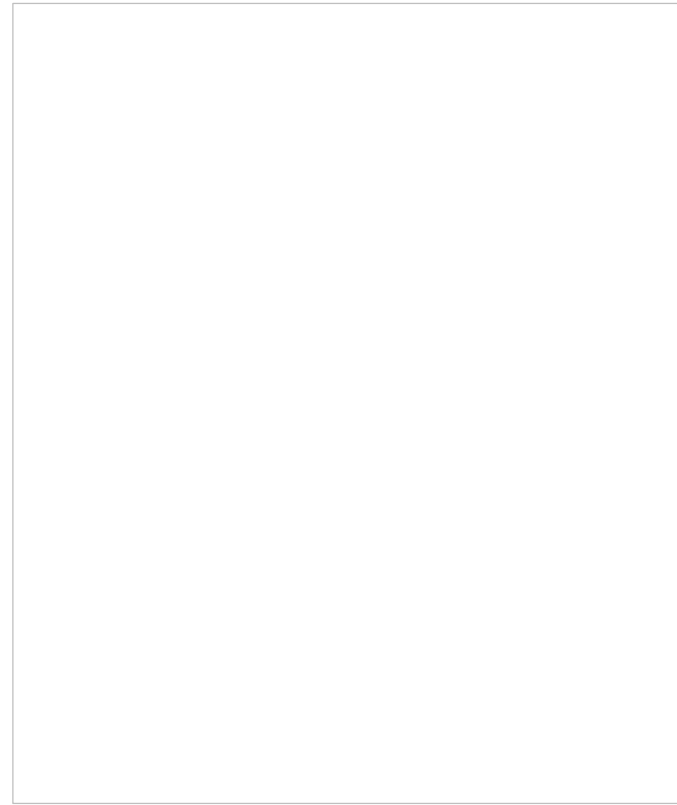
Note: When "released", emails will be scheduled for delivery at approximately 3 am EDT the next day.

RELEASE MODE

MANUAL

AUTOMATIC

STAGES OF EMPLOYEE W2/1099

	W2/1099 file sent to FileGuardian	Release to employees complete
Pending Generation		
Pending Delivery	✓	
Delivery Complete	✓	✓

EOY CHECKLIST

Path: FGX – Express \ EOY Checklist

1. Set your default EOY release setting
   - Defaulted to "Manual" for everyone

2. Define your W2/1099 retention policy
   - Default is seven years

3. Select your employee W2 & 1099 email templates
   - Can create new templates under My Account \ Branding
   - Tip: use the *|Year|* merge tag in your template

4. Activate the e-stuffer feature (if you want to use it)

E-STUFFERS

Prepend up to a 2 page PDF (500KB max) to employee W2s

E-Stuffer (page 1)

W2

EOY STATUS SCREEN

Allows for a "global" view of clients in the following stages:
- Pending generation
- Pending delivery
- Delivery complete

Allows for "batch" release of multiple clients
- What is "fully generated"?

  This means the count of W2s & 1099s generated is equal to the number of active employee rules defined.

EOY STATUS SCREEN

W2/1099 Employee Delivery Status

Search by client or #vc file name

Search for clients in a specific EOY status

Default Settings | EOY Status

Search by: PENDING GENERATION | PENDING DELIVERY | DELIVERY COMPLETE

Select All | Select All Full Generated | Deselect All

☐ DEMX Premier Sample
3 employee rules
3 documents generated

Green text denotes this client is "fully generated"
(# of ee rules = # of docs generated)

☐ Dem1 Test Two
2 employee rules
1 documents generated

Yellow text denotes this client is NOT "fully generated"
(# of ee rules != # of docs generated)

Why?
Were W2s processed but not 1099s?

Release Now

Select clients to "batch" release

THE DILEMMA

Situation

A single employee needs their W2 reprocessed for an address change

Your Hesitation

You've released W2s/1099s to all employees of the client already

What can you do now? Do you have to reprocess all W2s/1099s and disrupt all employees?

NO – you can selectively reprocess employees for reprocessing

REPROCESSING GOLDEN RULES

- If W2s/1099s have NOT been delivered
  - All existing generated employee W2s/1099s will be deleted and replaced with the latest version from the source W2/1099 file
  - W2/1099 deliveries will still be staged

- If W2s/1099s have been delivered
  - Only employees tagged will have their W2/1099 regenerated and delivered
  - Employees added since last W2/1099 generation will have W2s/1099s generated and delivered

STEPS WHEN REPROCESSING

1. Select the employees who require reprocessing

2. Regenerate W2s/1099s out of your payroll system

3. Tagged employees will have their newly generated W2s/1099s delivered the next morning

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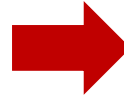Remember reprocessing is only required if W2s/1099s have been released to employees

HUB USERS

Path: HUB tab of an existing FGX rule

Reprocess tagging

NON-HUB USERS

Path: Employees tab of an existing FGX rule

W2/1099 Status

1. Generation
12/23/2012

2. Release Reprocess Tagging
12/24/2012

Initiates the reprocessing tagging

QUESTIONS

End of Year Knowledge Base Articles

ask@myshugo.com