

Net @ Work

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**Sage Forms & eFiling by
Aatrix**

About Sage Payroll Tax Forms and eFiling by Aatrix©

The Sage Payroll Tax Forms and eFiling by Aatrix© feature is included with Sage HRMS Payroll.

Sage Payroll Tax Forms and eFiling by Aatrix© enables you to file more than 330 state, provincial, and federal unemployment, withholding, and new hire reports from the data produced by Sage HRMS Payroll. You can print and mail the tax forms or eFile them. To ensure compliance, you will be prompted every quarter to download and install updated forms.

For a detailed overview and a price structure of the Sage Payroll Tax Forms and eFiling by Aatrix© options, visit our website here: <https://partner.aatrix.com/index.php/sage300erp>

Before you can use Sage Payroll Tax Forms and eFiling by Aatrix©, you must:

1. Make sure that you have entered a valid tax number (EIN) on the Company Profile window.
2. In Payroll Setup > Options, enter a valid EIN in the **Tax Number** field.
3. When you install or update Sage HRMS Payroll for Sage 300 ERP to the current version, your company will automatically be registered with Sage Payroll Tax Forms and eFiling by Aatrix© at no additional cost. Registration allows you to receive tax form updates and use the tax form service.

After you are registered, you can access your Sage Payroll Tax Forms and eFiling by Aatrix© tax forms from within Sage HRMS Payroll by selecting Payroll Government Reports > W-2 Tax Filing, Federal Tax Filing and/or State Tax Filing.

4. Once registered with Sage Payroll Tax Forms and eFiling by Aatrix©, each company or organization must be enrolled through the [Aatrix eFile Center](#) in order to use the eFiling service.

Using Sage 300 ERP eFiling powered by Aatrix

Streamline your tax reporting process with Sage 300 ERP Federal and State eFiling and Reporting. Eliminate manual form creation and save time by choosing from over 250 federal and state forms for Unemployment, Withholdings, New Hire reports, W-2s, W-3s, and 1099s. The electronic forms will look very familiar, as they are a replica of the government forms you would receive in the mail. Except the form that will appear on your screen won't be blank—much of the information will already be filled out for you by your Sage 300 ERP system. View and edit the information easily on your system, and once you've verified it's the way you want it, the form is ready to print or eFile. Once you eFile, you'll receive an email confirmation that the file was received. The form is processed and sent to the appropriate agency using an approved method. Going paperless has never been easier!

User Interface

Just **click** on the screenshot image to see a bigger version



W-2 and 1099 eFiling Service

Once you register with the eFile center, all your W-2 and 1099 filings can be completed easily, saving time and money. No more folding, stuffing, or mailing.

<https://partner.aatrix.com/index.php/sage300erp-w2-information>

Complete eFile Service

Our center will file your state and federal W-2s and 1099 and mail the employees' W-2s or contractor's 1099s directly to them. Or, save even more time and money and go completely green. Offer your employees their W-2s over a secured website. No more reprinting lost W-2s. Simply provide your employees their login information and they print their own. Your employees will have access to their W-2 information 24/7, anytime, anywhere they have an Internet connection.

W-2 eFile Pricing

Files fed W-2s, state W-2s, mails employee W-2s, and provides employee W-2s on-line.

Complete W-2 eFile Service

W-2s are automatically eFiled to the appropriate state and federal agencies and

\$1.95/employee

employee W-2s are mailed directly to your employees as well as posted to a secure website for immediate access.

Express W-2 eFile Service

Files Federal W-2s, State W-2s and provides employee W-2s on-line via a secure website.

\$0.99/employee

Fed & state

W-2s are eFiled to state and fed agencies

\$0.69/employee

Fed only

eFile fed W-2s and fed W-3

FREE

State only

eFile state W-2s and corresponding state W-3

\$0.69/employee

Local W-2 eFile Service

eFile supported local W-2s alone or in combination with any eFile option

\$0.69/employee

\$24.95 minimum applies to all W-2 filings.

Quarterly, Annual, New Hire, and Payment eFile Pricing

Any Report for only \$7.95

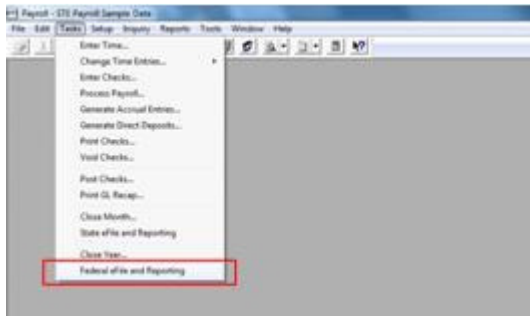
Plus \$0.25 per employee for employee list reports (Unemployment & New Hire)

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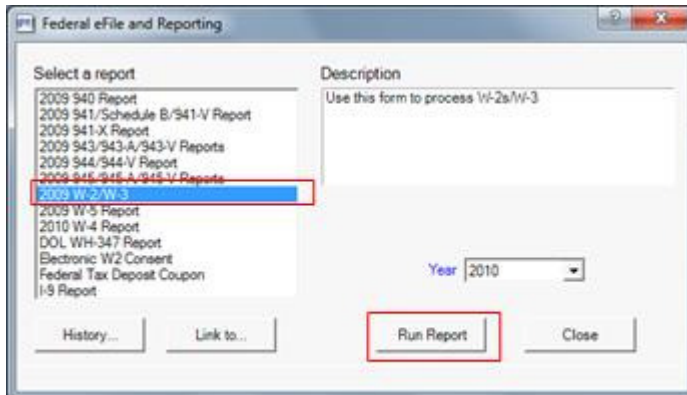
Step-by-step instructions

1. Select the W-2 Form

Under the payroll command center the **Tasks** menu select **Federal eFile and Reporting**.



This will bring up a forms selection window, select **W-2/W-3** and click the **Run Report** button.



2. Review Company Information

A Company setup wizard will take you through your company information that will display on the W-2/W-3 forms. All or most of the information will be populated from Timberline Enterprise.

W-2 Setup Wizard

W-3 Information

Control number (Box a):

Kind of Payer (Box b - check all that apply)

941 Military 943 (Agriculture) 944

CT-1 (Railroad) Household Employer Medicare Government Employer

Establishment number (Box d):

Other EIN used this year (Box h):

Third-party sick pay

Income tax withheld (Box 14):

Business terminated this year

< Back Next > Cancel

4. Review Employee Information

The wizard will take you into a grid displaying all of your employee data to review. Several data validations are performed during this step to ensure accuracy of your employee data and help elimination rejections.

Aatrix Software - W2/1099 Preparer

File Edit View Help

Verify Employee Information then click **Next Step**

Box a	Box b	Box c	Box d	Box e	Box f	Box g	Box h	Box i	Box j	Box k	Box l	Box m	Box n	Box o	Box p	Box q	Box r	Box s	Box t	Box u	Box v	Box w	Box x	Box y	Box z	AR	
SSN	Last Name	First Name	Middle Name	Name Suffix	Address LI	Address LI	City	State	Fed Wages	Fed Withheld	SS Wages	SS Withheld	Medicare	Medicare	SS Tips	EC	AR										
1	653-84-8413	Akley	Lisa		3243 River D		Salt Lake	UT	9577.00	287.28	10568.00	655.60	9577.00	130.84													
2	215-51-7545	Anderson	Pamela		343 34th Str		Trenton	NJ	9577.00	287.28	10568.00	655.60	9577.00	130.84													
3	451-41-4511	Andson	Jennifer		343 Main Str		Hartford	CT	9577.00	287.28	10568.00	655.60	9577.00	130.84													
4	512-75-2117	Banks	Carlton		343 34th Str		New York	NY	9577.00	287.28	10568.00	655.60	9577.00	130.84													
5	512-75-2117	Banks	Carlton		343 34th Str		San Jose	PR	4130.68	287.08	3130.68	194.16	3130.68	45.36													
6	124-74-7415	Barker	Travis		34 87th Stre		Baltimore	MD	9577.00	287.28	10568.00	655.60	9577.00	130.84													
7	632-54-8221	Benney	Simon		21 McLean A		Towner	VA	9577.00	287.28	10568.00	655.60	9577.00	130.84													
8	412-88-9117	Bunt	James		343 34th Str		Kansas City	MO	9577.00	287.28	10568.00	655.60	9577.00	130.84													
9	154-88-5864	Burn	Daphne		125 34th Str		Plantia	PR	4128.75	352.34	4128.75	256.04	4128.75	59.83													
10	412-41-7421	Burton	Tim		2343 Duke D		Chicago	IL	9577.00	287.28	10568.00	655.60	9577.00	130.84													
11	412-41-4147	Buam	George		3243 87th A		Atlanta	KY	9577.00	287.28	10568.00	655.60	9577.00	130.84													
12	745-74-2136	Carter	George		324 Training		Salem	RI	9577.00	287.28	10568.00	655.60	9577.00	130.84													
13	522-55-3333	Churno	William		444 35th Str		Hacienda	PR	3954.41	313.34	3130.68	245.23	3954.41	57.31													
14	741-85-9821	Clarkson	Kelby		343 34th Str		Michael	SD	9577.00	287.28	10568.00	655.60	9577.00	130.84													
15	412-41-7412	Clinton	Bill		343 45th Str		Albanta	KS	9577.00	287.28	10568.00	655.60	9577.00	130.84													
16	512-45-8004	Crow	Sheryl		3243 Listen		Denver	CO	9577.00	287.28	10568.00	655.60	9577.00	130.84													
17	343-84-4741	Depp	Johnny		2343 32nd A		Bloomington	IN	9577.00	287.28	10568.00	655.60	9577.00	130.84													
18	653-95-8965	Escobar	Veronica		125 34th Str		Plantia	PR	3568.84	308.34	3568.84	221.31	3568.84	51.71													
19	745-74-7851	Fath	Gina		2343 Main St		Pittsburgh	PA	9577.00	287.28	10568.00	655.60	9577.00	130.84													
20	451-73-1247	Ferral	Will		3243 34th A		Listings	DE	9577.00	287.28	10568.00	655.60	9577.00	130.84													
21	777-58-8003	Ferguson	Mawest	C	5100 Saint J		Saint John	VI	23082.72	1500.36	22886.86	1722.77	23082.72	334.65	4900.00	3600.00											
22	212-45-5004	Ford	Harrison		453 Fugitive		Mesa	AZ	9577.00	287.28	10568.00	655.60	9577.00	130.84													
23	523-12-5886	Gonzales	Hilary		123 Hollywo		Plantia	PR	3786.03	338.34	3786.03	233.55	3786.03	54.58													
24	777-98-8001	Grant	Timothy	A	4007 Estate		Charlotte Am	VI	23082.72	1500.36	22886.86	1722.77	23082.72	334.65	4900.00	3600.00											
25	777-98-8002	Graves	Alicene	B	240 Vpae Bel		Horsingom	GU	23082.72	1500.36	22886.86	1722.77	23082.72	334.65	4900.00	3600.00											
26	124-45-5004	Hawes	Kim	L	55 Casino W		Birmingham	AL	9577.00	287.28	10568.00	655.60	9577.00	130.84													
27	412-74-4124	Hawk	Tony		3243 87th A		Boston	MA	9577.00	287.28	10568.00	655.60	9577.00	130.84													
28	542-88-3142	Hawin	Codie		343 34th Str		Lincoln	NE	9577.00	287.28	10568.00	655.60	9577.00	130.84													
29	451-74-4126	Hilton	Paris		2343 Hilton D		Portland	ME	9577.00	287.28	10568.00	655.60	9577.00	130.84													

5. Select your Filing Options

The complete eFile package is the best value but you can also eFile just your Federal and or State W-2s/W-3s as well as print all your W-2 copies.

W-2/W-3 Wizard

W-2 Printing and Filing Options

Choose **Complete W2, eFile Fed or eFile State** and pick your filing dates. Corrections before dates are FREE! [More info?](#)

Complete W-2 eFiling Service **BEST VALUE!** **# Employees** **Price/Emp** **Subtotal**

The eFile Center will:

- Print and Mail Employee Copies 55 \$1.79 \$98.45
- eW-2 Only Employee Copies [What's This?](#) 0 \$0.99 \$0.00
- File your Fed W-2s and W-3 to the SSA included FREE
- File your State W-2s and Reconciliation Forms included FREE
- eW-2s Available for All Employees included FREE

Total Cost \$98.45

Other Options [Fed or State eFilers receive Free, Easy Corrections!](#)

- Print my Employee W-2s
- eFile Federal W-2s and W-3 55 \$0.49 \$ 0.00
- eFile State W-2s and Reconciliation Forms 55 \$0.49 \$ 0.00
- Print Federal W-2s and W-3
- Print State W-2s and Reconciliation Forms

Total Cost \$ 0.00

Print Employer Copy

< Back Next > Cancel

NOTE: Actual pricing may vary from screen image

6. Review your Forms

A Form Viewer will display your forms for review. You can print a record copy if eFiling or your official copy if printing and mailing.

Aatrix Payroll Reports - 2009 W-2/W-3

File Edit View Tools Help

Report 1 of 4: Federal W-2

1 28 pages **Click Print Copy for your copy, then click Next Step.** Print Draft Print Copy Prev Step Next Step

22222	Void <input type="checkbox"/>	a Employee's social security number 5 63 - 84 - 8413	For Official Use Only OMB No. 1545-0008			
b Employer identification number (EIN) 98-1777432		1 Wages, tips, other compensation 9577.08	2 Federal income tax withheld 287.28			
c Employer's name, address, and ZIP code AATRIX SOFTWARE 2500 LIBRARY CIRCLE GRAND FORKS ND 58201		3 Social security wages 10568.08	4 Social security tax withheld 655.60			
		5 Medicare wages and tips 9577.08	6 Medicare tax withheld 138.84			
d Control number		7 Social security tips	8 Allocated tips			
e Employee's first name and initial LISA		9 Advance EIC payment		10 Dependent care benefits		
Last name ALLEY		11 Nonqualified plans		12a See instructions for box 12		
3243 RIVER DRIVE		13 Statutory employee <input type="checkbox"/>	Retirement plan <input type="checkbox"/>	12b		
SALT LAKE CITY UT 14512		14 Other	12c			
f Employee's address and ZIP code		12d				
15 State UT	Employer's state ID number W12345	16 State wages, tips, etc. 9577.08	17 State income tax 191.52	18 Local wages, tips, etc.	19 Local income tax	20 Locality name

W-2 Wage and Tax Statement **2009**

0000/1048

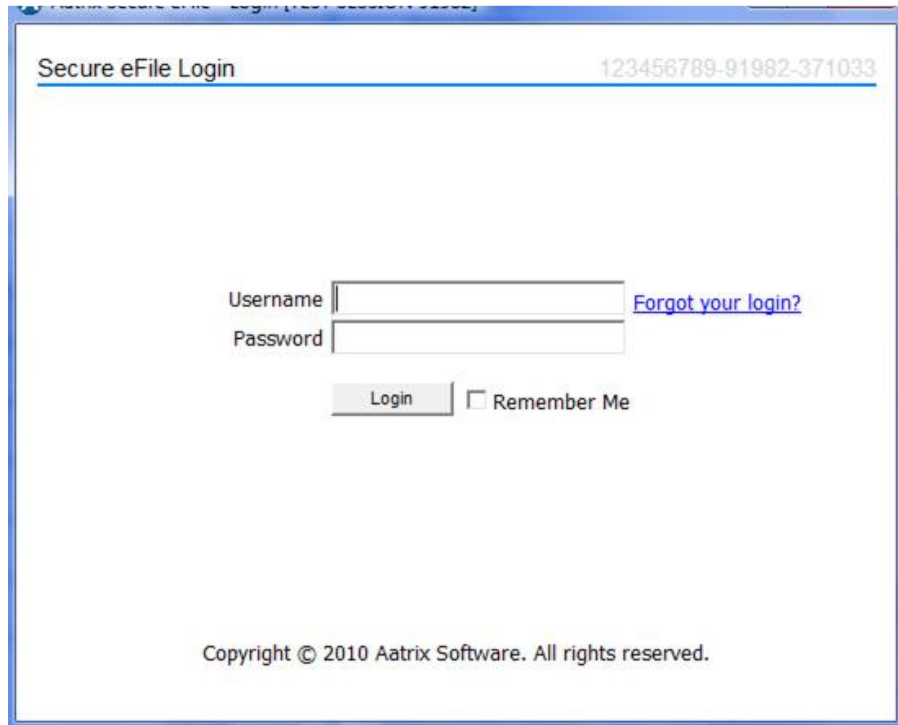
Department of the Treasury - Internal Revenue Service
For Privacy Act and Paperwork Reduction Act Notice, see back of Copy D.

Copy A For Social Security Administration — Send this entire page with Form W-3 to the Social Security Administration; photocopies are not acceptable.

Do Not Cut, Fold, or Staple Forms on This Page

7. Submit your Forms

An eFile wizard will guide you through submitting your forms to the eFile Center. Enrollment to the eFile center is required to obtain an username and password, [click here to enroll now](#) or you can enroll at time of eFiling.



Secure eFile Login 123456789-91982-371033

Username [Forgot your login?](#)

Password

Remember Me

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