Viewpoint ProContractor™

Preparing for Year-End

Below are steps that you can do NOW to be prepared for Year-End

W2s / Employee Module

Review the Employee file information

1. Verify the Employee's mailing address on the Contact Information tab is current.

2. On the Taxes tab, verity the Social Security Number is correct.

3. Also on the Taxes tab there is a section called 'W2 Box 13', make sure the appropriate option is selected, especially for Retirement Plan and Third Party Sick pay.

4. If you have any Deductions or Fringes that need to renew for 2023, you can enter that information now with the effective date in the year 2023.

5. Check the Employee's Paid Time off. Print the Employee Paid Time Off report using the employee's anniversary date or January 1st depending if it is setup to calculate on a Calendar year or Employee's anniversary.

   - *Example: If the Paid Time Off is setup to accrue using Employee PTO Start Date and the employee start 6/15/2019, print the report as 6/15/2022-6/15/2023. Make sure the system is accruing the hours correctly. Double-check the Balance as well.*

Purchase W2 Forms form www.Viewpointforms.com

1. If printing W2 from ProContractor, purchase the form that has 2 per page for Copy A, B, C, D, 1, and 2.

   - *Note: ProContractor doesn't print the W3. If purchased, can fill out manually.*

2. If printing W2 from Aatrix, no need to purchase any forms. Aatrix will print ALL forms (W2 & W3) to plain paper with 4 per page. Can purchase the blank perforated form, but not necessary. Aatrix will print the W3 to plain paper as well, so no need to purchase it.

Trimble. Construction

If using Aatrix for W2 or Quarterly forms

1. If new to Aatrix, make sure the path in Administration>Setup>System Settings is setup. Will need to map all States, localities and deductions to Aatrix.

2. If you already mapped these items to Aatrix, no need to do them again unless you added a new State or Deduction.

3. Please see knowledge base article called "**Aatrix & ProContractor - Aatrix Mapping Setups for Version 3.13.0 and Higher**" on how to map your State, localities and deductions to Aatrix.

4. If this is the first time using Aatrix will need to call them to get your account setup for the service you want (Efile, emailing employees W2 etc).

   - Access www.aatrix.com/efile/w2/pricing, to see their current prices.
   - Contact them online at: https://efile.aatrix.com/pages/public/help.aspx?v=ATX000
   - Phone number: (701) 746-6814

5. For 1095/1094, no need to purchase forms. ProContractor will print to plain paper as well as Aatrix.

If using Greenshades

Check and see if you need to renew your contract with Viewpoint/Trimble by contacting your Sales Rep.

1099s / Vendors Module

Verify Aatrix is setup/installed

Aatrix is required to print 1099 NEC or MISC forms. If already done for Payroll use, then no additional setup/install required, otherwise:

1. Set the Aatrix path in **Administration** > **Setup** > **System Settings**

2. Install Aatrix on the workstations where 1099s printing will be done

3. If planning on eFiling 1099's which is an option through Aatrix and have not already done so for the W2 year-end forms, call to get your account setup for the service you want (Efile, emailing 1099s etc).

   - Access www.aatrix.com/efile/w2/pricing, to see their current prices.
   - Contact them online at: https://efile.aatrix.com/pages/public/help.aspx?v=ATX000
   - Phone number: (701) 746-6814

Verify Vendor Compensation Reporting

Verify each vendor that requires a 1099 form (NEC, MISC, INT) is set up with the correct Compensation Type through Vendors > Setup > Vendor (Vendor Compensation Reporting section)

1. If the Report Type is set to anything but 'None', then, then make sure the Tax ID Number field is filled out with the vendors appropriate Social Security Number (SSN) or EIN/FEIN/TIN number
   - *NOTE: ProContractor currently does not verify the formatting of the Tax ID Number, but it should be entered as: xxx-xx-xxx for a SSN or xx-xxxxxxx for a EIN/FEIN*
2. *Also verify the vendor address on the Vendor setup screen is correct and complete.*
   - *TIP: Go through Vendors > Setup > View Vendor Setups and choose the View of 'Vendors' and click OK. Use this grid to check the information in the Vendor Compensation Report Type column (and the Tax ID Number and Corporate Name 1 fields if the Vendor Compensation Report Type is something other than None - all that information is required for successful 1099 processing/printing). You can double click on a line on the grid and it will pull up that vendor's setup screen if any edits to the setup are needed. Save and then go back to the View Vendor Setups and refresh to see the updated information.*

Purchase 1099/1096 forms through viewpointforms.com

- Printing 1099 INT forms through ProContractor - (required to purchase) 2up / 2 per page preprinted forms
- Printing 1099 NEC, MISC and/or INT through Aatrix –
  - Required to purchase: Federal Copy A forms - RED official preprinted form
    - 3 up/3 per page for 1099 NEC
    - 2 up/2 per form for 1099 MISC and 1099 INT
  - Required to Purchase: 1096 form (for all types) - need 1 1096 for each form type being submitted.
  - Optional to purchase- State & Payer Copy for NEC, MISC or INT - 4 up (4 part) quad forms - can purchase the 4 part blank perforated forms or print them to regular blank plain paper

- ○ Optional to purchase - Recipient for NEC, MISC or INT - 4 up (4 part) quad forms - can purchase the 4 part blank perforated forms or print them to regular blank plain paper.