

Print Management Partners (PMP) Year End File Creation Process

Once you have created and reviewed the W-2s, 1099-MISCs, and/or 1095-Cs and are ready to have PMP print, mail and/or e-file, you need to create a file(s) in the format needed to upload to the Go2TaxSolutions website.

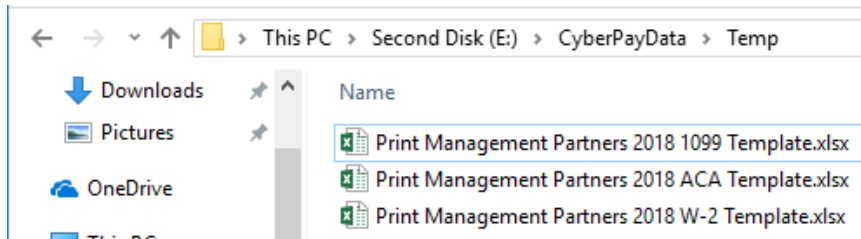
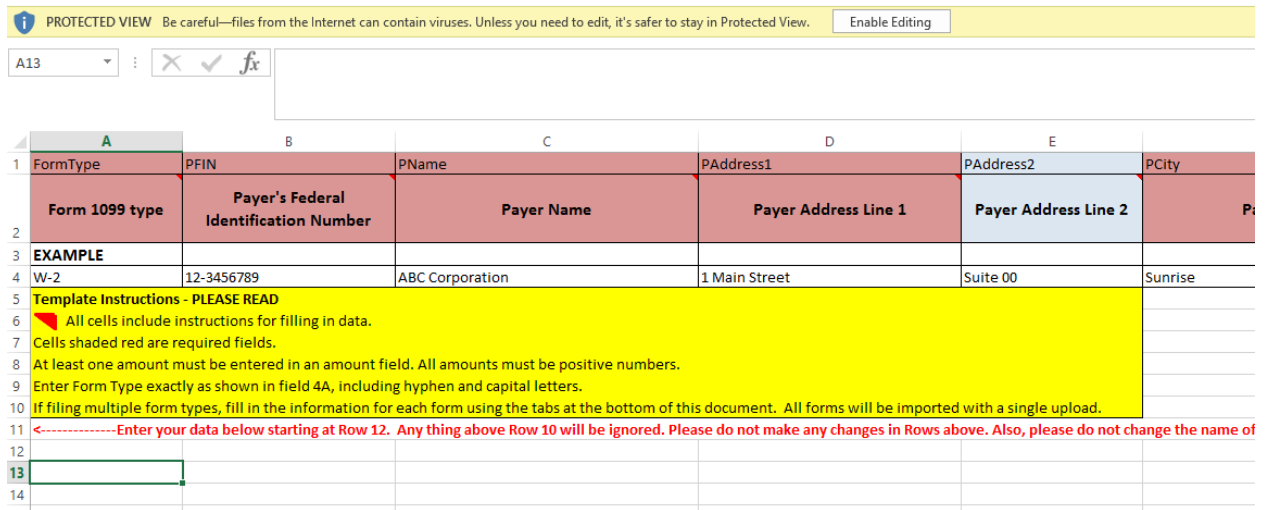
There are templates that must be downloaded to CyberTax to ensure the files are created properly and without error. Login to the Client Website and choose Support and Downloads. Then choose Miscellaneous.



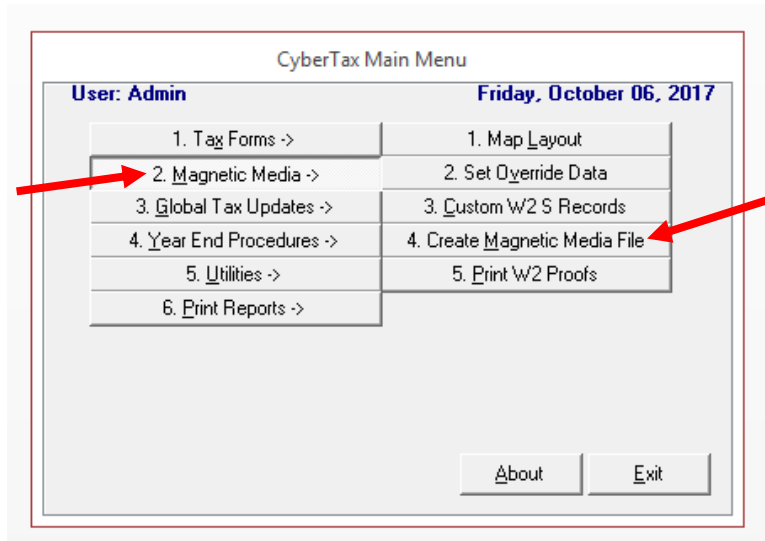
Find the three templates shown below. If they aren't at the top of your screen click "Date Posted" a couple of times to have them appear.

Miscellaneous Downloads			
	Filename	Size	Date Posted
	Print Management Partners 2018 ACA Template.xlsx	0.1 MB	11/16/18
	Print Management Partners 2018 W-2 Template.xlsx	0 MB	11/14/18
	Print Management Partners 2018 1099 Template.xlsx	0 MB	11/14/18

Click the desired template to download. Open and Enable Editing. Then Save As to a location within your CyberPay Data folder. Temp or Data is a good choice.



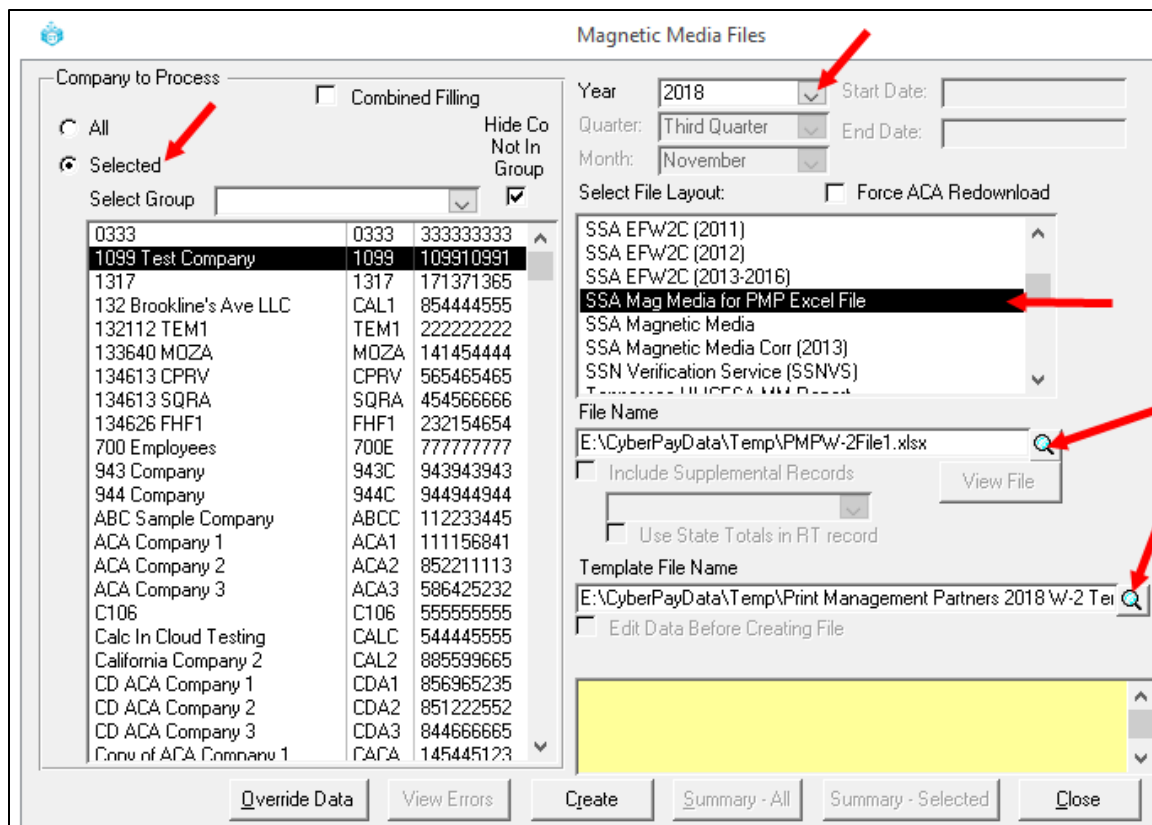
Open CyberTax. Choose 2. Magnetic Media and 4. Create Magnetic Media File



Choose All or Selected companies to create files for. This can be done as a bulk file creation but we always recommend choosing a group of 20-25 companies in case an error occurs. It's much easier to determine what went wrong with 1 of 25 companies versus 1 of 100.

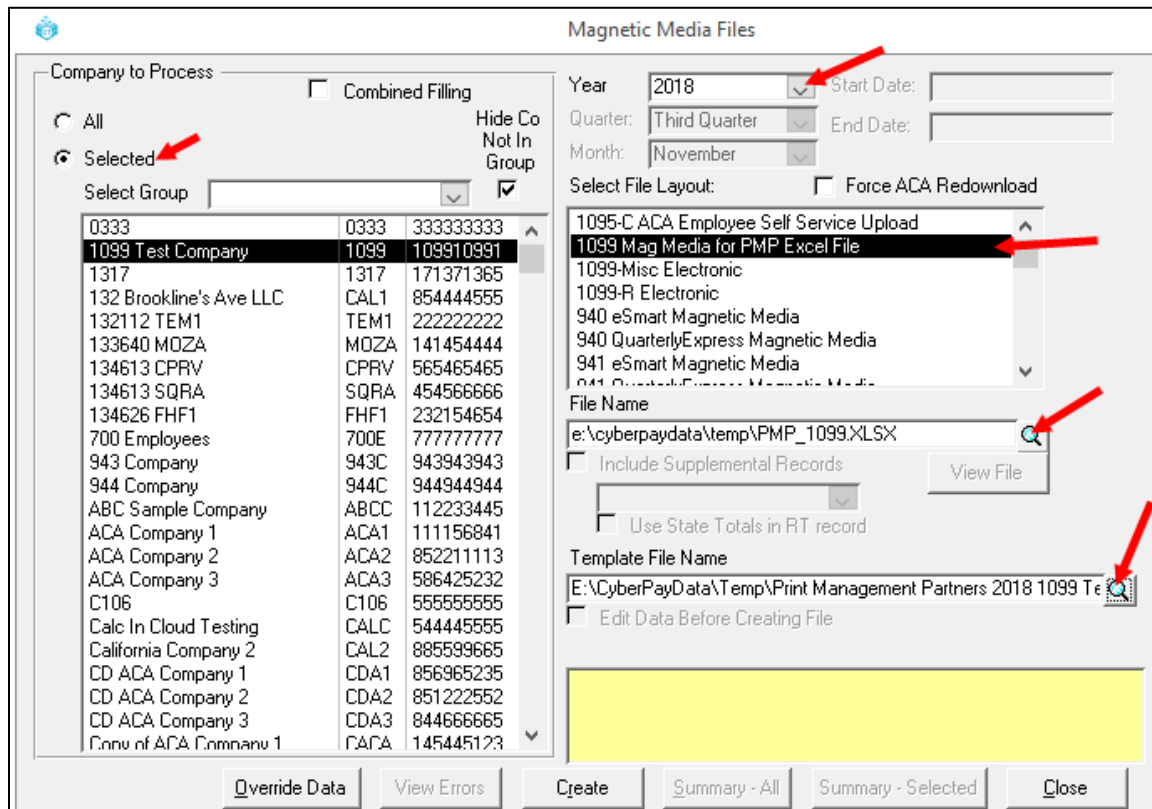
For W-2s:

1. Scroll to the "SSA Mag Media for PMP Excel File" option
2. Click the magnifying glass next to file name to create a file name and choose a file location
3. Click the magnifying glass next to the Template File Name and find the W-2 template you just downloaded and saved
4. Click Create
5. Feel free to open the file in Excel and check as needed
6. Follow steps 1-5 if additional files need to be created



For 1099s:

1. Scroll to the “1099 Mag Media for PMP Excel File” option
2. Click the magnifying glass next to file name to create a file name and choose a file location
3. Click the magnifying glass next to the Template File Name and find the 1099 template you just downloaded and saved
4. Click Create
5. Feel free to open the file in Excel and check as needed
6. Follow steps 1-5 if additional files need to be created

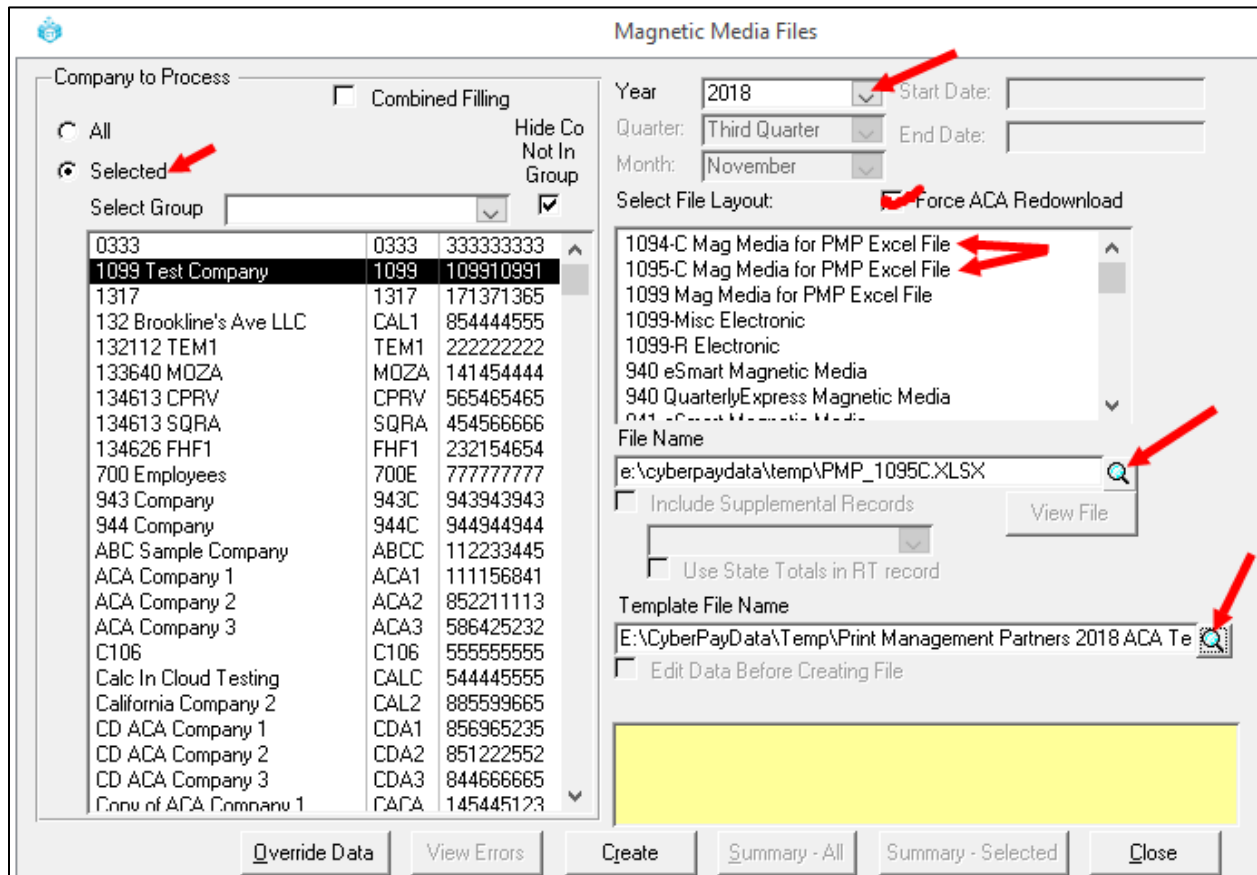


For 1095-C and 1094-Cs:

Note the process for ACA forms is different than the other forms. PMP requires both 1095-C and 1094-C data.

1. Scroll to the “1095-C Mag Media for PMP Excel File” option
2. Click the magnifying glass next to file name to create a file name and choose a file location
3. Click the magnifying glass next to the Template File Name and find the ACA template you just downloaded and saved
4. Click Create
5. Review file if desired

6. Scroll to the “1094-C Mag Media for PMP Excel File” option
7. Click the magnifying glass next to file name to create a file name and choose a file location
8. Click the magnifying glass next to the Template File Name and find the file that you just created with 1095-C data.
9. Click Create
10. **Please review the 1094-C data**, particularly the Part 3 data in columns AB to CM. The complexity of the ACA codes, makes this difficult to accurately calculate
11. Follow steps 1-10 if additional files need to be created



Uploading newly created files to the Go2TaxSolutions website:

Navigate to www.GO2TaxSolutions.com/CyberPay. Fill in the required information, choose your level of service and upload your file. If you created multiple files, you will need to complete this process for each file you upload. Each upload will be treated as a separate order. If you have multiple file uploads, specify this in the notes field to receive a consolidated invoice. ****It is highly recommended you purchase a CD with your PDF images by selecting the “Ship CD w/images back to me” option. CDs are created per batch file upload; you will need to select this option for each file you upload. This will be the only copy for your records of the actual forms that were generated and sent.****

Enter your information below and an associate will contact you within 2 business days.

Step 1: Enter your personal information
All fields other than the Phone Extension are required to submit your data file.

Select a State ▼

Shipping Address for Bulk Delivery or CD (if different from above)

Step 2: Select your service(s)

<input type="checkbox"/> Print & Mail to Recipients	Service Price
<input type="checkbox"/> Bulk Delivery (deadline to submit files is Jan 20th)	Contact us for Pricing michelle.wheeler@ourpartners.com
<input type="checkbox"/> E-file	kathy.wiley@ourpartners.com
<input type="checkbox"/> Ship CD w/ images back to me	(800) 545-0792
<input type="checkbox"/> Data Conversion/Technical Support	
<input type="checkbox"/> SSN Masking on Recipient Document (excluding W-2's)	
<input type="checkbox"/> TIN Matching (Available Oct - Dec)*	
<input type="checkbox"/> CASS Address Validation (Available Oct - Dec)*	

* Pre-Season data preparation services


Step 3: Select Your Form Type and Attach File
Provide any instructions and Upload Your File (Allowed types: csv, xls, xlsx, pdf, txt and zip)


Replacement File


It's as easy as 1-2-3 to Process your year-end documents:


- 1 Order the type of service you need
- 2 Securely upload your document.
- 3 Your documents will be processed and a confirmation will be sent.

How it works:


 Upload your files online to our secure server.


 Data is processed in our SSAE 16, SOC II, HIPPA compliant facility.


 We e-file directly to the IRS.


 We print and mail to the recipient.

You will then receive an email confirming your file was successfully uploaded. A secure email with your PDF images and a Totals Report will be provided for your review and approval for processing. Once approved, Print Management Partners will contact you to secure postage via credit card or ACH. Upon receipt of postage, forms will be printed, mailed and submitted for e-File processing within 48 hours.

Total Report		
Filer: ABC		03/23/2017
454-54-5454		
Invoice #:385014	Address: E V Blvd	
Order Status: T	ventura, CA 93003	
Order Date: 11/23/2016		
Form 1099-MISC 2016		
Form(s) Filed: 1		
	Box 1: Rents	\$0.00
	Box 2: Royalties	\$50.00
	Box 3: Other income	\$20.00
	Box 4: Federal income tax withheld	\$0.00
	Box 5: Fishing boat proceeds	\$0.00
	Box 6: Medical and health care payments	\$0.00
	Box 7: Nonemployee compensation	\$0.00
	Box 8: Substitute payments in lieu of dividends or interest	\$0.00
	Box 10: Crop insurance proceeds	\$0.00
	Box 13: Excess golden parachute payments	\$0.00
	Box 14: Gross proceeds paid to an attorney	\$0.00
	Box 15a: Section 409A deferrals	\$0.00
	Box 15b: Section 409A income	\$0.00
	Box 16: State tax withheld	\$0.00
	Box 18: State income	\$0.00

You will receive an email confirmation when the file process is complete. Lastly, you will receive a detailed invoice from Print Management Partners.

Contact Information:

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800-545-0792