



Microsoft Dynamics® SL

# Updating Microsoft Dynamics SL 1099 and W-2 Reporting for Tax Year 2013

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## Purpose

The Microsoft Dynamics SL 2013 year-end updates include changes for 1099 and W-2 reporting that will help your organization comply with tax year 2013 reporting regulations. This document includes procedures to follow when you install and use the updates.

## About These Updates

### General Information

- These year-end updates are supported for use with the following Microsoft Dynamics SL versions:
  - 2011
  - 2011 Service Pack 1
  - 2011 Feature Pack 1
  - 2011 Service Pack 2

Make sure that you determine which version is currently installed before you start the year-end updates installation. "Installing the Year-End Updates" on page 5 gives you the steps to verify your version.

- Always contact your organization's tax lawyers and tax accountants for information about your situation.
- Microsoft Corporation does not take responsibility for your company's compliance with federal, state, or local regulations.

## Changes

These year-end updates include the following changes.

### Accounts Payable 1099s

- **1099-MISC Form Changes**
  - The PAYER'S name/address box label changed to "PAYER'S name, street address, city or town, province or state, country, ZIP or foreign postal code, and telephone no." from "PAYER'S name, street address, city, state, ZIP code, and telephone no."
  - The "PAYER'S federal identification number" label is now on one line. Previously, "number" appeared on the second line.
  - The RECIPIENT'S city/state/zip code address box label changed to "City or town, province or state, country, ZIP or foreign postal code" from "City, state, and ZIP code".
  - The "RECIPIENT'S identification number" label is now on one line. Previously, "number" appeared on the second line.
  - **Box 11 - Foreign tax paid** is now used to report foreign tax paid on payments. This amount is reported in U.S. dollars.
  - **Box 12 - Foreign country or U.S. possession** is now used to report the name of the foreign country or U.S. possession for which the foreign tax was paid and reported in Box 11.
- **Filing 1099 Forms** : You can file 1099 forms electronically or on paper. For more information, see "Filing Information Returns Electronically (FIRE)" on page 15.
- **1099 Electronic File Changes**
  - Transmitter "T" Record Changes:
    - o The Foreign Entity Indicator in position 29 is set to "1" if the transmitter's Country is a foreign entity (transmitter's country <> "US"). Otherwise, the indicator is left blank.

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- For foreign addresses, you can use the payer city, state, and ZIP Code/Postal Code as a continuous 51-position field, in the following order: city, province or state, postal code, and the name of the country/region. This 51-position field runs from 230-280.
- Payer "A" Record Changes:
  - Payer's Taxpayer Identification Number (TIN) in positions 12 – 20 is blank for foreign entities that are not required to have a TIN, and the Foreign Entity Indicator in position 52 is set to "1".
  - Box 11 - Foreign Tax Paid is added in field positions 28 – 43, Amount Code "9".
  - Foreign Entity Indicator in position 52 is set to "1" if the payer's Country is a foreign entity (payer's country <> "US") and income is paid by the foreign entity to a U.S. resident. Otherwise, the indicator is left blank.
  - For foreign addresses, you can use the payer city, state, and ZIP Code/Postal Code as a continuous 51-position field, in the following order: city, province or state, postal code, and the name of the country/region. This 51-position field runs from 174-213.
- Payee "B" Record Changes:
  - Foreign Entity Indicator in position 247 is set to "1" if the payee's Country (Recipient on the 1099-MISC Form) is in a foreign country (payee's country <> "US"). Otherwise, the indicator is left blank.

## Payroll W-2s

- No changes were required for the layout of the W-2 form or the W-3 form.
- **Filing W-2 Forms** : You can file W-2 forms electronically or on paper. For more information about filing electronically, see "Business Services Online (BSO)" on page 15.
- **W-2 Electronic File Changes**
  - RA Submitter Record Changes:
    - New specifications are added for the 'Contact E-Mail/Internet' field in positions 446 - 485
  - RE Employer Record Changes:
    - Employer Contact Name is added in positions 222 - 248
    - Employer Contact Phone Number is added in positions 249 - 263
    - Employer Contact Phone Extension is added in positions 264 - 268
    - Employer Contact Fax Number is added in positions 269 – 278
    - Employer Contact E-Mail/Internet is added in positions 279 – 318

## Ordering Forms


Order 1099-MISC and W-2 forms for Tax Year 2013 that are compatible with the Microsoft Dynamics SL releases by calling 800-432-1281. Customer Service representatives will answer any questions that you may have. Or, you can order online from Deluxe Business Checks and Solutions at the following website: <http://www.microsoftbusinesschecks.com/>.

- Only laser 1099 forms and laser W-2 forms are supported for the releases compatible with these year-end updates.
- Electronic submission of W-2 and 1099-MISC information is supported.
- If you have customized the 1099 reports in Crystal Reports, you must use the following margins: Top margin of .50 inch, bottom margin of .25 inch.

## Installing the Year-End Updates

- Make sure that all users are logged off before you install these updates.
- Make a complete backup of your system database, all application databases, and customized reports.

### To install the year-end updates:

1. After you download the 2013 year-end updates from CustomerSource or PartnerSource, expand the files into a temporary folder that you create. The installation must be run from the server where you installed Microsoft Dynamics SL.
2. In the temporary folder, open the folder of the Microsoft Dynamics SL release that is currently installed (for example, \2011FP1). Verify the version of your release by selecting **Help**  | **About Microsoft Dynamics® SL** in Microsoft Dynamics SL.
3. Install the new Accounts Payable and Payroll files. To do this, follow these steps:
  - a) Locate the year-end updates file for your installation, and then double-click the file to start the installation wizard. The software versions and their corresponding year-end updates files are as follows:

<u>Version</u>	<u>Year-end updates file</u>
Microsoft Dynamics SL 2011	SL2011_YEU2013.exe
Microsoft Dynamics SL 2011 Service Pack 1	SL2011SP1_YEU2013.exe
Microsoft Dynamics SL 2011 Feature Pack 1	SL2011FP1_YEU2013.exe
Microsoft Dynamics SL 2011 Service Pack 2	SL2011SP2_YEU2013.exe

- b) Follow the instructions in the installation wizard.

**Note:** See “Changed Files” on page 16 for the complete list of files that are installed.

4. **(Microsoft Dynamics SL 2011, 2011 SP1, and 2011 FP1 only)** Apply the database table changes to your application database(s). To do this, follow these steps:
  - a) Open Microsoft® SQL Server® Management Studio, and then connect to the Microsoft Dynamics SL application database.
  - b) Open the temporary folder that you created in step 1.
  - c) In the folder for the Microsoft Dynamics SL release that is currently installed, locate the SQL script that contains SQL table updates, *SLversion\_Tables.sql*, and run the script.

**Example:** The .sql file for version 2011 Feature Pack 1 is named *SL2011FP1\_Tables.sql*.

- d) Repeat step c) for each of your application databases.
5. Apply the database views and procedures changes to your application database(s) as follows:
    - a) Open Microsoft® SQL Server® Management Studio, and then connect to the Microsoft Dynamics SL application database.
    - b) Open the temporary folder that you created in step 1.
    - c) In the folder for the Microsoft Dynamics SL release that is currently installed, locate the SQL script that contains SQL views, *SLversion\_Views.sql*, and run the script.

**Example:** The .sql file for version 2011 Feature Pack 1 is named *SL2011FP1\_Views.sql*.

- d) In the same folder, locate the SQL script that contains SQL stored procedures, *SLversion\_Procs.sql*, and run the script.

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**Example:** The .sql file for version 2011 Feature Pack 1 is named SL2011FP1\_Procs.sql.

- e) Repeat steps c) and d) for each of your application databases.
6. **(Microsoft Dynamics SL 2011, 2011 SP1, and 2011 FP1 only)** Apply the new messages to your database as follows:
  - a) In the Microsoft Dynamics SL navigation pane, click **Administration**.
  - b) In the **System Manager** details pane, under **Utilities**, click **Database Update**. *Database Update (98.100.00)* appears.
  - c) In the **Directory** box, browse for the temporary folder that you created in step 1 (for example, \2011FP1).
  - d) In the **Files** box, select messages.msg by clicking the file.
  - e) Click **Begin Processing**.
  - f) Click **OK** when the process is finished.
  - g) Close *Database Update (98.100.00)*.
7. **(Microsoft Dynamics SL 2011 only)** Apply the new possible values lists to your database as follows:
  - a) In the Microsoft Dynamics SL navigation pane, click **Administration**.
  - b) In the **System Manager** details pane, under **Utilities**, click **Database Update**. *Database Update (98.100.00)* appears.
  - c) In the **Directory** box, browse for the temporary folder that you created in step 1 (for example, \2011FP1).
  - d) In the **Files** box, select pvrec.csv by clicking the file.
  - e) Click **Begin Processing**.
  - f) Click **OK** when the process is finished.
  - g) Close *Database Update (98.100.00)*.
8. **(Microsoft Dynamics SL 2011, 2011 SP1, and 2011 FP1 only)** Open *Deduction Maintenance (02.290.00)* and press F3 or double-right click in **Deduction ID**.
  - a) If the *Deduction List* does not contain the FED9 deduction, you must apply the previously published Federal Tax Updates named “Revised September Tax Updates.” Download the updates, and then follow the instructions in the TaxUpd\_093013.pdf file that is included in the download from the following link:  
[https://mbs.microsoft.com/customersource/support/downloads/taxupdates/msd\\_slsept2013payroltableupdate.htm](https://mbs.microsoft.com/customersource/support/downloads/taxupdates/msd_slsept2013payroltableupdate.htm)
  - b) Verify the following, and add the settings if they do not exist:
    - i) In *Deduction Maintenance (02.290.00)*, for deduction ID FED9, you have the following setting:
      - **W-2 Control** tab, **Box Number** list - Box 06 Additional Medicare tax
    - ii) In *Earnings Type Maintenance (02.270.00)*, for the “Regular Earnings” earnings type ID, the FED9 deduction ID is in the **Deductions** grid.
9. Turn on **Initialize Mode** on the Application Menu, open *Vendor Maintenance (03.270.00)*, and then review and initialize the 2013 values in **Box 11 – Foreign Tax Paid** and in **Box 12 – Foreign Country or U.S. Possession** on the **1099 Info** tab. You must do this because the foreign tax paid was not indicated on any document for 2013.
10. Review and update the values in the **Tin Name** box and the **Recipient Name 2** box, or both, on the **1099 Info** tab in *Vendor Maintenance (03.270.00)*. Specify the correct last name value by typing the ‘@’ symbol in front of the correct last name.

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- For example, in **Tin Name** you must specify “Kim @Barr-Abercrombie” if the vendor’s last name is hyphenated or “Kim Barr @Abercrombie” if the vendor’s last name is not hyphenated.
- If **Recipient Name 2** contains “DBA American Interiors,” then you should put the ‘@’ symbol before “American” (that is, “DBA @American Interiors”).
- If **Tin Name** contains “The Flamingo,” then you should put the ‘@’ before “The” (that is, “@The Flamingo”). If **Tin Name** contains “The Red Flamingo,” then you should put the ‘@’ symbol before “Red” (that is, “The @Red Flamingo”).
- Remove all special characters other than hyphen (-) and ampersand (&) from **Tin Name** and from **Recipient Name 2**.

**Note:** The values in these boxes must follow the rules that are specified by the IRS in Publication 1220, Section 7, located at <http://www.irs.gov/pub/irs-pdf/p1220.pdf>.

11. On the computer where you will print the 1099 and W-2 forms, copy the font file, OCRAEXT.TTF, to %Windir%\Fonts (where %Windir% is your Windows® installation path). For example, if your Windows installation path is c:\WINDOWS, copy OCRAEXT.TTF to c:\WINDOWS\FONTS.

## 1099 Reporting Information and Guidelines

The 1099 boxes 1 - 8, 10 - 14, 15a, and 15b on Form 1099-MISC are supported in the Microsoft Dynamics SL versions that are compatible with these updates. For a list of compatible versions, see "About These Updates" on page 3.

Always contact your company's tax lawyers or tax accountants for the information about your company. Microsoft Corporation does not assume responsibility for your company's compliance with federal, state, or local regulations.

### Internal Revenue Service 1099-MISC Dollar Limits

One of the following criteria must be met before a Form 1099-MISC is printed:

- The sum of the amounts in boxes 1, 3, 6, 7, and 10 must be greater than or equal to the limit in AP Setup (03.950.00). This is \$600.00 for tax year 2013.
- Box 2 has an amount greater than or equal to 10.00.
- Box 4 has an amount greater than 0.00.
- Box 5 has an amount greater than 0.00.
- Box 8 has an amount greater than or equal to 10.00.
- Box 11 has an amount greater than 0.00.
- Box 13 has an amount greater than 0.00.
- Box 14 has an amount greater than 0.00.
- Box 15a has an amount greater than or equal to 600.00.
- Box 15b has an amount greater than 0.00.

### Multi-Company Reporting

Notice that the amount on a 1099 is calculated based on the ID of the company that issued the check to pay the voucher. For example, company 0020 enters a voucher for vendor A100 for \$1,000.00 by using box 7. Company 0010 pays the voucher. The 1099 for vendor A100 will show \$1,000.00 in box 7 for company 0010.

You can process multiple companies in a single database at the same time. Vendor information is sorted and grouped first by company federal ID number, and then by vendor. The following scenarios offer more information:

- Logon Company: 0010 (the master company)  
Selected Company: All  
Company 0010 has federal ID number of 3411111  
Company 0020 has federal ID number of 3422222  
Company 0010 paid vendor A100 \$300  
Company 0010 paid vendor A200 \$800  
Company 0020 paid vendor A100 \$700  
Company 0020 paid vendor A200 \$900

**Results:**

- Vendor A100 receives one 1099 with federal ID number 3422222 for \$700.
- Vendor A100 does not receive a 1099 for federal ID number 3411111 because company 0010 activity was under the \$600 reporting limit.



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- Vendor A200 receives two 1099s:
  - One with federal ID number 3411111 for \$800.
  - One with federal ID number 3422222 for \$900.

### Note:

- The 1099 forms for each federal ID number are separated by subtotals.
- Subtotals are in "C" records if you are filing electronically.
- Logon Company: 0010 (the master company)  
Selected Company: All  
Company 0010 has federal ID number of 3400000  
Company 0020 has federal ID number of 3400000  
Company 0010 paid vendor A100 \$300  
Company 0010 paid vendor A200 \$800  
Company 0020 paid vendor A100 \$700  
Company 0020 paid vendor A200 \$900

### Results:

- Vendor A100 receives one 1099 with federal ID number 3400000 for \$1,000. This is the sum of vendor's company 0010 and company 0020 activity. This is over the \$600 reporting limit.
- Vendor A200 receives one 1099 with federal ID number 3400000 for \$1,700.

### Note:

- When more than one company has the same federal ID number, the 1099 form carries the address of the company with the highest alphanumeric value in **Company ID**.
- You can validate amounts by using the *Vendor Maintenance (03.270.00)*, **1099 Info** tab.

You can also generate Form 1099 for one company in a database that contains multiple companies. Only vendors with activity in the selected company are reported. However, the amounts reported for them include amounts paid by other companies having the same federal ID number. For example:

Logon Company: 0030 (not the master company)  
Selected Company: 0030  
Company 0010 has federal ID number of 3411111  
Company 0020 has federal ID number of 3422222  
Company 0030 has federal ID number of 3411111  
Company 0010 paid vendor A100 \$200  
Company 0010 paid vendor A200 \$800  
Company 0020 paid vendor A100 \$500  
Company 0030 paid vendor A100 \$500

### Results:

- Vendor A100 receives one 1099 with federal ID number 3411111 for \$700.
  - This is the sum of the vendor's activity in companies 0030 and 0010. This is greater than the \$600 reporting limit.
  - Does not include company 0020 activity because it is for a different federal ID number.
- Vendor A200 is not reported because there was no company 0030 activity.

## Hints and Tips

### Issue

My page settings were changed in the Crystal Reports report file. What are the correct settings?

### Resolution

Reset the page settings in the appropriate Crystal report file.

1. Open the Crystal report file. The file name is 03740L.rpt.
2. On the **File** menu, select **Page Setup**.
3. Set the top margin to .50 inch (laser format).
4. Set the bottom margin to .25 inch (laser format).
5. Click **OK**.
6. On the **File** menu, select **Save** to save the report file.

### Issue

Amounts are incorrect in the 1099 boxes.

### Potential Causes

The 1099 box amounts are calculated based on check date. An incorrect check date was used. Or, the correct 1099 box number or letter, or both, were not specified on the voucher.

### Resolution

Initialize the correct totals.

**Note:** You must have permission to use Initialize Mode to follow these steps. For help, see your system administrator.

1. Select **Application | Initialize Mode**.
2. Access the vendor in *Vendor Maintenance* (03.270.00).
3. Click the **1099 Info** tab.
4. Type the correct totals for the appropriate reporting year.
5. Save the changes.

### Issue

1099 forms are printing for vendors who are under the minimum 1099 limit.

**Note:** The following criteria are used to determine whether a 1099 will be printed:

- Box 4 or box 5 is greater than 0.00.
- Box 2 or box 8 is greater than or equal to 10.00.
- The sum of boxes 1, 3, 6, 7, and 10 is greater than or equal to the limit in *AP Setup* (03.950.00).
- Box 13, box 14, or box 15b is greater than 0.00.
- Box 15a is greater than or equal to 600.00.

### Resolution

Set the correct 1099 limit amount in *AP Setup* (03.950.00).

1. Access the *AP Setup* (03.950.00), **1099** tab.
2. Type the 1099 minimum amount in **1099 Limit**.
3. Save.

### Issue

Does the value in **Number of Periods to Retain AP Detail** affect the ability to print 1099s?

### Resolution

No, it does not.

**Note:** The 1099 forms must be printed before you select **Purge Data** in *Close 1099 Year* (03.530.00).

### Issue

Error message "532 date must be in an open 1099 year, please re-enter" occurs when I try to print Accounts Payable checks.

### Resolution

Purge the oldest 1099 reporting year in *1099 Calendar Year Control* (03.530.00).

**Note:** Microsoft Dynamics SL keeps two years of data for 1099 purposes. Therefore, the current calendar year must be set up as an open 1099 year.

1. In Accounts Payable, select **1099 Calendar Year Control**. *1099 Calendar Year Control* (03.530.00) appears.
2. In **Process Option**, select Purge Oldest Year.
3. Click **Begin Processing**.

### Issue

I closed my 1099 year too many times. Is there a way to undo this or to print 1099s for a year that is no longer listed in *1099 Calendar Year Control* (03.530.00)?

### Resolution

Microsoft Dynamics SL only allows for two 1099 years to be open at the same time. If the 1099 year was purged by mistake, the best option is to restore the database from backup. If that is not an option, you could recover most of a purged year's 1099 information by following the steps in Knowledge Base article 848320. <https://mbs2.microsoft.com/Knowledgebase/KBDisplay.aspx?scid=kb:en-us:848320>

### Issue

I received notification from the government that they were unable to read my electronic file.

### Resolution

Contact your local IRS office or tax accountant for re-filing instructions.

### Issue

What should I do if my pre-printed 1099 or W2 forms do not align correctly?

### Resolution

The placement on the pre-printed form depends on the model of printer and printer driver that you are using. You may have to make a minor adjustment so that the form aligns correctly on your printer.

There are three possible adjustments that you can make:

- Move the print area up or down.
- Adjust for “creep.” If creep is the problem, the first printed page aligns correctly but later pages do not.
- Adjust the margins.

**Note:** Print a sample form to verify the alignment before you use the correction steps. Test each change that you make by reprinting test forms before you make a new adjustment.

1. Select the appropriate report.
2. On the **Report** tab, click **Printer Options**.
3. Select **Print to File**, and then click **Setup**. *Print to File* appears.
4. In **List Types of Files**, select Crystal Reports. Notice that **File Name** changes to \*.rpt.
5. In **Directories and Drives**, select the path (for example, \Program Files\Microsoft Dynamics\SL\Applications\Usr\_Rpts) on the appropriate drive to save the file.
6. Click **OK** on **Print to File** and again on the **Printer Options** screen.
7. Click **Print**.
8. Access Crystal Report Designer and open the appropriate report.
9. Use steps under a, b, or c that are shown here to make adjustments that are appropriate for your situation:
  - a) Move the form’s print area up or down.
    1. Increase (if lines print too high on the form) or decrease (if the printed lines are too low) the top margin by small increments (1/10”), and then print a test form again. Repeat this step until the alignment is correct.
    2. If the alignment continues to be a problem, change blank lines in the form. If you have to shift the whole form up, decrease the height of a blank line at the top of the form. To compensate for this adjustment, increase the height of the last blank line on the form by the same increment you used to adjust the first blank line.
  - b) Adjust for “creep.”

If each form prints slightly higher than the previous, resize sections of the form in small increments until the alignment is correct.

    1. Move the pointer over the bottom edge of the section that you want to resize.
    2. When the pointer shape changes to a resizing pointer, drag the boundary line to make the section larger or smaller as needed.
  - c) Adjust the right side margin.

Reduce the right side margin if the box outline on the right side of the W-2 plain paper forms does not print.
10. Save your changes.

### Issue

In Payroll *Employee Maintenance* (02.250.00) when I access an existing employee, try to exit, or save, message 14064 appears, "Warning – The W2 employee name record does not exist or is blank."

### Resolution

**W2 First Name, W2 Middle Name, W2 Last Name, and Suffix** in the W2Empname table must be populated. The IRS requires you to report the parts of an employee's name individually on the W2, and the employee's name on the W2 must match the name on their Social Security card.

To populate **W2 First Name, W2 Middle Name, W2 Last Name, and Suffix**, do *one* of the following:

Run Payroll *W2 Calculation* (02.510.00) to populate **W2 First Name, W2 Middle Name, W2 Last Name, and Suffix**. Examine each employee's W-2 name fields in *Employee Maintenance* (02.250.00) after you run *W2 Calculation* to verify that they match the employee's name on their Social Security card.

**Note:** You can run *W2 Calculation* as many times as needed until W2s are made final.

- OR -

In *Employee Maintenance* (02.250.00), access each employee's information and enter values in **W2 First Name, W2 Middle Name, W2 Last Name, and Suffix**.

### Issue

What is the purpose of each copy of the W-2 form?

### Resolution

The W-2 form is composed of six (6) copies:

- Copy A is submitted to the Social Security Administration by the employer when filing paper W-2 forms
- Copy B is given to employees for filing Federal income tax returns
- Copy C is given to employees for their records
- Copy D is kept by the employer for their records
- Copy 1 is given to employees for filing state, city, and local income tax returns
- Copy 2 is given to employees for filing state, city, and local income tax returns

### Issue

The instructions for Copies B, C, and D for the W-2 form do not print when the Plain Paper report formats are selected in *W-2 Forms* (02.741.00).

### Resolution

The instructions are not required to be printed on the back of the W-2 forms when you print to plain paper. It is acceptable to print the instructions on a separate sheet of paper and give to each employee.

### Issue

Copies 1 and 2 for the W-2 form are not available.

### Resolution

These copies are currently not supported. Use Copy D as a replacement. Select Plain Paper – Copy D when you print W-2s.

**Issue**

How do I meet the Employer-Provided Health Coverage Reporting requirement?

**Resolution**

Box 12 Letter DD is added to report the cost of employer-provided health coverage. This box letter is available on the **W-2 Control** tab of the *Deduction Maintenance* (02.290.00) screen. By selecting box 12, letter DD on your health insurance deduction(s), those amounts will then print on the W-2. See the IRS website for more information about this new reporting requirement:

<http://www.irs.gov/uac/Employer-Provided-Health-Coverage-Informational-Reporting-Requirements-Questions-and-Answers>

**Issue**

What should I do if I paid foreign taxes to more than one foreign country for a single vendor?

**Resolution**

Each vendor can have only one foreign country specified in Box 12 in *Vendor Maintenance* (03.270.00). If you have to report foreign taxes paid to more than one foreign country for a single vendor on a 1099, you must set up an additional vendor for each foreign country to which you paid taxes. Then, use Initialize Mode to specify the amounts and country code in Box 11 and in Box 12.

## Business Services Online (BSO)

As of tax year 2006, the Social Security Administration no longer accepts wage submission files prepared in the Magnetic Media Reporting and Electronic Filing (MMREF) format on magnetic tape or disk. To send your wage submission files electronically, access the Social Security Administration's Business Services Online (BSO) website at <http://www.ssa.gov/bsowelcome.htm>. Before they use the BSO website, employers must register. The Social Security Administration sends a personal identification number (PIN) or user identification number (user ID) that you must enter in the **User ID** box on the **Transmitter** tab of *Payroll Generate W2 Electronic File* (02.742.00). This makes sure that the identification number is included in the wage submission file.

If you use the SSA BSO system, the filing deadline is March 31, 2014. The deadline for submitting printed Copy A forms to the IRS is February 28, 2014. W-2 recipients must receive their copy by January 31, 2014. For more information, see the Social Security Administration website by using the link listed earlier in this section.

### Business Services Online (BSO) Disclaimer

While we try to provide accurate information to our clients on tax and government regulations, always contact your company's tax lawyers or tax accountants for the information about your company's situation. Microsoft Corporation does not take responsibility for your company's compliance with federal, state, or local regulations.

## Filing Information Returns Electronically (FIRE)

As of tax year 2008, the IRS no longer accepts 1099 information return files prepared in the 1099 Record Format Specifications and Record Layouts format on magnetic tape. To send your 1099 information return files electronically, access the Internal Revenue Service's Filing Information Returns Electronically (FIRE) website at <http://fire.irs.gov>.

**Note:** If you use the IRS FIRE system, the filing deadline is March 31, 2014. For more information, see the Internal Revenue Service website by using the link listed earlier in this section.

Before they use the FIRE website, organizations must request authorization to file information returns with the IRS/IRB (IRS Information Returns Branch). To do this, submit Form 4419 Application for Filing Information Returns Electronically. The IRS will send a Transmitter Control Code (TCC) that you must specify in the **Control Code** box on the **Transmitter** tab of *Accounts Payable Generate 1099 Electronic File* (03.742.00). This makes sure that the TCC is included in the 1099 information return file.

After they receive authorization, filers can test their 2013 electronic files starting November 12, 2013 through February 28, 2014 by accessing <http://fire.test.irs.gov>.

### Note:

- The deadline for submitting printed 1099 forms is February 28, 2014.
- 1099s with a Box 8 (Substitute payments in lieu of dividends or interest) amount or a Box 14 (Gross proceeds paid to an attorney) amount equal to 0.00 must be delivered to recipients by January 31, 2014.
- 1099s with a Box 8 or a Box 14 amount greater than 0.00 must be delivered to recipients by February 18, 2014.

### Filing Information Returns Electronically (FIRE) Disclaimer

While we try to provide accurate information to our clients on tax and government regulations, always contact your company's tax lawyers or tax accountants for the information about your company's situation. Microsoft Corporation does not take responsibility for your company's compliance with federal, state, or local regulations.

## Appendix

### Changed Files

This section contains the list of Microsoft Dynamics SL files that are updated by the 2013 Year End Updates.

- **Microsoft Dynamics SL 2011**

Module	File Name	Screen/Report Name	
Payroll	0226000.exe	Employee W2 History (02.260.00)	
	0227000.exe	Earnings Type Maintenance (02.270.00)	
	0229000.exe	Deduction Maintenance (02.290.00)	
	0229100.exe	Deduction History (02.291.00)	
	0251000.exe	W2 Calculation (02.510.00)	
	0274100.exe	W-2 Forms (02.741.00)	
	0274200.exe	Generate W2 Electronic File (02.742.00)	
	0275000.exe	941 Quarterly Tax Return (02.750.00)	
	0295000.exe	PR Setup (02.950.00)	
	02741xpa.rpt	W-2 Forms - Plain Paper - Copy A	
	02741xpb.rpt	W-2 Forms - Plain Paper - Copy B	
	02741xpc.rpt	W-2 Forms - Plain Paper - Copy C	
	02741xpd.rpt	W-2 Forms - Plain Paper - Copy D	
	02741x1w.rpt	W-2 Forms - 1 Form Wide	
	02741x2w.rpt	W-2 Forms - 2 Form Wide	
	02741x4u.rpt	W-2 Forms - 4Up Form	
	02750.rpt	941 Quarterly Tax Worksheet	
	02752.rpt	941 Schedule B	
	Accounts Payable	0301000.exe	Voucher and Adjustment Entry (03.010.00)
		0302000.exe	Quick Voucher and Pre-Payment Entry (03.020.00)
0302500.exe		Voucher Entry - Distributed Liability (03.025.00)	
0325000.exe		Document Maintenance (03.250.00)	
0326000.exe		Recurring Voucher Maintenance (03.260.00)	
0327000.exe		Vendor Maintenance (03.270.00)	
0374200.exe		Generate 1099 Electronic File (03.742.00)	
03730.rpt		1099 Print Preview Report - Standard	
03740l.rpt	1099 Forms Report - Laser 1099 Forms		

- **Microsoft Dynamics SL 2011 Service Pack 1 (SP1)**

Module	File Name	Screen/Report Name
Payroll	0226000.exe	Employee W2 History (02.260.00)
	0227000.exe	Earnings Type Maintenance (02.270.00)
	0229000.exe	Deduction Maintenance (02.290.00)
	0229100.exe	Deduction History (02.291.00)
	0251000.exe	W2 Calculation (02.510.00)



## Updating Microsoft Dynamics SL 1099 and W-2 Reporting for Tax Year 2013

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Module	File Name	Screen/Report Name
	0274100.exe	W-2 Forms (02.741.00)
	0274200.exe	Generate W2 Electronic File (02.742.00)
	0275000.exe	941 Quarterly Tax Return (02.750.00)
	0295000.exe	PR Setup (02.950.00)
	02741xpa.rpt	W-2 Forms - Plain Paper - Copy A
	02741xpb.rpt	W-2 Forms - Plain Paper - Copy B
	02741xpc.rpt	W-2 Forms - Plain Paper - Copy C
	02741xpd.rpt	W-2 Forms - Plain Paper - Copy D
	02741x1w.rpt	W-2 Forms - 1 Form Wide
	02741x2w.rpt	W-2 Forms - 2 Form Wide
	02741x4u.rpt	W-2 Forms - 4Up Form
	02750.rpt	941 Quarterly Tax Worksheet
	02752.rpt	941 Schedule B
Accounts Payable	0301000.exe	Voucher and Adjustment Entry (03.010.00)
	0302000.exe	Quick Voucher and Pre-Payment Entry (03.020.00)
	0302500.exe	Voucher Entry - Distributed Liability (03.025.00)
	0325000.exe	Document Maintenance (03.250.00)
	0326000.exe	Recurring Voucher Maintenance (03.260.00)
	0327000.exe	Vendor Maintenance (03.270.00)
	0374200.exe	Generate 1099 Electronic File (03.742.00)
	03730.rpt	1099 Print Preview Report - Standard
	03740l.rpt	1099 Forms Report - Laser 1099 Forms

- **Microsoft Dynamics SL 2011 Feature Pack 1 (FP1)**

Module	File Name	Screen/Report Name
Payroll	0227000.exe	Earnings Type Maintenance (02.270.00)
	0229000.exe	Deduction Maintenance (02.290.00)
	0229100.exe	Deduction History (02.291.00)
	0251000.exe	W2 Calculation (02.510.00)
	0274200.exe	Generate W2 Electronic File (02.742.00)
	0275000.exe	941 Quarterly Tax Return (02.750.00)
	0295000.exe	PR Setup (02.950.00)
	02750.rpt	941 Quarterly Tax Worksheet
	02752.rpt	941 Schedule B
Accounts Payable	0301000.exe	Voucher and Adjustment Entry (03.010.00)
	0302000.exe	Quick Voucher and Pre-Payment Entry (03.020.00)
	0302500.exe	Voucher Entry - Distributed Liability (03.025.00)
	0325000.exe	Document Maintenance (03.250.00)
	0326000.exe	Recurring Voucher Maintenance (03.260.00)
	0327000.exe	Vendor Maintenance (03.270.00)

## Updating Microsoft Dynamics SL 1099 and W-2 Reporting for Tax Year 2013

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Module	File Name	Screen/Report Name
	0374200.exe	Generate 1099 Electronic File (03.742.00)
	03730.rpt	1099 Print Preview Report - Standard
	03740l.rpt	1099 Forms Report - Laser 1099 Forms

- **Microsoft Dynamics SL 2011 Service Pack 2 (SP2)**

Module	File Name	Screen/Report Name
Payroll	0251000.exe	W2 Calculation (02.510.00)
	0274200.exe	Generate W2 Electronic File (02.742.00)
Accounts Payable	0301000.exe	Voucher and Adjustment Entry (03.010.00)
	0302000.exe	Quick Voucher and Pre-Payment Entry (03.020.00)
	0302500.exe	Voucher Entry - Distributed Liability (03.025.00)
	0325000.exe	Document Maintenance (03.250.00)
	0326000.exe	Recurring Voucher Maintenance (03.260.00)
	0327000.exe	Vendor Maintenance (03.270.00)
	0374200.exe	Generate 1099 Electronic File (03.742.00)
	03730.rpt	1099 Print Preview Report - Standard
	03740l.rpt	1099 Forms Report - Laser 1099 Forms

## Bug Corrections

This section contains the list of Microsoft Dynamics SL bugs that are included in addition to the 2013 Year End Updates.

- **Microsoft Dynamics SL 2011**

- Year End Updates 2011
- Year End Updates 2012
- Bug 23668 - The Doc Share buttons in the *Vendor Maintenance* (03.270.00) screen are disabled if you open the *Vendor Maintenance* (03.270.00) screen from the *Purchase Orders* (04.250.00) screen.
- Bug 23342 - The 941 Quarterly Tax Return (02750.rpt) report must have the exempt wages field {@ExWagesPaid} removed from total line 6e - Total Taxes before adjustments.
- Bug 24038 - Other companies' batches show in the *Quick Voucher and Pre-Payment Entry* (03.020.00) screen.
- Bug 25243 - Implement Q1-2013 941 changes. Changes were implemented to support the latest updates to Form 941 in the "Employer's 941 Quarterly Federal Tax Worksheet," printed from the 941 Quarterly Tax Return (02.750.00) screen. The changes include adding a selection called "Box 06 Additional Medicare tax" to the Box Number list on the W-2 Control tab in the Deduction (02.290.00) screen, the Earnings Type (02.270.00) screen, and the Deduction History (02.291.00) screen. This new "Box 06 Additional Medicare tax" box number value must be selected for the FED9 Deduction in the Deduction (02.290.00) screen so that the FED9 values are printed on the Employer's 941 Quarterly Federal Tax Worksheet (02750) report. A new Additional Medicare Percent box was added to the 941 Quarterly Federal Tax Worksheet (02.750.00) screen that uses the Fixed Pct/Rate value from the Deduction (02.290.00) screen for the FED9 deduction.

## Updating Microsoft Dynamics SL 1099 and W-2 Reporting for Tax Year 2013

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- **Microsoft Dynamics SL 2011 Service Pack 1 (SP1)**
  - Year End Updates 2011
  - Year End Updates 2012
  - Bug 24111 - The default expense account is cleared when you change the company ID on a detail line in the *Voucher and Adjustment Entry* (03.010.00) screen.
  - Bug 25243 - Implement Q1-2013 941 changes. Changes were implemented to support the latest updates to Form 941 in the "Employer's 941 Quarterly Federal Tax Worksheet," printed from the 941 Quarterly Tax Return (02.750.00) screen. The changes include adding a selection called "Box 06 Additional Medicare tax" to the Box Number list on the W-2 Control tab in the Deduction (02.290.00) screen, the Earnings Type (02.270.00) screen, and the Deduction History (02.291.00) screen. This new "Box 06 Additional Medicare tax" box number value must be selected for the FED9 Deduction in the Deduction (02.290.00) screen so that the FED9 values are printed on the Employer's 941 Quarterly Federal Tax Worksheet (02750) report. A new Additional Medicare Percent box was added to the 941 Quarterly Federal Tax Worksheet (02.750.00) screen that uses the Fixed Pct/Rate value from the Deduction (02.290.00) screen for the FED9 deduction.
- **Microsoft Dynamics SL 2011 Feature Pack 1 (FP1)**
  - Year End Updates 2012
  - Bug 25243 - Implement Q1-2013 941 changes. Changes were implemented to support the latest updates to Form 941 in the "Employer's 941 Quarterly Federal Tax Worksheet," printed from the 941 Quarterly Tax Return (02.750.00) screen. The changes include adding a selection called "Box 06 Additional Medicare tax" to the Box Number list on the W-2 Control tab in the Deduction (02.290.00) screen, the Earnings Type (02.270.00) screen, and the Deduction History (02.291.00) screen. This new "Box 06 Additional Medicare tax" box number value must be selected for the FED9 Deduction in the Deduction (02.290.00) screen so that the FED9 values are printed on the Employer's 941 Quarterly Federal Tax Worksheet (02750) report. A new Additional Medicare Percent box was added to the 941 Quarterly Federal Tax Worksheet (02.750.00) screen that uses the Fixed Pct/Rate value from the Deduction (02.290.00) screen for the FED9 deduction.
- **Microsoft Dynamics SL 2011 Service Pack 2 (SP2)**
  - No additional bugs included.