



GALAXY

hosted software LLC

Tax Form Guide

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Introduction

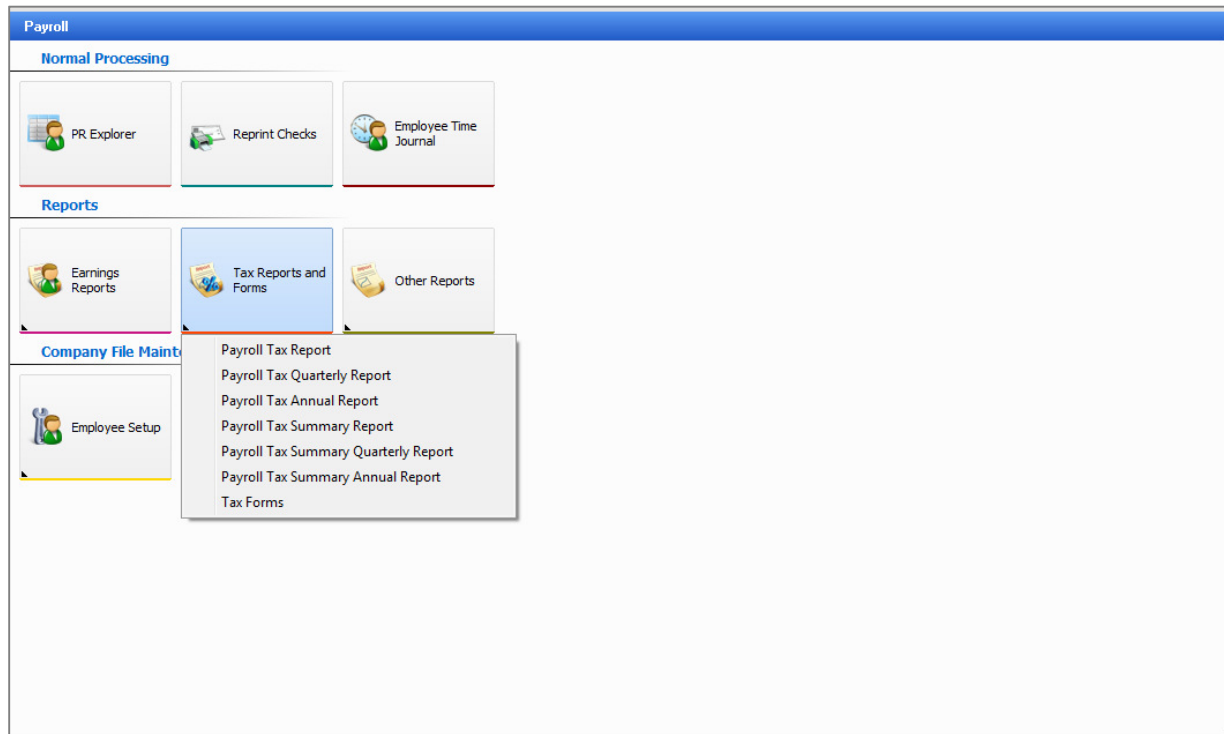
The Galaxy software can generate various payroll tax forms that are prefilled by the system with relevant payroll data for the appropriate reporting period. These forms include Federal tax forms 941, 944, 940, and W-2, as well as an electronic submission file for W-2 and W-3 information. Also included are some state unemployment files that can be electronically submitted.

1099 forms are not considered to be payroll tax forms. You may use the tools available in the Galaxy software to generate your 1099 forms. Please see the 1099 Form Guide for instructions and more information.

Galaxy does not provide legal or tax advice and will not be held accountable for any tax related fines and/or penalties that you or your company may be subject to as a result of incorrectly entered or setup data in the Galaxy system, erroneous form filing or lack of filing, incorrect tax payments, and/or late deposits that were your responsibility and that may have been completed based on any advice or assistance from any Galaxy employee.

Accessing Tax Forms

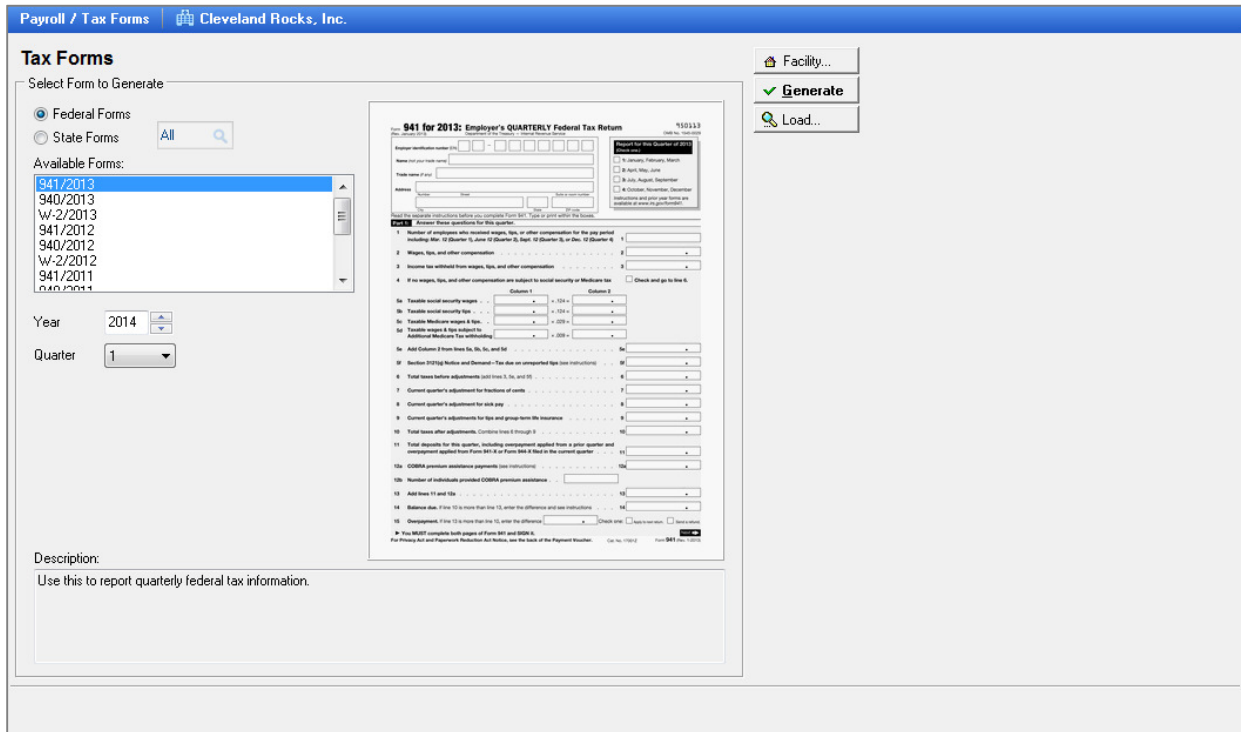
From the Payroll menu select the **Tax Reports and Forms** icon.



A list of different types of reports appears:

- **Payroll Tax Report**
- **Payroll Tax Quarterly Report**
- **Payroll Tax Annual Report**
- **Payroll Tax Summary Report**
- **Payroll Tax Summary Quarterly Report**
- **Payroll Tax Summary Annual Report**
- **Tax Forms**

Select the last option-**Tax Forms**. A screen with available tax forms will display.



System selection defaults to **Federal Forms** (you may change this to **State Forms** and select the desired state from the option to the right).

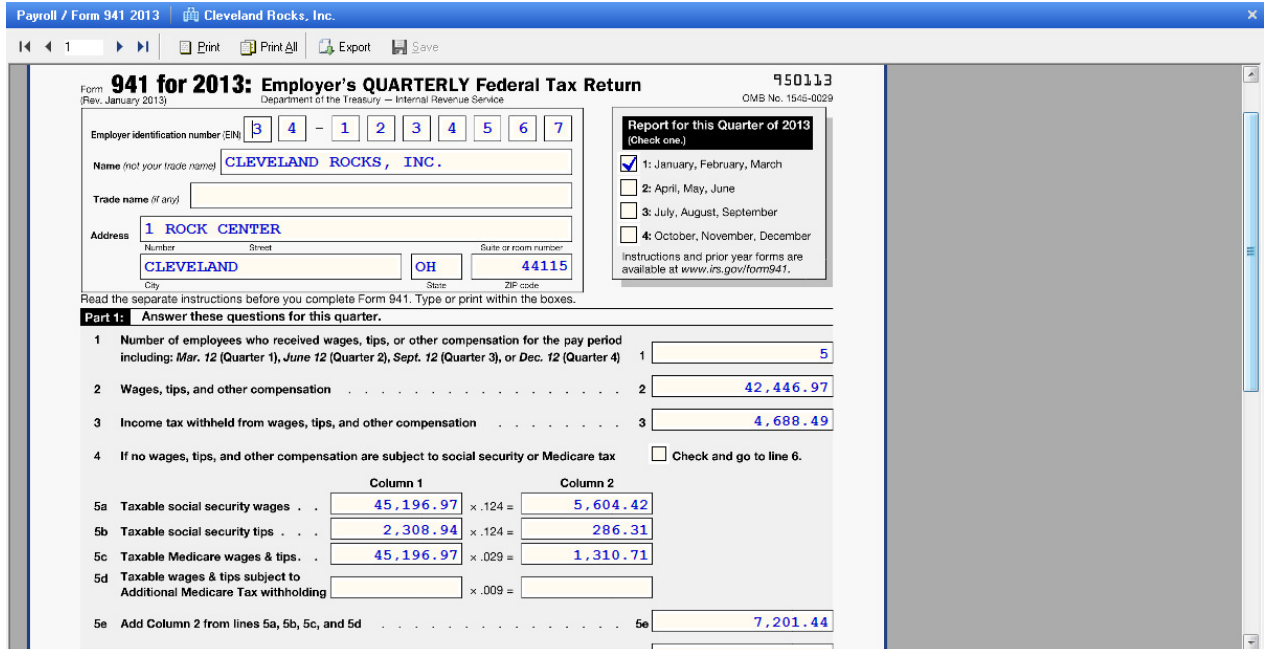
1. From **Available Forms** menu select the form that you need. All forms are listed in the **form #/year** format. A generic image of the form displays on the right side of the screen (the W2 form will NOT be generated in the same format as the preview image seen on this screen).
2. Select the **Year** that applies to the form you wish to access using the up/down arrows.
3. Select **Quarter (1, 2, 3, or 4)**, if applicable.
4. Click **Generate** to prefill the form.

*If the form has previously been generated, the following message will appear: 'The form xxx/xxxx for this period already exist. Recreate?' Clicking 'No' will simply load the form as it was last saved. Clicking 'Yes' will recreate the form. Clicking **Load** instead of **Generate** will allow you to load any previous versions of the form.

Generating Tax Forms

➤ 941/944 Form

After accessing the appropriate form the screen will display the selection. Any relevant data that is stored in the system will be prefilled in the corresponding fields on the form.



Payroll / Form 941 2013 | Cleveland Rocks, Inc.

Form **941 for 2013: Employer's QUARTERLY Federal Tax Return** 950113
(Rev. January 2013) Department of the Treasury - Internal Revenue Service OMB No. 1545-0029

Employer identification number (EIN) **Report for this Quarter of 2013**
(Check one)

Name (not your trade name) 1: January, February, March

Trade name (if any) 2: April, May, June

Address 3: July, August, September

4: October, November, December

Number Street Suite or room number City State ZIP code

Read the separate instructions before you complete Form 941. Type or print within the boxes.

Part 1: Answer these questions for this quarter.

1 Number of employees who received wages, tips, or other compensation for the pay period including: Mar. 12 (Quarter 1), June 12 (Quarter 2), Sept. 12 (Quarter 3), or Dec. 12 (Quarter 4) 1

2 Wages, tips, and other compensation 2

3 Income tax withheld from wages, tips, and other compensation 3

4 If no wages, tips, and other compensation are subject to social security or Medicare tax Check and go to line 6.

	Column 1		Column 2
5a Taxable social security wages . . .	<input type="text" value="45,196.97"/>	$\times .124 =$	<input type="text" value="5,604.42"/>
5b Taxable social security tips . . .	<input type="text" value="2,308.94"/>	$\times .124 =$	<input type="text" value="286.31"/>
5c Taxable Medicare wages & tips . . .	<input type="text" value="45,196.97"/>	$\times .029 =$	<input type="text" value="1,310.71"/>
5d Taxable wages & tips subject to Additional Medicare Tax withholding <input type="text"/>		$\times .009 =$	<input type="text"/>
5e Add Column 2 from lines 5a, 5b, 5c, and 5d			<input type="text" value="7,201.44"/>

Manually add any other information that may be required but not stored in the system. Fields that usually require manual input include:

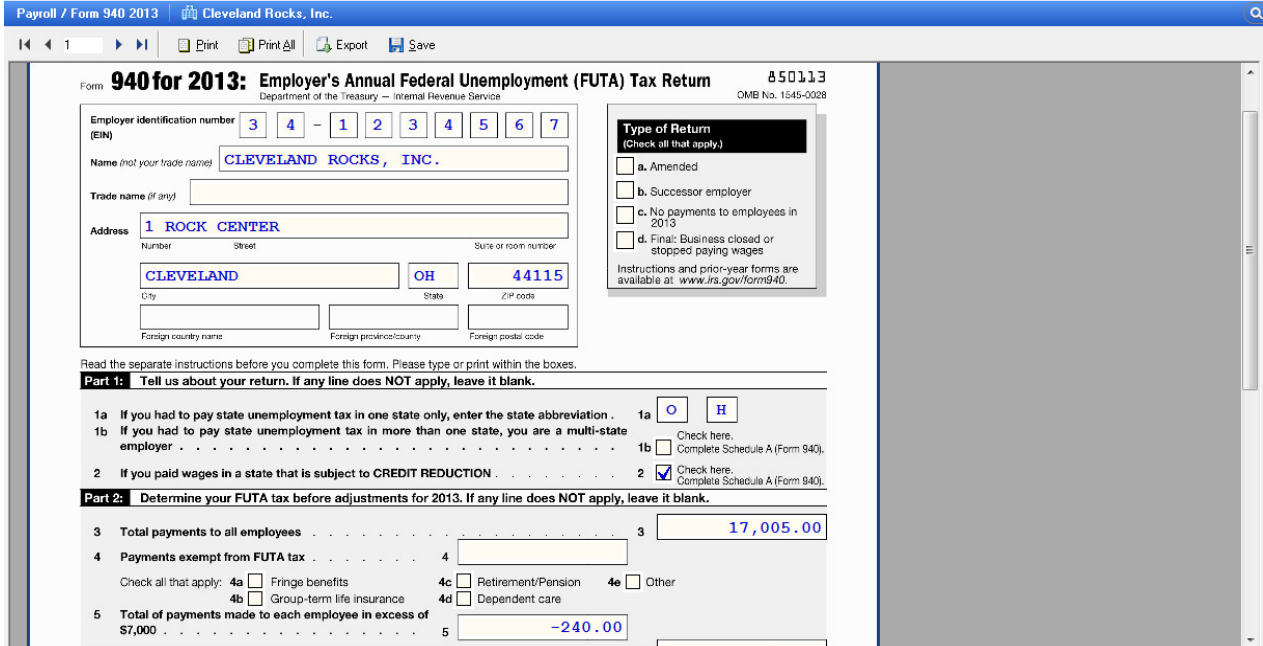
- Total deposits for the quarter/year (Part 1).
- Deposit schedule (Part 2).
- Signer information (Parts 4 and 5).
- Part 3 (if applicable).

The correct liability amounts will generate in Part 2 (or on an additional schedule for semi-weekly depositors).

Once all appropriate fields are complete, you should **Save** the form by using the button on the top of the screen. At this point you may choose to print the form. There are two print buttons at the top of the screen - **Print** (only prints current page) and **Print All** (prints all pages of the form).

🔍 940 Form

The selected 940 form will be displayed on the screen. Any relevant data that is stored in the system will be prefilled in the corresponding fields on the form.



Payroll / Form 940 2013 | Cleveland Rocks, Inc.

Form **940 for 2013: Employer's Annual Federal Unemployment (FUTA) Tax Return** 850113
Department of the Treasury - Internal Revenue Service OMB No. 1545-0028

Employer identification number (EIN) 3 4 - 1 2 3 4 5 6 7

Name (not your trade name) CLEVELAND ROCKS, INC.

Trade name (if any)

Address 1 ROCK CENTER
Number Street Suite or room number
CLEVELAND OH 44115
City State ZIP code

Type of Return (Check all that apply)
 a. Amended
 b. Successor employer
 c. No payments to employees in 2013
 d. Final: Business closed or stopped paying wages
 Instructions and prior-year forms are available at www.irs.gov/form940.

Read the separate instructions before you complete this form. Please type or print within the boxes.

Part 1: Tell us about your return. If any line does NOT apply, leave it blank.

1a If you had to pay state unemployment tax in one state only, enter the state abbreviation 1a O H
 1b If you had to pay state unemployment tax in more than one state, you are a multi-state employer 1b Check here. Complete Schedule A (Form 940).
 2 If you paid wages in a state that is subject to CREDIT REDUCTION 2 Check here. Complete Schedule A (Form 940).

Part 2: Determine your FUTA tax before adjustments for 2013. If any line does NOT apply, leave it blank.

3 Total payments to all employees 3 17,005.00
 4 Payments exempt from FUTA tax 4
 Check all that apply: 4a Fringe benefits 4c Retirement/Pension 4e Other
 4b Group-term life insurance 4d Dependent care
 5 Total of payments made to each employee in excess of \$7,000 5 -240.00

Manually add any other information that may be required but not stored in the system. Fields that usually require manual input include:

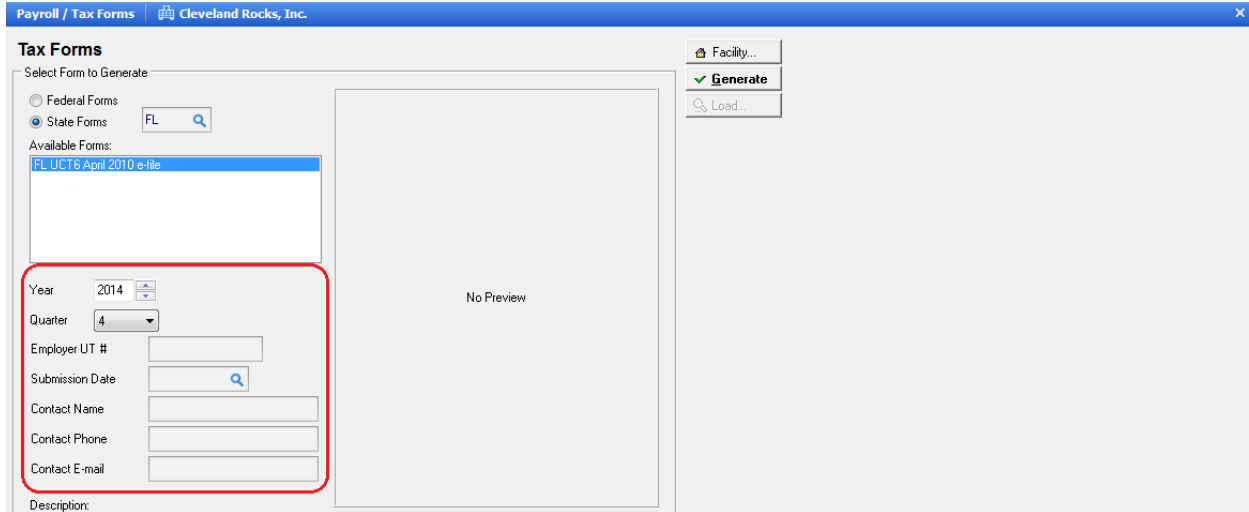
- The total deposits for the year (Part 4).
- Signer information (Parts 6 and 7).

The correct liability amounts will generate in Part 5. If a credit reduction applies, the correct information should be included and Schedule A will appear after page 2 of the form.

Once all appropriate fields are complete, you should **Save** the form by using the button on the top of the screen. At this point you may choose to print the form. There are two print buttons at the top of the screen - **Print** (only prints current page) and **Print All** (prints all pages of the form).

➔ State Forms

All state forms in the Galaxy software are electronic versions of information required by various state agencies. Depending on the selected state form, there may be additional fields that require completing (see in red below) before the form can be generated. Please make sure that those are completed.

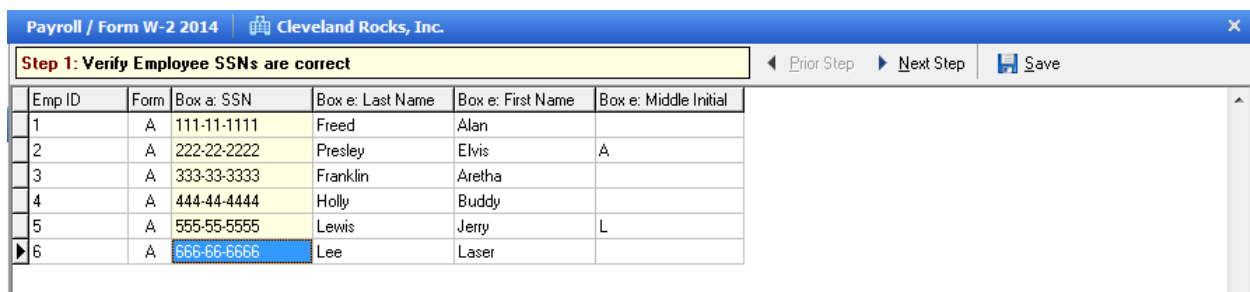


Once you click **Generate** you will get a dialog box that will allow you to save the electronic file in the selected format. You will then need to submit this file to the appropriate government authority. You will need to make sure that you have the appropriate access to do so. **We do not have any details or information about how this can be done. If you are unfamiliar with this process, you will need to contact your state agency directly or ask your accountant or tax advisor for help.**

W-2 Forms

If you selected to generate W-2 forms you will be taken through a series of ‘Steps’ that will ask that you confirm all data for accuracy. Any relevant data that is stored in the system will be prefilled in the corresponding fields. Each field can be overtyped directly on screen and that data will be used on the forms. However, some of the data (employee names, addresses and SSNs) may need to be updated in the Employee setup screen, otherwise this data will always display the same errors in future years’ W-2’s.

Step 1-In Step 1 you are asked to verify employee social security numbers. Once you have done so, click **Next Step** at the top of the screen.

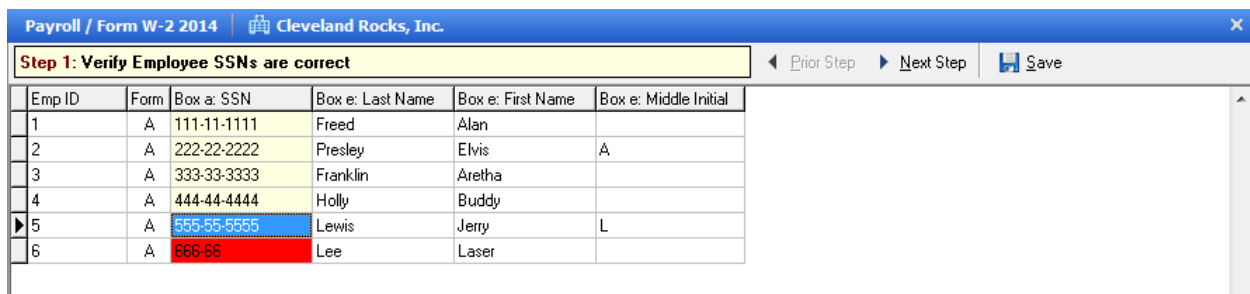


Payroll / Form W-2 2014 Cleveland Rocks, Inc.

Step 1: Verify Employee SSNs are correct

Emp ID	Form	Box a: SSN	Box e: Last Name	Box e: First Name	Box e: Middle Initial
1	A	111-11-1111	Freed	Alan	
2	A	222-22-2222	Presley	Elvis	A
3	A	333-33-3333	Franklin	Aretha	
4	A	444-44-4444	Holly	Buddy	
5	A	555-55-5555	Lewis	Jerry	L
6	A	666-66-6666	Lee	Laser	

If there are any fields with invalid data, they will be highlighted in red. Those errors must be corrected in order to proceed to the next step.

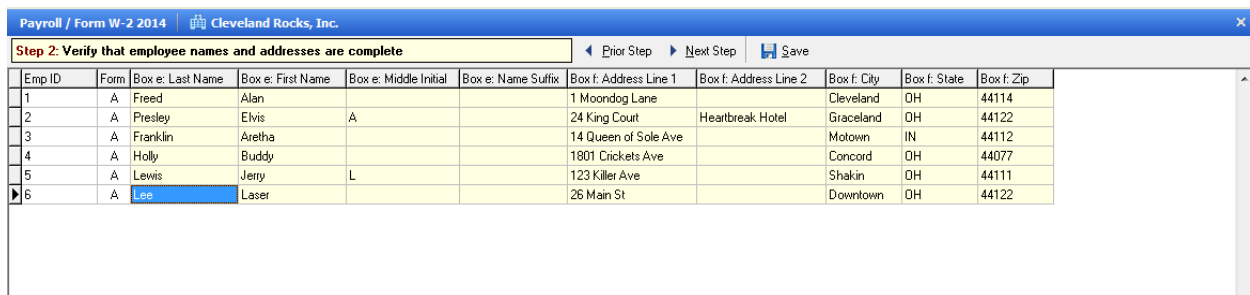


Payroll / Form W-2 2014 Cleveland Rocks, Inc.

Step 1: Verify Employee SSNs are correct

Emp ID	Form	Box a: SSN	Box e: Last Name	Box e: First Name	Box e: Middle Initial
1	A	111-11-1111	Freed	Alan	
2	A	222-22-2222	Presley	Elvis	A
3	A	333-33-3333	Franklin	Aretha	
4	A	444-44-4444	Holly	Buddy	
5	A	555-55-5555	Lewis	Jerry	L
6	A	666-66	Lee	Laser	

Step 2-In Step 2 you are asked to verify employee names and addresses. Once you have done so, click **Next Step** at the top of the screen.



Payroll / Form W-2 2014 Cleveland Rocks, Inc.

Step 2: Verify that employee names and addresses are complete

Emp ID	Form	Box e: Last Name	Box e: First Name	Box e: Middle Initial	Box e: Name Suffix	Box f: Address Line 1	Box f: Address Line 2	Box f: City	Box f: State	Box f: Zip
1	A	Freed	Alan			1 Moondog Lane		Cleveland	OH	44114
2	A	Presley	Elvis	A		24 King Court	Heartbreak Hotel	Graceland	OH	44122
3	A	Franklin	Aretha			14 Queen of Sole Ave		Motown	IN	44112
4	A	Holly	Buddy			1801 Crickets Ave		Concord	OH	44077
5	A	Lewis	Jerry	L		123 Killer Ave		Shakin	OH	44111
6	A	Lee	Laser			26 Main St		Downtown	OH	44122


Step 3-Step 8-Each of the steps clearly shows what is expected to be verified at the top of the screen. Steps 7 and 8 may display a warning message if totals in boxes 4 and 6 (highlighted in green) do not correspond to wages multiplied by the correct tax amounts. These warnings do NOT have to be corrected before proceeding to the next step.

Payroll / Form W-2 2014 | Cleveland Rocks, Inc.

Step 8: Verify Medicare wages (box 5) multiplied by 1.45% = Medicare withheld (box 6) | Prior Step | Next Step | Save

Emp ID	Form	Box e: Last Name	Box e: First Name	Box e: Middle Initial	Box 5: Medicare Wages	Box 6: Medicare Withheld
1	A	Freed	Alan		\$36,000.00	\$522.00
2	A	Presley	Elvis	A	\$18,602.50	\$269.73
3	A	Franklin	Aretha		\$221,680.00	\$3,409.48
4	A	Holly	Buddy		\$6,578.50	\$95.38
5	A	Lewis	Jerry	L	\$6,403.50	\$92.85
6	A	Lee	Laser		\$6,480.00	\$93.96

Warning

 **WARNING!** One or more Box 5 x 1.45% are not within \$1.00 of box 6. Please recheck those figures for accuracy.

Step 9-This is the step where you will be able to preview all of the W-2 fields for each employee to see if there are any changes needed.

Payroll / Form W-2 2014 | Cleveland Rocks, Inc.

Step 9: All required steps are complete. Please verify that all fields are correct. | Prior Step | Next Step | Save

Emp ID	Form	Box a: SSN	Box e: Last Name	Box e: First Name	Box e: Middle Initial	Box e: Name Suffix	Box f: Address Line 1	Box f: Address Line 2	Box f: City	Box f: State	Box f: Zip	Box 13: Status
1	A	111-11-1111	Freed	Alan			1 Moondog Lane		Cleveland	OH	44114	F
2	A	222-22-2222	Presley	Elvis	A		24 King Court	Heartbreak Hotel	Graceland	OH	44122	F
3	A	333-33-3333	Franklin	Aretha			14 Queen of Sole Ave		Motown	IN	44112	F
4	A	444-44-4444	Holly	Buddy			1801 Crickets Ave		Concord	OH	44077	F
5	A	555-55-5555	Lewis	Jerry	L		123 Killer Ave		Shakin	OH	44111	F
6	A	666-66-6666	Lee	Laser			26 Main St		Downtown	OH	44122	F

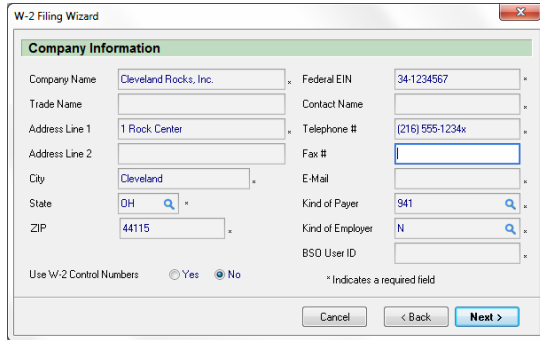
Once you click **Next Step** in Step 9, you will enter the Filing Wizard.

W-2 Filing Wizard

Process W-2 Filing Wizard

 Now that you have reviewed your employee information, please verify and complete your company information. Then print the W-2s and related forms.

Here you will be asked to verify your company information and to identify some other items that are W-2 specific (see **E-filing W-2's** on p. 13 for info on **BSO User ID**).



W-2 Filing Wizard

Company Information

Company Name: Cleveland Rocks, Inc. Federal EIN: 34-1234567

Trade Name: Contact Name:

Address Line 1: 1 Rock Center Telephone #: (216) 955-1234x

Address Line 2: Fax #:

City: Cleveland E-Mail:

State: OH Kind of Payer: 941

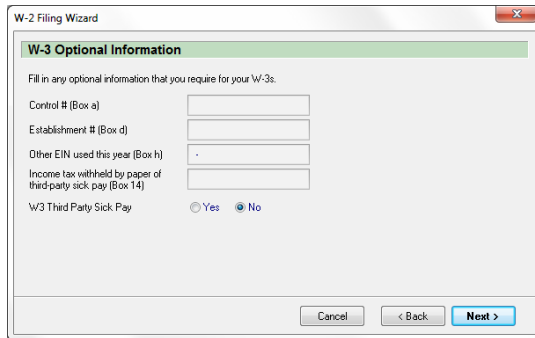
ZIP: 44115 Kind of Employer: N

Use W-2 Control Numbers: Yes No

* Indicates a required field

Buttons: Cancel, < Back, Next >

You will also have an option to enter additional information.



W-2 Filing Wizard

W-3 Optional Information

Fill in any optional information that you require for your W-3's:

Control # (Box a):

Establishment # (Box d):

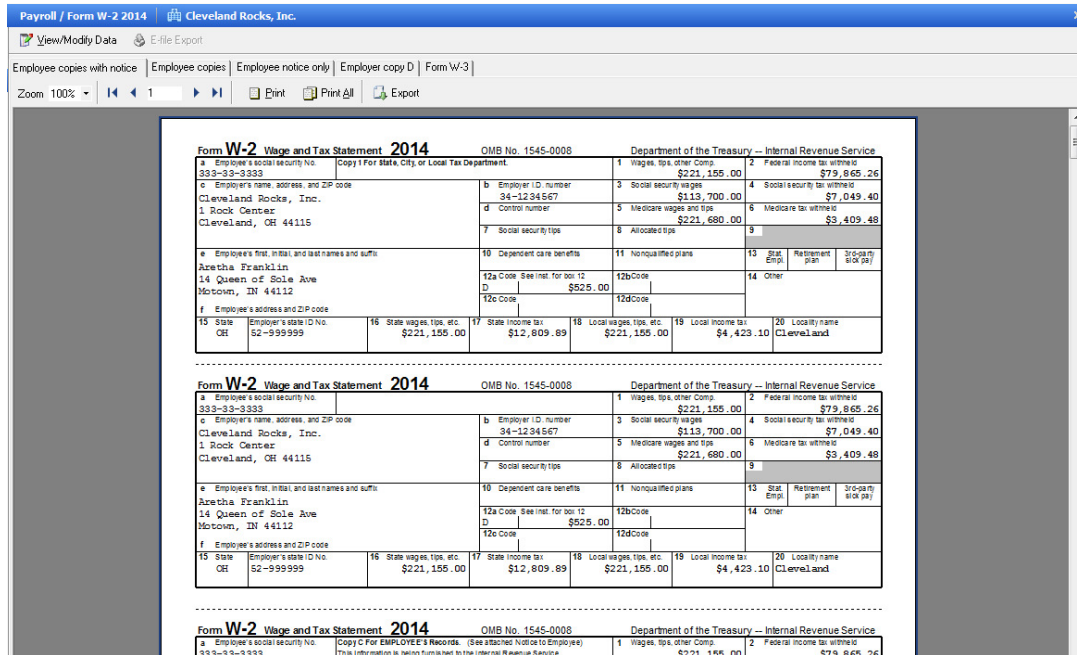
Other EIN used this year (Box h):

Income tax withheld by paper of third-party sick pay (Box 14):

W3 Third Party Sick Pay: Yes No

Buttons: Cancel, < Back, Next >

Once finished, the forms will be displayed on the screen. The **View/Modify Data** button at the top will allow you to go back into edit mode to make any necessary changes.



Payroll / Form W-2 2014 | Cleveland Rocks, Inc.

View/Modify Data | E-file Export

Employee copies with notice | Employee copies | Employee notice only | Employer copy D | Form W-3 |

Zoom: 100% | Print | Print All | Export

Form W-2 Wage and Tax Statement 2014 OMB No. 1545-0008 Department of the Treasury - Internal Revenue Service

a Employer's social security No. 333-33-3333 Copy 1 For State, City, or Local Tax Department

b Employer ID number 34-1234567

c Employer's name, address, and ZIP code Cleveland Rocks, Inc. 1 Rock Center Cleveland, OH 44115

d Control number

e Employer's first, initial, and last names and suffix: Aretha Franklin 14 Queen of Sole Ave Motown, IN 44112

f Employer's address and ZIP code

1 Wages, tips, other Comp. \$221,155.00

2 Federal income tax withheld \$79,865.26

3 Social security wages \$113,700.00

4 Social security tax withheld \$7,049.40

5 Medicare wages and tips \$221,680.00

6 Medicare tax withheld \$3,409.48

7 Social security tips

8 Allocated tips

9

10 Dependent care benefits

11 Nonqualified plans

12a Code See inst. for box 12 D \$525.00

12b Code

12c Code

12d Code

13 Stat. Emp. Retirement plan

14 Other

15 State Employer's state ID No. OH 52-999999

16 State wages, tips, etc. \$221,155.00

17 State income tax \$12,809.89

18 Local wages, tips, etc. \$221,155.00

19 Local income tax \$4,429.10

20 Locality name Cleveland

Form W-2 Wage and Tax Statement 2014 OMB No. 1545-0008 Department of the Treasury - Internal Revenue Service

a Employer's social security No. 333-33-3333

b Employer ID number 34-1234567

c Employer's name, address, and ZIP code Cleveland Rocks, Inc. 1 Rock Center Cleveland, OH 44115

d Control number

e Employer's first, initial, and last names and suffix: Aretha Franklin 14 Queen of Sole Ave Motown, IN 44112

f Employer's address and ZIP code

1 Wages, tips, other Comp. \$221,155.00

2 Federal income tax withheld \$79,865.26

3 Social security wages \$113,700.00

4 Social security tax withheld \$7,049.40

5 Medicare wages and tips \$221,680.00

6 Medicare tax withheld \$3,409.48

7 Social security tips

8 Allocated tips

9

10 Dependent care benefits

11 Nonqualified plans

12a Code See inst. for box 12 D \$525.00

12b Code

12c Code

12d Code

13 Stat. Emp. Retirement plan

14 Other

15 State Employer's state ID No. OH 52-999999

16 State wages, tips, etc. \$221,155.00

17 State income tax \$12,809.89

18 Local wages, tips, etc. \$221,155.00

19 Local income tax \$4,429.10

20 Locality name Cleveland

Form W-2 Wage and Tax Statement 2014 OMB No. 1545-0008 Department of the Treasury - Internal Revenue Service

a Employer's social security No. 333-33-3333 Copy C For EMPLOYEE'S RECORDS. (See attached Notice to Employee)

b Employer ID number 34-1234567

c Employer's name, address, and ZIP code Cleveland Rocks, Inc. 1 Rock Center Cleveland, OH 44115

d Control number

e Employer's first, initial, and last names and suffix: Aretha Franklin 14 Queen of Sole Ave Motown, IN 44112

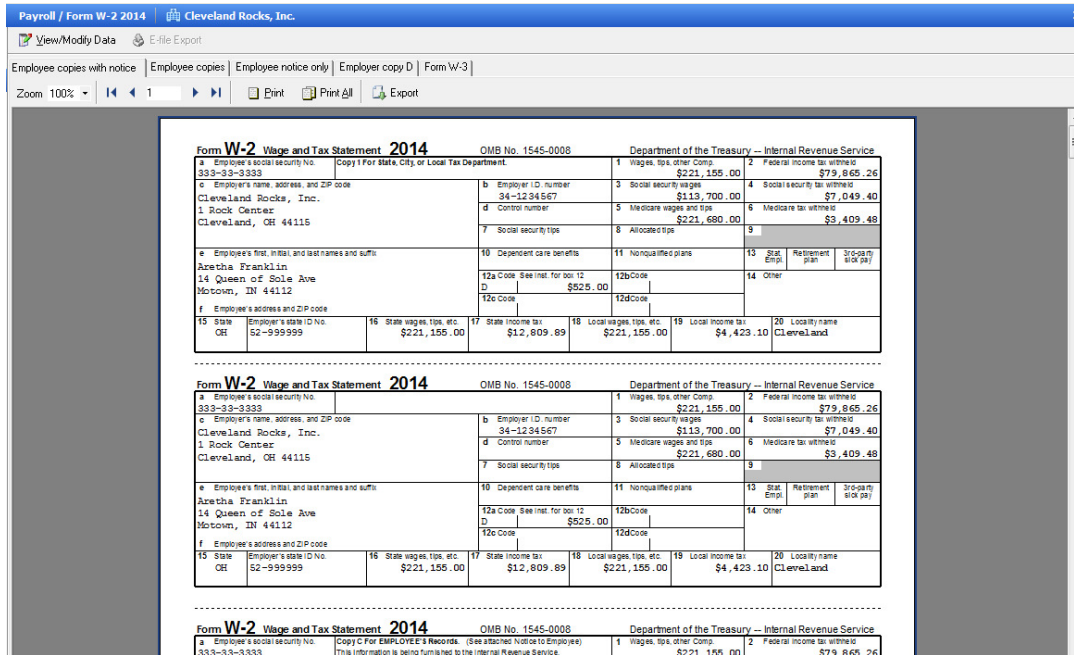
f Employer's address and ZIP code

1 Wages, tips, other Comp. \$221,155.00

2 Federal income tax withheld \$79,865.26

Printing W-2 Forms

Once your W-2 forms are generated, you will notice that there are several tabs at the top of the screen with various options:



The screenshot shows a software window titled "Payroll / Form W-2 2014" for "Cleveland Rocks, Inc.". At the top, there are tabs for "View/Modify Data", "E-file Export", "Employee copies with notice", "Employee copies", "Employee notice only", "Employer copy D", and "Form W-3". The "Employee copies with notice" tab is active. Below the tabs, there are navigation and action buttons: "Zoom 100%", "Print", "Print All", and "Export". The main content area displays a preview of a Form W-2 Wage and Tax Statement 2014. The form is for Cleveland Rocks, Inc. and includes the following data:

Form W-2 Wage and Tax Statement 2014		OMB No. 1545-0008		Department of the Treasury - Internal Revenue Service	
a	Employee's social security No. 333-33-3333	1	Wages, tips, other Comp. \$221,155.00	2	Federal income tax withheld \$79,865.26
c	Employer's name, address, and ZIP code Cleveland Rocks, Inc. 1 Rock Center Cleveland, OH 44115	b	Employer ID number 34-1234567	3	Social security wages \$113,700.00
		d	Control number	4	Social security tax withheld \$7,049.40
		e	Employee's first, initial, and last name and suffix Azecha Franklin 14 Queen of Sole Ave Mottom, IN 44112	5	Medicare wages and tips \$221,680.00
		f	Employee's address and ZIP code	6	Medicare tax withheld \$3,409.48
15	State OH	16	State wages, tips, etc. \$221,155.00	17	State income tax \$12,809.89
		18	Local wages, tips, etc. \$221,155.00	19	Local income tax \$4,423.10
		20	Locality name Cleveland		

- **Employee copies with notice**-this option shows all employee forms (one page with 4 W-2 forms per employee), each one followed by the notice page, so that you may print them back-to-back (form on one side, notice on back).
- **Employee copies**-this option shows only the employee copies and does not include the notices.
- **Employee notice only**-this option shows only the notice pages.
- **Employer copy D**-this option shows the employer copy of the forms (Copy D) which shows one form per employee (4 different employees to a page).
- **Form W-3**-this option shows the company W-3 summary.

Each tab selected has the same printing and export options at the top of the screen. You can choose to **Print** paper copies of the forms, or you can **Export** them into PDF format for e-mailing.

The forms CAN be printed on plain white paper.

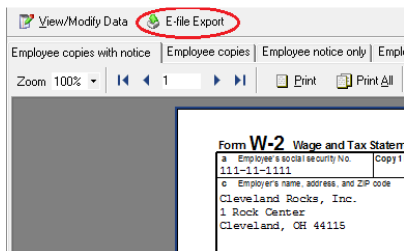
E-filing W-2's

In order to be able to submit the W-2 information to the government you will need a BSO account. If you have not done so already, you may register for an account at <http://ssa.gov/bsowelcome.htm>.

Our software does not support paper filing of W-2 forms using official IRS scannable forms.

Once you have a BSO User ID you will enter it in the W-2 Filing Wizard (see top of p. 11). If you completed your W-2 forms already, you will be able to access the wizard again by clicking the **View/Modify Data** button at the top of the screen with your generated W-2 forms, and clicking through all the steps until you get to the wizard.

Once your forms are finalized and you are ready to submit them, you will need to generate the electronic file by clicking the **E-File Export** button at the top of the W-2 form screen.



A dialog box will open and allow you to save the exported file.

You will then need to log in to BSO and follow the directions there for submitting your file to the government. **You do NOT have to file paper W-2 forms or send anything to the IRS.**