



2023 Year-End Tax Forms and 2024 Withholding Update News

November 10, 2023

Dear **CertiflexDimension** Client Write-Up, Accounts Payable and Payroll Customers:

2023 W2/W3, 1099/1096, ACA 1095-C, Employer Annual 944 Form and Employer 940 Form (FUTA):

The above form generators for CertiflexDimension Ultra are currently undergoing their final updating for the 2023 year-end changes. The updates will be available for downloading on or shortly after December 4, 2023.

As a reminder, if you have **10 or more** W2/1099 and/or 1095C forms, you are going **NOT** going to be able to file federal **paper forms** with the IRS/SSA this year. Please refer to 'News' section of your CertiflexDimension Knowledge Base system for a recap of these details:

<https://certiflexdimension.com/wp-content/uploads/2023/11/Newletter-2023-Federal-Year-End-Tax-Forms.pdf>

In addition, there are common FAQs on filing these types of forms electronically on page two of this document.

2024 Federal and State Withholding Tables Release Schedule:

The primary updates for next year's withholding tables will be available for downloading on or shortly after December 26, 2023. For companies using **CertiflexDimension Payroll**, please make sure to recheck for any last minute changes to our downloadable updates before validating paychecks on or after January 15, 2024.

Payroll Customers – If you will be processing payrolls in 2024 for employees with Alabama State wages/withholding and you have any overtime wages, please refer to the 'Payroll' section of your CertiflexDimension Knowledge Base system for a recap on exempting overtime pay for Alabama:

<https://certiflexdimension.com/wp-content/uploads/2023/11/Alabama-Exempt-Overtime-Pay.pdf>

Sincerely,

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FAQ's on filing W2, 1099 and 1095-C forms electronically for 2023:

1) Will CertiflexDimension year-end tax applications still print the Copy A (IRS/SSA) of tax forms?

A: Yes, but the system will warn you that these forms may need to be filed electronically if you attempt to print Copy A (IRS/SSA).

2) Does it cost more if I wait until the last minute to file forms electronically?

A: Yes, most electronic forms filing service companies like Yearli.com charge a premium amount per form if you wait to do your E-Filing close to the 01/31/2024 deadline.

3) Can I file the Federal Copy A of my year-end forms electronically without using an electronic forms filing service companies like Yearli.com?

A-W2: Yes, up to 50 individual W2 may be manually input at the new SSA SBO W2 Online site. In addition, CertiflexDimension Payroll/Client Write-up may be used to create a W-2 electronic federal filing file (EFW2) that may be imported into the SSA SBO system. You must pre-register with the SSA well in advance of utilizing these SSA services. You should use their Accu-Wage Online service to check your data entry and please be aware that if you use this type of option, you will still need to print and distribute (mail) all employee W2 copies. You may also manually have to file your state W2s electronically.

A-1099: Yes, up to 100 individual 1099s may be manually input at the new IRS IRIS online site. In addition, CertiflexDimension Accounts Payable/Client Write-up may be used to export 1099 information that can be manually adjusted to import into the IRIS system. You must pre-register with the IRS well in advance of utilizing these IRS services. You will still need to print and distribute (mail) all recipient 1099 copies. You may also manually have to file state 1099s electronically.

A-1095C(ACA): No, the IRS does not have an online service for manually entering 1095-C forms. If your company is required to file 1095 forms because you have 50 or more FTE employees, all Applicable Large Employers (ALE) will be required to file these federal forms electronically beginning in 2023. The CertiflexDimension ACA 1095 Filer application includes a direct interface to Nelco/Greatland for this service. You may alternately use the CertiflexDimension ACA filer to generate an export of employee 1095-C data to other popular third party 1095-C service filing applications.

4) Is the employee/recipient tax form data generally the same for paper filing vs. electronic filing?

A: Yes, you may have to ensure that the recipient address formatting is within the electronic specifications as those may not be exactly the same paper forms. In addition, you will need to make sure that all employer state ID numbers are in the correct format as defined by your individual state.