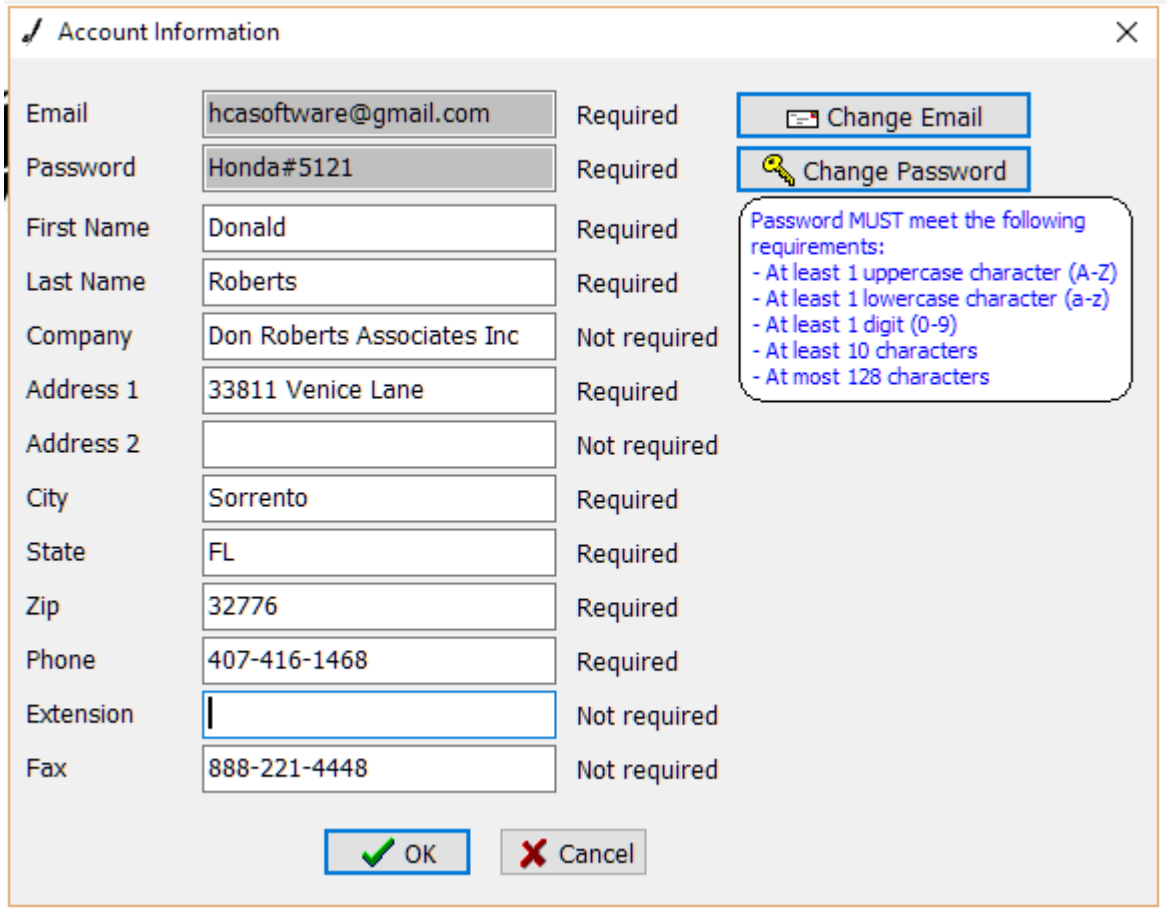
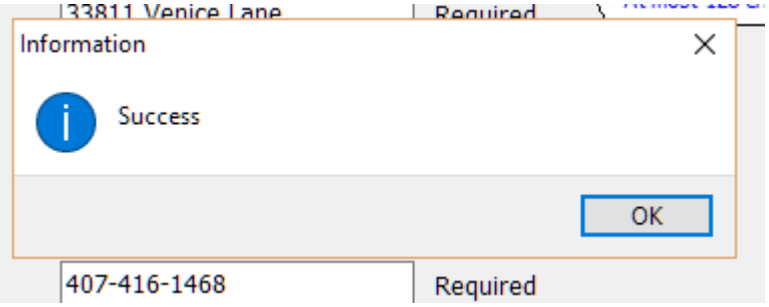
E-Filing Instructions

Start the Tax Reporting Module from HCA and then select the E-filing Menu

In order to start filing for the first time or change your password or e-mail go to the Account Information Screen. **Please read the new Nelco password requirements!**

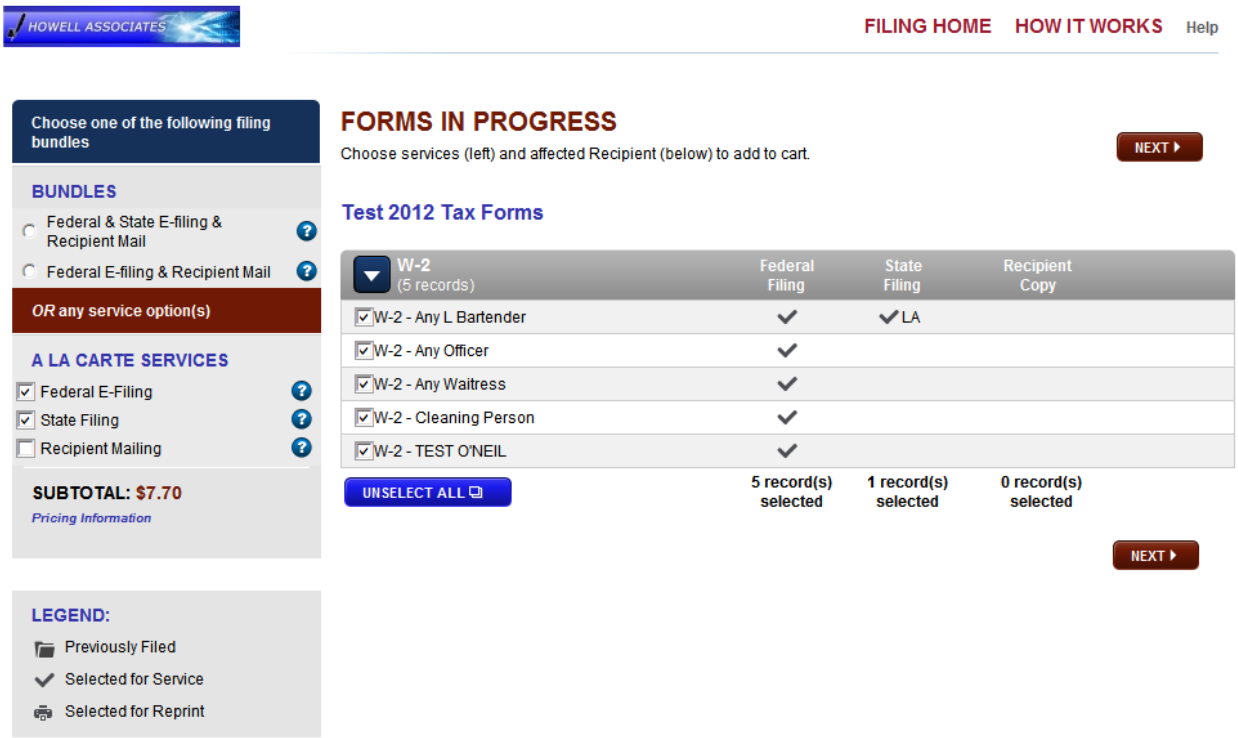


Click OK – you should see this Success screen. If not something is wrong and check your e-mail and password.



After you have set up your Account Information, it's time to get started. Click on the E-file menu and select the forms you are filing. I will select W2

Be patient the first time the program runs it is verifying all your payroll data and checking if there are any errors that need to be corrected and it may take a few minutes. You will either get an error report on screen telling you what needs correcting in your HCA Data or if all data is correct the following screen will appear approving your forms for e-filing. Nelco is our partner and provides all the E-filing data to the IRS and all fees charged for this service is collected by Nelco. Their charges vary by form.



1. Select the services you wish to use. Choose from Federal e-filing, State e-filing and Recipient print & mail fulfillment.
2. Confirm the payer(s) and payee(s) you are filing for.
3. Evaluate and choose your state filing selections for each payer. For 1099-MISC and 1099-R, we will tell you what states are available for filing based on your data. Other forms, you will have to select your states.
4. Add your filings to your filing cart.
5. Edit reconciliation forms in your filing cart.
6. Enter your payment information (VISA, MASTERCARD, AMEX, DISCOVER)
7. Submit your filings

About your data

The data in this electronic filing module comes directly from the HCA program. Each time you enter this electronic filing module, the data available to you is representative of the most current data you have entered into your program. We do save the data from all the forms you have filed for you to review.

Checking statuses and reports

This module makes it easy for you to regularly check on the status of your filings and print reports.

How to check your filing statuses:

1. Go to "Dashboard"
2. Under "Status & Reports" click on "Check Status"
3. From there you can view the status reports of all your electronic filings

How to view submitted forms:

1. Go to the "Dashboard"
2. Under "Status & Reports" click on "Submitted Forms"
3. You will then see a list of all your submitted forms

How to print reports:

1. Go to the "Dashboard"
2. Under "Status & Reports" click on either "Summary Report" or "Reconciliation Report"
3. You will then see a report and have the option to print or save a report.