

shelby

v.5

How To Use

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## Shelby Systems E-File with Shelby v.5

Updated: 6/13/2014

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## Overview

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Shelby Systems E-file allows you to electronically file your W-2, 941, and 1099 information to state and federal agencies. In just a few steps you can submit your information and even email your employees or vendors so they can access their W-2s or 1099s online.

## Benefits

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- Save time by electronically filing W-2, 941, and 1099 information with the appropriate Federal agency (IRS or SSA).
- Print and mail copies of forms to employees or vendors via U.S. Postal Service First Class mail.
- Email employees or vendors a link to access their W-2s or 1099s online.
- Provide fulfillment according to each state's required method of filing.
- Bundle services together for a cost savings.

## Payroll – W-2 E-File

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Select the option to **E-File** when you run W-2s. Click **OK** and Shelby v.5 will launch your default browser and take you to the Shelby Systems E-File website. You can then log in if you already have an account, click the **Forgot Password** link if you have forgotten your password, or the **Create Account** link to create a new account. You will need to create an account if this is your first time using Shelby Systems E-File.

After creating an account you will select the services you want, select the records for which you wish to file, proceed through the State Reconciliation process (if applicable), and submit payment.

## Forgot Password

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Click the **Forgot Password** link if you need to reset your password. Enter your **Email Address** and click the **Send Me My Password** button. This email address must be the same one that you used when you first registered with Shelby Systems E-File.

Email Address:

[SEND ME MY PASSWORD](#)

## Create New Account

Click the **Create Account** link to access the **User Information** page. Fill out the form (fields with asterisks are required) and then click **Confirm** to create your account or the **Cancel** link to return to the main Shelby Systems E-File screen.

### USER INFORMATION

\* Required Field

<p>* First Name <input type="text" value="Bob"/></p> <p>* Last Name <input type="text" value="Jenkins"/></p> <p>Company Name <input type="text"/></p> <p>* Address Line 1 <input type="text" value="5433 Forestwood Glen"/></p> <p>Address Line 2 <input type="text"/></p> <p>* City <input type="text" value="Collierville"/> * State <input type="text" value="TN"/></p> <p>* Zip Code <input type="text" value="38017"/></p> <p>* Phone Number <input type="text" value="(901) 555-9218"/> Ext. <input type="text"/></p> <p>Fax Number <input type="text"/></p>	<p>* Email Address <input type="text" value="bob.jenkins@example.com"/></p> <p>* Confirm Email Address <input type="text" value="bob.jenkins@example.com"/></p> <p>* Password <input type="password" value="*****"/> <small>Minimum of 8 (Max. 30) characters</small></p> <p>* Confirm Password <input type="password" value="*****"/></p> <p>Where did you hear about us? <input type="text" value="Select One"/></p> <p>What industry is your company in? <input type="text" value="Select One"/></p> <p>What is the number of employees at your company? <input type="text" value="Select One"/></p>
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The Confirm Information page allows you to review all of your account information before creating your account.

### CONFIRM INFORMATION

Please take a moment to confirm the following information.

First Name	Bob	Where did you hear about us?
Last Name	Jenkins	What industry is your company in?
Company Name		What is the number of employees at your company?
Address 1	5433 Forestwood Glen	
Address 2		
City	Collierville	
State	TN	
Zip Code	38017	
Phone Number	(901) 555-9218	
Phone Extension		
Fax Number		
Email	bob.jenkins@example.com	

Click the **Edit** button to change your contact information or the **Create Account** button to finalize the creation of the account.

**Note:** If you want to change your email address or password, finish creating your account and then go to the **Manage Account** section (click [here](#) for more information).

## Forms in Progress – Select Services

**Choose one of the following filing bundles**

**BUNDLES**

Federal & State E-filing & Recipient Mail & Online Retrieval ?

Federal E-filing, Recipient Mail, & Online Retrieval ?

**OR any service option(s)**

**A LA CARTE SERVICES**

Federal E-Filing ?

State Filing ?

Recipient Mail & Online Retrieval ?

**SUBTOTAL: \$45.91**

[Price List](#)

On the left side of the **Forms in Progress** page you can select the **Bundle** or **A La Carte** services that you want. Click the blue question mark icon by any option to see exactly what you get with that bundle or service.

The **Bundles** let you take advantage of all of the Shelby Systems E-File options. The only difference between the bundles is that one of them includes State E-Filing and one does not. Both bundles submit your Federal returns electronically, send W-2s to your employees, and give you the option of emailing links for online W-2 retrieval. The **A La Carte** services allow you to select only the services in which you are interested.

**Note:** The bundles are discounted. Selecting all 3 a la carte service options will result in a higher cost.

The **Subtotal** shows your total cost based on the selected services and the number of employees for which you have selected to file. Click **Price List** for more information.

## Forms in Progress – Select Records

The grid displays a header for each Payer (Company) that you have exported to Shelby Systems E-File. In the grid, remove the check from any employee for which you do not want to electronically file. In the **State Filing** column the state abbreviation from the employee record (if any) is displayed. If you are not filing state taxes the state abbreviation is grayed out with no check mark. The **Recipient Copy** column has a check if you are using that service.

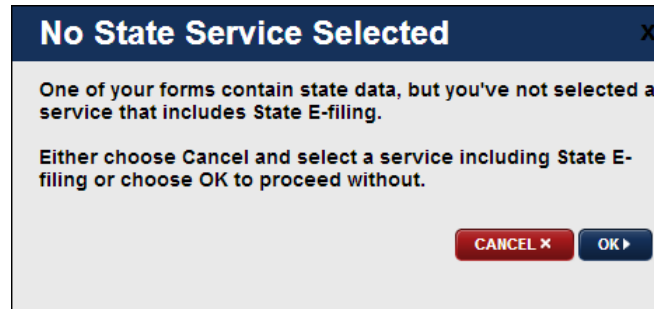
**Note:** There is no state W-2 for California or Oklahoma so they will not show up in the **State Filing** column.

FIRST CHURCH			
W-2 (9 records)	Federal Filing	State Filing	Recipient Copy
<input checked="" type="checkbox"/> A. BLACK	✓		✓
<input checked="" type="checkbox"/> BLAKE EDWARDS	✓		✓
<input checked="" type="checkbox"/> DAVID JOHANN	✓		✓
<input checked="" type="checkbox"/> GARY EUGENE WEATHERLY	✓	✓ IN	✓

Click the **Unselect All** button if you want to deselect all employees. When ready to move forward click **Next**.

**Note:** A check in a column means that you are selecting to perform that service. A folder icon in a column means that particular service has already been performed for that employee.

If you click **Next** without selecting a service option that includes state filing and you have at least one employee in the grid that pays state taxes, you will receive the following message:



Click **Cancel** to go back and change your service selection or **OK** to move forward in the process.

## State Reconciliation

You will be prompted to fill out and confirm state reconciliation forms for any state(s) you have selected that require them. State Reconciliation forms are not required for the following states: Arkansas, California, Colorado, Delaware, Washington DC, Illinois, Indiana, Kentucky, Maine, Massachusetts, Michigan, Minnesota, Mississippi, New Mexico, North Dakota, Oklahoma, Oregon, South Carolina, and West Virginia. Click **Next** when finished to move forward in the process.

**Note:** Click the help icon ( ? ) to view IRS help documentation regarding any line for which you have a question.

## Add/Edit Recipient Emails

On the **Add/Edit Recipient Emails** screen you can enter email addresses for any users to whom you want to send a link to their W-2s. Click **Next** when finished.

**Note:** This screen will be skipped if you have more than 100 records exported to Shelby Systems E-File. You can still select to input email addresses later.

## Submit Forms – Review Cart

On the **Submit Forms** screen you can review your selections before moving on. The grid displays a header for each Payer (Company) that you have exported to Shelby Systems E-File. For each employee, the grid displays a check in the column for the services that apply to that record. The column will not contain a check if you are not using that particular service (e.g., Recipient Copy).

The screenshot shows the 'SUBMIT FORMS' interface. At the top, there is a progress bar with four steps: 'Review Cart' (active), 'Payment Details', 'Review & Confirm', and 'Complete'. A 'NEXT' button is located to the right of the progress bar. Below the progress bar are three buttons: 'PREVIEW FORMS', 'SUMMARY REPORT', and 'DETAIL REPORT'. A legend indicates that checked boxes represent 'Selected for Service', 'Selected for Reprint', and 'Previously filed'. The main table is titled 'FIRST CHURCH' and lists W-2 forms for various employees. The table has columns for 'W-2', 'Federal Filing', 'State Filing', 'Recipient Copy', and 'Subtotal'. The total for the payer is \$45.91. At the bottom of the table are buttons for 'REMOVE PAYER' and 'ADD/EDIT EMAILS'.

W-2	Federal Filing	State Filing	Recipient Copy	Subtotal
A. BLACK	✓		✓	\$4.99
BLAKE EDWARDS	✓		✓	\$4.99
DAVID JOHANN	✓		✓	\$4.99
GARY EUGENE WEATHERLY	✓	✓ IN	✓	\$5.49
JANICE JORDON	✓		✓	\$4.99
JIM ANDERSON	✓		✓	\$4.99
NANCY RANDOLPH	✓		✓	\$4.99
RANDY UDALL	✓	✓ IN	✓	\$5.49
WILLIAM JACKSON	✓		✓	\$4.99
				\$45.91

Click **Preview Forms** to download a PDF preview of your W-2 forms.

Click **Summary Report** to download a summary report in PDF form. The **Summary Report** summarizes all forms currently in your forms cart or in your submitted forms section. The reports are separated by Payer (Company) and Form Type.

Click **Detail Report** to download a detail report in comma separated values (.csv) format, which should open in Microsoft Excel®. This report contains all details for the forms you are submitting.

Click the **Remove Payer** button and you will be prompted to confirm whether you want to delete all of your submissions from that Payer (Company) or continue. Make your selection and click **OK**.

The **Add/Edit Emails** button allows you to enter email addresses for any employees to whom you want to send a link to their W-2s.

Enter a **Promo Code**, if applicable, and click **Apply Code** to update the **TOTAL**.

The screenshot shows the 'SUBTOTAL' and 'TOTAL' section of the interface. The subtotal is \$40.03. There is a 'Promo Code' input field and an 'APPLY CODE' button. The total is \$40.03.

Click **Next** to move forward in the process.

## Submit Forms - Payment Details

Enter your payment details in the fields provided then click **Next**.

### SUBMIT FORMS

Review Cart

**Payment Details**

Review & Confirm

Complete

[PREVIOUS](#)

[NEXT ▶](#)

**Enter Payment Information**

Cardholder Name:

Card Number:

Card Type:

Expiration:

Security Code:

[PREVIOUS](#)

[NEXT ▶](#)

## Submit Forms – Review & Confirm

On the left side of the screen, review your **Cart**, including the name of your payer(s) (company) and the total amount. Click the **Edit Cart** button to return to the **Review Cart** screen.

**Cart**

FIRST CHURCH	W-2	\$45.91
<a href="#">EDIT CART</a>		<b>TOTAL: \$45.91</b>

On the right side of the screen, review your **Payment Details**. Click the **Edit Payment Details** button to return to the **Payment Details** screen.

**Payment Details**

Cardholder	card test
Card Number	**** * 1111
Card Type	Visa
Expiration	01/2018

[EDIT PAYMENT DETAILS](#)

You can review the **Electronic Filing Terms & Conditions** and **License Agreement** by clicking the appropriate links at the bottom of the screen. Click the **Previous** button to return to **Payment Details** or the **Confirm & Submit** button to submit your payment and continue.

## Filing Complete

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On the next screen a summary of your completed process is displayed along with a **Confirmation #**. You will also receive an email confirmation. For those using the email service, any records for whom you specified an email address will receive a link to access an online copy of their W-2s.

In the **What We Do For You** section, Shelby Systems E-File breaks down what is going to take place automatically now that you have finalized your submission. Click the **More Info** links for more information on each item. You can also view or print the **Summary Report**.

In the **What You Are Responsible For** section, Shelby Systems E-File breaks down your responsibilities now that you have completed the electronic filing process.

The **Print Page** button allows you to print the confirmation web page. Click **Print Forms** to access the **Form Filing History** page (see *Form Filing History* later in the document). Click **Print Receipt** to be prompted to download a PDF receipt of your paid services provided by Shelby Systems E-File.

When finished, click **Return To Your Filing Home**.

## Payroll - 941 E-File

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Select the option to **E-File** when you run 941s. You must also enter your **Tax Payer PIN** on the **Signer Information** tab. If you do not have a PIN then you will need to request one from the IRS. You can do so at this link:

<https://shelby.nelcoportal.com/FormFiling/ModifyForm/efilepinregistrationform>

Once you have entered your PIN and selected to E-File you can click **OK** and Shelby v.5 will launch your default browser and take you to the Shelby Systems E-File website. You can then log in if you already have an account, click the **Forgot Password** link if you have forgotten your password, or click the **Create Account** link to create a new account. Refer to the *Payroll – W-2* section of this document for assistance with either **Forgot Password** or **Create Account**. You will need to create an account if this is your first time using Shelby Systems E-File.



## Forms in Progress – Select Services

**Choose one of the following filing bundles**

**BUNDLES**

Federal E-Filing ?

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**SUBTOTAL: \$5.49**

[Price List](#)

On the left side of the **Forms in Progress** page you can select **Federal E-Filing** for your 941. Click the blue question mark icon by any option to see what is included with the bundle or service.

The **Subtotal** shows your total cost based on the selected service. Click **Price List** for more information.

Federal E-Filing is your only option for E-Filing the 941.

## Forms in Progress – Select Payer

The grid displays a header for each Payer (Company) that has been exported to Shelby Systems E-File. In the grid remove the check from any payer for which you do not want to electronically file.

<b>FIRST CHURCH</b> <span style="float: right;">-</span>		
941 / Schedule B (1 records)	Federal Filing	Edit/View
<input checked="" type="checkbox"/> FIRST CHURCH - Q1 2013	✓	

Click the **Unselect All** button if you want to deselect all payers (companies). When ready to move forward click the **Edit/View** button.

**Note:** A check in a column means that you are selecting to perform that service. A folder icon in a column means that particular service has already been performed for that payer.

## 941/Schedule B

When prompted to **Select Period** make your quarter selection and click **Continue**.

**941 / Schedule B**

Please select a filing period.

**Select Period:**

2nd Quarter 2013  
 3rd Quarter 2013  
 4th Quarter 2013  
 1st Quarter 2014

CANCEL
CONTINUE

## How to Use

Fill out the 941 form. Click the help icon (?) by any line you have a question about to view IRS help documentation. There are three tabs: **Data Entry Pg. 1**, **Data Entry Pg. 2**, and **Data Entry Sch. B**. You can also click the **Edit Quarter** button to change the quarter on which you are reporting. The **Edit Signature Info** button allows you to edit the information about the person preparing/submitting the 941.

**Note:** If you change the signature info you will need to re-enter and confirm your PIN.

Click **Next** after making sure the information on all three pages is correct. This will return you to the **Forms In Progress** page where you can then click **Next** to continue filing your 941(s).

## Submit Forms – Review Cart

On the **Submit Forms** screen you can review your selections before continuing. The grid displays a header for each Payer (Company) that you have exported to Shelby Systems E-File. For each Payer the grid displays a check in the column for the services that apply to that company.

The screenshot shows the 'SUBMIT FORMS' interface. At the top, there is a progress bar with four steps: 'Review Cart' (active), 'Payment Details', 'Review & Confirm', and 'Complete'. A 'NEXT' button is located to the right of the progress bar. Below the progress bar are three buttons: 'PREVIEW FORMS', 'SUMMARY REPORT', and 'DETAIL REPORT'. A legend indicates 'Selected for Service' (checked), 'Selected for Reprint' (unchecked), and 'Previously filed' (unchecked). The main table lists payers, with 'FIRST CHURCH' selected. The table has columns for '941 / Schedule B', 'Federal Filing', and 'Subtotal'.

FIRST CHURCH		
941 / Schedule B	Federal Filing	Subtotal \$5.49
FIRST CHURCH - Q4 2013	✓	\$5.49
		\$5.49

Click **Preview Forms** to download a PDF preview of your 941 report(s).

Click **Detail Report** to download a detail report in comma separated values (.csv) format, which should open in Microsoft Excel. This report contains all details for the forms you are submitting.

Click the **Remove Payer** button and you will be prompted to confirm that you want to delete all of your submissions from that Payer (Company) or to continue without deleting. Make your selection and click **OK**.

If you have a **Promo Code** put it in and click **Apply Code**.

The screenshot shows the 'Apply Code' section. It features a 'SUBTOTAL: \$40.03' at the top, a 'Promo Code:' label with an input field, an 'APPLY CODE' button, and a 'TOTAL: \$40.03' at the bottom.

Click **Next** to move forward in the process.

## Submit Forms - Payment Details

Enter your payment details in the fields provided then click **Next**.

### SUBMIT FORMS

●  
Review Cart

●  
**Payment Details**

●  
Review & Confirm

●  
Complete

PREVIOUS

NEXT ▶

**Enter Payment Information**

Cardholder Name:

Card Number:

Card Type:

Expiration:

Security Code:

PREVIOUS

NEXT ▶

## Submit Forms – Review & Confirm

On the left side of the screen review your **Cart** including the name of your payer(s) (company) and the total amount. Click the **Edit Cart** button to return to the **Review Cart** screen.

<b>Cart</b>		
FIRST CHURCH	941 / Schedule B	\$5.49
<div style="background-color: gray; color: white; padding: 5px 10px; border-radius: 5px; display: inline-block;">EDIT CART</div>		TOTAL: \$5.49

On the right side of the screen review your **Payment Details**. Click the **Edit Payment Details** button to return to the **Payment Details** screen.

<b>Payment Details</b>	
Cardholder	card test
Card Number	**** * 1111
Card Type	Visa
Expiration	01/2018
<div style="background-color: gray; color: white; padding: 5px 10px; border-radius: 5px; display: inline-block;">EDIT PAYMENT DETAILS</div>	

You can review the **Electronic Filing Terms & Conditions** and **License Agreement** by clicking the appropriate links at the bottom of the screen. Click the **Previous** button to return to **Payment Details** or the **Confirm & Submit** button to submit your payment and continue.

## How to Use

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On the next screen a summary of your completed process is displayed along with a **Confirmation #**. You will also receive an email confirmation.

In the **What We Do For You** section, Shelby Systems E-File breaks down what is going to take place automatically now that you have finalized your submission. Click the **More Info** links for more information on each item.

In the **What You Are Responsible For** section, Shelby Systems E-File breaks down your responsibilities now that you have completed the electronic filing process.

The **Print Page** button allows you to print the confirmation web page. Click **Print Forms** to access the **Form Filing History** page (see *Form Filing History* later in the document). Click **Print Receipt** to be prompted to download a PDF receipt of your paid services provided by Shelby Systems E-File.

When finished, click **Return To Your Filing Home**.

## Accounts Payable – 1099 E-File

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Select the option to **E-File** when you run 1099s. Click **OK** and Shelby v.5 will launch your default browser and take you to the Shelby Systems E-File web site. Many of the steps are the same as when processing W-2s. Refer to the *Payroll – W-2* section of this document for assistance with the following: **Forgot Password**, **Create Account**, and **Add/Edit Recipient Emails**.

### Forms in Progress - Select Services

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Choose one of the following filing bundles

**BUNDLES**

Federal E-filing, Recipient Mail, & Online Retrieval

**OR any service option(s)**

**A LA CARTE SERVICES**

Federal E-Filing

Recipient Mail & Online Retrieval

**SUBTOTAL: \$9.98**

[Price List](#)

On the left side of the **Forms in Progress** page you can select the **Bundle** or **A La Carte** services that you want. Click the blue question mark icon by any option to see exactly what you get with that bundle or service.

The **Bundles** section lets you take advantage of all of the Shelby Systems E-File options. The bundle listed submits your Federal 1099s electronically, sends 1099s to your vendors, and gives you the option of emailing links for online 1099 retrieval. The **A La Carte Services** allow you to only select the services you are interested in.

**Note:** The bundle is discounted. Selecting to do part of the process a la carte and then coming back later for the other part will result in a higher cost.

The **Subtotal** shows your total cost based on the selected services and the number of vendors for which you have selected to file. Click **Price List** for more information.

## Forms in Progress – Select Records

The grid displays a header for each Payer (Company) that you have exported to Shelby Systems E-File. In the grid, remove the check from any vendor for which you do not want to electronically file. The **Recipient Copy** column has a check if you are using that service.

FIRST CHURCH		
1099-MISC (1 records)	Federal Filing	Recipient Copy
<input checked="" type="checkbox"/> George Barnes	✓	✓

Click the **Unselect All** button if you want to deselect all vendors. When ready to move forward click **Next**.

**Note:** A check in a column means that you are selecting to perform that service. A folder icon in a column means that particular service has already been performed for that vendor.

## Submit Forms – Review Cart

Click **Next** on the **Add/Edit Recipient Emails** screen (for more information see the *Payroll –W-2* section of this document). On the **Submit Forms** screen you can review your selections before moving on. The grid displays a header for each Payer (Company) that you have exported to Shelby Systems E-File. For each vendor the grid displays a check in the column for the services that apply to that record. The column will not contain a check if you are not using that particular service (e.g., Recipient Copy).

The screenshot shows the 'SUBMIT FORMS' interface. At the top, there is a progress bar with four steps: 'Review Cart' (active), 'Payment Details', 'Review & Confirm', and 'Complete'. A 'NEXT' button is located to the right of the progress bar. Below the progress bar are three buttons: 'PREVIEW FORMS', 'SUMMARY REPORT', and 'DETAIL REPORT'. A legend indicates that checked boxes represent 'Selected for Service', 'Selected for Reprint', and 'Previously filed'. The main content area displays a table for 'FIRST CHURCH' with the following data:

1099-MISC	Federal Filing	Recipient Copy	Subtotal
George Barnes	✓	✓	\$4.99
			\$4.99

At the bottom of the table, there are two buttons: 'REMOVE PAYER' and 'ADD/EDIT EMAILS'.

Click **Preview Forms** to download a PDF preview of your 1099 forms.

Click **Summary Report** to download a summary report in PDF form. The **Summary Report** summarizes all forms currently in your forms cart or in your submitted forms section. The reports are separated by Payer (Company) and Form Type.

Click **Detail Report** to download a detail report in comma separated values (.csv) format, which should open in Microsoft Excel®. This report contains all details for the forms you are submitting.

Click the **Remove Payer** button and you will be prompted to confirm that you want to delete all of your submissions from that Payer (Company) or to continue. Make your selection and click **OK**.

The **Add/Edit Emails** button allows you to enter in or edit email addresses for any records to whom you want to send a link to their 1099s.

If you have a **Promo Code** put it in and click **Apply Code**.

The screenshot shows a section for applying a promo code. It displays 'SUBTOTAL: \$40.03' at the top. Below that is a text input field labeled 'Promo Code:'. Underneath the input field is an 'APPLY CODE' button. At the bottom, it shows 'TOTAL: \$40.03'.

Click **Next** to move forward in the process.

## Submit Forms - Payment Details

Enter your payment details in the fields provided then click **Next**.

### SUBMIT FORMS

●  
Review Cart

●  
**Payment Details**

●  
Review & Confirm

●  
Complete

PREVIOUS

NEXT ▶

**Enter Payment Information**

Cardholder Name:

Card Number:

Card Type:

Expiration:

Security Code:

PREVIOUS

NEXT ▶

## Submit Forms – Review & Confirm

On the left side of the screen review your **Cart** including the name of your payer(s) (company) and the total amount. Click the **Edit Cart** button to return to the **Review Cart** screen.

<b>Cart</b>		
FIRST CHURCH	1099-MISC	\$4.99
<span style="background-color: gray; color: white; padding: 2px 10px; border: 1px solid gray;">EDIT CART</span>		TOTAL: \$4.99

On the right side of the screen review your **Payment Details**. Click the **Edit Payment Details** button to return to the **Payment Details** screen.

<b>Payment Details</b>	
Cardholder	card test
Card Number	**** * 1111
Card Type	Visa
Expiration	01/2018
<span style="background-color: gray; color: white; padding: 2px 10px; border: 1px solid gray;">EDIT PAYMENT DETAILS</span>	

You can review the **Electronic Filing Terms & Conditions** and **License Agreement** by clicking the appropriate links at the bottom of the screen. Click the **Previous** button to return to **Payment Details** or the **Confirm & Submit** button to submit your payment and continue.

## Filing Complete

On the next screen a summary of your completed process is displayed along with a **Confirmation #**. You will also receive an email confirmation. For those using the email service, any records for whom you specified an email address will receive a link to access an online copy of their 1099s.

In the **What We Do For You** section, Shelby Systems E-File breaks down what is going to take place automatically now that you have finalized your submission. Click the **More Info** links for more information on each item. You can also view or print the **Summary Report**.

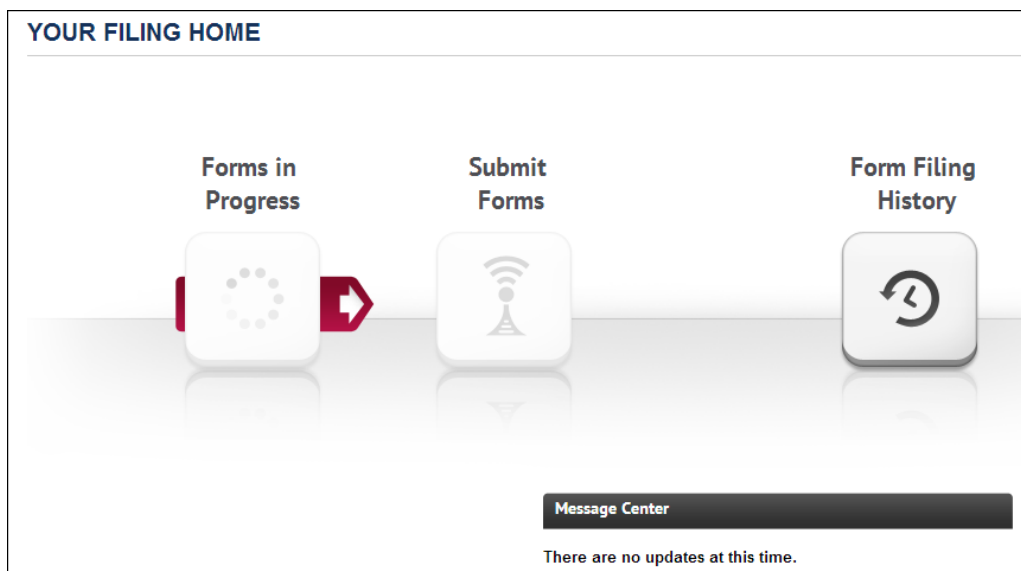
In the **What You Are Responsible For** section, Shelby Systems E-File breaks down your responsibilities now that you have completed the electronic filing process.

The **Print Page** button allows you to print the confirmation web page. Click **Print Forms** to access the **Form Filing History** page (see *Form Filing History* later in the document). Click **Print Receipt** to be prompted to download a PDF receipt of your paid services provided by Shelby Systems E-File.

When finished, click **Return To Your Filing Home**.

## Filing Home

The **Your Filing Home** page allows you to view your current status in the process (in case your progress was interrupted) and also access **Form Filing History**. Any messages will be listed in the **Message Center**.





## Form Filing History

The **Form Filing History** page displays all of your Shelby Systems E-File history broken down by the calendar year. For each listing the grid displays the confirmation number, date of submission, and the type of form submitted. From this page, you can check the status of any previous filings, view and print forms, and email recipients.

### Form Filing History

**LEGEND:**

Check Status

View & Print Forms

Email Recipients

2013
⌵

FIRST CHURCH
⌵

Confirmation #.48574	Submitted: 12/17/2013	1099-MISC	
Confirmation #.48559	Submitted: 12/16/2013	W-2	
Confirmation #.48558	Submitted: 12/16/2013	W-2	
Confirmation #.48391	Submitted: 12/11/2013	W-2	

**Note:** For W-2 filing, if you have some employees who had state forms to file and some who did not, you will have two listings and two confirmation numbers in the grid.

## Form Filing History – Check Status

Click the **Clock** icon on the **Form Filing History** page to access the **Check Status** screen. The current status for each service you purchased is displayed in the grid.

Return to Form Filing History

### Check Status

FIRST CHURCH
⌵

Confirmation #: 48574
Submitted: 12/17/2013
Service: Federal E-filing, Recipient Mail, & Online Retrieval

Services	Date	Status	Form Type
Online Retrieval	12/17/2013	<i>Online Retrieval Forms Posted - Not Yet Complete</i> <b>Online Retrieval Order Confirmed</b>	1099-MISC
Recipient Mailing	12/17/2013	<i>Recipient Mailing Sent - Not Yet Complete</i> <b>Recipient Mailing Order Confirmed</b>	1099-MISC
Federal Filing	12/17/2013	<i>Federal Filing Accepted - Not Yet Complete</i> <i>Federal Filing Sent to Agency - Not Yet Complete</i> <b>Federal Filing Order Confirmed</b>	1099-MISC


**NAMES:**

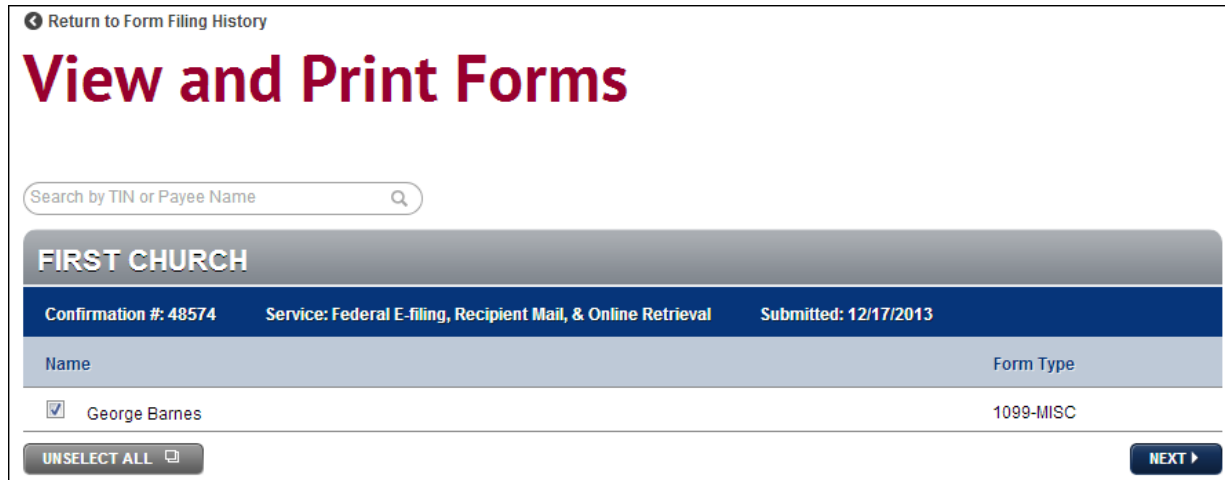
1099-MISC  
George Barnes

## How to Use

The names of your employees or vendors and the forms that were submitted for them are listed below the grid. Click the **Return to Form Filing History** link to return to the **Form Filing History** page.

## Form Filing History – View and Print Forms

Click the **Print**  icon on the **Form Filing History** page to access the **View and Print Forms** screen. Select the employees or vendors for whom you want to print forms. Click the **Unselect All** button to deselect all individuals in the grid. Click **Next** when finished.



Return to Form Filing History

# View and Print Forms

Search by TIN or Payee Name

**FIRST CHURCH**

Confirmation #: 48574    Service: Federal E-filing, Recipient Mail, & Online Retrieval    Submitted: 12/17/2013

Name	Form Type
<input checked="" type="checkbox"/> George Barnes	1099-MISC

UNSELECT ALL    NEXT

Select the **Form/Report(s)** that you wish to print and then click the **Download** button to be prompted to download the items you have selected.



Return to View and Print Forms

# Print Forms


Form/Report	Description	Format
<input checked="" type="checkbox"/> Copy B	Replacement copy for the Recipient's records	PDF
<input checked="" type="checkbox"/> Copy C	A Payer copy	PDF
<input type="checkbox"/> Copy 1	State Tax Department copy	PDF
<input type="checkbox"/> Copy 2	Replacement copy for the Recipient's state income tax form	PDF
<input type="checkbox"/> 1096	Annual Summary and Transmittal of U.S. Information Returns (Do not file. Record copy only.)	PDF
<input type="checkbox"/> Summary Report	Recap of all monetary fields at the TIN level, by form type.	PDF
<input type="checkbox"/> Detail Report	Detailed listing of all fields for selected forms, with totals by form type.	CSV
<input type="checkbox"/> Receipt	Receipt for the entire batch.	PDF

PDF will also include any applicable state reconciliation forms.

DOWNLOAD

Click the **Return to View and Print Forms** link to return to the previous screen and then the **Return to Form Filing History** link to return to the **Form Filing History** page.

## Form Filing History – Email Recipients

Click the **Mail**  icon on the **Form Filing History** page to access the **Email Recipients** screen. For any employee or vendor in the grid, enter an **Email Address** in the field provided and click **Send Email** to send them a link to access their W-2 or 1099 forms online.

[Return to Form Filing History](#)

## Email Recipients

Enter new email addresses, or edit previously entered addresses, for recipients.  
Once complete, click "Send Email" to send the recipient notification with instructions for obtaining their form online.

**FIRST CHURCH**

**Confirmation #: 48574    Submitted: 12/17/2013    Service: Federal E-filing, Recipient Mail, & Online Retrieval**

Name	Form Type	Email Address	
George Barnes	1099-MISC	<input style="width: 90%;" type="text" value="george.barnes@example.com"/>	<a href="#" style="background-color: #000080; color: white; padding: 2px 5px; border: none;">SEND EMAIL ▶</a>

**Note:** If you previously entered email addresses for your employees or vendors this year during the submission process they will automatically be populated in this grid.

## Additional Information

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Click the **How It Works** link at the top of the page for an overview of the process as well as pricing. You can also access **Help** and **Manage Account**.

### Help

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Click the **Help** link at the top of the page to access the **Contact Us and Technical Support** screen. Click the **Frequently Asked Questions & Answers** link for answers to common questions about Shelby Systems E-File services. The **Knowledgebase of Answers** link allows you to access help with technical issues. You can also view the **License Agreement**.

Fill out the form on the right side of the page and click **Submit** if you are unable to find the answer to your question. We will reply by email as soon as possible.

### Manage Account

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The **Manage Account** link takes you to a screen with three options:

- **Update Password** – Enter your **Current Password** and then enter your new password in the **New Password** and **Confirm Password** fields. Click **Update** to change your password or the **Cancel** button to return to the **Manage Account** screen.  
**Note:** Passwords must be at least eight characters.
- **Update Email Address** – Your **Current Email Address** is displayed. Enter your new email address in the **New Email Address** and **Confirm Email Address** fields. Click **Update** to change your email address or the **Cancel** button to return to the **Manage Account** screen.
- **Update Account Information** – Update your information and click **Update** to save your changes or the **Cancel** button to return to the **Manage Account** screen.

## Contact Us

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*We want to hear from you!*

<b>Sales</b>	<b>(800) 877-0222</b>	<a href="mailto:sales@shelbyinc.com"><u>sales@shelbyinc.com</u></a>
<b>Support</b>	<b>(888) My-Shelby</b>	<a href="mailto:v5support@shelbyinc.com"><u>v5support@shelbyinc.com</u></a>
<b>Customer Service</b>	<b>(901) 757-2372</b>	<a href="mailto:customerservice@shelbyinc.com"><u>customerservice@shelbyinc.com</u></a>
<b>Training</b>	<b>(800) 654-1605</b>	<a href="mailto:training@shelbyinc.com"><u>training@shelbyinc.com</u></a>
<b>International Shelby Conference</b>	<b>(800) 654-1605</b>	<a href="mailto:isc@shelbyinc.com"><u>isc@shelbyinc.com</u></a>
<b>Website</b>		<a href="http://www.shelbysystems.com"><u>www.shelbysystems.com</u></a>
<b>Workshops</b>	<b>(800) 654-1605</b>	<a href="mailto:workshops@shelbyinc.com"><u>workshops@shelbyinc.com</u></a>