

Federal/State Tax Forms (Aatrix)

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CenterPoint uses Federal/State Tax Forms (Aatrix) to process and print/eFile Federal and State tax forms and reports. This document provides general information about the Federal and State tax forms/reports. You can locate specific instructions for some Federal forms from Help by searching for the form name, for example W-2, 1099, etc.

[Federal Tax Forms/Reports](#)

[State Specific Tax Forms/Reports](#)

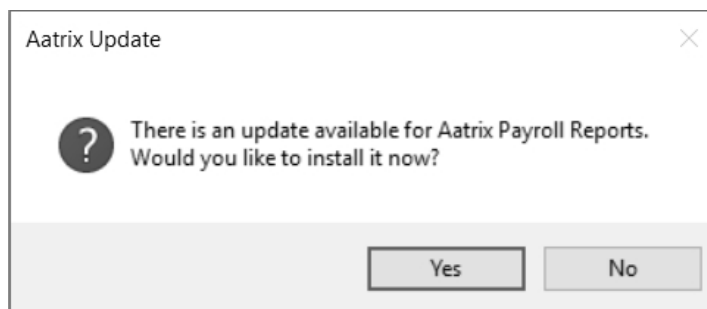
[Set Report List Favorites](#)

The Federal Tax Forms menu selection allows you to prepare and print or eFile Federal forms such as the 941, W-2, 1099, 1094/1095, etc. The State Tax Forms menu selection allows you to print State specific forms and reports.

Federal Tax Forms/Reports

1. Select **Reports > Federal & State Payroll Forms & Reports > Federal Tax Forms** .

- » If you have internet access and the latest version of Federal/State Tax Forms (Aatrix) is not installed, the following **Aatrix Update** screen will display when you select the menu selection above.
- » If you want to immediately install the update, click **Yes** and follow the on screen instructions. A progress bar will display as the update continues.



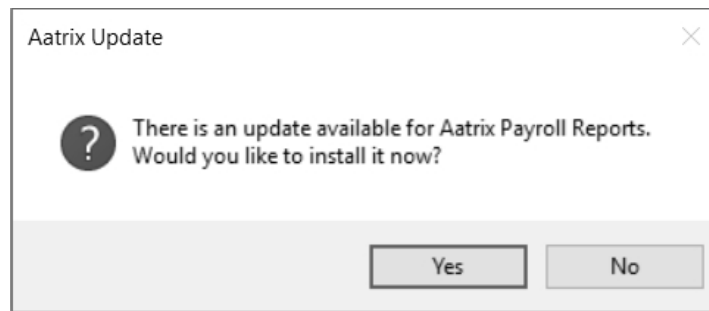
- » If you do not want to immediately install the update and continue processing without the required update, click **No**.

The screenshot shows a window titled "Federal Tax Forms" with a "General" tab. Inside the tab, there are several input fields: "Employer" with the value "Alpine Sports", "Report Method" with a dropdown menu showing "Normal", "Report" with a dropdown menu showing "2023 1099-MISC", "Year" with a dropdown menu showing "2023", and "Minimum Pay" with a text box containing "\$600.00". At the bottom of the window, there are four buttons: "Backup", "Restore", "OK", and "Close".

2. Select the **Employer** you want to print/eFile the Federal form for.
3. In the **Report Method** box, select **Normal**. The History option is used to view or edit a previously saved Federal form.
4. In the **Report** box, select the **Federal form** you want to print/eFile.
5. In the **Year** box, select the year you are reporting the information for.
6. Additional information may be required for the Report selected in step 5. In the screen shot above, Minimum Pay is an example of additional information displayed for the 1099-MISC form. Complete all information displayed.
7. Click **OK**. It may take several minutes for the CenterPoint data to be transferred to the printing/eFiling process. Actual time will depend on the amount of data in your database.
8. Additional screens may display, follow the on-screen prompts and answer the displayed questions. Click **Next** to continue through the displayed screens until the Forms/Reports Viewer displays for the selected form/report.
9. At the top of the screen, look for the instructions in the toolbar. Click the **Next** or **Next Step** buttons to move through the form/report.
 - » **Review/Edit**
 - » Fill out required fields highlighted in Red.
 - » Review the report for accuracy of values.
 - » Fields highlighted in Blue may be edited.
 - » **Print** a copy for your records when the form is complete.
 - » Choose to either **eFile** or **Print** your Federal copy.

State Specific Forms/Reports

1. Select **Reports > Federal & State Payroll Forms & Reports > State Tax Forms** .
 - » If you have internet access and the latest version of Federal/State Tax Forms (Aatrix) is not installed, the following **Aatrix Update** screen will display when you select the menu selection above.
 - » If you want to immediately install the update, click **Yes** and follow the on screen instructions. A progress bar will display as the update continues.



- » If you do not want to immediately install the update and continue processing without the required update, click **No**.

2. Select the **Employer** you want to print/eFile the State form/report for.
3. In the **Report Method** box, select **Normal**. The History option is used to view or edit a previously saved State form.
4. Select the **State** you are reporting for.
5. In the **Report** box, select the **State form/report** you want to print/eFile. A description of the form/report is displayed at the bottom of the screen.
6. In the **Time Period** box, select the period of time you want to report on.
7. In the **Year** box, select the year you are reporting the information for.
8. Additional information may be required for the Report selected in step 5. In the screen shot above, the two check boxes displayed below the Year box are an example of additional information displayed for the MN New Hire Report. Complete all information displayed.
9. Click **OK**. It may take several minutes for the CenterPoint data to be transferred to the printing/eFiling process. Actual time will depend on the amount of data in your database.
10. Additional screens may display, follow the on-screen prompts and answer the displayed questions. Click **Next** to continue through the displayed screens until the Forms/Reports Viewer displays for the selected form/report.

11. At the top of the screen, look for the instructions in the toolbar. Click the **Next** or **Next Step** buttons to move through the form/report.
 - » **Review/Edit**
 - » Fill out required fields highlighted in Red.
 - » Review the report for accuracy of values.
 - » Fields highlighted in Blue may be edited.
 - » **Print** a copy for your records when the form is complete.
 - » Choose to either **eFile** or **Print** your State copy.

Set Report List Favorites

To determine which reports are your most often used and add them to a Favorites section at the top of the Report drop-down list, follow the steps below:

1. Select **Reports > Federal & State Payroll Forms & Reports > Federal State Tax Forms** or **State Tax Forms**.
2. If you do not have any favorite reports selected, the current year W-2/W-3 displays in the **Report** box and in the Favorites section of the Report List. Click the drop-down arrow to display the full report list.

The screenshot shows the 'General' tab of a software interface. The 'Employer' field is 'Alpine Sports'. The 'Report Method' is 'Normal'. The 'Report' field is '2024 W-2/W-3'. The 'Year' field is '2024'. The 'Report' dropdown menu is open, showing a list of reports. The 'Favorites' section is at the top, with '2024 W-2/W-3' listed. Below it is the 'All Reports' section, which lists various tax forms and reports, including '2024 1095/1094-B', '2024 1095/1094-C', '2024 1099-MISC', '2024 1099-NEC', 'Federal Tax Deposit (EFTPS)', '2024 940 Report', '2024 941/Schedule B/941-V Report', '941-X Report', '2024 943/943-A/943-V Reports', '943-X Report', '2024 944 Report', '2024 945/945-A/945-V Reports', 'Electronic 1095 Consent', 'Electronic 1099 Consent', 'EEO-1 Component 1 Form', 'Electronic W2 Consent', 'I-9 Report', 'SSN Verification Form', 'W-2 History', '2024 W-2/W-3', '2024 W-2/W-3 American Samoa', '2024 W-2/W-3 Guam', '2024 W-2/W-3 Virgin Islands', and '2025 W-4 Report'.

3. Select a report you want to add to the Favorites section list.
4. Right-click in the **Report** box or click the **Ellipsis** button () and select **Add to Favorites** to move the report to the Favorites section at the top of the Report drop-down List. In the following example, the 2024 10990-NEC was moved to the Favorites section.

General

Employer Alpine Sports

Report Method Normal

Report 2024 1099-NEC

Year

Minimum Pay

---- Favorites ----

2024 W-2/W-3

2024 1099-NEC

---- All Reports ----

2024 1095/1094-B

2024 1095/1094-C

2024 1099-MISC

2024 1099-NEC

Federal Tax Deposit (EFTPS)

2024 940 Report

2024 941/Schedule B/941-V Report

941-X Report