# **Aatrix & ProContractor - Aatrix Mapping Setups for Version 3.13.0** and **Higher**

Use this article to identify where to perform Aatrix mapping to create quarterly and Year end forms such as the 940, 941, W-2, ACA 1094-c / 1095-c and Family Medical Leave in Versions 3.13.0 and 3.14.0. Commonly if an Aatrix report has incorrect /wrong amounts or blank because data is not populating, it is due to mapping. [ProContractor//PR - Employees (Payroll) -PC]

Details

Environment: ProContractor Version 3.13.x and higher, Aatrix All Versions

Aatrix Mapping needs to be performed in the following areas listed below in ProContractor in order to create forms and reports by all Users. Viewpoint does not perform mapping as it is unique to each customers setups and state requirements.

**Q** CAUTION: For the upcoming 2023 year-end, we will release one year-end version of ProContractor that will only be compatible with those customers who have already upgraded to v4.0 and beyond.

Customers currently on v3.16.4 or below will be required to upgrade to v4.0 (which requires being on an updated version of SQL Server 2019) to upgrade to any subsequent updates including the 2023 year-end version once it is released.

Please click on this link for FAOs and the new requirements.

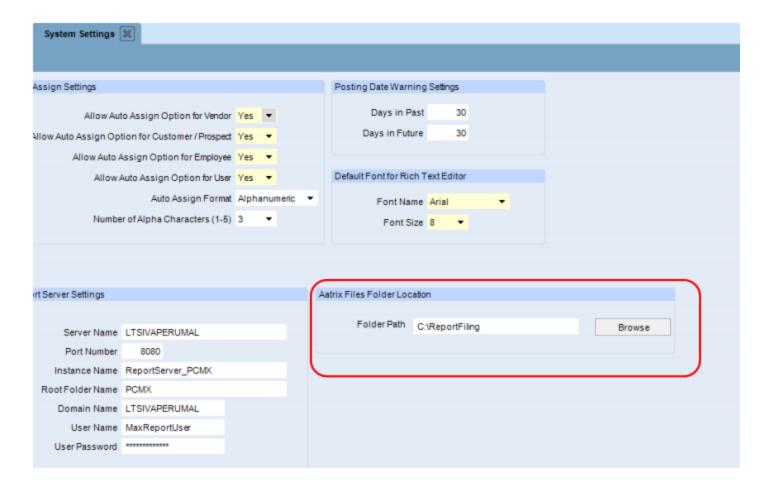
For installation directions, click here: <u>Aatrix & ProContractor - Installation / Uninstall and Mapping Setup</u> for Version 3.13.0 and higher

Steps

### **Setup / Configuration Mapping:**

There are a few steps that need to be done in order for the right information to be collected and integrated into Aatrix.

- 1. **System Settings** The Aatrix application needs a common location in which ProContractor will generate the data file for Aatrix, along with Aatrix saving in progress reports and completed forms as appropriate in this file folder. This location should be a shared location in which all Aatrix users can access. This allows for one user to start a report and another person to review and complete it if necessary.
  - Go to: Administration > Setup > "System Settings" and set the "Aatrix Files Folder Location" path for this shared location. It is recommended to select a secure folder located on a server where only users who need access to Aatrix. (Cloud customers this will be set automatically for them. It will be added via script for the H drive.)

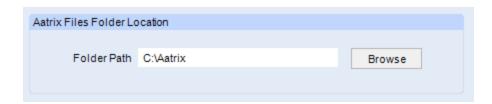


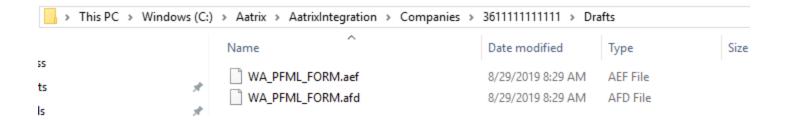
If the folder path is assigned to a file that the computer does not have read and write permissions, the following error will appear: <u>Aatrix & ProContractor - Error : "Configure the Aatrix files folder location in system settings. Make sure the folder has read and write permissions."</u>

To verify, assign the file to the C drive then contact your companies IT to add permissions to the computer accessing the server

**NOTE:** Saved copies of reports / forms will be located in a file in the Folder Path assigned above. To access saved copies, go to Employees > Quarter and Year End > "Aatrix Report Filing" or Vendors > Year End " and select "History". For more details, click here: <u>Aatrix & ProContractor - How to access reports or forms saved in Aatrix for Version 3.13.0 and Higher</u>

## EXAMPLE:



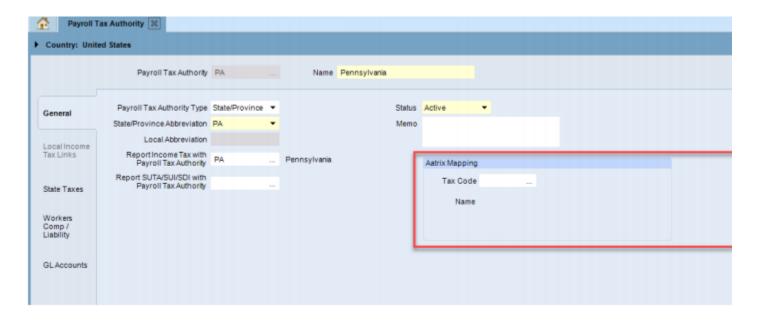


2. **Tax, Deduction, and Fringe Setup** - The next step is to configure the Taxes, Deductions and Fringes, as appropriate with a mapping so Aatrix knows what information it is being provided. There is now an Aatrix mapping section that was added to the Tax, Deduction, and Fringe setup. Open up the selection window and select the appropriate item from the list that represents the appropriate tax, deduction or Fringes.

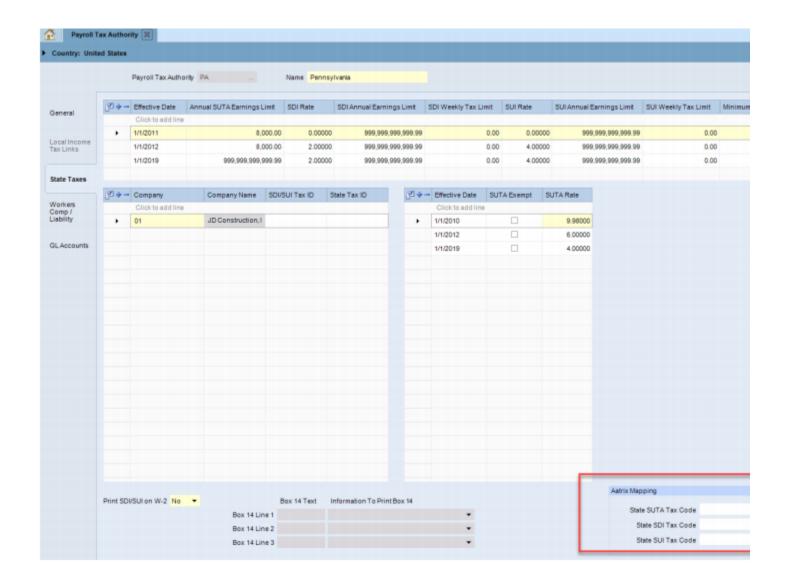
! Not all Deductions or Fringes should have an Aatrix Mapping code, only the ones that are related to any appropriate regulatory reporting. Federal Tax coding is hard coded

#### **TAXES**

Go to Employees > Setup > Taxes & Insurance > "Payroll Tax Authority" Use the look up to select the Aatrix Tax Code

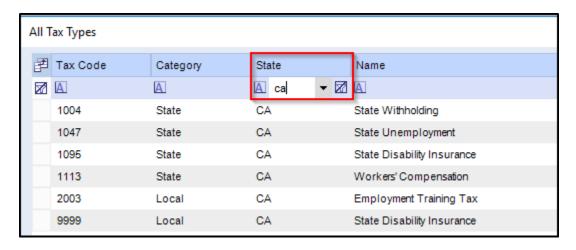


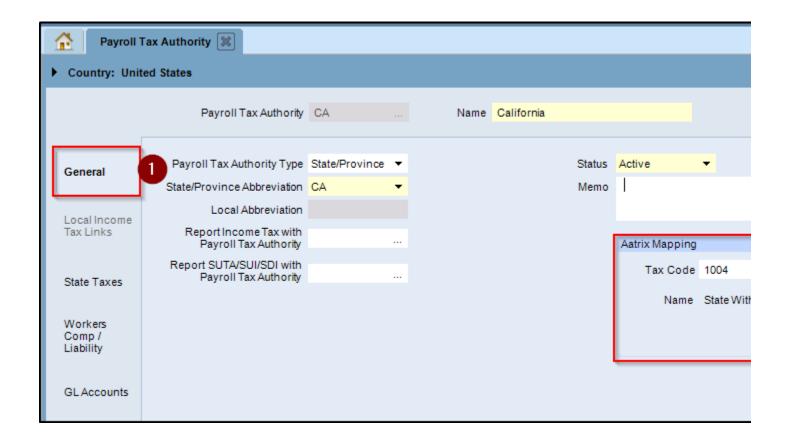
**NOTE:** The Aatrix Mapping on the general Tab of the Tax setup should be used for Income Taxes



## **EXAMPLE:** California Mapping for Payroll Tax Authority

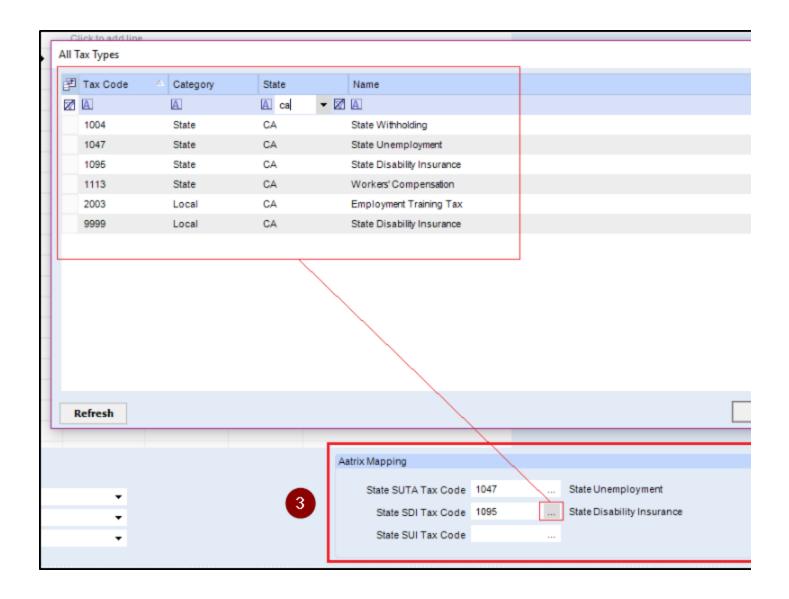
- 1. In Payroll Tax Authority, go to the "General" tab.
- 2. Click on the 3 dots next to the "Tax Code" field in the Aatrix Mapping. Enter "CA" in the State column of the popup box and select 1004 for "State Witholding" for CA



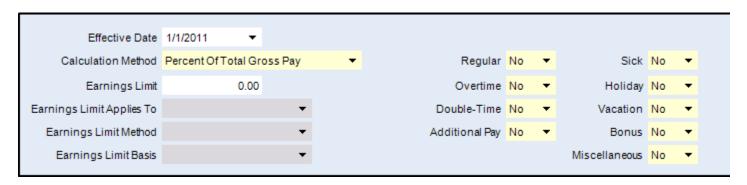


3. Go to the "State Taxes" tab, and select the Aatrix mapping codes that correlate for CA

\* CA does not have SUI assigned



4. Go to "Workers Comp / Liability" tab, select the Aatrix mapping code 1113 for CA



5. "Save Authority"

#### **DEDUCTIONS**

Go to Employees > Setup > Deductions & Fringes > "Deductions"

For a list of deductions mapped to print on W2's in ProContractor, go to Employees > Setup > "View

Employee Setups" and select View = "Deductions-General"

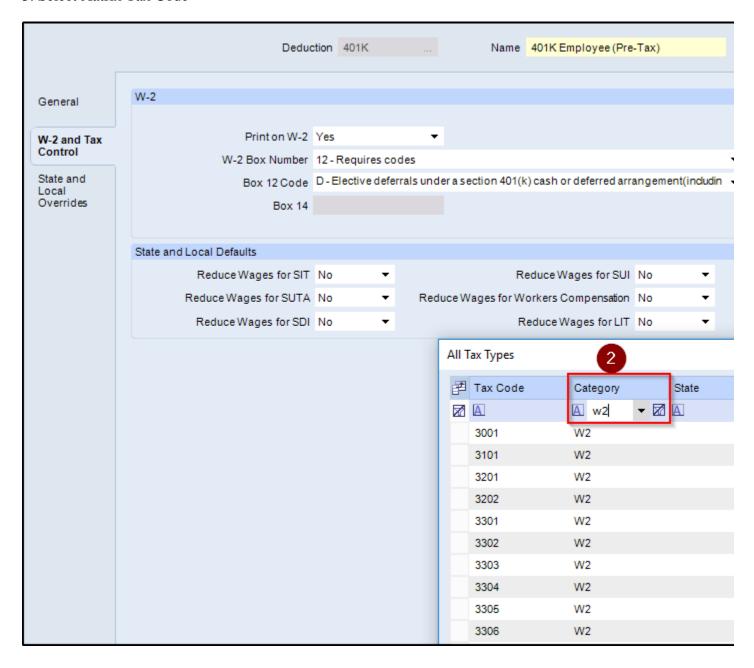
! It is recommended to consult with a CPA or review the IRS <u>2023 General Instructions for Forms W-2 and W-3</u> to identify what boxes to assign deductions. Viewpoint employees are not tax consultants



**EXAMPLE:** 401K Mapping to add to W2

- 1. Click on 3 dots to access look up list
- 2. Enter W2 in "Category" column

#### 3. Select Aatrix Tax Code



## Once the configuration is completed, you can run the appropriate report from the Report Selection Window that appears when you Launch Aatrix Report filing

- Select the report, enter the date, and select continue
- Aatrix will process the information that ProContractor generates and open the selected form in a new window in a form that is like a fillable PDF. Aatrix will fill in the information it has from the file generated by ProContractor and direct to complete any required missing information
- Users can print forms to complete
- It is an optional to e-file after setting up an account with Aatrix

For Massachusetts Family and Medical Leave mapping instructions, click here: <u>How To Setup Massachusetts State Paid Family and Medical Leave</u>

For Washington Family and Medical Leave mapping instructions on Version 3.13.1 click here: <u>Setup Washington State Paid Family and Medical Leave</u>

For Oregon State setups, click here: <u>Aatrix & ProContractor - Mapping for Oregon State Quarterly and Year End Forms Version 3.13.0 and higher</u>

Cause

**Related Articles** 

Aatrix & ProContractor - Installation and Mapping Setup for Version 3.13.0 and higher

<u>Aatrix & ProContractor - Frequently Asked Questions and Article Links for Version 3.13.0 and higher - ProContractor</u>