PeopleSoft User Group

January 13, 2016
User Group Agenda

- Year End Close
- New Fiscal Year Journal Entries
  - Pledge Receivable Accounts
  - Time Study Journal Entries
- Audit/Council Adjustments
- Processing IRS Forms 1099
Council Fiscal Management

Year End

Accounts Payable
Accounts Payable Year-End 2015
Accounts Payable Year-End Presentation
Instructions to Adjust 1099 Information in PeopleSoft
Instructions to process IRS Forms 1099 in PeopleSoft

Fundraising
Fundraising Year-End Procedures 2015

General Ledger
General Ledger Year-End Procedures 2015
PeopleSoft Closing the Year

Membership
Membership Year-End Close Procedures 2015

Payroll
Accountable Plan Compliance Expense Reimbursements and Allowances
Fringe Benefits- Employer-Provided Vehicles and Group-Term Life Insurance

SellWise
SellWise Year-End Procedures 2015
Audit and Tool Kit Guides posted

2015 BSA Audit Tool Kit
Includes Local Council Audit Self-Review Form
Year End Close Process
Year End Close Process

• Close December (Period 12)
• Run Year End Close Process
  – User Guide Section 7.3, page 7-4
  – Submit JTE Data
7.3.1 Processing the Year End Close

The first time you access this process, you will want to create a "Run Control ID that is unique to you and can be used again.

1. Click on the “Add a New Value” tab.
2. Add a Run Control ID.
3. Click on the “Add” button.
New Fiscal Year Journal Entries
Pledge Receivable Accounts

- After Year End Close Process
- Create Journal Entries (to move current, prior and future year balances to the appropriate receivable accounts)
- Update Allowance accounts (1391, 1381, 1371)

<table>
<thead>
<tr>
<th></th>
<th>Current</th>
<th>Future</th>
<th>Prior</th>
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<td>x-1338-xxx-00</td>
<td>x-1328-xxx-00</td>
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Time Study Journal Entry

• If there is no change in time study percentages from the prior year
  – Copy prior year time study journal entry
  – Change the journal date to 01/01/2016, and post the journal entry
• Query LC_TIME_STUDY_JOURNAL_ENTRIES
Create a Time Study Journal Entry

On the next screen add a long description.
Create a Time Study Journal Entry

Click on the link “Templates List”
Create a Time Study Journal Entry

1. Un-Check both the default “LOCAL” & “Permission” boxes.

2. Check both of the “Time Study” boxes as shown.

3. Click “OK” to Save. NOTE: The default will return when you are through with this journal.

A different looking “Lines” tab page will appear.
Time Study Journal Entry

1- Notice that gone are Fund, Account, Project, and Debit/Credit fields.

2- Add two lines and then select Account “PROG” and enter the “Stat Amt” from the Time Study for Program.

3- Select Account “MNGMNT” and enter the “Stat Amt” from the Time Study for Management.

4- Select Account “FUNDR” and enter the “Stat Amt” from the Time Study for Fundraising. BE SURE THAT THE TOTAL OF THE THREE IS 100.00.

5- Save your Journal. It is now ready for Edit and Post process on your schedule.
Audit/Council Adjustments
Audit/Council Adjustments

1. Adjustments after Year End Close
2. Undo the Year End Close (User Guide Section 7.5.3.1) – Page 7-8
Council Adjustments after Year End Close

1. Re-Open December 2015 (Period 12)
2. Make adjusting journal entries using source code CA
Council Adjustments after Year End Close

4. Run December Allocations (if applicable)
5. Generate Year End Reports
6. Run Year End Close Process (User Guide Section 7.3 Page 7-4)
7. Submit JTE Data
Audit Adjustments after Year End Close

1. For Auditor Proposed and Accepted Journal Entries
2. Use same process except use source code AA for the journal entries.
3. Reclose all periods affected to correct all months
Processing IRS Forms 1099
Resources

- Council Fiscal Management [-](http://www.scouting.org/FinanceImpact/Council/Fiscal/Management/PeopleSoft/Year_End.aspx)
- Member Care Contact Center
Processing IRS Form 1099

• Step 1 – Identify vendors designated as 1099
• Step 2 – Identify vouchers that are 1099 applicable
• Step 3 – Select vouchers flagged as “N” in the query
• Step 4 – Update 1099 Withholding information
• Step 5 – Print the list of vendors with associated 1099 Vouchers
• Step 6 – Generate the 1099 MISC. forms and the “Test” for the IRS
• Step 7 – Generate the 1099 Misc. forms and the electric file for the IRS
## Identify 1099 Withholding Vendors
### Query LC_1099_VENDORS

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<td>ALVAREZ-BIVER, VANESSA</td>
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<td>012520</td>
<td>KELLY COBB</td>
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<td>001607</td>
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<td>VAREL TENT RENTALS</td>
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## Identify 1099 Withholding Vendors

Query LC_1099_WITHHOLDING_INFORMATION

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<th>Rule</th>
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<th>Vendor</th>
<th>Location</th>
<th>Address</th>
<th>SetID</th>
<th>Bank</th>
<th>Account</th>
<th>Method</th>
<th>Payment</th>
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<th>Tax ID</th>
<th>Currency</th>
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Identify Vouchers
Query LC_VENDORS_VOUCHERS

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Update Vendor Withholding Information

Withholding Vendor Update

Vendor Selection
*Vendor SetID:

Tax Reporting Year
*Start Date: 01/01/2013  
*End Date: 12/31/2013  

Details
New Withhold Details

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Save  Return to Search  Previous in List  Next in List  Notify  Add  Update/Display
Update Vendor Withholding Information

Withholding Vendor Update

Withholding Update ID
Withholding Update ID: UPDATE_VENDOR_WITHHOLDINGS

Vendor Selection
*Vendor SetID:

Tax Reporting Year
*Start Date: 01/01/2013
*End Date: 12/31/2013

Details
Vendor
New Withhold Details

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<th>Vendor ID</th>
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Save

Return to Search

Previous in List

Next in List

Notify

Add

Update/Display

Prepared. For Life™
Update Vendor Withholding Information

Withhold Update Request

Run Control ID: Update Withholdings

*Request ID: 1

*Process Frequency: Always Process

*Process Option: Process All Updates

*Description: Update 1099 Withholding Info

Run

Save

Notify

Add

Update/Display

Prepared. For Life.
Update Vendor Withholding Information

Process Scheduler Request

User ID: MCREAGH
Run Control ID: Update_Withholdings

Server Name: [Dropdown]
Recurrence: [Dropdown]
Time Zone: [Input]

Run Date: 01/11/2016
Run Time: 3:06:36PM

Process List

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<td>Application Engine</td>
<td>Web</td>
<td>TXT</td>
<td>Distribution</td>
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</table>

OK Cancel
## Update Vendor Withholding Information

**LC_1099_WITHHOLD_INFORMATION**

| Instance | Unit | Entity | Type | Jurisdiction | Class | Rule | Vendor SetID | Vendor | Location | Address | SetID | Bank | Account | Method | Payment | BU Tax ID | Tax ID | Currency | Rate Type | Date       | Posted    | Declarat Date | Basis Amt | Description |
|----------|------|--------|------|--------------|-------|------|--------------|--------|-----------|---------|-------|------|---------|--------|---------|----------|--------|----------|-----------|-----------|------------|------------|-------------|
| 1        | 0    | L.114 | IRS  | 1099         | 07    | RULE0| L.114       | 060000000028 | 01       | 1 L.114| BK001 | CK1    | CK1     | 00000000482 | 04-3462285 | 12:3333333 | USD      | CRRNT    | 12/31/2013 | 12/31/2013 | 12/31/2013 | 506.00    | Withhold Update |
| 2        | 0    | L.114 | IRS  | 1099         | 07    | RULE0| L.114       | 060000000152 | 01       | 1 L.114| BK001 | CK1    | CK1     | 00000000553 | 04-3462285 |          | USD      | CRRNT    | 12/31/2013 | 12/31/2013 | 12/31/2013 | 506.00    | Withhold Update |
| 3        | 0    | L.114 | IRS  | 1099         | 07    | RULE0| L.114       | 060000000152 | 01       | 1 L.114| BK001 | CK1    | CK1     | 00000000712 | 04-3462285 |          | USD      | CRRNT    | 12/31/2013 | 12/31/2013 | 12/31/2013 | 506.00    | Withhold Update |
| 4        | 0    | L.114 | IRS  | 1099         | 07    | RULE0| L.114       | 060000000152 | 01       | 1 L.114| BK001 | CK1    | CK1     | 00000000778 | 04-3462285 |          | USD      | CRRNT    | 12/31/2013 | 12/31/2013 | 12/31/2013 | 506.00    | Withhold Update |
| 5        | 0    | L.114 | IRS  | 1099         | 07    | RULE0| L.114       | 060000000152 | 01       | 1 L.114| BK001 | CK1    | CK1     | 00000000896 | 04-3462285 |          | USD      | CRRNT    | 12/31/2013 | 12/31/2013 | 12/31/2013 | 506.00    | Withhold Update |
| 6        | 0    | L.114 | IRS  | 1099         | 07    | RULE0| L.114       | 060000000152 | 01       | 1 L.114| BK001 | CK1    | CK1     | 00000000990 | 04-3462285 |          | USD      | CRRNT    | 12/31/2013 | 12/31/2013 | 12/31/2013 | 506.00    | Withhold Update |
| 7        | 0    | L.114 | IRS  | 1099         | 07    | RULE0| L.114       | 060000000152 | 01       | 1 L.114| BK001 | CK1    | CK1     | 00000000991 | 04-3462285 |          | USD      | CRRNT    | 12/31/2013 | 12/31/2013 | 12/31/2013 | 506.00    | Withhold Update |
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| 9        | 0    | L.114 | IRS  | 1099         | 07    | RULE0| L.114       | 060000000152 | 01       | 1 L.114| BK001 | CK1    | CK1     | 00000001011 | 04-3462285 |          | USD      | CRRNT    | 12/31/2013 | 12/31/2013 | 12/31/2013 | 506.00    | Withhold Update |
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Generate the 1099 Misc. forms for “TEST”
Generate the 1099 Misc. forms for “TEST”

![Image of process scheduler request]

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<thead>
<tr>
<th>Process List</th>
<th>Description</th>
<th>Process Name</th>
<th>Process Type</th>
<th>*Type</th>
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Generate the 1099 Misc. forms for “TEST”
Generate the 1099 Misc. forms for “TEST”
Generate the 1099 Misc. forms for “TEST”

Click the details link to get the text file to upload to the IRS
Save the Electronic File to Submit to IRS
Save the Electronic File to a Local Folder

Save the text file to a location that will be used when uploading the file to the IRS website.
Generate the 1099 for Electric File to IRS
Generate 1099 for Electric File to IRS
Generate 1099 for Electric File to IRS

Process Scheduler Request

User ID: MCREAGH
Run Control ID: Withhold_1099_Report_Job

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Select: [x] XMLP.Withhold 1099 Report
Select: [x] XMLP.Withhold 1099 G Report
Select: [x] XMLP.Withhold 1099 I Report
Select: [x] 1099_MISC_CPY_B
Select: [ ] 1099-G Copy B
Select: [ ] 1099-INT Copy B
Select: [x] 1099 Job
Select: [x] 1099 Report
Select: [x] 1099 Copy B Sort
Select: [x] 1099 Post Report & Copy B Sort

Process List

OK  Cancel
Generate 1099 for Electric File to IRS
Generate 1099 for Electric File to IRS

<table>
<thead>
<tr>
<th>Select</th>
<th>Report ID</th>
<th>Report Instance</th>
<th>Description</th>
<th>Request Date/Time</th>
<th>Format</th>
<th>Status</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5651937</td>
<td>3821248</td>
<td>1099 Report</td>
<td>01/11/2016 3:59:45PM</td>
<td>Text Files</td>
<td>Posted</td>
<td>Details</td>
</tr>
</tbody>
</table>

Boy Scouts of America
Prepared. For Life™
Generate 1099 for Electric File to IRS

Click the details link to get the text file to upload to the IRS.
Generate 1099 for Electric File to IRS
Generate 1099 for Electric File to IRS

https://fire/irs/gov/fire1r/default

Filing Information Returns Electronically (FIRE)


This service will be unavailable from approximately 6 p.m. Eastern time on Friday, Dec. 11, 2015, until approximately 8 a.m. Eastern time on Tuesday, January 19, 2016, due to planned maintenance. We apologize for any inconvenience.

Note: Refer to Form 8955-SSA Resources for more information when Form 8955-SSA due dates are in jeopardy during the FIRE Production downtime.
2016 Training Opportunities
www.scouting.org/FinanceImpact/Training

• First Time Accounting Specialist Training
  – $625.00 Four courses in 2016 at ScoutingU – Westlake, TX

• Fiscal Management I
  – $125.00 Six courses in 2016 at various Council offices around the country

• Fiscal Management II
  – $250.00 Two courses in 2016 – March 15-16 & September 13 -14
Member Care Contact Center

- Needs User Guide
- Best practices
- Accounting calls have a special queue
- Three care members rotate on calls
- Reviewing how calls will be handled next year

- For assistance, please contact the Member Care Contact Center through the online Support Center site in MyBSA or at (855) 707-2644
Feedback Time

- Questions
- Best practices
- Needs
- Requests for future user group topics email michael.creagh@scouting.org
Resources

- www.Scout-Wire.org
- FID – www.scouting.org/financeimpact
- Local Council Fiscal Software User’s Guide
- Year-end documents – FID website