



A **Cyncly** Company

**Version 23.99**

# Update Document

## Table of Contents

2023 Tax Year/2024 Pay Year US & Canada .....	3
Montana Changes .....	3
Activating 2024 Tax Rates & Resetting the YTD Figures .....	3
US & Canada .....	3
W-2 and 1099 Printing /T4 and T5018 Printing.....	5
US Electronic Filing .....	6
Canadian Human Resources .....	7
Next .....	7

# Introduction

This update to the Windows version of the RFMS Business Management System includes many new features and enhancements. The update also includes many “behind the scenes” changes that increase processing speed and other performance-related functions. This document explains only the new features contained in this update.

For all alterations, see the release notes on the download web page or [Release Notes – RFMS Help Desk \(zendesk.com\)](#)

## RFMS Core

RFMS Core Program Suite For Sql

[Rfms Update](#) (Last Download Date 4/8/2021) | [Documentation](#)  
[B2B Service](#) | [Manual](#)  
[Barfont \(New Installs Only\)](#) | [Documentation](#)  
[Release Notes](#) (Last Download Date 4/8/2021)  
[RFMS Workstation Components \(New Installs Only\)](#) | [Documentation](#)

To see what you may have missed in previous updates, click [here](#).

[For directions on loading updates to the RFMS software, click here.](#)

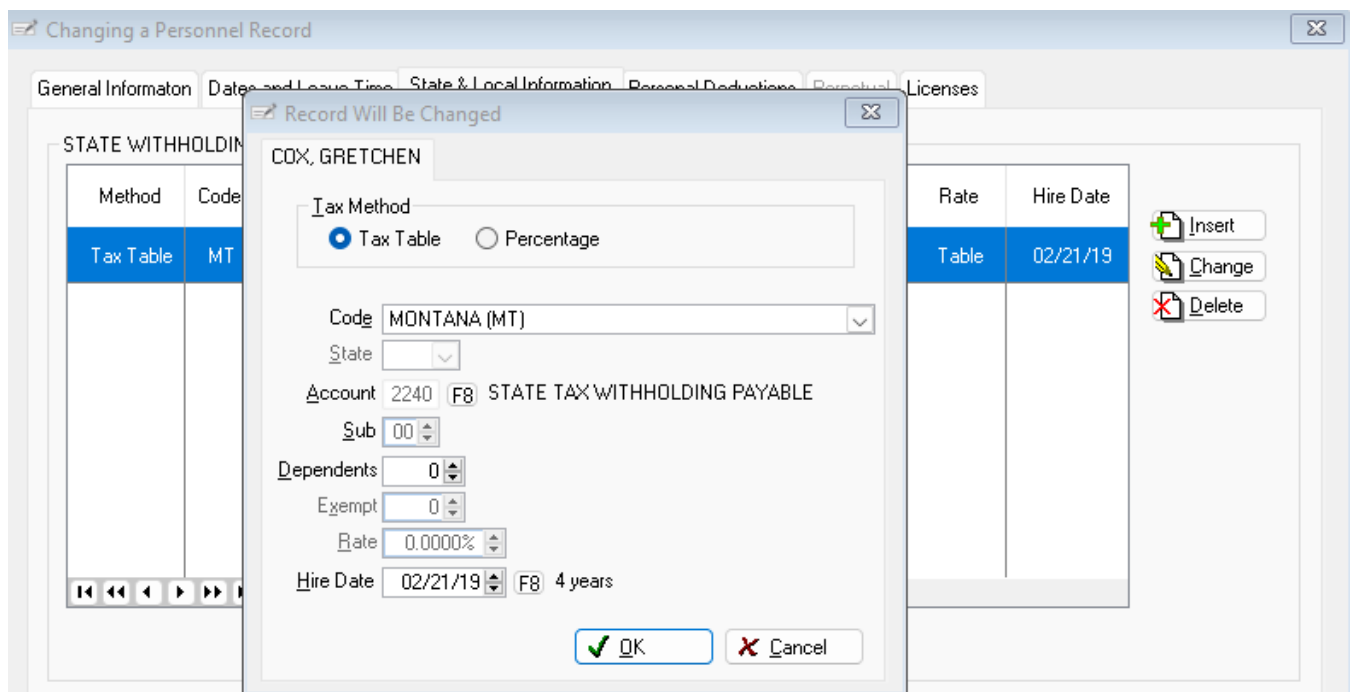
The same documentation is included in the online help system and can be accessed by pressing the F1 button at any RFMS screen. If something is on the screen you either do not recognize or understand, check this document, refer to the Help Files by pressing F1 or go to <https://rfmsinc.zendesk.com>

# 2023 Tax Year/2024 Pay Year US & Canada

You do not have to apply this update to run your first payroll for 2024 nor to print your forms for 2023. The State, US Federal, Provincial and Canadian Federal rates are now stored in the cloud. Your RFMS Core system will pick up these changes without the 23.99 update. The formatting of the 2023 tax forms will require the 23.1 update as it allows your core system to connect with the formatting in the cloud.

## Montana Changes

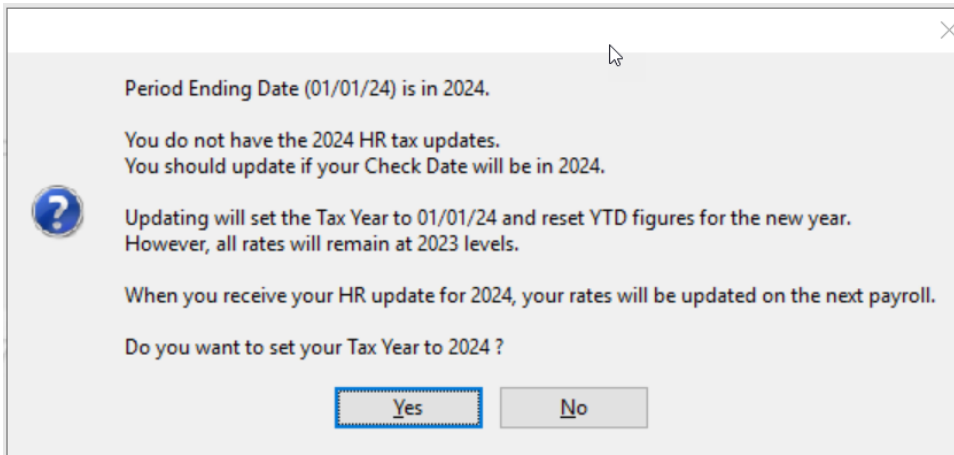
Montana has changed from a single tax rate to 3 tax rates, so the system cannot automatically pick up the changes. For each employee go to the State and Local Tax Information and select which of the new tables is applicable.



## Activating 2024 Tax Rates & Resetting the YTD Figures US & Canada

### Step 1

This can be done with any version since 22.99.0, without running an additional update.



[End of Year Videos and Articles – RFMS Help Desk \(zendesk.com\)](#)

Steps 2-4 of Year End Processing will remain the same.

# W-2 and 1099 Printing /T4 and T5018 Printing

Instead of directly printing the forms the system will utilize code in the cloud to format the data and generate a pdf. Using your pdf viewer, you can then print the forms.

Tax Form Printing

W-2 / W-3 Printing 1099 / 1096 Printing

**1096 Annual Summary and Transmittal**

Form **1096** Annual Summary and Transmittal of U.S. Information Returns **2023**

Department of the Treasury Internal Revenue Service OMB No. 1545-0108

Fill in the name of the filer:  
**OWNER'S CONFERENCE 2019**

Street address (including room or suite number):  
**3073 PALISADES CT**

City or town, state or province, country, and ZIP or foreign postal code:  
**TUSCALOOSA, AL 35405**

Name of person to contact: \_\_\_\_\_ Telephone number: \_\_\_\_\_ Ext. \_\_\_\_\_

Email address: \_\_\_\_\_ Fax number: \_\_\_\_\_

**For Official Use Only**

1 Employer identification number: **63-1111111** 2 Social security number: \_\_\_\_\_ 3 Total number of forms: **NEC 2 MISC 0** 4 Federal income tax withheld: **\$ 0.00** 5 Total amount reported with this Form 1095: **\$ 6,392.01**

6 Enter an "X" in only one box below to indicate the type of form being filed.

1096-32	1096-DTC	1096-81	1096-C	1096-E	1096-F	1096-G	1096-T	1096-A	1096-B	1096-95	1096-CAP	1096-DIV	1096-G	1096-INT	1096-K	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1099-LS	1099-LTC	1099-MISC	1099-NEC	1099-CID	1099-DIVR	1099-G	1099-GA	1099-R	1099-S	1099-SA	1099-GB	3021	3022	5408	5408-EISA	5408-GA
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5498-SA																
<input type="checkbox"/>																

Print Order:  
 Name Order  
 Social Security Number Order

Forms to Print:  
 1099 Nonemployee Compensation [2]  
 1099 Miscellaneous Income Statements [0]  
 1096 Annual Summary and Transmittal

Output Directory:  
 C:\Users\KLee\OneDrive - Cyncly\Desktop

Test Generate Exit

Tax Form Printing

T4 Printing T5018

**T5018 Summary**

Period Ending: **2000/12/31** YYYY/MM/DD

Payroll Account No: **000000000 0001**

Payor's Information:  
 Legal Name: **LEGAL NAME**  
 Trade Name: **TRADE NAME**  
 Address #1: **ADDRESS**  
 #2: \_\_\_\_\_  
 City: **B** Province: **B** Postal Code: **T1T 1ZR**  
 Language Choice:  
 English  French

Totals:  
 Total # of T5018 Slips - 80: **7**  
 Total Payments - 82: **27,544.57**

Person to contact about this return (First and Last Name): \_\_\_\_\_

**Generating Tax Forms...**

Canada T5018 Printing

T5018 Print Type:  
 One form per subcontractor with Payroll Account Number  
 (Print one set for Canada Revenue Agency and one set for your files)  
 One form per subcontractor for distribution to subcontractor without Payroll Account Number

OK Cancel

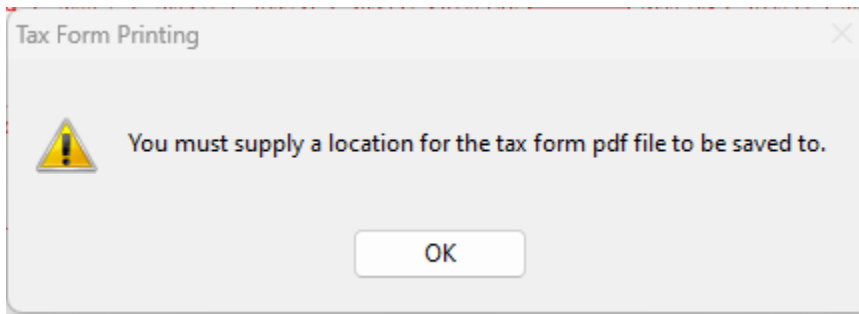
Print Order:  
 Name Order  
 Social Security Number Order

Forms to Print:  
 T5018 Statement of Contract Payments [7]  
 T5018 Summary of Contract Payments

Output Directory:  
 C:\Users\KLee\Desktop

Generate Exit

A location must be provided so the system will know where to save your pdf file.



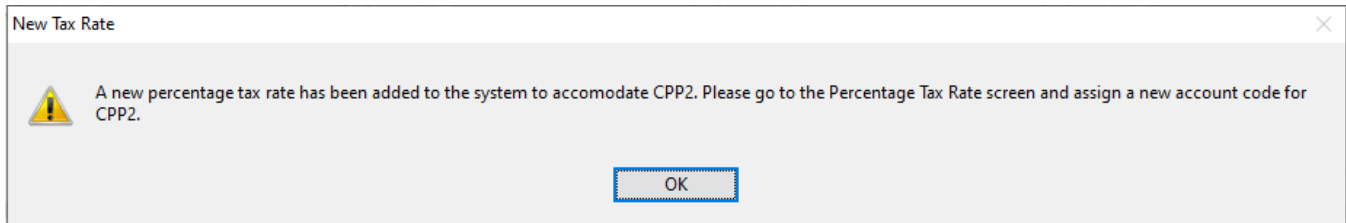
## US Electronic Filing

The federal government this year is requiring all employers with 10 or more forms to file the forms electronically. If your filing is required to be in the .csv format, updating to version 23.99 will be required to select that option.

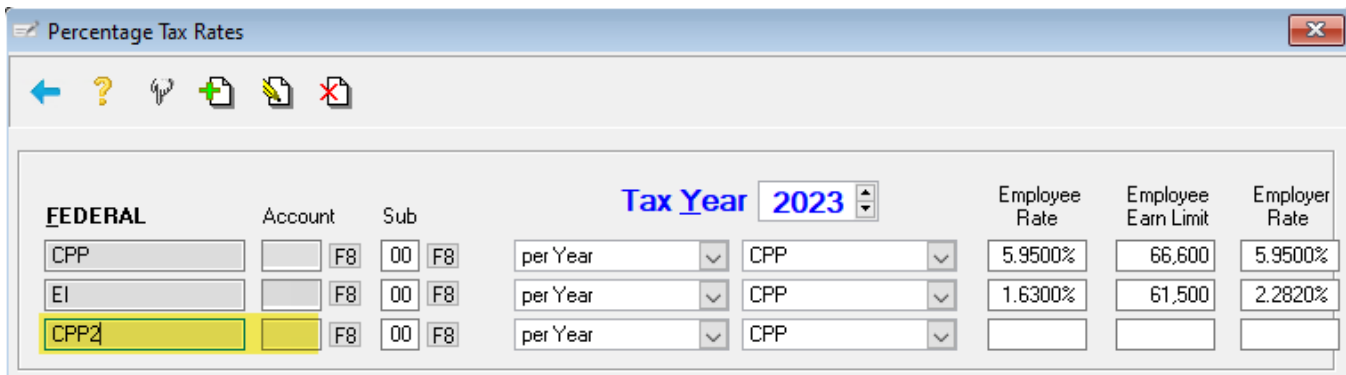
The screenshot shows the "1099 Electronic Filing" software interface. It includes fields for "Payment Year" (2023), "Transmitter's TIN" (456456), "Transmitter Control Code" (45678), and "Test File Indicator" (unchecked). The "Transmitter Name" is "RFMS". The "Mailing Address" is "J", "City" is "J", "State" is "AL", and "Zip" is "35473". The "Contact Name" is "KL" and "Contact Phone" is "[205]733-1675". The "Payer Name Control" is "KIMB". A checkbox for "Combined Federal/State Filing (CF/SF)" is checked. Below this is an "Explanation of Current Field" section with text about the CF/SF program. The "1099 Form Type To Process" section has "MISC" selected. The "File Format" section has "FIRE (txt)" selected, which is highlighted with a red box. The "Output Directory" is "C:\Users\KLee\Desktop". At the bottom are "Process" and "Cancel" buttons.

# Canadian Human Resources

In Version 23.1.0.36288, Canadian RFMS users will find a new, one-time message when opening Human Resources regarding the new percentage tax rate that has been added to the system to accommodate CPP2:



Go to Human Resources > File Percentage Tax Rates to add a new (not duplicate) account code:



NOTE: While this is listed in your Percentage Tax Tables with the tax year listed as 2023, this information will not be used until processing payroll for tax year 2024.

## Next

Version 23.1.0.36288 is required for using the RFMS Next Online Software version 1.2.