Interface Between Windstar and Banner

Banner -Run xpep1042 (see log for effective dates) or (individual or payment info) in banner. Print report to use for notations.

Connect to remote

Open Interface program. Select Banner file and (Individual or payment file) make corrections as needed in interface file as they won't transfer if errors. CHECK TO SEE THAT EVERYONE HAS AN EMAIL ADDRESS, if not find & add email address. Update in Interface file & Banner PPAIDEN

Send data to Tax Navigator. If any files remain they need corrections, find errors & correct, send again. Interface program should be EMPTY OF FILES when complete.

Open Tax Navigator. Use Banner report to look individuals up. (Some will be new employees, some will be existing. You can tell by their FNIS # if they are old employees, BUT, the safest way is to look at each individuals VISA DETAIL. If visa detail is empty, then they need to be emailed.

New employees do not have a FNIS #. Upload employee to FNIS from Tax Nav. Employee is auto emailed to fill in visa detail & assigned a FNIS#.

Old employees w/ a FNIS# but NO visa detail. Open FNIS: password: janwjanw. See list of all FNIS contacts & click on existing employee. Send 'reminder' email; choose from list of email messages.

Open FNIS: password: janwjanw. Open FNIS Website administrator to see which employees have responded to FNIS email: Settings: <insert screen print>

Do a screen print of all individuals who have responded. This sheet is very important to work from.

If they fill it out correctly, approve it and send them a thank you email from list. Approved emails get compiled into a file that will need to be transferred. (Mark them on you sheet Ok or Yes)

If they don't fill it out correctly, Disapprove it, remove their submittal approval to reopen the their file for corrections. Send them email explaining what is missing. (Mark them on your sheet No)

Transfer Data from FNIS to Windstar Interface file.

Hit 'send data' in FNIS, see # of files transferring. Close FNIS, Close Tax Nav. Open Interface file. Select "individual files". Send Individual files, if some remain, read what error is, fix & resend. Select "Visa files" Send visa files, if some remain, read what error is, fix & resend. Interface file should be empty.

Close Interface: Open Tax Navigator:

Use your FNIS screen print sheet to look each individual up. Go to their "Visa detail", click on "Substantial Presence Test" <insert screen print>, substantial presence test appears, click on "Analysis", probably it will say "set income type" click ok & it will take you to screen. Click "change", click "no

income from employment" which turns it into "has income from employment", and continue analysis by clicking on "analysis". Click on "Reprints"; see all the forms that printed for that individual. Print any tax treaties (form 8233) that may be assigned. Print "Individual Analysis Summary" (because it has his A#, country & residency status on it). Repeat this for each person on your FNIS screen print. Get your stack of printouts and go back to Banner PDADEDN. Look at each person's deduction set up to ensure they are sitting where they should be.

Keep FNIS screen print & Banner XPEP1042 report in a log book so you can see names & dates. It will come in handy later.

Done with one cycle.