

# Client Process Flow: Form 7200 & Advance Payment of Employer Credits Due to COVID-19

## Purpose

The purpose of this document is to provide an overview of the process that G&A Partners utilizes to provide IRS Form 7200, Advance Payment of Employer Credits Due to COVID-19, to eligible clients.

The 7200 will be available to your managers that have access to approve the payroll in WorkSight and PrismHR. If for some reason, you are unable to view the 7200 form in WorkSight, your current security level in the G&A system may not allow access. Please contact us at 1-866-497-4222 (choose prompt 1 for Customer Support, then 2 for designated client contact, and lastly, choose prompt 5 for Technology Assistance) or email us at [techsolutions@gnapartners.com](mailto:techsolutions@gnapartners.com) for assistance.

For detailed information regarding how the calculations are derived for this report, please reference the “COVID-19 Deferral and Credit Calculation Logic Summary” document found on the G&A Partners Client Secure Resources website.

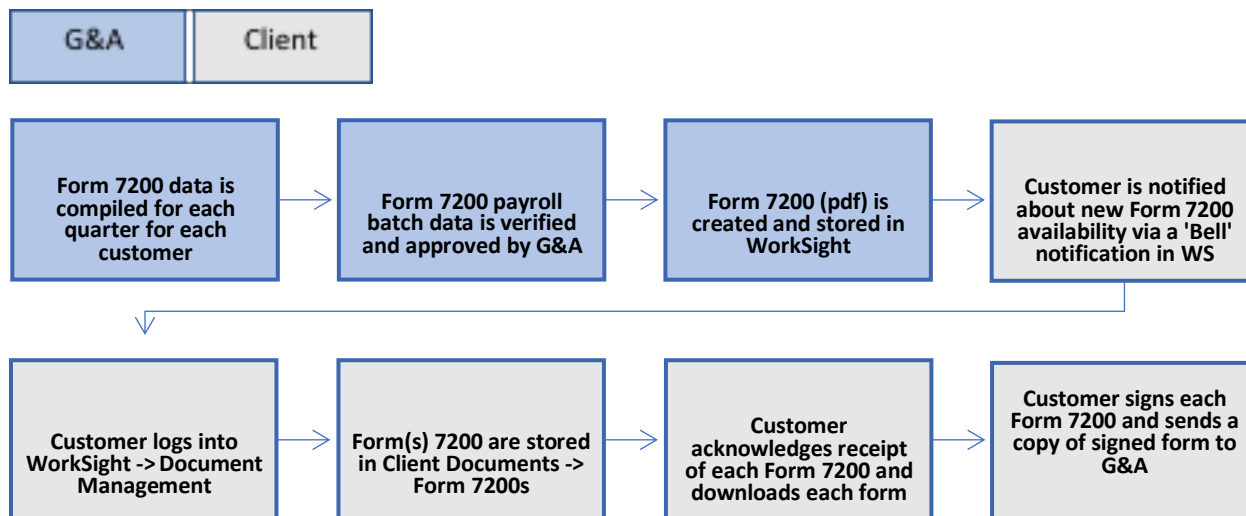
Important: Please note, for quarters 1, 2 and 3, the Form 7200 must be submitted to the IRS by the last day of the month following the end of the quarter. For quarter 4, the Form 7200 must be submitted to the IRS prior to the 941 being filed. To ensure processing by the IRS, please be sure to submit your Form 7200 by the following dates:

- 2020 Quarter 2 by 7/31/2020
- 2020 Quarter 3 by 10/31/2020
- 2020 Quarter 4 by 1/31/2021
- 2021 Quarter 1 by 4/30/2021
- 2021 Quarter 2 by 7/31/2021
- 2021 Quarter 3 by 10/31/2021
- 2021 Quarter 4 by 1/31/2022

## Process Overview

The following workflow shows each step in this process and which party is responsible for completing the step.

### Step completed by:



## Form 7200 Process Overview

### Step 1 – Data Compilation

Form 7200 data is compiled for each client.

### Step 2 – Form 7200 Creation

Using the compiled payroll data, G&A creates a separate Form 7200 for each employer ID that was used by G&A in processing payroll. This is completed on a quarterly basis per client.

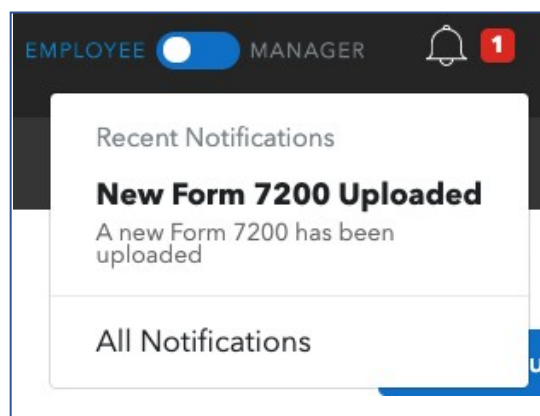
### Step 3 – Form 7200 Transferred to Client/Notification

The Form 7200 is validated by G&A and approved.


Once approved, the new Form 7200 is transferred into the client's Document Management folder labeled "Form 7200s" within the client's "Company Documents" folder. The "Form 7200s" folder will automatically alert designated individuals whenever a new Form 7200 has been uploaded for the client. The notification will happen via the WorkSight "Bell" (see below).



The Bell will indicate that new Form 7200 has been uploaded.



Clicking on the bell notification will provide additional details including a link to the Document Management folder where new Form 7200s are stored.



## New Form 7200 Uploaded

MESSAGE

A new Form 7200 has been uploaded to the Form 7200 pay date folder linked below. Please follow the link to the folder so that you can download file the form with the IRS.

[Click Here](#) to see the uploaded document

## Documents

Actions ▾

NAME
FILE TYPE
UPLOADED AFTER
UPLOADED BEFORE

All
▾

Clear Filters
Search

All Documents > Company Documents > Form 7200s > Pay Date - 05-08-20

NAME ▲	DATE MODIFIED	DATE DOWNLOADED	
<input type="checkbox"/> Form-7200-Pay-Date-05-08-20-Batch-202010-EID-43.pdf	June 29, 2020 1:46PM MDT	-	⋮
<input type="checkbox"/> Form-7200-Pay-Date-05-08-20-Batch-202015-EID-43.pdf	June 29, 2020 1:27PM MDT	-	⋮

### Step 4 – Form 7200 Review/Download

Form 7200s can be accessed within the WorkSight Document Management. They are stored within “Company Documents / Form 7200s”.

- 🏠 Dashboard
- ☰ Action Center
- 👤 Employees ▾
- 📄 Documents ←
- 📊 Reports
- 👥 Support Team
- ⚙️ Client Settings ▾

## Documents

NAME
FILE TYPE

All

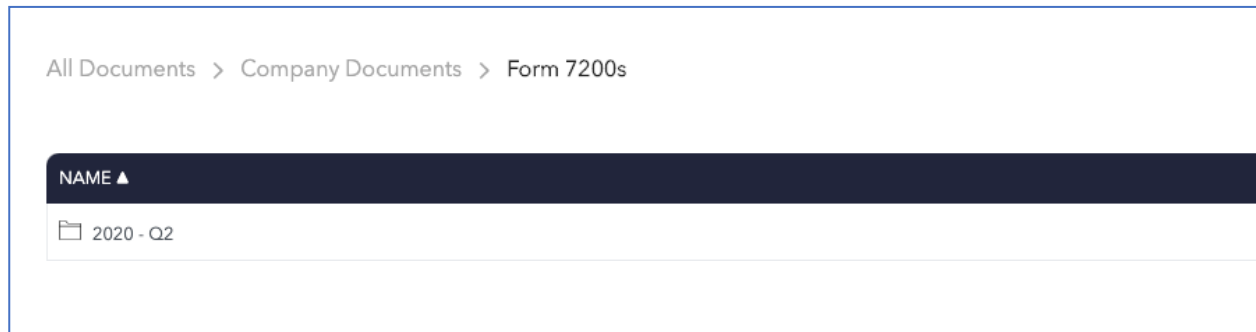
Clear Filters
↓

All Documents > Company Documents > Form 7200s



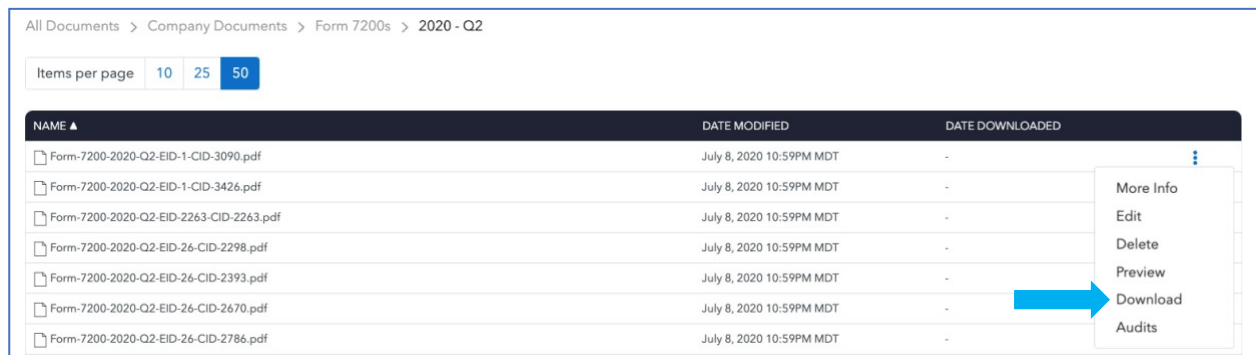
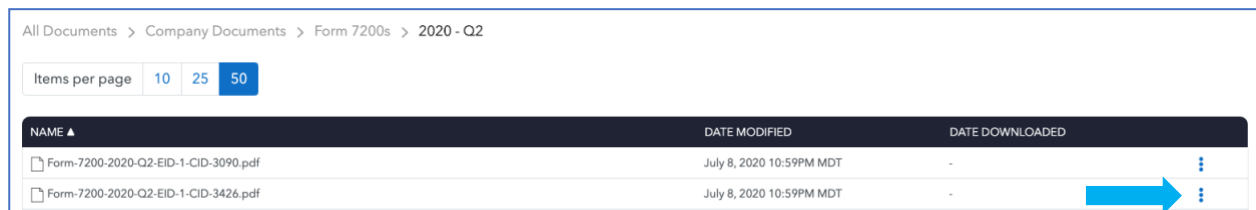
## Step 5 – Directory Structure for Form 7200s

Form 7200s are organized by Year by Quarter. There can be one or multiple Form 7200s within these folders depending on client configuration.



## Step 6 – Review/Download Form 7200

An individual Form 7200 within the Year-Quarter folders can then be reviewed and/or downloaded. The menu to Review or Download is accessible by clicking on the three vertical dots at the end of the row for any Form 7200 within the folder.



In order to Review/Download any Form 7200, the client must acknowledge receipt of that Form 7200. This acknowledgment is recorded within WorkSight for auditing purposes. The acknowledgment is required before the Form 7200 can be downloaded.

**Click Accept To Acknowledge** ×

By downloading this Form 7200, you agree with all of the following:

- You are responsible for reviewing the accuracy of the data on this Form 7200;
- If you find a discrepancy in the data, you will immediately notify G&A prior to filing the form with the IRS;
- It is your sole responsibility to submit this form directly to the IRS in a timely manner;
- G&A will have no legal liability for any issues related to any Form 7200 that is filed with the IRS; and
- You will subsequently provide G&A Partners with a signed completed copy of this Form 7200 by sending an email to [taxhelp@gnapartners.com](mailto:taxhelp@gnapartners.com)

**Decline** **Accept**

### Step 7 – Post Download Client Process

After downloading any Form 7200, the client should review for accuracy, and then sign and submit the form to the IRS and retain the original for tax purposes.

After downloading and signing the Form 7200, the client should also send a copy of the signed Form 7200 to G&A for tax/reporting purposes. The email address to send these signed Form 7200s is [taxhelp@gnapartners.com](mailto:taxhelp@gnapartners.com).