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## NEW IRS E-FILING REQUIREMENT THRESHOLD

UAN Support has received many inquiries on the new IRS electronic filing threshold. To clarify, any entity that has a **combined total** of ten or more **W-2, W-3, 1099 NEC, 1099 Misc, 1094 and 1095** forms is required to file electronically. The previous threshold of 250 is now 10! This requirement change is likely to affect **almost all smaller UAN clients** that were previously not required to file electronically.

Note: Your entity might have other IRS information returns that you complete outside of the UAN application that also count towards the threshold of ten.

A notice about the change is included with IRS instructions for each form.

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## 1096 PRINT ACCURACY OF BOX 6 “X” INDICATOR

UAN has identified an issue with the placement of the “X” indicator in Box 6 of the printed 1096 NEC and 1096 Misc. If your entity has a combined total of less than ten forms as discussed above, and you need to print the 1096 form, then please review the placement of the “X” indicator within Box 6.

This issue can be resolved in one of two ways:

- The first option is to customize the 1096 print layout to accurately place the “X” indicator. Guidance for how to customize the 1096 print layout is included in the Year End Procedures document beginning on page 61.
- The second option is to print the 1096 form after downloading the 2024 US Tax Table Update patch. UAN will correct of the placement of the “X” indicator within Box 6 and include the resolution in the release of the 2024 US Tax Table Update patch which is scheduled for January 10, 2024.

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## BANK RECONCILIATION REPORT

The bank reconciliation report is not printing the governing board signature lines and reconciliation notes (notes for any other adjusting factors) on the bottom of page 1 of the bank reconciliation report. This is a printing issue we are aware of, and it will be resolved in the 2024.2 release. In the meantime, you can manually add lines to page 1 for your governing board to sign or print a separate page with signature lines for them to sign and attach to your bank reconciliation report.