

HELPFUL TIPS FOR THE SELF-AUDIT ONLINE PROCESS

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What to do if You Receive a Message Online that the Final Audit has Already Been Completed:

**** The audit process has already been completed and access is no longer permitted under this username and password. If you need to provide additional information regarding this audit, please refer to the telephone and fax numbers shown on the letter you received. Sorry for any inconvenience. ****

If you attempt to login using the credentials from your letter but receive a message that the audit has already been completed and access is no longer permitted under the username and password, please contact our office for further assistance at 505-343-7720.

Once the due date for submitting the audit has passed, the online credentials are no longer valid, and the audit has been completed in the system as a Close-Out. We can re-set the audit and provide new credentials for the online system, or if you prefer, a paper version of the self-audit form can be forwarded to you for manual completion; to be returned along with your supporting payroll documentation.

Types of Payroll Records to Gather Before Beginning the Audit Process:

Before entering information on the self-audit form, it is recommended that the following records be gathered:

- Payroll Summary Report covering the policy period noted on the self-audit letter (Including Names, Job Duties, Gross Wages, and Gross Overtime Amounts)
- Federal 941 and/or State ES903A Quarterly Returns (4 most recent Quarters) **
- Subcontract/1099 Contract Labor Report (Including Names, Type of Work Performed, Dates and Amounts Paid)
- Certificates of Workers Compensation Insurance for any Subcontractors utilized, if any
- Other Types of Records that may also be of use in completing the self-audit are:
 - o General Ledgers
 - o Cash Disbursement Records
 - o Bank Statements and Check Stub copies
 - o Federal Form 943 or Schedule F from a Personal Tax Return (*Specific to Agricultural Accounts*)
 - o Schedule C from a Personal Tax Return
 - o Year-End 1099 Forms
 - o Year-End W-2 Forms
 - o Business Financial Statements
- List of Executive Officers, Owners or Partners (Including Ownership %'s, Amounts Paid, Job Duties, and Titles).

****PLEASE NOTE THAT WE MAY ACCEPT THESE TYPES OF RECORDS IN LIEU OF, OR IN ADDITION TO, THE FEDERAL 941 FORMS REQUESTED BY THE ONLINE SYSTEM****

Useful Tips that can be Found Within the Online Audit Process:

Please note that while entering information throughout the online process, you will note a few areas that have useful tips that pop up as you hover your mouse over the following sections:

- Types of Categories of Business Descriptions (Manufacturing, Retail/Distributor, Service, Contracting) on the 'General' Tab:

Business Description*

Click the category that most closely describes your business for ideas: [Manufacturing](#) [Retail/Distributor](#) [Service](#) [Contracting](#)

For more information about this section, hover over the word in blue above.

Please describe the types of services offered by your company, the type of work performed by employees and note any changes in your service offerings over the past year. If you have multiple locations, please indicate the type of work performed at each location.

Has the business made any of the following changes during the audit reporting period? Please check the appropriate box.

Business name changed? Please describe here:

- “Helpful Tip” on the Payroll Tab under both payroll entry sections:

					Total
<div style="border: 1px solid gray; padding: 5px; width: fit-content;">+ Add Row</div>					
PAYROLL INFORMATION: ALL OTHER EMPLOYEES					
<p>Please list names, description of duties, gross wages and any other information being asked for based on your answers to the questions above for all employees. Additional figures reported such as overtime and tips should also be included in the gross payroll numbers. Indicate the location the employee worked from using the drop-down. (No Location drop-down will be present if only one location was on the policy). The grand total of all employees should balance to the 941 numbers provided in the Verification section. Please round payroll figures to the nearest dollar, no decimals needed.</p>					
Helpful Tip Instruction					
First Name	Last Name	Specific Duties	State	Gross Wages	
			New Mexico		

If you have 10 or fewer employees, it is preferred that you list each employee individually. However, if you have more than 10 employees, you may group employees with the same duties and classification together if you prefer. For example, a restaurant with two office workers could list the two office employees separately and group all restaurant staff into one row labeled as "All Others." Principals must always be listed separately in the principals grid above.

- “Instruction” on the Payroll Tab under both payroll entry sections

PAYROLL INFORMATION: OFFICERS, MEMBERS, PARTNERS OR SOLE PROPRIETORS					
<p>Please list names, titles, description of duties, gross wages and any other information being asked for based on your answers to the questions above for all sole proprietors, partners or officers. Include principals at their actual payroll. If you had more than one location on your policy, please choose the location the employee worked from using the drop-down. (No drop-down will be present if only one location was on the policy). Principal adjustments for state minimums should be made prior to billing. Please round payroll figures to the nearest dollar, no decimals needed.</p>					
Helpful Tip Instruction					
First Name	Last Name	Title	Percent	Specific Duties	State

Type in the information in the fields below and click on 'Add Principal Entry'. You may insert an unlimited number of rows.

How to Proceed when a Section Does Not Apply:

When submitting the manual (paper) self-audit report form **please DO NOT leave any sections blank** as we will assume that the information was inadvertently missed. Should a section or question not apply, please write in either NONE -or- N/A and provide a written explanation on the paper audit form.

When submitting your audit through the online system, please leave the section blank and then add notes within the Closing Comments section on the ‘Summary’ Tab with an explanation as to why the section does not apply.

Reporting 'Employees Per Location' through the Online System under the "General" Tab:

The number of Principals (Owners, Officers, Members, Sole Proprietor, Partners, etc) in the business MUST be included in this count, and as such, even if there were no employees, please enter the total number of Principals in the business within this section and select 'Update' once completed:

EMPLOYEES PER LOCATION					
Please enter in the total number of employees at each location shown on your policy. The number of Principals of the business should be included in this count.					
Entity Number	Location Number	Location State	Location Description	Number of Employees	
1	1	NM	456 Irving Blvd NW, Albuquerque, NM 87114	<input type="text" value="1"/>	<input type="button" value="Update"/> <input type="button" value="Cancel"/>
Total				0	

Please note that we do not currently audit by location so you can add the average number of employees under any available address listed. **At least one listed location must have a minimum of one (1) employee entered for the on-line system to recognize this section of the self-audit form as being "completed"**.

Changes Required to Location(s) and/or Reporting of Employees Per Location when the Location(s) No Longer Apply, as Shown on the "General Tab":

Please note that the locations reflected on the self-audit form come directly from the policy being audited. Should you find that any of the listed locations no longer apply or need to be updated, please check the box next to "Locations added or removed?" under the 'General' screen where it states "Did the business make any of the following changes during the audit reporting period? Please provide details for all changes:" Be sure to note all changes next to this section and include the applicable number of employees within ANY of the available locations listed on the form. We currently do not audit by location so you can simply input the average number of all employees under any of the listed addresses **At least one listed location must have a minimum of one (1) employee entered for the on-line system to recognize this section of the self-audit form as being "completed"**.

Did the business make any of the following changes during the audit reporting period? Please provide details for all changes:

Business name changed?	<input type="checkbox"/>	<input type="text" value="Please describe here"/>
New products offered?	<input type="checkbox"/>	<input type="text" value="Please describe here"/>
Operations changed?	<input type="checkbox"/>	<input type="text" value="Please describe here"/>
Entity Type changed?	<input type="checkbox"/>	<input type="text" value="Please describe here"/>
Locations added or removed?	<input checked="" type="checkbox"/>	<input type="text" value="Please describe here"/>
Mailing address changed?	<input type="checkbox"/>	<input type="text" value="Please describe here"/>

Saving Payroll Information within the Online System:

Officers, Members, Partners or Sole Proprietors Section

When completing the 'Payroll' Tab of the online audit, please click on the button titled 'Add Principal Entry' after entering the details of each Officer, Member, Partner, or Sole Proprietor being entered within the system.

Here is an example of two reported Officers- One has been added (bottom) and one is ready to be added (top):

If you need to edit the data for any of the principals that have been entered below, click on the row that you need to edit, make your changes, and click Update. If you need to delete a row, click on the row and then click on the 'Trash' icon that looks like a garbage can.

	First Name	Last Name	Title	Percent Ownership	Specific Duties	Work State	Gross Wages	
	BILL	SMITH	PRESIDENT	50.00%	OUTSIDE SALES, MARKETING, FINANCE	New Mexico	\$64,000	
	BETTY	SMITH	VICE PRES	50.00%	OFFICE MANAGER, LEGAL, HR, PAYROLL	New Mexico	\$64,000	
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	<input type="text" value="SAMANTHA"/>	<input type="text" value="SMITH"/>	<input type="text" value="SEC/TREAS"/>	<input type="text" value="0"/>	<input type="text" value="INACTIVE"/>	New Mexico	<input type="text" value="0"/>	<input type="button" value="Update"/> <input type="button" value="Cancel"/>

Should you find that an entire entry needs to be removed, please click on the Name of the individual to be deleted so that it re-opens the boxes for entry, then click on the 'Trash' icon to remove the entry:

If you need to edit the data for any of the principals that have been entered below, click on the row that you need to edit, make your changes, and click Update. If you need to delete a row, click on the row and then click on the 'Trash' icon that looks like a garbage can.

	First Name	Last Name	Title	Percent Ownership	Specific Duties	Work State	Gross Wages	
	BILL	SMITH	PRESIDENT	50.00%	OUTSIDE SALES, MARKETING, FINANCE	New Mexico	\$64,000	
	BETTY	SMITH	VICE PRES	50.00%	OFFICE MANAGER, LEGAL, HR, PAYROLL	New Mexico	\$64,000	
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	<input type="text" value="SAMANTHA"/>	<input type="text" value="SMITH"/>	<input type="text" value="SEC/TREAS"/>	<input type="text" value="0"/>	<input type="text" value="INACTIVE"/>	New Mexico	<input type="text" value="0"/>	<input type="button" value="Update"/> <input type="button" value="Cancel"/> <input type="button" value="Trash"/>

All Other Employees Section

When entering the details of 'All Other Employees', please click on the button titled 'Add Employee Entry' after entering the details of each Employee.

Here is an example of two reported Employees - One has been added (bottom) and one is ready to be added (top):

PAYROLL INFORMATION: ALL OTHER EMPLOYEES

Please list names, description of duties, gross wages and any other information being asked for based on your answers to the questions above for each employee. Any additional figures reported such as overtime and tips should also be included in the gross payroll numbers. If you had more than one location on your policy, please choose the location the employee worked from using the drop-down. (No Location drop-down will be present if only one location was on the policy). The grand total of all officers and employees should balance to the 941 numbers provided in the Verification section. Please round payroll figures to the nearest dollar, no decimals needed.

Helpful Tip ⓘ Instruction ⓘ

First Name	Last Name	Specific Duties	State	Gross Wages
JEREMY	SMITH	SERVER/BARTENDER	New Mexico	40000

If you need to edit the data for any of the employees that have been entered below, click on the row that you need to edit, make your changes, and click Update. If you need to delete a row, click on the row and then click on the 'Trash' icon that looks like a garbage can.

First Name	Last Name	Specific Duties	Work State	Gross Wages
BOB	SMITH	CHEF/KITCHEN	New Mexico	\$50,000
Total				\$50,000

Should this information require an update after being added, please click on the Name of the individual to be updated so that it re-opens the boxes for entry, make your changes, and then click 'Update' to save your changes within the form:

If you need to edit the data for any of the employees that have been entered below, click on the row that you need to edit, make your changes, and click Update. If you need to delete a row, click on the row and then click on the "Trash" icon that looks like a garbage can.

	First Name	Last Name	Specific Duties	Work State	Gross Wages	
	BOB	SMITH	CHEF/KITCHEN	New Mexico	\$50,000	
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	<input type="text" value="JEREMY"/>	<input type="text" value="SMITH"/>	<input type="text" value="SERVER/BARTENDER"/>	New Mexico	<input type="text" value="40000"/>	<input type="button" value="Update"/> <input type="button" value="Cancel"/>

Should you find that an entire entry needs to be removed, please click on the Name of the individual to be deleted so that it re-opens the boxes for entry, then click on the 'Trash' icon to remove the entry:

If you need to edit the data for any of the employees that have been entered below, click on the row that you need to edit, make your changes, and click Update. If you need to delete a row, click on the row and then click on the "Trash" icon that looks like a garbage can.

	First Name	Last Name	Specific Duties	Work State	Gross Wages	
	BOB	SMITH	CHEF/KITCHEN	New Mexico	\$50,000	
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	<input type="text" value="JEREMY"/>	<input type="text" value="SMITH"/>	<input type="text" value="SERVER/BARTENDER"/>	New Mexico	<input type="text" value="40000"/>	<input type="button" value="Update"/> <input type="button" value="Cancel"/> <input type="button" value="Trash"/>

Please note that the "Save Form Information" button does NOT save the entries for Principals or Employees within the online form. Rather, this button is utilized to save the information that you have already entered should you need to leave the system and return later to complete the final audit before the due date:

Tip for Reporting Multiple 'All Other Employees' Having Identical Job Duties:

If you have 10 or fewer employees, it is preferred that you list each employee individually. However, if you have more than 10 employees, you may group employees with the SAME Job Duties together.

Here is an example of how to summarize groups of employees together:

PAYROLL INFORMATION: ALL OTHER EMPLOYEES

Please list names, description of duties, gross wages and any other information being asked for based on your answers to the questions above for each employee. Any additional figures reported such as overtime and tips should also be included in the gross payroll numbers. If you had more than one location on your policy, please choose the location the employee worked from using the drop-down. (No Location drop-down will be present if only one location was on the policy). The grand total of all officers and employees should balance to the 941 numbers provided in the Verification section. Please round payroll figures to the nearest dollar, no decimals needed.

Helpful Tip  Instruction 

First Name	Last Name	Specific Duties	State	Gross Wages
GARAGE	STAFF	MECHANICS, PARTS DEPT, SVC WRITERS	New Mexico	55000

Be sure to select "Add Employee Entry" to save your changes within the online form.

Submitting Payroll Online for Employees with Multiple Job Duties:

When submitting your final audit online, please complete the 'Payroll Information: All Other Employees' section with the Gross Wages by individual Employee for each separate type of work performed. This situation will most likely occur with contractors, but can apply in any business.

Here is an example of wages for one individual that was paid to perform different job duties:

PAYROLL INFORMATION: ALL OTHER EMPLOYEES

Please list names, description of duties, gross wages and any other information being asked for based on your answers to the questions above for each employee. Any additional figures reported such as overtime and tips should also be included in the gross payroll numbers. If you had more than one location on your policy, please choose the location the employee worked from using the drop-down. (No Location drop-down will be present if only one location was on the policy). The grand total of all officers and employees should balance to the 941 numbers provided in the Verification section. Please round payroll figures to the nearest dollar, no decimals needed.

[Helpful Tip](#) [Instruction](#)

First Name	Last Name	Specific Duties	State	Gross Wages	OT @ 1.5
			New Mexico		

If you need to edit the data for any of the employees that have been entered below, click on the row that you need to edit, make your changes, and click Update. If you need garbage can.

First Name	Last Name	Specific Duties	Work State	Gross Wages	OT @ 1.5
ANDREW	CHAVEZ	INTERIOR PAINTING PAY	New Mexico	\$5,647	\$456
ANDREW	CHAVEZ	INTERIOR DRYWALL PAY	New Mexico	\$9,876	\$865
ANDREW	CHAVEZ	EXTERIOR STUCCO PAY	New Mexico	\$15,615	\$659
ANDREW	CHAVEZ	TILE FLOORING PAY	New Mexico	\$850	\$0
Total				\$31,988	\$1,980

Please be aware that per WC Manual Rules, not all classifications are eligible for an individual employee's wages to be split between other job duties. Some examples of the most common classifications that cannot be split with other classifications are:

- 5606 - Contractor Project Manager, Construction Executive, Construction Manager or Superintendent
- 8742 – Salespersons or Collectors, Outside
- 8720 – Estimators for Construction
- 8748 – Automobile Salespersons
- 8810 – Clerical Office Employees NOC
- 8871 – Clerical Telecommuter Employees

Submitting Audits Online for Non-Profit Organizations:

- 1) Select 'Other' as your Entity Type on the 'General' Tab
- 2) List the Ownership as follows in the 'Payroll Information: Officers, Members, Partners or Sole Proprietors' section:

PAYROLL INFORMATION: OFFICERS, MEMBERS, PARTNERS OR SOLE PROPRIETORS

Please list names, titles, description of duties, gross wages and any other information being asked for based on your answers to the questions above for all sole proprietors, partners or officers. Include principals at their actual payroll. If you had more than one location on your policy, please choose the location the principal worked from using the drop-down. (No drop-down will be present if only one location was on the policy). Principal adjustments for state minimums/maximums, if applicable, will be made prior to billing. Please round payroll figures to the nearest dollar, no decimals needed.

Helpful Tip ⓘ Instruction ⓘ

First Name	Last Name	Title	Percent Ownership	Specific Duties	State	Gross Wages
NON	PROFIT	BOD	0	INACTIVE	New Mexico	0

[+ Add Principal Entry](#)

(Board of Directors)

Be sure to select "Add Principal Entry" to save your changes within the form. ***Please note that any individuals that are active and paid should be reported separately under the 'Payroll Information: All Other Employees' section.***

Submitting Domestic Worker (Per Capita Basis) Audits Online, If Applicable:

When entering the audit online, please note that the system uses the verbiage of 'Gross Units' on the 'Units' Tab to request the total number of Domestic (Per Capita) Workers during the audit period. Please enter the number of applicable employees for each Domestic Worker classification listed in the form and then select 'Update' to save your changes:

UNITS OF EXPOSURE

Your policy exposure is based on a measure of 'units.' For example, exposure for a movie theater may be measured on the number of admissions or exposure for some auto policies may be based on the number of vehicles. Please enter the number of units that your policy exposure is based on for each code shown below for the 12 month period most closely corresponding with your policy period. If no codes are shown, click the Add Row button to provide a description of the exposure being reported along with the total number of units related to that exposure.

State	Class Code	Class Description	Basis Description	Gross Units	
NM	0913	DOMESTIC WORKERS-RESIDENC	Per Capita	3	<input type="button" value="Update"/> <input type="button" value="Cancel"/>

Reporting Payroll Totals from Federal Form 941's by Quarter:

When entering Federal 941 amounts on the 'Verification' tab for an online audit, please always use **Column 1 Line 5C** from the 941 report. Please also enter your most recent Quarterly Reports that tie to the audit period, regardless of the dates shown in the system (e.g. in case you have not yet filed a Quarterly report that the system is requesting due to the period not having ended yet). We do understand that your Quarterly Reports will NOT match identically to your reported Gross Wages should your policy term be off-period from your Quarterly Report dates or if there are applicable Pre-Tax Wages that are not reported on the Federal 941 Forms. **Refer to Page # 2 for other types of acceptable alternative payroll documents to the Federal 941 Quarterly Reports.**


	Column 1		Column 2
5a Taxable social security wages.....	<input type="text"/>	x 0.124 =	<input type="text"/>
5b Taxable social security tips.....	<input type="text"/>	x 0.124 =	<input type="text"/>
5c Taxable Medicare wages & tips.....	<input type="text"/>	x 0.029 =	<input type="text"/>
5d Taxable wages & tips subject to Additional Medicare Tax withholding ...	USE THIS TOTAL		<input type="text"/>

Reporting Subcontract/Contract/Casual Laborers Online:

- If no Subcontractors, Contract Laborers, or Casual Laborers were utilized during the final audit period, please be sure to check mark the box next to "No Subcontractors were hired":

Check box if: No Subcontractors were hired.

- Use 'Add Row' for additional entries. If any subcontractors or other labor types were used in a state other than New Mexico, please include the state along with the description of the type of 'Work Performed'.
- The system allows for you to upload their Workers Compensation Insurance Certificates. Here is an example of a Certificate of Insurance section that lists Workers Compensation coverage:

		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 01/08/2019				
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS								
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY	Y/N		01/01/2019	01/01/2020	X PER STATUTE	OTHER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	Y	N/A			E.L. EACH ACCIDENT		\$ 2,000,000
	DESCRIPTION OF OPERATIONS below					E.L. DISEASE - EA EMPLOYEE		\$ 2,000,000
						E.L. DISEASE - POLICY LIMIT		\$ 2,000,000

Should you have any issues uploading these documents, please fully completed the online process, without uploading the documents, and add a comment in the notes section as to how you will be submitting the supporting documentation. Please use the first page of your audit letter (with the bar code listed on the bottom right hand corner) as your cover page and submit your payroll records with this letter by:

Email to: Audit@NewMexicoMutual.com

Fax to: 888-228-9163.

We will review the final audit once all records have been received.

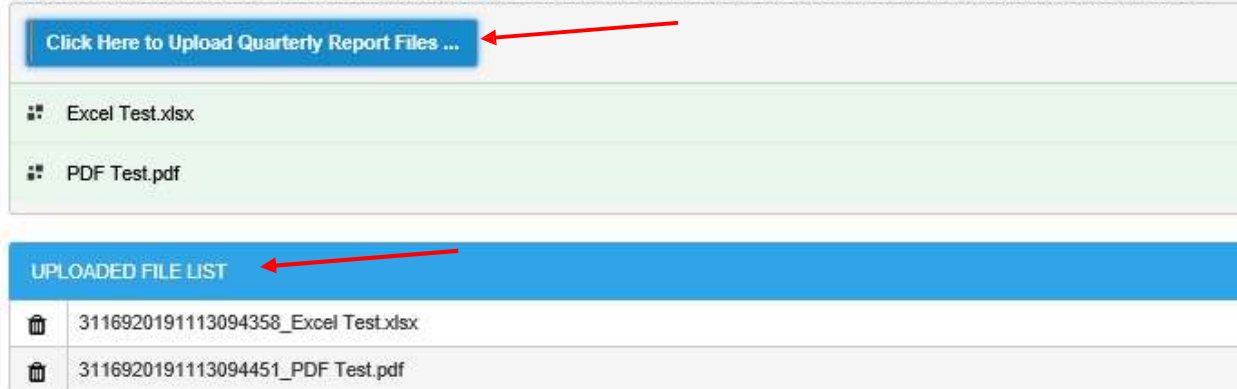
Submitting Final Audits with Additional Named Insured(s) Included (More than one Entity):



- Please report the related Principals AND All Other Employees of ALL entities included for coverage during the policy period within the 'Payroll' Tab.
- On the 'Verification' Tab, please list the Federal Employer Tax ID number only for the primary Policyholder name listed.
- When completing the Federal 941's section on the 'Verification' Tab, please combine the totals from Column 1 Line 5C of the Quarterly reports for each covered entity by Quarter, and then upload, fax, or email copies of the supporting payroll documentation for each covered entity.

Document Upload Tips:

As part of the online process, please upload your supporting payroll documentation directly into the system under the 'Verification' Tab. Select "Click Here to Upload Quarterly Report Files...." You will then be prompted to select the file you wish to upload from your Computer. Select 'Open' to choose the file. Repeat the process as needed until all required documents are reflected in the Uploaded File List. It is preferred that you do not upload Password Protected Files. **If you are uploading a Password Protected File, please provide the password required to open each document in the Closing Comments Section on the 'Summary' Tab.**

Only files smaller than 20 MB of the following file types can be uploaded: .pdf, .tif, .tiff, .doc, .docx, .rtf, .zip, .xls, .xlsx, .gif, .jpg, .jpeg, .png, .txt



UPLOADED FILE LIST	
	3116920191113094358_Excel Test.xlsx
	3116920191113094451_PDF Test.pdf

Issues with Uploading Documents through the Online System:

Should you have any issues uploading documents through the online system, you do have the ability to fax or email these records separately. Please fully submit your final audit online, without uploading any attachments, but by adding a note in the Closing Comments section as to how you will be submitting the supporting payroll documentation. Once you have fully completed the online process, use the first page of your audit letter (with the bar code listed on the bottom right hand corner) as your cover page and submit your payroll records with this letter by:

Email to: Audit@NewMexicoMutual.com

Fax to: 888-228-9163

We will review the final audit once all records have been received.

How to Verify the Audit is Fully Completed and Ready for Submitting through the Online System:

Please note that **ALL** online Tabs for each entry section (e.g. General, Payroll, Verification, Subcontractors, Units- If Applicable, Summary) **MUST be check marked as completed before the system will allow you to “Submit Form”**.



The option to “Submit Form” will NOT display until all sections are completed. Once ‘Submit Form’ is selected, you will no longer be able to make changes or re-open the online entry process.

SUMMARY

Additional comments relevant to this audit process:

Closing Comments

[Save Form Information](#)

Save or Print a copy of this form for your records. Please review it to make sure the information provided is correct. Then click on the “Submit Form” button to complete the process.

[Download Report](#)

[Submit Form](#)

What to do if Errors were Made During the Online Process or if you have Additional Questions:

Should you find that mistakes were made when entering your final audit but were not discovered until AFTER the final audit has been submitted and can no longer be accessed, or if you need additional assistance at any time, please feel free to contact our office directly at 505-343-7722.