

W-2 Processing Instructions

Start with submitter maintenance.

```
W-2 Submitter Maintenance                APYRG600 1
Tax Year - 2004

Submitter Company. . . +

Type options, press Enter.
2=Change      4=Delete      5=Display
6=Employer Maintenance      8=W-2 Print      9=W-2 Mag Media

Co Submitter      Submitter      Federal
Opt Id Name      Address      Id.
01 TIMS SOLUTIONWARE LTD.      4301 WATERWOOD PKY      734323211
10 EXCELLENT FOODS, INC.      5551 N. WESTERN, #101      731251801
48 SPLIT-T RESTAURANT      5500 N. WESTERN #101      12-345678

F3=Exit      F5=Refresh      F6=Add      F9=Lookup+      Bottom
```

If you haven't setup any submitters, these are the companies that are the transmitters of W-2 information. The IRS refers to these companies as SUBMITTERS. Chose F6 to create a NEW submitter, using the same company id as exists in the payroll system. All of the information entered for the submitter is self-explanatory or has the F9 key for LookUp purposes, except the **Personal Id**.

The **Personal Id** field is required if you plan on delivering your W-2 information on Magnetic Media. It must be acquired before W-2 Magnetic Media processing begins. If, however, you are not planning on submitting your W-2 information via Magnetic Media, then put "PRINT ONLY" in this field!!!

W-2 Processing Instructions

Then drill down on each submitter to the **all** of the Submitter's employers:

```

                                W-2 Employer Maintenance
                                Tax Year - 2004
                                APYRG601 1

Submitter Company. . 01 TIMS SOLUTIONWARE LTD.
Employer Company . .      +

Type options, press Enter.
  2=Change   4=Delete   5=Display   6=Codes Maintenance
Co Employer      Employer      Federal
Opt Id Name      Address      Id.
01 P.S.A. FINANCIAL      4301 WATERWOOD PKY      73-432311
10 SOLUTIONS ENTERPRISES, IN      5005 N. PENN SUITE 200      73-432122
12 REDUNDANT ENTERPRISES      1234 MAIN ST      73-432122

F3=Exit      F5=Refresh      F6=Add      F9=Lookup+      Bottom
  
```

Verify or create each Employers information.

Each Employer must have the W-2 Codes verified. Do that by choosing option "6" on each Employer. Be sure to page through all of the codes.

```

UPDATE                                W2 Codes Maintenance
                                Tax Year - 2003
                                APYRG602 1

Submitter Company. . 01 TIMS SOLUTIONWARE LTD.
Employer Company . . 01
Code Type. . . . . +
Code Identifier. . .

Type options, Press enter.
  2=Change   4=Delete   5=Display
Cde Cde AdPy AdPy AdPy AdPy AdPy
Opt Typ Id. Ded1 Ded2 Ded3 Ded4 Ded5 Description
  B 09 D01      ADVANCE EARNED INCOME CREDIT PAYMENT
  B 10 D33      DEPENDENT CARE BENEFIT
  B 11 A09 A34  NON-QUALIFIED PLANS OR SEC. 457 PLAN
  M A          UNCOLLECTED SOCIAL SECURITY TAX ON TIPS
  M B          UNCOLLECTED MEDICARE TAX ON TIPS
  M C D01      GROUP TERM INSURANCE > $50,000.00
  M D A56      401(K) CASH OR DEFERED COMPENSATION PLAN
  M E          403(B) SALARY REDUCTION AGREEMENTS
  M F D09      408(K)(6) SALARY REDUCTIONS SEPS

F3=Exit      F5=Refresh      F6=Add Mode      +F9=LookUp      F11=Update mode      More...
  
```

Once you have verified all of the Employers and W-2 Codes information then press F3 to go back to Submitter Maintenance.

W-2 Processing Instructions

Select option "8" on the Submitter which will bring you to the W-2 Print screen.

```
UPDATE                                W-2 Print                                APYRG604 1
                                      Tax Year - 2003                            Print
                                                                              Options
Submitter Company Id. 01 TIMS SOLUTIONWARE LTD.      Print Fmt 1WIDE
Employer Company Id.

Type options, Press enter.
  2=Change          5=Display
W-2   W-2   Co. Employer
Opt Select Run  Id. Name                    Employer
Y     1/18  01  P.S.A. FINANCIAL              4301 WATERWOOD PKY
N     10    10  SOLUTIONS ENTERPRISES, IN    5005 N. PENN SUITE 200
N     12    12  REDUNDANT ENTERPRISES        1234 MAIN ST

F3=Exit          F5=Refresh          F7=Select/Unselect
F2=Run W-2s     F14=Print Options          Bottom
```

W-2's are printed by employer! Each Employer that will print W-2's must have a "Y" under the W-2 Select heading.

Be sure to press F14 to check your Printer Options.

Once the W-2 Employer's have been selected, press **F2 to start the run.**

Once F2 has been pressed lines should begin displaying, upon completion the W-2 Run Date should update to today's date.

That will tell you that the process has completed and you may now print the W-2 Spool File!

W-2 Processing Instructions

Select option "9" on the Submitter which will bring you to the W-2 Magnetic Media screen.

```
UPDATE                               W-2 Magnetic Media                APYRG604 1
                                      Tax Year - 2004                          Mag Media
                                                                              Options

Submitter Company Id. 01 TIMS SOLUTIONWARE LTD.
Employer Company Id.                                     Filing      E Electronic
                                                         Folder      MAGMEDIA

Type options, Press enter.
 2=Change          5=Display
W-2      W-2      Co. Employer
Opt Select Run  Id. Name                               Employer
                                                         Address
  Y      2/08   01 P.S.A. FINANCIAL                      4301 WATERWOOD PKY
  Y      10     10 SOLUTIONS ENTERPRISES, IN            5005 N. PENN SUITE 200
  Y      12     12 REDUNDANT ENTERPRISES                1234 MAIN ST

F3=Exit          F5=Refresh          F7=Select/Unselect
F2=Run W-2s     F15=Mag Media Option          Bottom
```

W-2 Magnetic Media is generated by Employer! Each Employer that will be included in the Magnetic Media file must have a "Y" under the W-2 Select heading.

Be sure to press F15 to check your Magnetic Media Options.

Once the W-2 Employer's have been selected, press **F2 to start the run.**

Once F2 has been pressed lines should begin displaying, upon completion the W-2 Run Date should update to today's date.

That will tell you that the process has completed and you may now copy the W-2 Mag Media File to the SSA!