2012 W2 Training

December 5th, 2012

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Presenter: QSS Account Manager, Lois Milstead

W2 Processing Release Overview

- The W2 software updated annually.
- Software for 2012 is designated as TX12.

Changes for 2012 W2 Tax Year Reporting General Overview

- Employee Social Security Tax Withholding Rate changes from 4.2% to 6.2% effective March 1st, 2012.
- Cost of Employer-sponsored Health Coverage required changes in 2012 reporting. These changes will impact 2012 W2 processing.

How W2 Processing Works

- W2 information comes from two sources: Payroll records in PERPAY (personnel and payroll) d/b and Travel Claims in A/P system.
- W2 information is extracted from those two sources and combined into one consolidated file.
- W2 Media file is transmitted to the Social Security Administration (SSA).

W2/1099 Processing Branch

SQSS ControlCenter 39 - QSS DEMONSTRA	TION DISTRICT	QSS/OASIS	
File View District Year Go Messages Window	News Video Help		
Image: View District Year Go Messages Window Image: Flavorites Image: Flavo	News Video Help		
Last Run: 12/04/2012 05:53:06	Yr:2008 Dist:39 Site:	L GS: W 12/4	/2012 8:42 AM 🏼 🎢

2012 W2 Processing Menu



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2012 W2 Task List (Part 1)

TASK	WHAT	WHEN	ном
1-T	Install current year's W2 programs; add to user menus	Dec Jan.	
2-PR	Set up or review program options and state ID number mask	Dec Jan.	W2PO12 menu program or Y12W2PROGOPT UDC and W2HCVD menu program
3-Т	Create or copy control files, including federal EIN file	Dec Jan.	editor program
4-Т	Zero out Y-T-D totals for payroll after running last Y1 payroll and prior to running first Y2 payroll	Dec Jan.	RUN PAY790.IPPSCH.IPACT
5-PR	Get PIN/Password from Social Security Administration	January	1-800-772-6270 or www.socialsecurity.gov/ bso/bsowelcome.htm
6-PR	Print preliminary prelist; check for accuracy	January	W2RP12 menu program
7-PR	Print report of W2 records from Pay History for comparison purposes	January	PAY830 menu program
8-PR	Include employees lacking pay history records	January	PHUPDT menu program

2012 W2 Task List (Part 2)

IASK	WHAI	WHEN	ном
9-PR	Make Pay History adjustments using Enter Payroll History	January	PHUPDT menu program
PR	Repeat reports until accuracy is obtained (Tasks 6-PR through 9-PR)	January	
10-T	Produce Extract file from W2 records from Pay History	.lanuary	Y12W2EXTRACT UDC
11-T	Print prelist report of W2 records from Pay History	January	Y12W2REPORT UDG
PR	Compare prelists created in 6-PR and 11-T with pay history report from 7-PR	January	
T and PR	Repeat extract and reports until accurate (Tasks 6-PR through 11-T)	January	
12-T	OPTIONAL—Include travel claims if processed through Accounts Payable	January	Y12W2TCEXT and Y12W2TCRPT UDCs
13-AP	Adjust Travel Claims (optional)	January	
14-T	Merge pay history records and travel claims	January	Y12W2FNLMRG UDC
15-T	Print prelist report of W2 records including Pay History and travel claims	January	Y12W2REPORT UDC
PR	Check report for accuracy	January	
16-PR	Edit W2 records with Edit program	January	W2ED12 menu program
17-T	Print prelist report of W2 records including Pay History and travel claims	January	Y12W2REPORT UDC
PR	Check report for accuracy	January	
18 T	Print and distribute W2 forms	By 1/31	Y12W2PRINT UDC
т	OPTIONAL—Print and distribute W2 laser forms	By 1/31	Y12W2LASER UDC
	Allow interval before creating electronic transmittal file		
19-1	Make W2 electronic transmittal file	Ну 3/31	Y12W2EILE UDC
20-T	Create transmittal totals report	By 3/31	Y12W2TFTOTALS UDC
21-T	Save history files		Y12W2SAVE UDC

W2 Processing Task Flowchart

T denotes Technical Staff, PR denotes Payroll Staff, AP denotes Accounts Payable Staff



Flaure 9.1: Flawebart of W9 Tooks

W2 Processing Identification Numbers

- Two numbers used in W2 processing: Federal EIN or State Identification Number.
- State ID hand input when prompted or read from DISTRICT record.

W2 Processing 2012 Mileage Payments

- 2012 rate is \$.555 per mile
- Mileage payments in excess of Federal Government allowance must be reported.

W2 Processing Imputed Paylines

- Paylines for imputed gross occurs when taxes are owed on a benefit an employee receives.
- Imputed paylines needed to be processed on a payroll dated 12/31/12 or earlier.

W2 Processing Voluntary Deduction 8999

• Group Life Insurance (GLI) is defaulted to Voluntary Deduction code of 8999 in QSS/OASIS payroll software.

W2 Processing Cell Phones

• Fringe benefits such as cell phones provided by employer subject to FIT, SIT, OASDI and Medicare taxes.

W2 Processing Default Deferred Compensation

- Determine default for Deferred Compensation plans
- Determine additional plan codes for alternate deferred compensation.

W2 Processing W212DC and W212DX Program Options



W2 Print Sort Options

- 1. District, name (just as in transmittal file)
- 2. District, pay location 1, name (suggested if you enclose W2s with pay warrants)
- 3. District, pay location 2, name (suggested if you enclose W2s with pay warrants)
- 4. District, pay code, name
- 5. Zip code (suggested if you mail W2s)
- 6. District, pay location 1, pay code, name
- 7. District, pay location 2, pay code, name
- 8. District, pay code, pay location 1, name
- 9. District, pay code, pay location 2, name
- 11. Name, district number
- 12. Name, district number, pay location 1
- 13. Name, district number, pay location 2
- 14. Name, district number, pay code
- Zip code (same as 5.)
- 16. Name, district number, pay location 1
- 17. Name, district number, pay location 2, pay code
- 18. Name, district number, pay code, pay location 1
- 19. Name, district number, pay code, pay location 2

W2 Processing Pay History Records

• W2's will not print on employee unless Pay History records exist even if Travel Claim records exist.

W2 Processing Submitting to IRS

 Send Copy A of W2 forms (Wage and Tax Statement) to the SSA (Social Security Administration) by March 31st, 2013.

W2 Processing Considerations and Cautions

- Program option record control reporting of Deferred Compensation amounts, Dependent Child Care, GLI, Roth IRA's, Federal/State subjectivity differences, Employer HSA's. Be sure Program Options are setup correctly.
- QSS supports Box 12 amounts Substantiated Employee Expense (Code L), Uncollected OASDI on GLI (Code M), Uncollected Medicare on GLI (Code N) and Adoption Benefits (Code T). Manual entries may be needed on W2's.

W2 Processing Other Considerations and Cautions

- State ID entered in District Master file.
- How to handle Employees with no SSN.
- Security USERSEC setups for W2 processing.

W2 Processing USERSEC Entries Used by QCC

QSSHP3K - Reflection for HP	- 🗆 🗙
<u>File Edit Connection Setup Macro Window H</u> elp	
MENO20 H.OO.OO Program Security Matrix (User: DEAO8) QSS/OAS	18
1 2 3 4 5 6	
Program 1234567890123456789012345678901234567890123456789012345678901234567890	
193. ACSBB YYYYYYYYYYYYYYYYY 194. SUBPOOL 66S1S2SASB SISKTHSJECW4 195. USUBPOOL ALL 196. PXENCD YYYYCPN 197. CHGFY YY9715 198. PPSECSK W 199. P602TQ Y10YYYN0YED 200. PDL010 02 201. P0C0 12222222 2111100 202. DDR001 Y0 203. GUIPURCH NYYP12324YYYNN 204. TNED12 YY	
205. H2P012 YYY See Modules, Task and User Security Manual (GS38). Note, the	
206. H2SB12 YYYY Tax Year processed is used in the Usersec Name.	
207. AZEDT2 YYY	
1 2 3 4 5 6 123456789012345678901234567890123456789012345678901234567890	
Start Print User Load Page Page Return Over Screen Data Global Backward Forward to Men	u ,
1, 1 HP70092 hp3k via TELNET 08:31:50 Num Caps	

W2 Processing

District Record containing State ID

🔑 View Districts	07 - QSS DEMON	STRATION DI	STRICT	QSS/OAS	SIS 🗖	• X
<u>O</u> ptions						
]			
	vistrict Codes : 07 :	QSS UNIFIED	SCHOOL DIS	TRICT	•	Inspect
Dis	trict Number : 07					
	Name : QSS	UNIFIED SCH	OOL DISTRIC	CT		
	Address : 2121	S EL CAMINO	REAL, D200			
City : SA	IN MATEO		State : C	A ▼ Z	Zip: 944030	000
SULID : 94	024030	-	FICA ID : 69	9-0933885		
Workers Comp Rate : 13	7525		SIT ID: 80	0096845		
Ret-system 1 Ret-system 2	1/3 Option : Pickup 2/4 Option : Both	· •	Percent : 0, Percent : 4	0000		
The system :	ora option. [Dom	<u> </u>	T Broome. [].	2000		
		FICA Option:	_			
Audit Information						_
ID: I	DA07	Date: 05/05/	2008	Time:	03:49:05 PM	
<u> </u>						
	Yr	:1997 Dist:07	7 Site:1 GS:	w 11/2	7/2010 11:	:51 AM

Task 1-T (Tech) Install W2/1099 Release

Step 1-Obtain User Manuals from the QSS Web Site

Step 2-Distribute Materials

Step 3—Download the TX11 Installation File from QSS Web Site

Step 4—Transfer and Restore Installation File to Your HP e3000

Step 5-Build New Release and Archive Groups

Step 6—Restore Files

Step 7—Archive Current Versions of Released Files

Step 8—Integrate Release Files into Standard Groups

Step 9-Move Updated Files into Production

Step 10—Copy Process Control and Printer Environment Files

Step 11-Move W2 Transmittal File Program into Production

Step 12-Copy Last Year's Control Files

Step 13-Modify UDCMENU

Step 14—Integrate W2 and 1099 UDCs

Step 15—Store Archive Files to Tape

Task 2-PR Maintain W2 Program Options (W2PO12)



W2 Option Maintenance (W2PO12) W2 Program Option Maintenance

🖳 2012 W2 Option Mainte	enance (W2PO12)	- • ×
File Options		
$\square \oslash \times \mathcal{P} $]+] 	
W2P012: YYYYYYYYYYYYYY	Y	Inspect
Program Option Name	Source Year 12	
	W2EX12 - Basic/Default settings used to control how W W2EX12 - Basic/Default settings used to control how W W212DC - Employee/employer vol-ded detail, vol-deds f W212CC - Vol-deds for dependent care DEFMED - Deferred Medicare W25TID - Edit mask for State EIN W212DX - Additional vol-ded ranges when W212DC spi W212FA - Vol-deds used during the year to reduce SIT v W212CA - Vol-deds used during the year to reduce SIT v W212CA - Vol-ded ranges for Roth W212CA - Vol-deds used during the year to reduce FIT v W212FA - Vol-deds used during the year to reduce FIT v W212FA - Vol-deds used during the year to reduce FIT v W212FA - Vol-deds for Employer HSA W212FA - Employer-Sponsored Health Plan Reporting W212FX - Extension codes for W212HC	2 data is accumulated or alt. deferred comp. plans ace is exceeded wages but not FIT wages but not SIT

W2 Option Maintenance (W2PO12) Control Window Access

🖳 2012 W2 Option Maint	enance (W2PO12)		
File Options			
8 O X 🔎 🖗	+60		
W2P012: YYYYYYYYYYYYY	r		Inspect
Program Option Name	Source `	ríear 12	
	W2PO I2 - Controls which program-opt W2EX12 - Basic/Default settings used W2I2DC - Employee/employer vol-ded W2I2DC - Vol-deds for dependent car DEFMED - Deferred Medicare W2STID - Edit mask for State EIN W212DX - Additional vol-ded ranges w W212EA - Vol-deds used during the ye W212CX - Extension vol-deds for W21 W212DR - Vol-deds used during the ye W212DR - Vol-deds used during the ye W212DR - Vol-deds used during the ye W212DR - Vol-deds for Employer HSA W212HS - Vol-deds for Employer HSA W212HC - Employer-Sponsored Healt W212HX - Extension codes for W212	tion records can be maintained d to control how W2 data is accord d detail, vol-deds for alt. deferred e when W212DC space is exceed santo reduce SIT wages but not 12CC ear to reduce FIT wages but not h Plan Reporting 2HC	umulated d comp.plans ed : FIT : SIT

W2 Option Maintenance(W2STID) State EIN Edit Mask

🖳 2012 W2 Option Maintenance (W2P012)
File Options
W25TID: XXX-XXXX-X Inspect
Program Option Name W2STID Source Year 12
-W2STID Contains edit mask for State EIN
State EIN Edit Mask: XXX-XXXX-X
The edit mask can contain up to 17 characters. The following table describes how the mask interprets each character in your EIN.
Character Interpretation
X For each 'X, print one character of the State EIN.
If the EIN is is greater than the number of Xs, the mask will print only the number of characters equal to the number of Xs.
For example, if the number of characters in the EIN is 8, but there are only 6 ∞s , then only the first 6 characters of the EIN will print.
- A '-' will cause a hyphen to be inserted in the State EIN.
space Each blank space in the mask inserts a blank space in the printed State EIN.
Usersec: YYY Yr: 2008 Dist: 39 Site: 1 GS: W 12/3/2012 4:08:10 PM

W2 Option Maintenance (W2EX12) Configure W2 Extract Program

a 2012 W2 Option Maintenance (W2PO12)	
File Options	
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W2EX12: NNONYYYY00YNEX0000YYYN 075017599060708091030	Inspect
Program Option Name W2EX12 Source Year 12	
W2EX12 Basic/Default settings used to control how W2 data is accumulated	
1. Pay History Category 1 is treated as GLI?	N (Y=Yes/N=No)
2. Pay History Category 2 is treated as Dependent Care?	N (Y=Yes/N=No)
3. Pay History Category to use for 3rd Party S_ (0=none)?	0 (0,3-5)
4. Should imputed gross amounts be treated as GLI?	N (Y=Yes/N=No)
5. Back 'CAR' amounts out of W2 Gross?	Y (Y=Yes/N=No)
6. Print STRS/PERS pickup amounts in Box 14?	Y (Y=Yes/N=No)
7. Print Alternate Retirement amounts in Box 14?	Y (Y=Yes/N=No)
8. Client defined field for SSN flag (01 to 30)?	00 (00 - Nonc)
9. Set Retirement Itag for rel-system 5 and vol-ded 84xx?	Y (Y/N/X)
10. Do you have a New York Fringe Benefit warrant number?	N (Y=Yes/N=No)
11. Default code for reporting TSA amounts in Box 12?	E (D/E/F/G/H/S)
12. Extract only districts defined in CTV/2TP12 control file?	X (Y/N/X)
13. Alternate GLI VD-VO: 0000 Back GLI amits out of V/2 Gross?	Y (Y=Yes/N=No)
14. Set pension flag for TSA > 0? Y For any Ret-CTD > 0?	Y (Y=Yes/N=No)
15. Report employee gross in multiple states?	N (Y=Yes/N=No)
16. Default state code (when #15=Y and code in history=00)?	
17. Pay History Category to use for Employer DC (0-none)?	0 (0, 3 - 5)
18. Additional alt-ret VD range?	7501 - 7599
19. Set Ret. flag for ret-system 5 when pay- code is	x-W2prt: 30 (00 - None)
Usersec: YYY Yr: 2008 Dist: 39 Site: 1 G5: W 12	/3/2012 4:15:36 PM

W2 Option Maintenance (W212DC) Deferred Compensation Individual Voluntary Deductions

■ 2012 W2 Option Maintenance (W2PC	12)	_ = ×
File Options		
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W212DC: YYYYY		Inspect
Program Option Name W212DC 💌	Source Year	12
-W212DC Whether to extract employe deferred comp. plans when extracting	e and/or employer vol-ded de detail	tail, and vol-deds to use for alt.
Report employee contributions for	deferred compensation?	Y (Y=Yes/N=No
Report employer-paid amounts for	deferred compensation?	Y (Y=Yes/N=No/Xtended)
Report vol-ded 8999 amounts as G	LI?	Y (Y=Yes/N=No
Report section-125 amounts separ	ately?	Y (Y=Yes/N=No
Report 84xx with subjectivity (1-3)	as Ret-3/TS?	Y (Y=Yes/N=No
-Alternate Deferred Compensation Pla	ns:	
Plan Code Vol-Ded C	nde – Plan Code Vo	ol-Ded Code
Note: This option record is used if you amounts from warrant history.	intend to accumulate defer	red compensation
It is also used when your organi contributed during the year	zation has multiple plans to	which employees
It also is used when you want to and/or treat alt-ret (84xx) as ret-	separately identify section- 3.	125 amounts
Usersec: YYY	Yr: 2008 Dist: 39 Site: 1	G5: W 12/3/2012 4:17:16 PM

W2 Option Maintenance (W212DX) Deferred Compensation Voluntary Deduction Ranges

a 2012 W2 Option Maintenance (W2PO12)	- • ×
File Options	
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W212DX: D91009111	Inspect;
Program Option Name W212DX - Source Year 12	
-W212DX Additional vol-ded ranges when W212DC space is exceeded Alternate Deferred Compensation Plans Extension (Requires W212DC)	
Plan Code Vol-Ded Code Bange	
D 9100 - 9111 - - - - - - - - - - - - Note: - - - This option record is used to extend the W212DC record if you have - -	
more vol-ded codes than can be setup on the W212DC screen.	
This option record allows for up to 5 ranges of vol-ded codes to be associated with an alternate plan code.	
Usersec: YYY Yr: 2008 Dist: 39 Site: 1 GS: W 12/3/	2012 4:19:02 PM

W2 Option Maintenance (W212DR) 403b/401k/457b Roth Contributions (Box 12)

a⊒ 2012 W2 Option Maintenance (W2P012)	
File Options	
E ⊘ ×	
W212DR: 300010002	Inspect
Program Option Name W212DR - Source Year 12	
W212DR Vol-ded Ranges for Roth (post-tax) contrib to 401k/403b/457b plans	
Roth (after-tax) Compensation Plans	
Plan Code Vol-Ded Code Range 3 0001 - 0002 - -<	tax.
Usersec: YYY Yr: 2008 Dist: 39 Site: 1 GS: W 12/3/20	012 4:21:06 PM

W2 Option Maintenance (W212CC) Dependent Care Sec125 Voluntary Deductions (Individual)

🖳 2012 W2 Option Maintenance (W2PO)	12)	×
File Options		
	I	
W212CC; YY		Inspect
Program Option Name W212CC -	Source Year 12	
W212CC Defines which vol-deds are u	sed for dependent care	
Report employee contributions for dep	pendent care? [Y] (Y=Yes/N=No)	
Report employer-paid amounts for de	pendent care? Y (Y=Yes/N=No)	
- Dependent Care Vol-Ded Codes		
Vol-Ded Code	Vol-Ded Code	
This option record is used if you deferred dependent care amounts	intend to accumulate from warrant hielory.	
Usersec: YYY	Yr: 2008 Dist: 39 Site: 1 GS: W	12/3/2012 4:22:03 PM:

W2 Option Maintenance (W212CX) Dependent Care Sec125 Voluntary Deductions (Individual)

🖳 2012 W2 Option Maintenance (W2PC	12)	
File Options		
HOX PA+O	I II I	
W212CX:		Inspect;
Program Option Name W212CX -	Source Year 12	
-W212CX Extension vol-deds for W212	200	
Dependent Care Vol-Ded Codes		
Vol-Ded Code	Vol-Ded Code	
Usersec: YYY	Yr: 2008 Dist: 39 Site: 1 GS: W	12/3/2012 4:30:33 PM

W2 Option Maintenance (W212FA) Voluntary Deduction Ranges Add Back FIT

🖳 2012 W2 Option Maintenance (W2PO1	.2)
File Options	
	0
W212FA: 0100050005790803	Inspect
Program Option Name W2*2FA 👻	Source Year 12
W212FA Defines which vol-deds were have reduced FII wages	used during the year to reduce SIT wages that should NOT
FIT Subjectivity Add Back Definition	
	Vol-Ded Code Range
Note: This option record is used to	0100 - 0500 0579 - 0803
that are intended to reduce S	IT wages, but <u>not</u> to reduce FIT wages.
QSS/OASIS payroll does NC for deductions to support pre-)T differentiate FIT/SIT subjectivity -tax SIT but <u>not</u> to support pre-tax FIT.
Therefore FIT wages must be for correct W2 reporting.	adjusted by adding back the amounts
Usersec: YYY	Yr: 2008 Dist: 39 Site: 1 GS: W 12/3/2012 4:31:37 PM:

W2 Option Maintenance (W212SA) Voluntary Deduction Ranges Add Back SIT

🖫 2012 W2 Option Maintenance (W2PC	912)	
File Options		
80×21+0	I I I I I I I I I I I I I I I I I I I	1
W2125A:		inspect ,;;
Program Option Name W212SA 💌	Source Year 12	
-W212SA Similar to W212FA, but for v	ol-deds that reduced FIT but NOT SIT	
SIT Subjectivity Add Back Definition	1	
	Vol-Ded Code Range	
Note: This option record is used to defi	- -	
that are intended to reduce FIT v QSS/OASIS payroll does NOT di tor deductions to support pre-tax	vages, but NOT SIT wages. ifferentiate FIT/SIT subjectivity ⊢II but NOI pre-tax SII.	
Therefore SIT wages must be ad for correct W2 reporting.	justed by adding back the amounts	
Usersee: YYY	Yr: 2008 Dist: 39 Site: 1 GS: W 12/3	3/2012 4:34:32 PM
W2 Option Maintenance (W212H8) Add Employer HSA Voluntary Deduction Codes

🖳 2012 W2 Option Maintenance (W2PO	12)	- • ×
File Options		
$ \oslash \times \land \uparrow \uparrow \ominus$	I	
W212HS: 00010003		Inspect
Program Option Name W212HS 💌	Source Year 12	
-W212HS Defines which vol deds are u Employer Contributions to HSA Defi	used for Employer HSA	
	Vol-Ded Code Range	
Note: This option record is used to defi to provide an employer contributi Amounts accumulated here are re	0001 - 0003 - - - <th>: used ccount. : 1w^r.</th>	: used ccount. : 1w ^r .
Usersec: YYY	Yr: 2008 Dist: 39 Site: 1 GS: W 12	1/3/2012 4:36:49 PM

W2 Program Option (W212HC) Employer-Sponsored Health Plan Reporting

📲 2012 W2 Option Maintenance (W2PO12)	
File Options	
₩ ₩ ₩	
W212HC: MEC00020004C00060008C00100012C00140010	5C00180022 Inspect
Program Option Name W212HC Source W212HC Defines rules/codes used for Employer-Sponsored	Year 12 Health Plan Reporting
Cost of Employer-Sponsored Health Coverage (Box 12, o	:ode=DD)
Use by-District 'H' vol-ded settings flag_(N/D/D/M):	
M = Use by-DI settings if entered AND global rules (merge)	· · · · · · · · · · · · · · · · · · ·
Global Rules	
Option Vol-Ded Code Rar C 0002 - 000 C 0006 - 000 C 0010 - 001 C 0014 - 001 C 0018 - 002	rge Option values C - vol-ded class V = vol-ded number 8 2 6 2
Usersec: YYY Yr: 2008 Dist: 39 9	iite: 1 GS: W 12/3/2012 4:37:56 PM 🥁

W2 Program Option (W212HX) Extension Employer-Sponsored Health Plan Reporting

🖷 2012 W2 Option Maintenance (W2P012)
File Options
W212HX: V17001725
Program Option Name W212HX Source Year 12
- W212HX Extension codes for W212HC
Cost of Employer-Sponsored Health Coverage (Box 12, code=DD) Extension
(Requires W212HC)
Global Rules
Option Vol-Ded Code Range Option values C = vol-ded class V = vol-ded number
Usersec: YYY Yr: 2008 Dist: 39 Site: 1 G5: W 12/3/2012 4:38:45 PM



- CTW2TP12.W2109912.<your_account> contains Federal EIN for each district
- CTSUFFIX.W2109912.<your_account> Custom list of suffix names.
- CTW2RA12.W2109912.<your_account> Submitter Address for W2 transmittal file
- CTW2RP12.W2109912.<your_account> Defines custom report layouts for W2 Prelist (W2RP12).





Task 5-T-(Tech)

Obtain User ID and Password for File Submission

All submitters must obtain a User Identification (User ID) and Password. You do not need a new User ID every year, as long as you change your Password at least once every 365 days.

To obtain your User ID/Password:

- 0 Access the Internet at <u>www.socialsecurity.gov/employer</u>.
- Under "Electronic Filing," select *Electronically File Your W-2s* (This will take you to <u>http://www.ssa.gov/bso/bsowelcome.htm</u>.)
- Click on the *Register* button. Then follow the instructions.
 You will create your own Password as part of the registration process.
 - or

If you already have a User ID/Password, click *Login* to access, verify, or update your account information.

If, for any reason, you are unable to register online, call 1-800-772-6270 Monday through Friday, 7 a.m. to 7 p.m., Eastern Time to complete the registration.

Include the User ID in the submitter record you send to the SSA. Use the Password with the User ID to access the Online Wage Reporting Service.

Task 6-PR Preliminary W2 Prelist Run Options

📲 2012 W2 Prelist (W2SB12)	39 - QSS DEMONSTRATION DISTRICT	QSS/OASIS	- • ×
File Options			
🔒 🔗 🗙 🦉 🎟 🧼 🖗 o	urrent Year		
			:
Report Selections Select Field Ranges			
District:	39 🔻 The Train USD		
Report Format:		1	
Run Option:	P - Prelist R - Reasonability check (OASDI/Medicare)	4	
Print W2ED12 changes made since:	S - Selected field value range value (Run option = 2 only)	1	
SSN Mask (# digits set to '0')?	(0-none, 1-9-mask, L/R-ExtRef)		
Client field for ssn flag:	00 Use 01 - 30, or 00 for none		
Set pension flag if Alt-Retire:	N 84xx vol-deds only (Y/N/X)		
Report layout:	Leave blank for default layout, use 01-99 for customer defined custom	layouts.	
Usersec: YYYY		Yr: 2008 Dist: 39 Site: 1 GS: W	12/3/2012 4:42:17 PM

Run Option 1 (Temp File) Run Option 2 (Extract File)

₩2 Prelist

□ 2012 W2 Prelist (W2SB12)	39 - QSS DEMONSTRATION DISTRICT	QSS/OASIS	- • ×
File Options			
🗄 🔊 🗙 💐 🖩 🔗 🚱	Current Year		
Report Selections Select Field Ranges			
Distri	ct: 39 🔹 The Train USD		
Report Form	at: [•	
Run Optic	on: 🔽 👻		
Print W2ED12 changes made sinc	1 - Extract and then print 29: 2 - Use existing extract/W2 edit file		
SSN Mask (# digits set to '0)? (0=none, 1-9=mask, L/R=ExtRef)		
Client field for ssn fla	ag: 00 Use 01 - 30, or 00 for none		
Set pension flag if Alt-Reti	re: N 84xx vol-deds only (Y/N/X)		
Report layo	ut: Leave blank for default layout, use 01-99 for customer defined custor	n layouts.	
		-	
		Var 2008 Dich 20 Sitor 1 CS W	13/2/3013 5:32:20 PM
USEISEC: TITT		11. 2006 DISC 39 SILE: 1 GS: W	12/3/2012 3:23:30 PPI

W2 Prelist Print W2ED12 Changes (only)

🖳 2012 W2 Prelist (W2SB12)	39 - QSS DEMONSTRAT	ION DISTRICT	QSS/OASIS	- • X
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	District 39 🔻 The Train US)		
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Client f	ield for ssn flag 00 Use 01 - 30, or 00	for none		
Set pension	flag if Alt-Retire N 84xx vol-deds only	/ (Y/N/X)		
	Report layout Leave blank for de use 01-99 for cust	fault layout, omer defined custom lay	vouts.	
Userser: YYYY		٢	r: 2008 Dist: 39 Site: 1 GS: W	12/3/2012 5:25:42 PM 🦽

W2 Prelist Main Window Additional Report Settings

□ 2012 W2 Prelist (W2SB12)	39 - QSS DEMONSTRATION DISTRICT	QSS/OASIS	- • ×
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Set pension flag if Alt-Retire	x N 84xx vol-deds only (Y/N/X)		
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Usersec: YYYY		YP: 2008 Dist: 39 Site: 1 GS: W	12/3/2012 5:28:10 PM

W2 Prelist "S" Report Option Select Field Ranges Window

9 2012 W2 Prelist (W2SB12)	39 - QSS	DEMONSTRATION DIS	STRICT		QSS/OAS	IS		- • ×
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] - [AND	EE	Roth 457b			
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		ar juannou.		FA	FIT/Addback			
Ex: \$FG is Federal Gross.				FG	Fed Gross			
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Usersec: YYYY				Yr	: 2008 Dist: 39 Site	: 1 GS	5: W 1	2/3/2012 5:30:11 PM

W2 Prelist

Report Totals

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Task 7-PR

Print Pay History Report (PAY830) QCC Job Menu

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View					
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Labor/Benefits History Report (PYREPT)					
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	Yr:1997 Dist:07 Site:1	11/28/2010 8:43 AM	11		

Pay History Report (PAY830) Main Window

equest Pay History Report - Logon Dist	rict (PAY830)
e Options	
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Report Selections Select Em	plovees
E District	
For District	
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Select by Date Paid:	▼ - / / ▼ And/or Select by Effective year: Quarter
Compute Lotals Rule:	
Include Terminated	
Pay Code	Pay Location
Select by Last Name Range	
SSN Mask:	No Masking
Record Type:	All Records Cancelled Warr: Open and Cancelled
Summary Level:	Detail Each Employee on New Page:
Pay-Line Detail:	None Position Summary:
Deduction Detail:	None Account Detail: None

Pay History (PAY830) DI/SSN Select Window

🖳 Request Pay History Report - Logon District (PAY830)	
File Options	
Report Selections Select Employees	_
DistinCOM	

Include Employees Without a Pay History Record (PHUPDT)

Task 8-PR

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File Options Window	
📫 🕂 Add 🚽 Add From 😰 Refresh 📙 Save 👔 Save and Close ा Close 🛛 🖬 💽 💽 🔝 🔛 📰 🤤 🖉 📄 🔓 🎇 Switch to: 🗸	
Payroll History Inspect (PHUPDT) Inspect Detail (PHINSP) Warrant Distribution CTD Totals	
Reverse Amounts PHUPDT usersec must be setup for add/change security. See MTUS manual for security parameters.	
Date of 12/31/2011 Per end 12/31/2011 Fff-Y 11 Ot 04 V PLoc: 0000 APD 00 V Tax calc type R V	
Warrant: 99111111 Pay code 02 Ret-sys 02 SC 00 CC: 00 Status A Tax annualization factor 00 🗸	
	=
Exempt 0.00 + Regular 1000.00 + Federal 0.00 + Ceta 0.00	
+ State/G: 0.00 = State Lax Gross 0.00	
- Federal Tax 0.00 + Advance EIC 0.00 - OASDI 0.00 - Survive Ben 0.00 Add Vol Deds	
- State Tax 0.00 - County Tax 0.00 - STRS: 0.00 - Misc Deducts 0.00	
PERS 0.00 - Medicare 0.00 - SDI 0.00 = Net Pay 0.00 Calc Net Pay 0.00	
CAB allowance 0.00 Empired STBS: 0.00	
Deferred Comp 0.00 Empir pd PERS: 0.00	

Adding 2011 Pay History Setup PHUPDT USERSEC

Task 9-PR

Payroll History	07 - QSS UNIFIED SC	HOOL DISTRICT	QSS/OASIS	
Eile Options Window	Refresh 🗐 Save 🕋 Save and G	Close 🗚 Close 🗔 💽		Switch to: -
SUMSTEAD, DAGWOOD	**-**- Warrant: 1122331	1 1/1/1997 🗔 🕻		AddMode;
Payroll History Inspect (PH	UPDT) Inspect Detail (PHINSP) CTD Tota	als Warrant Distribution		
Reverse Amounts	l used ADD From Warrant	Option and reversed	all check amounts.	
Date pd 12/31/2010	Per. end 12/31/2010 E	:#-Y 10 Qt 01 ▼ P	.oc: 0000 APD 00 -	Tax calc type A 🗸
Warrant: 00000000	Pay code 02 Ret-	sys 02 SC 05	CC: 00 Status A Tax an	nualization factor 00 👻
Exempt	0.00 + Regular -12.22	+ Federal 0.00	+ Ceta 0.00 =	Gross -12.22
- NTX Tax Gross	0.00 - TSA 0.00 -12.22 OASDI Gross -12.22	+ IMP 0.00 MEDI Gross -12.22	- STRS-TS: 0.00 - SDI Gross 0.00	PERS-TS: 0.00
- Federal Tax 0	00 + Advance EIC 0.00 -	- OASDI 0.00 -	Survive Ben 0.00	Add Vol Deds
- State lax U	.00 - County Tax 0.00 - .00 - Medicare 0.00 -	- STRS: 0.00 - - SDI 0.00 =	Misc Deducts -105.00 Net Pay 92.78	Calc Net Pay 92.78
	0.00	Voluntary Deduc	tions	
CAR allowance	0.00 Empir pd STRS:	0.00 Code	Description	Employee Amount
Cat-1:	0.00 Empir pd MEDI	0.00		
Cat-2:	0.00 Emplr pd FICA	0.00		
Cat-3:	0.00 REU-1-	0.00		

Task 10-T (Tech) Extract W2 Data Y12W2EXTRACT

- Execute Y12W2EXTRACT.
- Payroll history, deduction history and payroll adjustments records are extracted for each 2012 payroll check.

Task 11-T (Tech) Report of W2 Records from Pay History

• Execute Y12W2REPORT.

• Travel Claims are not included in W2 Prelist at this point.

Task 12-T (Tech) Including Car Travel Claims

- Execute Y12W2TCEXT and Y12W2CKTCRPT
- Include Car Travel Claims before running Final Merge.

Task 13-AP Adjusting Travel Claims A/P Branch (TCPYMT)

R Accounts Payable - Accounts Payable	39 - QSS DEMONSTRATION DISTRICT	QSS/OASIS	×
File Options View Help			
◇\$\$+ ₽ × ⊅E 9			
Accounts Payable PO Payments (PO) Pay Vouchers (PV) Travel Claims (TC) Credit Memos (CM) Revolving Cash (RC) Set Up Payables (EP) Payables Payments (CL) Liabilities (LB) Transaction Maintenance Move / Hold Payments 1099 Maintenance (AA) Approve Due Date Payments EDD 542 District Maintenance Independent Contractor Maintenance	Search (F3)	re grid) cr Ctrl+O to view details)	
		11. 2000 DISC. 33 SILE. 1 (35. W 12/3/2	2012 3.36.23 111

Car Travel Claims (TCPYMT) Mileage Flag "M"

🚰 Travel Claim				_ • ×
File Options				
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				Add
TC #: *AUTO* Invoice: 06/30/1997 👻				
Description:		Mileage Pymt for W-2		
Batch number:	Payment Due: / /	Warrant No:		
Vendor No./Address No. 😒 /				
Vendor name/addre	88	Remit name/addre	85	
X Delete Selected Row				
Ed Bdr Sch Besc Y Goal Func Obit Type	Payment Use Tax Flag	Use Tax 1099 Fl	ag Net Payment	Budget Balance
* L				
				58

Vendor Maintenance (VEUPDT) Changing Vendor Tax ID

🆘 Vendor Lookup	07 - QSS DEMONSTRATION DISTRICT	QSS/OASIS 😑 💌 🗙
<u>File</u> <u>Options</u> <u>H</u> elp		
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Vendor Record Updated - TaxID is the SSN of BUI	MSTEAD, DAGWOOD .	Inspect
Contact Information Optional Information Add/I Address	es Commodities Comments	
District: 07 💌 Number: 0001 40		
Name: TESTING EMPLOYEE VENDOR	Remit Name:	
Address:	Remit Address:	
State:	City: State:	Zip:
Phone: () Fax: (1	
Contact:		
1099: N - No 💌 Name: Burnstead, Dagwo	od Preset: Y 🔽 Tax ID: 111111111 SSN: 1	11-11-1111
Use Tax Preset: 1 · One 💌 Use Tax 1: [06.6500 % 9512 · Use Tax 2: 08.2500 % 0000 ·	
Acct Number: Rating	r Msg Flag: 1 ▼ We are No. 1! We are No. 1!	
Category.		
Type: Revolving Cash Object:	Terms: 06.65 Shipping &	5

Task 14-T (Tech) Merge All Sources of W2 Information

- Execute Y12W2FNLMRG to create combined file even if there are no Car travel claims to process.
- Use caution when re-running Y12W2FNLMRG.



- Execute Y12W2REPORT.
- W2 Prelist will contain combined W2 information.
- Pass the Point of No Return Considerations.

Task 16-PR Edit W2 Information (W2ED12)

• Adjust W2 amounts using W2ED12

W2 Edit Program (W2ED12)

/2 Data Edit (W2ED	12)	39 - QSS DE	MONSTRATI	ON DISTRICT		QSS/OA	ASIS	
e Options								
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ester City Taxes								
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		District: 3	9 - Th	e Train USD				
🖾 Include Terr	unated	Show	v SSN					
Fed Gross	Subtractio	ns Additio	ons .	FIT/Not SIT	1	I. Fed Tax GR	2. Fed Tax	
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State Circas	-	+	+			ID. SIGLE TAX ON	T7. State Tax	
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457 NQP		Other NQP	-	J/Si	ck Pay		P/FMF	
M/Unc OA.		N/Une MD.		W/E	R HSA		R/ER MSA.	
12 Code Emp	loyee	Employer	Code	Employee	Fn	ployer	DD/ER-HC	
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AA	vRoth 401k: [BB/Roth 403	b:		EE/Roth 457b:	
		P-SI	Stat: Us	se Suffix	Х	Prt: Sour	ce Changed	
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R-PI: SSN F Name: Addr:	lag: 3		City:		PC:	RS:	.1: L2: L2: Zip:	SC:

W2 Edit Program (W2ED12) Advanced Search Feature

🖥 W2 Data Edit (W2ED12)	39 - QSS DEMONSTRATION D	ISTRICT QSS/O	
File Options			
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			Inspect #
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	District: 39 - The Train	1 USD	
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	5110W 5514		
Fed Gross Subtractions	Additions FIT/N	lot SIT 1. Fed Tax GR	2. Fed Tax
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State Gross Subtractions	Additions SIT/N	lot FII 16. State Tax GR	17. State Lax
Subtractions	T		
Ret TS #1 Ret TS #2	Ret TS #3 Secti	on 125 Other NTX	Employee DC
Additions	40.011		
14. CAR Allowance Fringe/Other	- <u>12. GLI</u>		
EIC:	Dep Care:	State SDI:	
40/ NQF.			
		WIER HSA:	RVER MSA:
12. Code Employee Er	nployer Code Empl	oyee Employer	UVER-HC:
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W2 Edit Program (W2ED12) Advanced Search Feature

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Enter Search parameter, perform search and retur				
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W2 Edit Program (W2ED12) Returned Search Entry

📲 W2 Data Edit (W2ED12)	39 - QSS DEMONSTRATION	DISTRICT QSS/OA	
File Options			
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BUILDER, bob 001016 XXX-XX-120	1 Employee has no W2 data		Inspect
Master City Taxes			
-Quick Find: Enter a Last Name, SS	N, or ExtRef, and press Enter. F3	opens advanced search.	
	District: 39 - The Tr	ain USD	
☑ Include Terminated	Show SSN		
Fed Gross Subtractions	Additions FIT	/Not SIT 1. Fed Tax GR	2. Fed Tax
-	+ +	=	
State Gross Subtractions	Additions SIT	/Not FIT 16. State Tax GR	17. State Tax
	+ +	=	
Subtractions Ret TS #1 Ret TS #2	Ret TS #3 Ser	tion 125 Other NTX	Employee DC
Additions 14. CAR Allowance Fringe/Other	12. GLI		
OASDI Gr:	OASDI Pd:	MEDI Gr:	MEDI Pd:
EIC:	Dep Care:	State SDI:	State SUI:
457 NQP:	Other NQP:	J/Sick Pay:	P/EME:
M/Une DA	N/Une MD	W/FR HSA	R/FR MSA
12. Code Employee Em	nployer Code Emr	ployee Employer	DD/ER-HC
()	()		L/SEBER:
()	())		T/AdoBe
AA/Roth 401lc		3B/Roth 403b:	EE/Roth 457b
R-PI: SSN Flag: 3P-	SL: Stat: Use S	uffix: XPrt: Source	ce Changed:
Name:		PC: RS: L	.1: L2: SC:
Addr:	City:		State: Zip:
Isersec: YYY		Yr: 2008 Dist: 39 Site:	1 GS: W 12/4/2012 2:29:17 PM

W2 Edit (W2ED12) New Items (2009 -2012) Supported TSA Codes

- New fields added in 2009: R/ER MSA, (Medical Savings Acct), AA/Roth 401k and BB/Roth 403b.
- Supported Box12 codes: D (401k), E (403b), F (408kb), G (457b), H (501(c)(18)(d), S(408p)
- New fields added in 2011:Hired Exem Wages, Employer Health and EE (Roth 457b).

dditions 4. CAR Allowance F	ringe/Other 12. GLI	New fields for Hire Exem V	2011 /ages Employer He	alth EBRoch 4576
OASDI Gr:	OASDI Pd:	ME	DI Gr.	VED Pd:
EIC:	Dep Care:	Sta	le SDI:	State SJ :
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W2 Edit (W2ED12) W2 Data Source

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Changed If this field is blank, the record has not been edited.

Task 17-T (Tech) Final W2 Prelist Report

- Payroll Staff final review, use W2ED12 for any last minute corrections and rerun report.
- Report of W2 Edit Changes (W2RP12)

a⊒ 2011 W2 Frelist (W2SB11)	07 - QSS DEMONSTRATION DISTRICT	QSS/OASIS	×
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Task 18-T (Tech) Ready to Print W2 Forms

- Payroll approves the Final W2 Prelist.
- Three methods of printing: Pin-feed form printing, export to 3rd party print system and laser printing.



Task 18-T (Tech) W2's converted to PDF

Printing Nelco SSUNIV Forms Using Print Manager (LSPOOL)

These instructions tell how to use the universal print driver (W211UNPF) to print Nelco form SSUNIV with Print Manager (LSPOOL). With this method, the W2 forms do not print immediately. Instead, a file of W2 forms is sent to a P-file (print file) in Print Manager (LSPOOL) that you can manage just like any other report in QSS/OASIS.

NOTE: QSS has optional software that allows you to convert the generated P-file to PDF. For more information, contact your QSS account manager.

2012 W2 Sample

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Interval Between W2 Distribution and Creation of W2 File for SSA





- Execute Y12W2FILE.
- Transfer W2 Transmittal file to your PC using Reflections and Minisoft (see 2012 W2 Processing Manual)

Task 20-T (Tech) Create Transmittal Totals Report

• Execute Y12W2TFTOTAL.

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Task 21-T Saving History Files

• Execute Y12W2SAVE.

File Name	Purpose
W2Ty1.HISTORY.QSSUSER	The raw W2 transmittal file (do not send this to SSA)
W2FILEy1.HISTORY.QSSUSER	The W2 transmittal file that is sent to SSA
W2Dy1.HISTORY.QSSUSER	Created by Yy1W2FNLMRG and edited by the W2EDy1 program
W2PIXDy1.HISTORY. QSSUSER	Cross-references employee W2 to internal document number for one-off laser form printing
W2EXPTy1.HISTORY.QSSUSER	Used to export data to third-party printing solutions
W2ZIPCy1.HISTORY.QSSUSER	Contains W2 counts by zip code
W2PIFDy1.HISTORY.QSSUSER	PIF data file for printing laser W2 forms

Special Notes for W2 Processing

• If employee SSN changes in database during the year and the W2 file is already extracted, the W2 form for the employee will be printed with the bad SSN number.