



Specialized Data Systems

2022 W2 Processing

Revised: 11/30/22

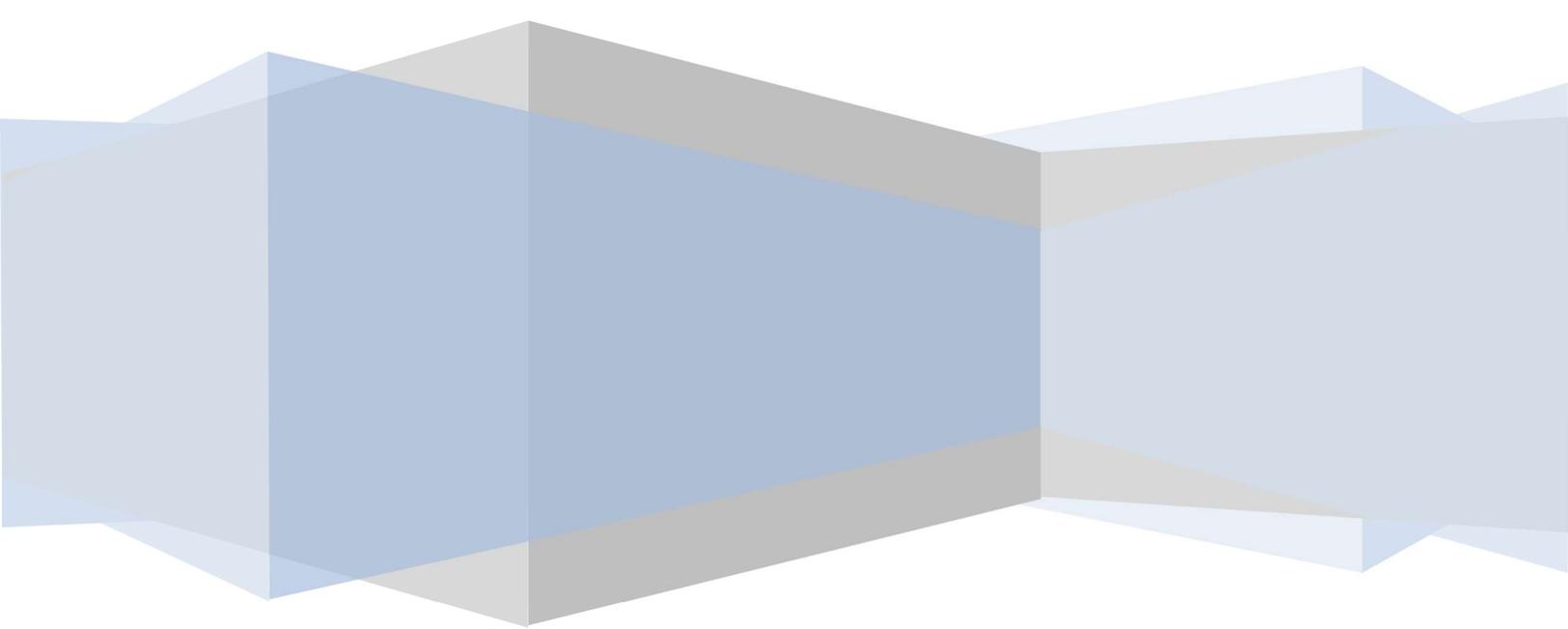




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WELCOME

Thank you for attending the 2022 W2 Online Course. This manual explains W2 processing for 2022. If at any time during the W2 course you have a question, please feel free to contact SDS support by going to <https://help.linq.com> we are here to help! We hope you enjoy the course.

W2 Processing for 2022 Instructions

Below are the Preliminary Steps which prepare you for success in processing the W2's for 2022.

Items to Review before Producing W2's

STEP ONE -Balancing

Please print out and save the last Payroll Summary of December 2022. This report needs to be printed before closing the payroll to retain the figures in the YTD column.

Code	Description	Open Payroll	Mtd	Qtr	Ytd	Ftd
ER	Expense Reimbursement	0.00	0.00	0.00	240.00	100.00
G1	Gross Earnings	23,393.56	46,787.15	93,674.31	496,746.44	223,517.49
G2	Taxable Gross Earnings	22,147.38	44,294.79	88,679.69	481,148.40	214,871.30
G3	Fica Gross Earnings	5,624.99	11,250.00	22,500.00	146,322.00	63,625.00
G4	Gross Earnings (T)	17,918.57	35,837.15	71,774.31	351,574.44	160,492.49
G5	Gross Earnings (I)	5,624.99	11,250.00	22,500.00	135,402.00	60,805.00
G6	Gross Earnings (N)	0.00	0.00	0.00	11,070.00	2,970.00
G7	Gross Earnings Medicare	16,397.74	32,795.49	65,690.99	343,541.12	153,709.17
G8	Taxable Gross State	22,147.38	44,294.79	88,679.69	481,148.40	214,871.30
T1	Federal Tax	1,527.55	3,055.12	6,110.24	62,719.57	18,229.80

It is imperative that the 941 reports from each quarter of 2022, when added together, balance to the YTD figures shown on the Payroll Summary. Those figures should also balance to the figures shown on the W2 Summary report when preparing the W2's. One way to compare the numbers on these reports may be to create a spreadsheet for easy comparison.

Once the figures are balanced, you can continue with the steps of reviewing and processing of the W2's.

STEP TWO - Box 12 and Box 14 Setup

1. Select Human Resource
2. Select Human Resources Control Center

Select Deductions & Benefits Master

- Review the codes in “Box 12” and “Box 14” for each deduction or benefit that is to show in “Box 12” or “Box 14” on the W2 form.

Human Resource Control Center

Processing Options

- Data selection definition
- Award Attendance Days
- Increase Other Master Values
- Employee YTD Adjustments
- Employee Distribution Adjustment
- Deductions & Benefits Master**
- Employee Deductions & Benefits
- Affordable Care Act
- Import Employee information

Code: 31 Description: Annuity		Vendor: 18700 ~ American Fidelity	
Start / Stop		Control Amount	
Active: Y	Amount (\$): 0.00	Maximum Cutoff Period: N ~ Not Used	
Activation Date:	Percent (%): 0	Maximum Gross: 0.00	
Last Active Date:	Creditable Earning Factor: Select Creditable Earnings Factor	Maximum To Withhold: 0.00	Maximum To Withhold Group:
Shelter / Special Purpose		W2 & State Reporting Information	
Fed, State, Local Tax Shelter: Y	Deferred Compensation: Y	Step 1 %: 0	Percent (%):
FICA Shelter: N	Nonqualified Plan: N	Step 2 %: 0	Step 1 \$: 0.00
Retirement Shelter: N	Earned Income Credit: N	Step 3 %: 0	Step 2 \$: 0.00
Taxable Income: N	Dependant Care Benefit: N		Step 3 \$: 0.00
Taxable Fringe: N	Pension Plan: N		
Cash in Lieu: N	Deduct Type: D ~ Full Distributio		
Garnishment Uses MWA: N	Box 12: E		
Timing Code: 4 ~ Deduction Timi	Box 14:		

STEP THREE - Third Party Sick Pay Setup

- Select Human Resources or Payroll Processing.
- Select Add Change Employee Information.
- Select the “Other” check box.
- For those employees that had “Third Party Sick Pay,” change the field to a “Y”.
- Select Save.
- Review “STEP THREE – Employee Year to Date Adjustments” to learn how to adjust the employee’s year to date amounts for the amount received from a third-party vendor.

Human Resources | Add, Change Employee Inform | Remember last opened | Resources Online

Anderson, Adam | Save | Search | Reports and Options

Active Staff | Have a Contract | Advanced Search | Select All | **Other** | Deductions & Benefits | Degree | Leave

Number	Name
1071	Anderson, Adam
974	ANDERSON, ALEHA G.
975	ANDERSON, IVY L.
864	ANTRY, KAYLA M.
1069	ARWOOD, TRINITY J.
00663	BARNFIELD, KELLY J.
1026	BAUER, CHASE J.
1033	BAUER, HUNTER S.
1039	BAUM, MADISON N.
00176	BAXTER, SIERRA N.
00709	BESHER, COLLIN J.
976	BIERMAN, COBY B.

Other

Years in District: 1 | Title I and Title II Part_A: | Statutory Employee: Y

Years of Teaching Experience: 0 | MI Sponsoring Institution: | **Third Party Sick Pay**

Years Teaching Experience Out of State: 0 | State Approved Content Test: | Workers Comp Class:

- If the Third-Party Sick Pay is not to be added to the employee’s taxable gross but is to show on the W2 in Box 12, you need to setup a code for the Third-Party Sick Pay.

- For more information on setting up a new code for Third-Party Sick Pay please review the following link.
<http://help.schooloffice.com/financehelp/#!/Documents/humanresourcescontrolcenterdeductionsbenefitsmaster1.htm>
8. Once the code has been setup in the Human Resource Control Center and the correct code has been added for Box 12, you can add the amount of the Third-Party Sick Pay through the Employee Year to Date Adjustment area. See STEP THREE, next page.
 9. To determine which way the Third-Party Sick Pay should show on the W2, and which code should be used for Box 12, you may need to consult with your auditor, tax accountant, or IRS.

STEP FOUR - Employee Year to Date Adjustments

You may find you need to adjust some employee's year to date amounts for the W2's. This may occur because of adjustments from third party vendors. This section shows you how to make those types of adjustments. After making any adjustments to the employee's year to date amounts that affect their W2 information, you **must** select the button to "Create File and Refresh W2 Area", prior to printing 2022 W2's. Please refer to the W2 production section of this documentation to review how this process works. If you do not push this button after making changes to an employee's year to date amounts, the W2 forms print the values in the system from the *last* time the W2 area was refreshed which may not include the adjustments to the employee.

How to turn on the Employee YTD Adjustment Option:

If you have not activated this process before, complete the below steps.

1. Select Administrative Utilities.
2. Select SDS Web Office Settings.
3. Under the Payroll area find the option Allow Employee YTD Adjustments.



Employee YTD Adjustments - Allow	Y ▼	If Y then Employee YTD Adjustments will be allowed using the Human Resource Control center. The user also must have access to Calculate Payroll
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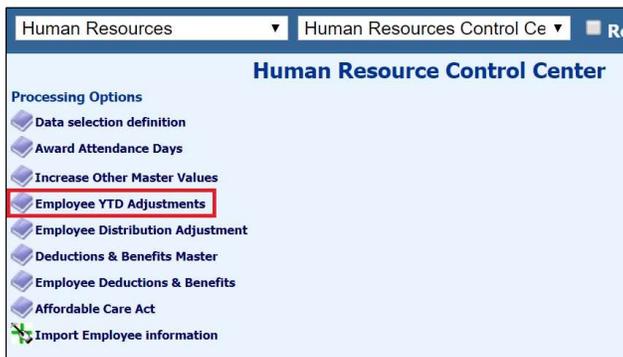
4. The setting should be at a "Y" to be able to make changes to an employee's year to date records. If the setting is not a "Y" change it and then save the change. For the saved change to become activated log out of the system and then log back in. When this

setting is changed to a “Y”, any user that has the right to “Compute a Payroll” can adjust an employee’s year to date amounts.

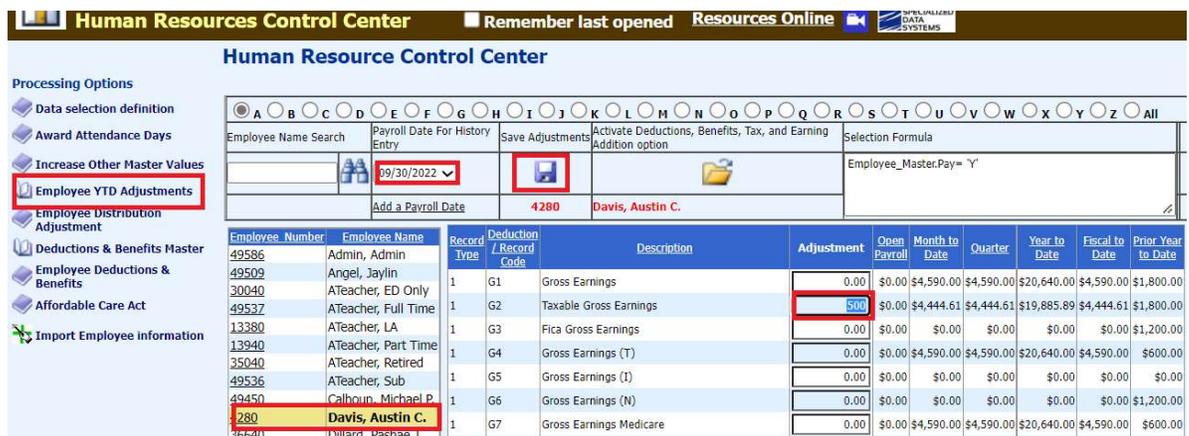
5. Select Save Changes.
6. Log out and back in again, for changes to take effect.

Making Employee YTD Adjustments

1. Select Human Resources.
2. Select Human Resources Control Center.
3. Select Employee YTD Adjustments.



4. Select the employee that needs to be adjusted.
5. Select a payroll date within the reporting period(s) you wish to have affected.



6. Enter the amount of the adjustment into the adjustment field for the code that needs to be changed.
7. Save the changes by selecting the Save Adjustments button.



NOTE: If an employee does not appear in the list of employees, the employee is not active in the Employee Demographics area. To be able to view this employee in the Human Resource Control Center change the formula to read “Employee_Master.Pay=’N’”. Then select one of the alphabet letters. The system refreshes, and the inactive employees display.

Employee Number	Employee Name	Record Type	Deduction / Record Code	Description	Adjustment	Open Payroll	Month to Date	Quarter	Year to Date	Fiscal to Date	Prior Year to Date
1075	ABBOTT, ASHLEY										
856	ADAIR, JOSHUA H.										
00728	DAI FN 1FNNA M	1	G1	Gross Earnings	0.00	\$0.00	\$3,575.00	\$11,225.00	\$44,258.34	\$17,950.00	\$54,633.34

What happens in the system when an Employee’s Year to Date is adjusted?

1. If an August payroll date is selected in the current year, then the value entered adjusts the month selected such as (August), it adjusts the third Quarter, the calendar year, and the fiscal year of the date.
2. If the selected date is in the current month, then the MTD, QTR, YTD and FTD are adjusted.
3. If today’s date is 12/9/2022 and a payroll date in January 2022 is selected, then the month of January 2022 is adjusted as well as the first Quarter, and the current Calendar YTD.

STEP FIVE - W2 Setup

Email Setup

Before you can send W2s by Email, you must enter individual employee email addresses, server information, and a return email address in several areas. It is important to complete all the steps listed below.

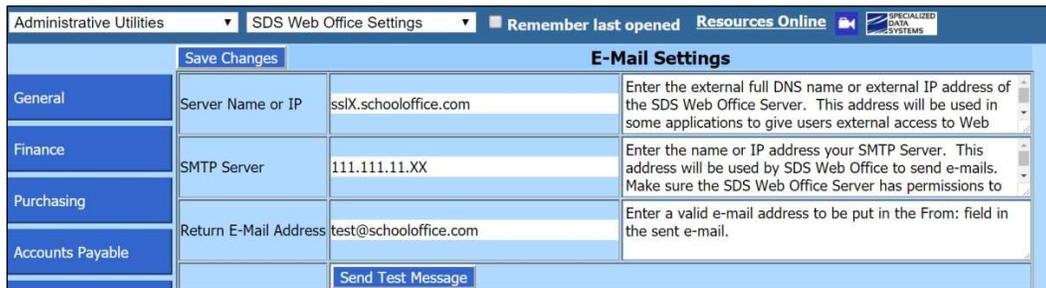
Enter Server and Return Email Address Information

1. Select Administrative Utilities.
2. Select SDS Web Office Settings.
3. Select the Email Settings.

E-Mail Settings

Enter Server Name or IP Address

1. Enter the external full DNS name or external IP address of the SDS Web Office Server. This address is used for the URL in the e-mail that is sent (if applicable).
2. Enter the SMTP Server: Enter the name or IP address of your SMTP Server. This address is used by SDS Web Office to send e-mails. Make sure the SDS Web Office Server has permissions to relay e-mail through this.
3. Send a test email message.
4. Save the settings.



E-Mail Settings		
General	Server Name or IP	sslx.schooloffice.com <small>Enter the external full DNS name or external IP address of the SDS Web Office Server. This address will be used in some applications to give users external access to Web</small>
Finance	SMTP Server	111.111.11.XX <small>Enter the name or IP address your SMTP Server. This address will be used by SDS Web Office to send e-mails. Make sure the SDS Web Office Server has permissions to</small>
Purchasing	Return E-Mail Address	test@schooloffice.com <small>Enter a valid e-mail address to be put in the From: field in the sent e-mail.</small>

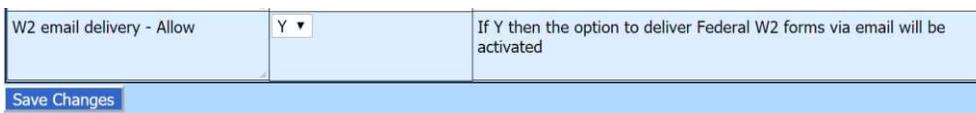
Send Test Message

Activate W2 email delivery option

1. Select the Payroll Option.

Payroll

2. Locate the W2 email option, select "Y".



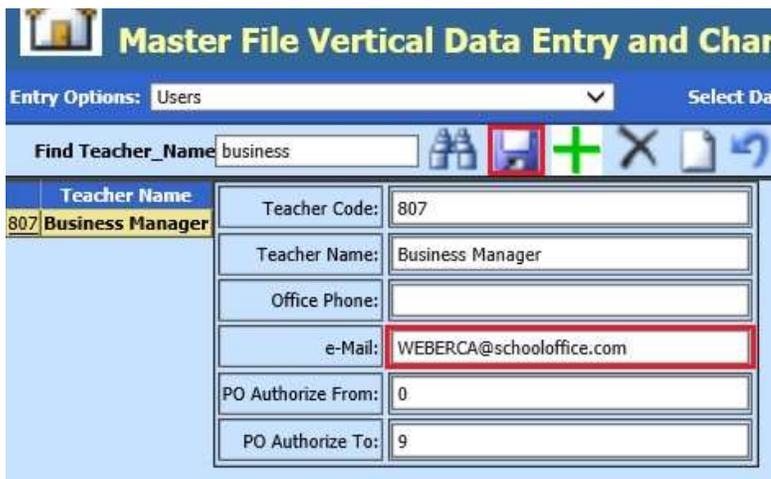
W2 email delivery - Allow	Y ▼	If Y then the option to deliver Federal W2 forms via email will be activated
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Save Changes

3. Select Save Changes.
4. Log out/in for changes to be activated.

Enter Email Information for the person sending W2s by Email

1. Select Master File and Code Entry Options.
2. Master File Vertical Data Entry and Changes.
3. Entry Options dropdown, select "Users".
4. In the Teacher Name list on the left, locate the person who is sending the W2's by email, and select that person.
5. Enter that person's "email address".
6. Select the Save icon.



Master File Vertical Data Entry and Changes

Entry Options: Users Select Data

Find Teacher_Name: business

Teacher Name	Teacher Code:
807 Business Manager	807
	Teacher Name: Business Manager
	Office Phone:
	e-Mail: WEBERCA@schooloffice.com
	PO Authorize From: 0
	PO Authorize To: 9

Enter Email Information for all Employees who are receiving W2s by Email

1. Select Payroll Processing.
2. Employee Horizontal Data Changes.
3. Entry Options dropdown, select Employee Demographics (All Fields).
4. First Field to Edit dropdown, select "Email Name".
5. Enter the employee's email address into 'Email Name' field for all employees who are to receive their W2s by Email.
6. Select Save.
7. If multiple pages, make sure you select Save before proceeding to the next page.

Employee Horizontal Data Changes Remember last opened **Res**

Entry View Groups: All Entry Views Entry Views: Employee Demographics All Fields

Name: ID: Find/Refresh Search Mass Chg Inactive?

Save Page Rows Adjust Display Width First Field To Edit Sort By

50 Email Name Employee Combin

Total records found: 204

Emp Num	Employee Name	Email Name	Work Phone	Extension	Supervisor
856	ADAIR, JOSHUA H.	ADAIRJO@schooloffice.com			
974	ANDERSON, ALEAHA G.	ANDERSAL@schooloffice.com			
975	ANDERSON, IVY L.	ANDERSIV@schooloffice.com			
00662	ANGELOVIC, TALYNN N.	ANGELOTA@schooloffice.com			
864	ANTRY, KAYLA M.	ANTRYKA@schooloffice.com			
1069	ARWOOD, TRINITY J.	ARWOODTR@schooloffice.com			
1073	Ash, Kim				
00663	BARNFIELD, KELLY J.	BARNFIKE@schooloffice.com			

Setting up the Verification to allow W2's to be emailed to the Employee

1. Select Payroll Processing.
2. Employee Horizontal Data Changes.
3. Entry Options dropdown, select Employee Demographics (All Fields).
4. First Field to Edit dropdown, select "Email W2".
5. Upon receiving verification from the employee that they are authorizing their W2 to be sent via email, change this field to a 'Y'. The 'Y' in this field allows the W2 to be sent electronically.



Employee Horizontal Data Changes Remember last opened

Entry View Groups: All Entry Views Entry Views: Employee Demographics All Fields

Name: ID: Find/Refresh Search Mass Chg Inactive?

Save Page Rows Adjust Display Width First Field To Edit Sort By

1 50 Email_W2 Employee C

Total records found: 204

Emp Num	Employee Name	Email W2	Organization Code	SB E Site Codes	SB E Alloc
856	ADAIR, JOSHUA H.	<input type="checkbox"/>			
974	ANDERSON, ALEAHA G.	<input type="checkbox"/>			
975	ANDERSON, IVY L.	<input type="checkbox"/>			

W2 Production

1. Select Payroll Processing.
2. Select State/Federal Reporting.
3. Select your State.
4. Select Federal W2 Reporting.

Select Your State: Illinois Federal W2 Reporting Save Setup

Report File Name: FW2 **Paper Report:** Create File and Refresh W2 Area W2 Plain Paper Form (Front) W2 Correction Option Print Report

Dates and Periods
Report Calendar Year: 2022 Evaluation Option

District Address, Contact, Account #'s and other coding information:

District Name:	Specialized Data Systems Te	FEIN Number:	84123455678
Address:	200 E. Randolph St., Suite 5	State W2 Acct Number:	
Address:		W2 User ID:	
City:	Chicago	Third Party Sick Pay (Y/N)	
State:	Illinois #17	2nd State W2 Acct Number:	
Zip Code:	60601	3rd State W2 Acct Number:	
Employer Name:	Specialized Data Systems	4th State W2 Acct Number:	
Email Address:	jlitiz@linq.com	5th State W2 Acct Number:	
Contact Phone:	800-323-1605	6th State W2 Acct Number:	
Contact Name:	Jennifer Litz		

- **Report Calendar Year:** Make sure it is set to 2022. The system reports the payroll information for the selected calendar year. Enter all the information in the fields on the screen.

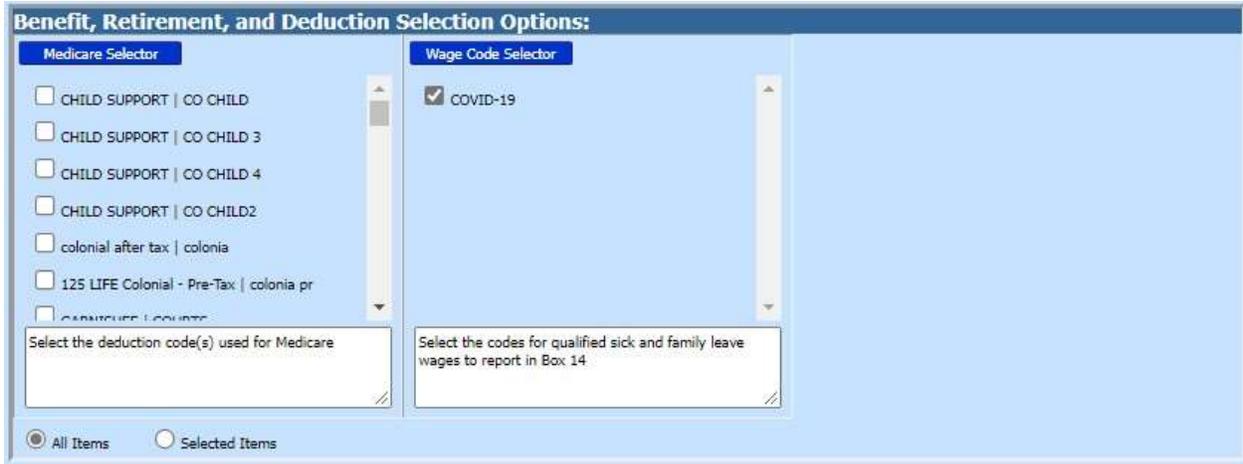


District Address, Contact, Account #'s and other coding information:

Report File Name:		Paper Report:	
FW2	Create File and Refresh W2 Area	W2 Plain Paper Form (Front) ▼	W2 Correction Option
Print Report			
Dates and Periods			
Report Calendar Year:		2022 ▼	Evaluation Option
District Address, Contact, Account #'s and other coding information:			
District Name:	Specialized Data Systems Te	FEIN Number:	84123455678
Address:	200 E. Randolph St., Suite 5	State W2 Acct Number:	00123456 For State: IL
Address:		W2 User ID	888
City:	Chicago	Third Party Sick Pay (Y/N)	Y
State:	Illinois #17 ▼	2nd State W2 Acct Number:	12365 For State: IL
Zip Code:	60601	3rd State W2 Acct Number:	For State:
Employer Name:	Specialized Data Systems -	4th State W2 Acct Number:	For State:
Email Address:	jlitz@linq.com	5th State W2 Acct Number:	For State:
Contact Phone:	800-323-1605	6th State W2 Acct Number:	For State:
Contact Name:	Jennifer Litz		

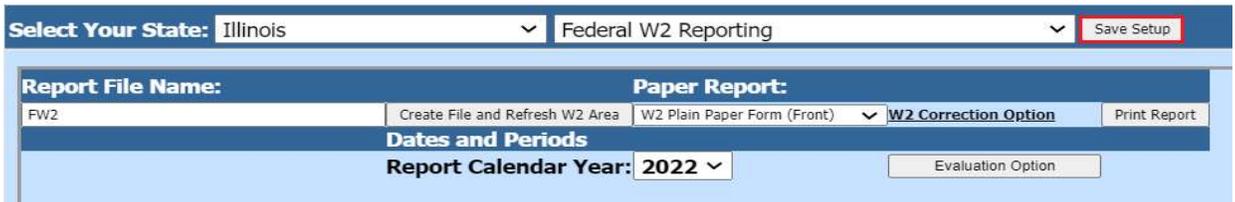
- W2 User ID # is supplied by the Federal Government when you register to report via Online Wage reporting or by Magnetic Media. For more information, contact SSA the (Social Security Administration). To register go to www.ssa.gov.
- If you have any employees that received Sick Pay from a Third Party, the “Third Party Sick Pay (Y/N)” field needs to be coded with a “Y”. This selection option is activated for any employees you have with “Third Party Sick Pay”. This places a check mark in “Box 13” the “Third party sick pay” field on the W2. For this information to show on a specific employee, the field “Third Party Sick Pay YN” in the “Employee Demographics All Field” view must have a “Y” in that field.
- If you have employees that pay State taxes to another state, enter the Account number for the second state in the “2nd State W2 Account Number” field. This account prints on the W2 for those employees who have taxes for the 2nd state, 3rd State W2 Acct Number and 4th State W2 Acct Number field completed prints properly as well.
- The system prints one W2 for the employees that have multiple employee numbers unless they paid into more than one taxing state during the calendar year. If this happens, the employee receives a W2 for each taxing state that is on the employee’s record.

Benefit, Retirement, and Deduction Selection Options:

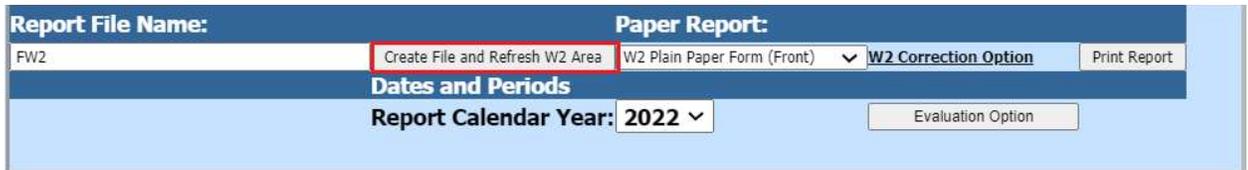


- **Medicare Selector:** For those states that have employees who contribute to MEDICARE only (1.45%) and not the full FICA you need to select the deduction code used to deduct Medicare.
- **Wage Code Selector:** Select the codes for qualified sick and family leave wages to report in Box 14.

5. Select Save Setup.



6. Select Create File and Refresh W2 Area.



7. After the process is finished, the W2 Summary Report displays on the screen. Print and review the information. This report has the date the “Create File and Refresh W2 Area” button was last selected for your reference.

W2 Summary Report

Calendar Year 2022

Printed: 11/06/2022 6:46:27AM

Employer Information	Description	Amount
Specialized Data Systems Test Data 200 E. Randolph St., Suite 5100 Chicago IL 60601	Box 1-Taxable Gross	\$392,468.71
	Box 2-Fed Tax	\$56,609.33
Employer FEIN 8412345678	Box 3-Soc.Sec. Wages	\$123,822.00
Employee Count for W2 17	Box 4-Soc.Sec. Tax	\$7,676.84
W2 area last refreshed November 6, 2022 6:46 am	Box 5-Medicare Wages	\$401,672.13
	Box 6-Medicare Tax	\$1,795.53
	Box 10-Dependent Care	\$0.00
	Box 11-Nonqualified Plan	\$0.00
	Box 16-Taxable State	\$392,468.71
	Box 17-State Tax	\$18,244.55
	Box 18-Local Wages	\$0.00
	Box 19-Local Tax	\$0.00

8. Another report that is available to use for checking the W-2 information is the “Federal W-2 Review Report”. To create this report, select from the drop down that is next to the “Print Report” button and select the “Federal W-2 Review Report.” Then select the Print Report” button. On the next screen, select the way you want the report to sort and then select “OK”.

Del?	Created On	Created At	Open	Suggested Save As Name	Created By	ID#
<input type="checkbox"/>	Sunday, November 6, 2022	6:46:18 AM		W2report		1

Report File Name:		Paper Report:	
W2report	Create File and Refresh W2 Area	Federal W2 - Review Report	W2 Correction Option
Dates and Periods		Print Report	
Report Calendar Year:		Evaluation Option	
		<ul style="list-style-type: none"> W2 Plain Paper Form (Front) W2 Plain Paper Form (Back) W2 Summary Report Federal W2 - Review Report W2 Pre-Printed Form (2-Up) W2 Pre-Printed Form (4-Up) 	
District Address, Contact, Account #'s and other coding information:			

- Select how you would like to sort your W2's.

Federal W2 Copy B - Data Review Report

Printed: 11/6/2022 6:52:10AM

Calendar Year 2022

Specialized Data Systems - Test Data

Employee Name and Number																		
1 Wages, tips, other comp.	2 Federal tax withheld	3 Social security wages	4 Social security tax withheld	5 Medicare wages and tips	6 Medicare tax withheld	7 Social security tips	8 Allocated tips	9	10 Dependent care benefits	11 Nonqualified plans	12a 12b 12c 12d	13 Statutory employee Retirement plan Third-party sick pay	14 Other	15 State Employer's state ID number	16 State wages, tips, etc.	17 State Income Tax	18 Local wages, tips, etc.	
Admin, Admin - 49586																		
66,283.76	7,626.13	9,600.00	595.20	66,850.00	139.20	0.00	0.00		50.00	0.00		X		IL 60123456	66,283.76	3,261.06	0.00	

- When printing W2's on plain paper, the IRS has requirements that must be met to use this option (refer to publication 1141 section 2.4). This publication can be found on <https://www.irs.gov/pub/irs-pdf/p1141.pdf>. If you are unsure about meeting these requirements or have any questions on printing W2's on plain paper, it is strongly suggested that you contact the IRS directly.

How to print W2's with Preprinted forms

Enter prompt values.

Select how you would like to sort your W2's. Sort By

...

Employee Name

Pay Check Location

School Location

Employee ID Number

Employee Zip Code

Former Default Sequence

Discrete Value

OK

Once the W2's has been created:

Select Paper Report: W2 Pre-Printed Form (2-up).

PRINTING NOTES:

- When printing with Adobe: Verify settings are printing with **Actual Size**. Any settings with "Scaling" reduce the font and not print correctly or fit into envelopes.
- When printing with other options, i.e., Chrome: Verify scaling settings are "Default". Any settings outside of Default may not print correctly or fit into envelopes.
- When folding W2 forms, place the folded side in envelope first

Option 1 for printing the W2's. This option allows the printing of both the front and back at the same time. Select the drop down next to "Print Report" and select W2 Plain Paper Form

Front). Select "Print report". A screen appears with two parameters. The first parameter allows you to select the way you want the W2 forms to sort. The "Employee Name" has been selected for this example. The second parameter allows you to print the first page and back page of the W2 form on one page for each employee if your printer allows for double sided printing.

Report File Name: W2report: **Paper Report:** Create File and Refresh W2 Area W2 Plain Paper Form (Back) **W2 Correction Option** Print Report

Close Report Export report to Message Center Viewer Font Size: Small Print Control: PDF Close Report

Enter prompt values.

Select how you would like to sort your W2's. Sort By

Employee Name

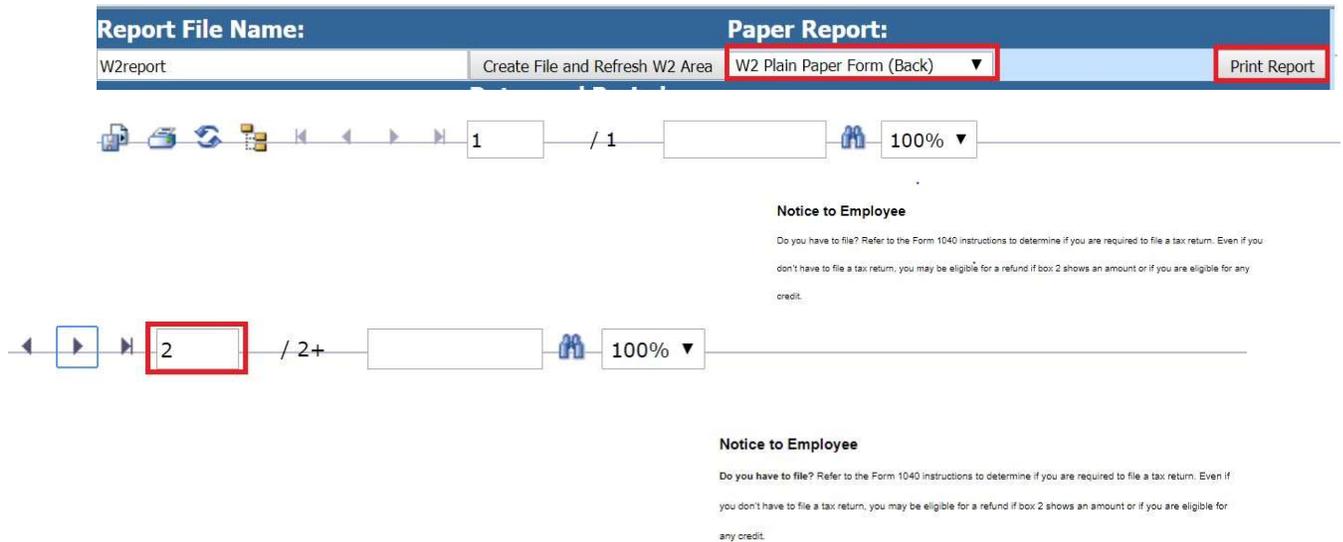
Select an option. Print Back Page

Print Back Page for Each Employee

OK

1 / 1+ 100%

Copy B - To Be Filed With Employee's FEDERAL Tax Return.			Copy 2 - To Be Filed With Employee's State, City, or Local Income Tax Return.		
41-0852411 OMB No. 1545-0008			41-0852411 OMB No. 1545-0008		
a Employee's soc. sec. no. 329-82-1234	1 Wages, tips, other comp. 66283.76	2 Federal income tax withheld 7626.13	a Employee's soc. sec. no. 329-82-1234	1 Wages, tips, other comp. 66283.76	2 Federal income tax withheld 7626.13
b Employer ID number (EIN) 84123455678	3 Social security wages 9600.00	4 Social security tax withheld 595.20	b Employer ID number (EIN) 84123455678	3 Social security wages 9600.00	4 Social security tax withheld 595.20
	5 Medicare wages and tips 66850.00	6 Medicare tax withheld 139.20		5 Medicare wages and tips 66850.00	6 Medicare tax withheld 139.20
c Employer's name, address, and ZIP code Specialized Data Systems Test Data 200 E. Randolph St., Suite 5100 Chicago IL 60601			c Employer's name, address, and ZIP code Specialized Data Systems Test Data 200 E. Randolph St., Suite 5100 Chicago IL 60601		
d Control number 49556			d Control number 49556		
e Employer's name, address, and ZIP code Admin Admin 196 Royal Rd. Chicago IL 60623			e Employer's name, address, and ZIP code Admin Admin 196 Royal Rd. Chicago IL 60623		
7 Social security tips .00	8 Allocated tips .00	9	7 Social security tips .00	8 Allocated tips .00	9
10 Dependent care benefits .00	11 Nonqualified plans .00	12a See instructions for box 12	10 Dependent care benefits .00	11 Nonqualified plans .00	12a
13 Statutory employee Retirement plan X Third-party sick pay	14 Other	12b Other 12c 12d	13 Statutory employee Retirement plan X Third-party sick pay	14 Other	12b 12c 12d
IL 0123456	66283.76	3261.06	IL 0123456	66283.76	3261.06
15 State Employer's state ID number	16 State wages, tips, etc.	17 State income tax	15 State Employer's state ID number	16 State wages, tips, etc.	17 State income tax
18 Local wages, tips, etc.	19 Local income tax	20 Locality name	18 Local wages, tips, etc.	19 Local income tax	20 Locality name



The screenshot shows a software interface for generating W2 reports. At the top, there are two main sections: "Report File Name:" and "Paper Report:". Under "Report File Name:", the text "W2report" is displayed. To its right is a button labeled "Create File and Refresh W2 Area". The "Paper Report:" section features a dropdown menu currently set to "W2 Plain Paper Form (Back)", which is highlighted with a red box. To the right of this dropdown is a "Print Report" button, also highlighted with a red box. Below these sections is a navigation bar with several icons (back, forward, search, etc.) and a page indicator showing "1 / 1". A zoom level of "100%" is also visible. Below the navigation bar, there is a "Notice to Employee" section with the following text: "Do you have to file? Refer to the Form 1040 instructions to determine if you are required to file a tax return. Even if you don't have to file a tax return, you may be eligible for a refund if box 2 shows an amount or if you are eligible for any credit." Below this notice is another navigation bar with a page indicator showing "2 / 2+", a zoom level of "100%", and another "Notice to Employee" section with the same text as above.

10. **Option 2 for printing the W2's.** This option of printing allows you to print the back of the W2 and then use the copies that the back is printed on and print the front of the W2 on the other side. To print the back of the W2 forms on plain paper, select the drop down next to "Print Report" and select W2 Plain Paper Form (Back). Select "Print report." The back of the W2 displays on the screen. Print out as many copies of the back of the W2 as you need for processing your W2's. Then print the front of the W2.

11. To print the front of the W2 forms on plain paper, select the drop down to the right of "Create File and Refresh W2 Area" and select W2 Plain Paper Form (Front). Select "Print report". Select the way you want the W2's to sort. To only print the front page of the W2, select the option "Don't Print Back Page". Select OK. The front of the W2's display on the screen. Put the backs of the W2's into your printer so it allows the front of the W2's to be printed on the other side of the paper.

Enter prompt values.

Select how you would like to sort your W2's. Sort By

Employee Name

Select an option. Print Back Page

Don't Print Back Page

OK

<ul style="list-style-type: none"> ABBOTT, ASHLEY 30.00 ADAIR, JOSHUA H. 45.00 ALLEN, JENNA M. 43.00 ANDERSON, ALEAHA G. 52.00 ANDERSON, IVY L. 33.00 ANTRY, KAYLA M. 51.00 Ash, Kim 29.00 BARNFIELD, KELLY J. 48.00 BAUER, CHASE J. 50.00 BAUER, HUNTER S. 37.00 BAUM, MADISON R. 31.00 BAKTER, SIERRA N. 47.00 BESHER, COLLIN J. 32.00 BIERMAN, COBY R. 35.00 BIEVENUE, GABRIELLE F. 34.00 BIEVENUE, REESHA M. 49.00 BIONE, BLAKE A. 46.00 BROOKMAN, NOLAN D. 44.00 BRUNKHORST, NICOLE L. 38.00 BUCH, JORDAN M. 40.00 BURGDORF, LILIANA M. 54.00 CARNAHAN, GARRETT M. 36.00 COSENTINO, ALLISON S. 39.00 DOWNING, PAYTON E. 42.00 GODIER, DEVIN C. 53.00 PEREZ, JONATHAN L. 41.00 SCOTT, DREW P. 55.00 	<p>Copy B - To Be Filed With Employee's FEDERAL Tax Return. 41-0802411 OMB No. 1545-0008</p> <table border="1"> <tr> <td>a Employer's soc. sec. no. 125-98-7415</td> <td>1 Wages, tips, other comp. 15122.68</td> <td>2 Federal income tax withheld 841.64</td> </tr> <tr> <td>b Employer ID number (EIN) 8412045678</td> <td>3 Social security wages .00</td> <td>4 Social security tax withheld .00</td> </tr> <tr> <td></td> <td>5 Medicare wages and tips 17063.32</td> <td>6 Medicare tax withheld 247.54</td> </tr> </table> <p>c Employer's name, address, and ZIP code ABC School District 123 SOUTH MAIN Breckenridge CO 80123</p> <p>d Control number 1075</p> <p>e Employer's name, address, and ZIP code ASHLEY ABBOTT 1256 Rocky Mtn Rd Aspen CO 80454</p> <table border="1"> <tr> <td>7 Social security tips .00</td> <td>8 Allocated tips .00</td> <td>9</td> </tr> <tr> <td>10 Dependent care benefits .00</td> <td>11 Nonqualified plans .00</td> <td>12a See instructions for box 12 C 1500.00</td> </tr> <tr> <td>13 Statutory employee Retirement plan X Third-party sick pay</td> <td>14 Other DD 1872.96 PERSA 1629.64</td> <td>12b W 800.00</td> </tr> </table> <table border="1"> <tr> <td>cc 0120486</td> <td>15 State wages, tips, etc. 15122.68</td> <td>17 State income tax 817.00</td> </tr> <tr> <td>16 State Employer's state ID number</td> <td>18 Local wages, tips, etc. .00</td> <td>19 Local income tax .00</td> </tr> <tr> <td>18 State wages, tips, etc.</td> <td>19 Local income tax</td> <td>20 Locality name</td> </tr> </table> <p>Form W-2 Wage and Tax Statement 2020 Dept. of the Treasury -- IR-1 This information is being furnished to the Internal Revenue Service. www.irs.gov/efta</p>	a Employer's soc. sec. no. 125-98-7415	1 Wages, tips, other comp. 15122.68	2 Federal income tax withheld 841.64	b Employer ID number (EIN) 8412045678	3 Social security wages .00	4 Social security tax withheld .00		5 Medicare wages and tips 17063.32	6 Medicare tax withheld 247.54	7 Social security tips .00	8 Allocated tips .00	9	10 Dependent care benefits .00	11 Nonqualified plans .00	12a See instructions for box 12 C 1500.00	13 Statutory employee Retirement plan X Third-party sick pay	14 Other DD 1872.96 PERSA 1629.64	12b W 800.00	cc 0120486	15 State wages, tips, etc. 15122.68	17 State income tax 817.00	16 State Employer's state ID number	18 Local wages, tips, etc. .00	19 Local income tax .00	18 State wages, tips, etc.	19 Local income tax	20 Locality name	<p>Copy 2 - 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12. The W2's can be sent to the message center and then forwarded to the employees. Both the front and back page of the W2 can be sent to the employee via the message center. To send both the front and back pages of the W2, follow steps above. Once the W2's preview on the screen, select "Export Report to Message Center" at the top of the screen. Verify the checkmark in the checkbox "Export W2 Forms to the Message Center for Employee Access". Select "Send Now".

Close Report Export report to Message Center Viewer Font Size: Large Print Control: ActiveX Close Report

Send report to the Message Center	
1 Subject	Attachment: Federal W2
2 Message	FW2 (11/6/2022 @ 7:06 AM)
File Type	Adobe Acrobat (PDF)
3	<input type="button" value="Send Now"/> <input type="checkbox"/> Export W2 forms to the Message Center for Employee Access.

Copy B - To Be Filed With Employee's FEDERAL Tax Return.	41-0882411 OMB No. 1545-0008	Copy 2 - To Be Filed With Employee's State, City, or Local Income Tax Return.	41-0882411 OMB No. 1545-0008
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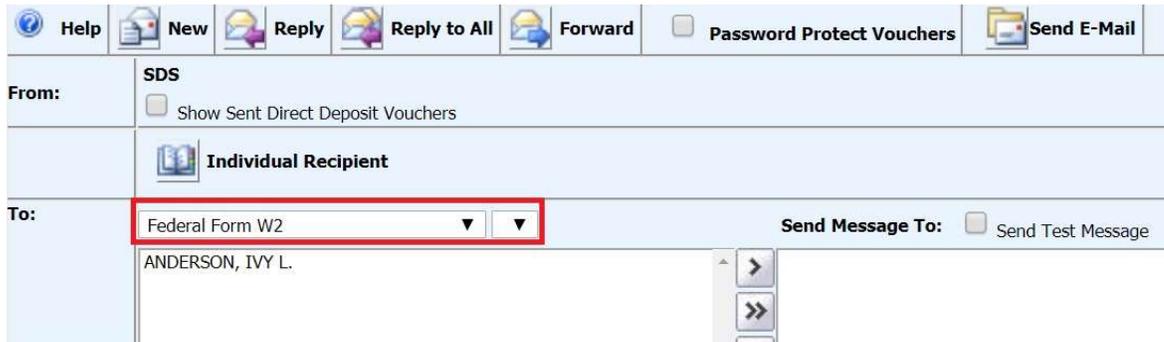
13. If you are using the “Employee Portal” in the system, the W2’s are sent to the employees’ message center for them to view and print.
14. The W2’s are sent to the employees via email if the setup for this process has been completed. Please refer to “Step Four – W2 Email Setup” before producing W2’s.

Sending the W2’s via Email

It is **STRONGLY** recommended that a **quick test** of the email process be completed by sending only one W2. Typically, the person processing the W2’s selects themselves and sends it. Then do one more test by selecting themselves and one or two co-workers in the finance area. If that looks good, then they should be able to send the emails with confidence.

The above test needs to be done as the W2’s that are sent via email cannot be pulled back into the system once they have been sent.

1. Select Payroll Processing.
2. Select Direct Deposit eMail.
3. Select the option for W2.
4. Indicate the employee W2’s you wish to send.
5. Push the send button.



Help New Reply Reply to All Forward Password Protect Vouchers Send E-Mail

From: SDS
 Show Sent Direct Deposit Vouchers

Individual Recipient

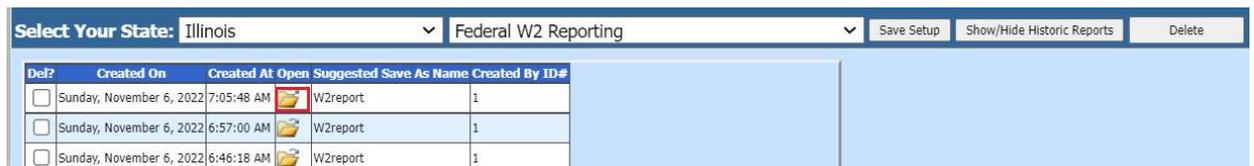
To: Federal Form W2 Send Message To: Send Test Message
 ANDERSON, IVY L.

- The W2 option remains available and provides the ability to send additional copy(s) as needed. If a W2 needs to be resent, you can re-enter this screen, select the employee(s) and send.

Magnetic Media and Electronic Filing to the Federal Government

To download the W-2 file for submission, follow the instructions below:

- Select Payroll Processing.
- Select State / Federal Reporting.
- Select your State, select Federal W2 Processing.
- After printing the W2's and making sure they are accurate, select the "Show/Hide Historic Reports."



Del?	Created On	Created At	Open	Suggested Save As Name	Created By ID#
<input type="checkbox"/>	Sunday, November 6, 2022	7:05:48 AM		W2report	1
<input type="checkbox"/>	Sunday, November 6, 2022	6:57:00 AM		W2report	1
<input type="checkbox"/>	Sunday, November 6, 2022	6:46:18 AM		W2report	1

- The next step is to save the file to your workstation, so it can be sent to the Federal Government through the <https://www.SSA.gov> website. Right click on the folder and select "Save Target As" or "Save Link As." The selection you pick when saving the file depends on what internet browser you are using.
- In the Save in area, select the location on your workstation you want to save the file.
- In the file name field, change the file name to W2report. Then change the save as type from 'Text Document' to 'All Files' and select Save.
- You should be using the last file that was created in the historic area. This should be the file that contains the information you just finished producing W2 reports with.
- The file is ready to submit to the SSA.



Magnetic Media and Electronic Filing to the State

1. Select Payroll Processing.
2. Select State/Federal Reporting.
3. Select your State, then select State W2 Processing.
4. Enter all the information on this screen in the boxes provided.
5. This screen setup is the same setup as the Federal W2 Reporting. Review the screen setup and make any changes that are needed.
6. Select the Create Report button.
7. The system creates a file for you that needs to be saved to your workstation and sent to the State for W2 reporting purposes.
8. To save the file, right click on the yellow folder and select "Save Target As" or "Save Link As". This selection depends on what internet browser you are using. Select the location on your workstation to save the file to.
9. In the file name, change the file name to StateW2report (or the appropriate file name that is required by your state.) Then change the save as type from Text Document to All Files and select Save.
10. You should be using the last file that was created in the historical area.
11. Submit the file to your State.

Note: You may need to submit a file electronically to the State for reporting W2's. The State W-2 files must be submitted electronically. For more information, please refer to Electronic Filing section on your states Department of Revenue website.

Where the W2 Data Comes from in SDS

The information below explains where the data that is printing on the W2 forms comes from within the SDS system.

Box a Employee's social security number- (employee master).

Box b Employer ID Number (EIN) - (prompted for on screen if not found in the District Information area).

Box c Employer's name and address - (prompted for on screen if not found in the District Information area).

Box d Employee number – (employee master).

Box e Employee's name and address - (employee master).

Box 1 Wages, tips, other comp. - Taxable Gross - (employee YTD pay history area G2 record).

Box 2 Federal income tax withheld - (employee YTD pay history area T1 record).



- Box 3** Social Security wages - FICA OASDI Wages (employee YTD pay history area G3 record).
- Box 4** Social Security tax withheld - FICA OASDI Tax 6.2% (employee YTD pay history area T21 record).
- Box 5** Medicare wages and tips - Medicare HI wages (employee YTD pay history area G3 + G7 records).
- Box 6** Medicare tax withheld - Medicare HI Tax 1.45% (employee YTD pay history area T22 record + the Deduction code used for Medicare only employees selected on the Medicare Deduction screen).
- Box 7** Social Security tips - N/A.
- Box 8** Allocated tips - N/A.
- Box 9** Verification code.
- Box 10** Dependent Care benefits - (employee YTD pay history area - deduction code used that has a 'Y' in the dependent care benefit field on the Deduction Master).
- Box 11** Nonqualified plans - (employee YTD pay history area - deduction code used that has a 'Y' in the nonqualified plan field on the Deduction Master).
- Box 12** Codes for a-d - Employee YTD pay history area – (deduction codes used that have valid letters 'A' thru 'Z' & 'AA' thru 'HH' in the Box 12 field on the Deduction Master).
- Box 13** Statutory employee - (In the Employee Demographics All fields view the field Statutory Employee YN needs to be coded with a 'Y' if you want this box checked).
- Box 13** Retirement Plan (employee YTD pay history area – In the Deduction and Benefits Master there must be a 'Y' on the deduction code for the pension plan. The 'Y' activates the X for this box to be checked.)
- Box 13** Third Party sick pay (In the Employee Demographics All fields view the field Third Party Sick Pay YN needs to be coded with a 'Y' if you want this box checked).
- Box 14** Other - (employee YTD pay history area - deduction code used that have any characters in the field on the Deduction Master).
- Box 15** State Employer's state ID # - (Taxing state field on the Employee master). Employer's ID# (prompted for on screen if not found in District Information area).
- Box 16** State wages, tips etc. - (employee YTD pay history area G8 record).
- Box 17** State Income Tax - (employee YTD pay history area T3?? - where?? = your state abbreviation).
- Box 18** Local wages, tips, etc. - (employee YTD pay history area - deduction code used for local tax code field on the Employee master).
- Box 19** Local taxes (employee YTD pay history area - deduction code used for local tax code field on the Employee master).
- Box 20** Locality Name - (local tax code field on the Employee master).

Here is a Quick recap of the Steps Needed to Process W2's

1. Select Payroll Processing.
2. Select State and Federal reporting, select your state, then Federal W2's.
3. Select the Create File and Refresh W2 Area.
4. Print/View the W2 - Summary Report.
5. Print/View Federal W2 – Review Report.
6. Print/View Federal W2 Form.
7. Export the W2's to the message center.
8. Send W2 electronic file to the SSA and State.

How to Correct W2's

1. The BSO (Business Services Online) or www.ssa.gov website can be used to process correcting W-2c's and W-3c's.
2. This site can be used to create, save, print, and submit Forms W-2C, and Corrected Wage and Tax Statements, online for the current year as well as for prior years.
3. After logging into the BSO website, select the "menu" option at the top of the screen. Then select "Business Services" under the "Business & Government" heading. In this new screen select "Employer W-2 Filing." On the next screen select "Business Services Online." You can log into the filing area by selecting the "Log In" button and putting in your user's name and password or by creating a new user account.
4. Once you are logged into the "Electronic Wage Reporting (EWR)" screen, you can select the tab "Forms W-2c/W3c Online." You can then select the year for which you want to correct the W-2's.
5. Follow the directions on the screen.
6. You can also review the information for E-filing and E-filing Forms W-2c and W-3c.

Running the First Payroll for 2023

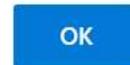
1. The W2's for 2022 do not have to be completed before running the first payroll for 2023.
2. Before running the first payroll for 2023 you need to update the Federal and FICA Tax Tables. This process happens when activating the first payroll for the 2023 calendar year.
3. Select Payroll Process and then Activate Open a payroll. Setup the calendar for the first payroll for the 2023 calendar year. Then record the payroll date for this payroll.

4. After the payroll date has been recorded and upon selecting the option to activate this payroll, a message displays that your current tax tables are for 2022 and your new payroll is for 2023.

Activate and Other Options	Option Value:
Activate/Open Selected Payroll:	01/13/2023 Check 01/13/2023 <input type="button" value="Activate"/>
Establish and adjust payroll calendar information	<input type="button" value="Calendar Setup"/>
Special / Advanced processing options	<input type="button" value="Advanced Options"/>

ssl7.schooloffice.com says

Your current Federal and FICA rates are from 2022. Your new payroll is for 2023. You should update your tax rates before you compute the selected payroll. | Your Payroll has been opened. | Your current Federal and FICA rates are from 2022. Your new payroll is for 2023. You should update your tax rates before you compute the selected payroll.



5. Select the "OK" button.
6. The screen has the button for you to select to update your 2023 tax rates. Select the button "Push this button to Update 2023 Federal Tax Rates," the system updates both the Federal and FICA tax tables.

Active Payroll: 01/13/2023 Check Date: 1/13/2023

Open	
Contract Selection Option:	Select Category(s) (Edit) Show contracts
Select the Contract Payout Category(s) to Include:	<input checked="" type="checkbox"/> Payout Category 0 <input checked="" type="checkbox"/> Payout Category 5 <input checked="" type="checkbox"/> Admin PC 1 <input checked="" type="checkbox"/> Payout Category 6 <input checked="" type="checkbox"/> Teachers PC 2 <input checked="" type="checkbox"/> Payout Category 7 <input checked="" type="checkbox"/> Non-certified PC 3 <input checked="" type="checkbox"/> Payout Category 8 <input checked="" type="checkbox"/> Coaches PC 4 <input checked="" type="checkbox"/> Payout Category 9
Select Contracts with a start date before or equal to:	09/01/2022
Retro Pay Options:	DO NOT include Retro Pay
Hourly Time Card Cloning Option:	Select Gross Pay Type(s) (Edit) Show time cards to clone
For Hourly payments select the Gross Pay Code(s) to Include. If no gross values are selected then no time cards will be created.	<input type="checkbox"/> Gross Pay Type 0 <input type="checkbox"/> Gross Pay Type 5 <input type="checkbox"/> Gross Pay Type 1 <input type="checkbox"/> Gross Pay Type 6 <input type="checkbox"/> Gross Pay Type 2 <input type="checkbox"/> Gross Pay Type 7 <input type="checkbox"/> Gross Pay Type 3 <input type="checkbox"/> Gross Pay Type 8 <input type="checkbox"/> Gross Pay Type 4 <input type="checkbox"/> Gross Pay Type 9
Select Hourly/Non Contract Employees Paid on:	09/30/2022
Activate and Other Options	Option Value:
Update your Federal and FICA tax tables	Push this button to Update 2023 Federal Tax Rates
Activate/Open Selected Payroll:	01/13/2023 Check 01/13/2023 opened 11/07/2022
	<input type="checkbox"/> Check to allow for Re-Activation of a open payroll.
Establish and adjust payroll calendar information	Calendar Setup
Special / Advanced processing options	Advanced Options
<input checked="" type="checkbox"/> Show Payroll Summary Information?	

- After selecting the update option, you can verify the Federal and FICA tax listings before you compute the first payroll for 2023. The ANNUAL TAX TABLE #7 from Circular E is the table that is used.
- To update your state tax tables, go to “Payroll Processing” and then “Activate/Open a Payroll.” Select “Advanced Options”. In the Advanced Options area, you see the option to select your state and update the state tax tables.

Activate and Other Options	Option Value:
Update your Federal and FICA tax tables	Push this button to Update 2023 Federal Tax Rates
Activate/Open Selected Payroll:	01/13/2023 Check 01/13/2023 opened 11/07/2022 ▼ <input type="checkbox"/> Check to allow for Re-Activation of a open payroll.
Establish and adjust payroll calendar information	Calendar Setup
Special / Advanced processing options	Advanced Options
Advanced Option Description:	Advanced Option Values:
Select no Contracts Dated Before:	07/01/2022 ▼
Select the Contract Types you wish to Pay:	<input checked="" type="checkbox"/> Blank <input checked="" type="checkbox"/> N/A <input checked="" type="checkbox"/> Supt23 <input checked="" type="checkbox"/> Teach23 <input checked="" type="checkbox"/> Admin23 <input checked="" type="checkbox"/> NC23 <input checked="" type="checkbox"/> Teach22 Check/Uncheck
Contract Payoff Option:	<input type="checkbox"/> Payoff ALL selected contracts.
Deactivate the Open Payroll:	01/13/2023 Deactivate
Make the selected closed payroll available for Check/Voucher printing and/or the creation of a new Direct Deposit file.	Allow Re-Printing of a Closed Payroll
Update your Federal and FICA tax tables	Update 2023 Federal Tax Rates
Update State tax tables	Select State to Update ▼ Update
Activate Delete Payroll History	
<input checked="" type="checkbox"/> Show Payroll Summary Information?	

9. The Local tax tables ARE NOT CHANGED for you. If the local taxes have changed, you need to make those changes in the payroll tax code area.
10. Another item that should be checked is the amount in the step 1 earnings on the matching FICA code. The rate for this item in 2022 was \$142,800. The code is found in the Deductions/Benefit Master screen. The FICA benefit must be updated manually.
 - a. Select Human Resources Control Center.
 - b. Select Deductions & Benefits Master.
 - c. Select the FICA Benefit code.
 - Maximum Cutoff Period: Verify "C – Calendar Year".
 - Step 1: Update to the 2023 rate.

Human Resource Control Center

Processing Options
 Data selection definition
 Award Attendance Days
 Increase Other Master Values
 Employee YTD Adjustments
 Employee Distribution Adjustment
 Deductions & Benefits Master
 Employee Deductions & Benefits
 Affordable Care Act
 Import Employee Information

ENPLYR PD FICA | FR Is this a Deduction or Benefit

Code FR Description ENPLYR PD FICA Vendor 18700 - BANK ONE

Start / Stop Active Y ~ Y Maximum Cutoff Period C ~ Calendar Year

Control Amount Percent (%) 0 Maximum Gross 0.00

Last Active Date Gross Code / Pay Type Indicators G3 Maximum To Withhold 0.00

Wizard for Gross Code / Pay Type Indicators

Benefit Distribution Using:		Compute Benefit Using:	
Select one or more Gross Pay Type(s):		Select one earnings type:	Select one or more Gross Pay Type(s):
<input type="checkbox"/> 0 - Gross Pay Type 0	<input type="checkbox"/> 5 - Gross Pay Type 5	<input type="radio"/> ALL	<input type="checkbox"/> 0 - Gross Pay Type 0
<input type="checkbox"/> 1 - Gross Pay Type 1	<input type="checkbox"/> 6 - Gross Pay Type 6	<input type="radio"/> G1 - Gross Pay	<input type="checkbox"/> 1 - Gross Pay Type 1
<input type="checkbox"/> 2 - Gross Pay Type 2	<input type="checkbox"/> 7 - Gross Pay Type 7	<input type="radio"/> G2 - Taxable Gross Earnings	<input type="checkbox"/> 2 - Gross Pay Type 2
<input type="checkbox"/> 3 - Gross Pay Type 3	<input type="checkbox"/> 8 - Gross Pay Type 8	<input type="radio"/> G3 - Fica Gross Earnings	<input type="checkbox"/> 3 - Gross Pay Type 3
<input type="checkbox"/> 4 - Gross Pay Type 4	<input type="checkbox"/> 9 - Gross Pay Type 9	<input type="radio"/> G4 - Gross Earnings (T)	<input type="checkbox"/> 4 - Gross Pay Type 4
		<input type="radio"/> G5 - Gross Earnings (I)	<input type="checkbox"/> 5 - Gross Pay Type 5
		<input type="radio"/> G6 - Gross Earnings (N)	<input type="checkbox"/> 6 - Gross Pay Type 6
		<input type="radio"/> G7 - Gross Earnings Medicare	<input type="checkbox"/> 7 - Gross Pay Type 7
		<input type="radio"/> G8 - Taxable Gross State	<input type="checkbox"/> 8 - Gross Pay Type 8
		<input type="radio"/> Use Gross Pay Type(s)	<input type="checkbox"/> 9 - Gross Pay Type 9
		<input type="radio"/> CE - Creditable Earnings (T)	

Shelter / Special Purpose Fed, State, Local Tax Shelter N N N N N N N

W2 & State Reporting Information Deferred Compensation N N N N N P ~ Partial Distribut

Deduction/Benefit Graduated Step Values

Step	Percent (%)	Earnings To / Cutoff \$
Step 1 %	7.65	147800.00
Step 2 %	1.45	999999.00
Step 3 %	0	0.00

Note: Under General Accounting Reports, Payroll Setup Tax Listings reports. Print verify Taxes.

Under General Accounting Reports, Payroll Setup Compare two payrolls. Compare two payrolls one from 2022 and one for 2023 to see the difference in taxes for each employee.