



Payroll Year End Process Document

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Payroll Year End Process

Introduction

The W-2 report will print W-2s in either the official 2-forms-per-page scannable format that is required if you are sending the forms into the Social Security Administration, or they will print in the 1-form-per-page format that corresponds with the downloadable PDF W-2. You can download the appropriate for at this URL: <https://www.irs.gov/pub/irs-pdf/fw2.pdf>

The one form per page format can be given to the employees if you submit the electronic W-2 file to the SSA (Social Security Administration) via BSO (Business Services Online). You can register to submit the W-2 electronic file at this URL: <https://www.ssa.gov/bsowelcome.htm>

W2 Distribution Management

Search for W2 Distribution Management or locate in **Reports>US Tax Reports>W2 Distribution Management** - All the Actions needed are in the ribbon.

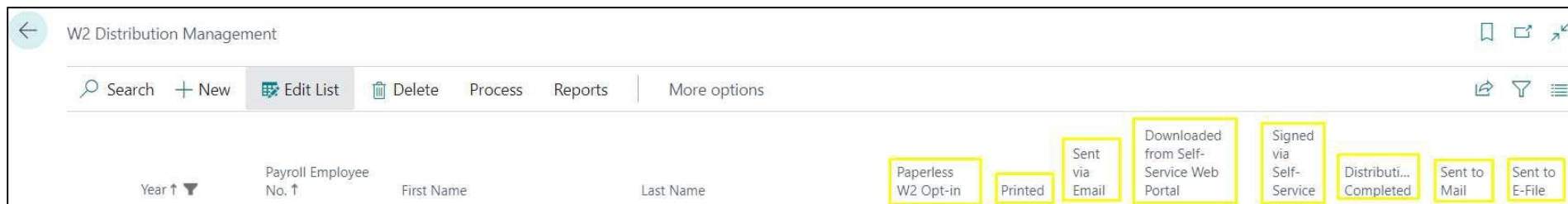


Process options:

- A. **Load W2 Employees** – Provides a list of all employees with earnings in the current year. This should include any blocked or terminated employees with earnings.
- B. **Email W2 to Employees** – This feature will create password protected files that are sent by email to all employees that have the proper settings marked in their employee card.
- C. **W2 Downloaded / Signed** – This is only valid if you have Web portal. It provides a list of employees that have downloaded their w-2 and signed it digitally.
- D. **Electronic W2 File Setup** – State Specific Filing setup.

Reports options:

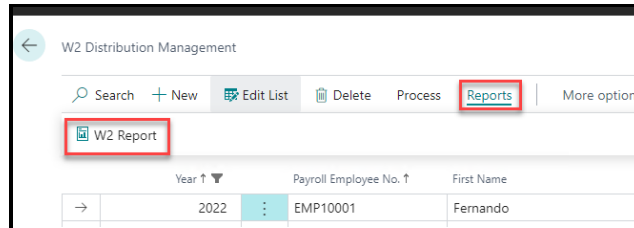
- A. **W2 Report** – Provides multiple ways to print W2's.



- B. **Paperless W2 Opt-in:** This is located on each employee's card. Administration tab.
- C. **Printed:** Once W2 is printed this will show checked if the option in the W2 report 'Set Printed to True in W2 Dist.' is set to true when running the W2 report.
- D. **Sent via Email:** Will populate if W2's are emailed.
- E. **Downloaded from Self-Service Web Portal:** This will be populated when employees access the portal and download their W2.
- F. **Signed via Self-Service Web Portal:** This will be populated when employees access the portal, download, and sign their W2 if required.
- G. **Distribution Completed:** This will be populated if any of the other options are filled in. It allows for quick filtering to see who is completed.
- H. **Sent to Mail:** This will populate if W2's sent to Mail.
- I. **Sent to E-File:** This will populate if W2's sent to E-file.

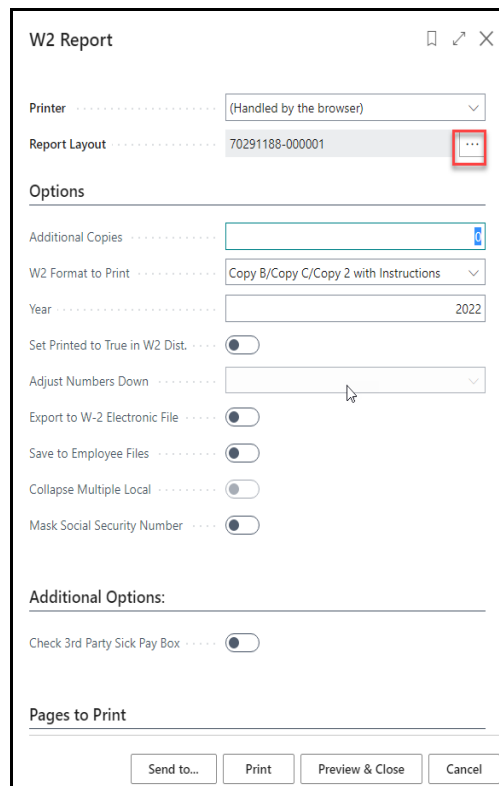
Exporting W2 to Excel to verify data prior to printing

Search for W2 Distribution Management or locate in **Reports>US Tax Reports>W2 Distribution Management** - All the Actions needed are in the ribbon.



Year	Payroll Employee No.	First Name
2022	EMP10001	Fernando

Run the W2 Report but in Report Layout Select



W2 Report

Printer: (Handled by the browser)

Report Layout: 70291188-000001

Options

Additional Copies:

W2 Format to Print: Copy B/Copy C/Copy 2 with Instructions

Year: 2022

Set Printed to True in W2 Dist. ☐

Adjust Numbers Down:

Export to W-2 Electronic File ☐

Save to Employee Files ☐

Collapse Multiple Local ☐

Mask Social Security Number ☐

Additional Options:

Check 3rd Party Sick Pay Box ☐

Pages to Print

Send to... Print Preview & Close Cancel

Report Layouts				
Report ID ↑	Report Name	Layout Name	Description	Extensic
70291188	W2 Report	IDPNW2Report	IDPNW2Report	Payrol

Then run your W2report with 'Send To' > 'Microsoft Excel Document (data and layout)

W2 Report

Printer

(Handled by the browser)

Report Layout

IDPNW2Report

Options

Additional Copies

0

W2 Format to Print

Copy B/Copy C/Copy 2 with Instructions

Year

2022

Set Printed to True in W2 Dist.

☒

Adjust Numbers Down

Export to W-2 Electronic File

☒

Save to Employee Files

☒

Collapse Multiple Local

☒

Mask Social Security Number

☒

Additional Options:

Check 3rd Party Sick Pay Box

☒

Pages to Print

Send to...

Print

Preview & Close

Cancel

Printing Forms

When printing there are two formats available:

- 1 form per page with layout – no additional form purchase needed.
- 4up form – requires the purchase of 4up preprinted W2 forms, the front is preprinted with 4 W2 forms, the back is preprinted with instructions.

1 form per page with layout

All forms can be printed for all employees or just one depending on the filter selected.

The Pages to print are as follows:

- Copy 1 – For State, City, or Local Tax Department
- Copy B – To Be Filed with Employee's Federal Tax Return
- Copy C – For Employee's Records
- Copy 2 – To Be Filed with Employee's State, City, or Local Income Tax Return.
- Copy D – For Employer

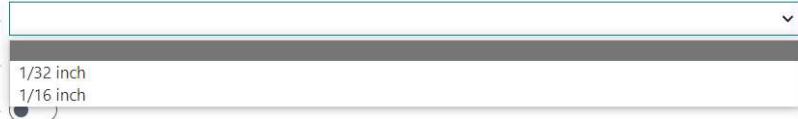
The screenshot shows the 'W2 Report' printing options dialog box. It includes a 'Printer' dropdown set to '(Handled by the browser)'. Under the 'Options' section, there are several settings: 'Additional Copies' is set to 0; 'W2 Format to Print' is set to 'Copy B/Copy C/Copy 2 with Instructions' (with a dropdown menu open showing other options like 'Copy B/Copy C/Copy 2', 'Copy B/Copy C/Copy 2 x 2', and 'Copy B/Copy C/Copy 2 x 2 with Instructions'); 'Year' is empty; 'Set Printed to True in W2 Dist.' is unchecked; 'Adjust Numbers Down' is unchecked; 'Export to W-2 Electronic File' is unchecked; 'Save to Employee Files' is checked; 'Collapse Multiple Local' is unchecked; and 'Mask Social Security Number' is checked.

When you select the W2 Form to print, the form will update the Pages to Print tab with the correct toggle switches.

4up Form – This format is required for Integrity Data Mail Service

Requires the purchase of 4up preprinted front and back form. If you print the 4up form and there are multiple states it will print multiple forms for the same employee with only the 1st form showing the federal information.

When printing the 4up form you may need to adjust the print down. This can be done by selecting either 1/32 inch or 1/16 inch. This is done in the options Tab. Adjust Numbers Down:

Adjust Numbers Down 

Export to W-2 Electronic File

Save to Employee Files

If you choose to use the W2 Distribution Manager, you will want to toggle on the “Set Printed to True” in W2 Dist so that those employees show as ‘Printed’ in the W2 distribution list.

Options

Additional Copies 0

W2 Format to Print 4up

Year 2022

Set Printed to True in W2 Dist. ☒

Adjust Numbers Down 

Click the “Send to” button, choose “PDF Document,” then click “OK” to create the PDF file. The PDF file will have standardized spacing making the information fit correctly on the forms regardless of the local printer settings. Once your PDF is created, simply open and print onto the W-2 forms.

Filter: Payroll Employee

× No. 

× Employee Posting Group 

× Blocked 

+ Filter...

Send to... Print Preview & Close Cancel

 Choose file type...

☒ PDF Document

☐ Microsoft Word Document

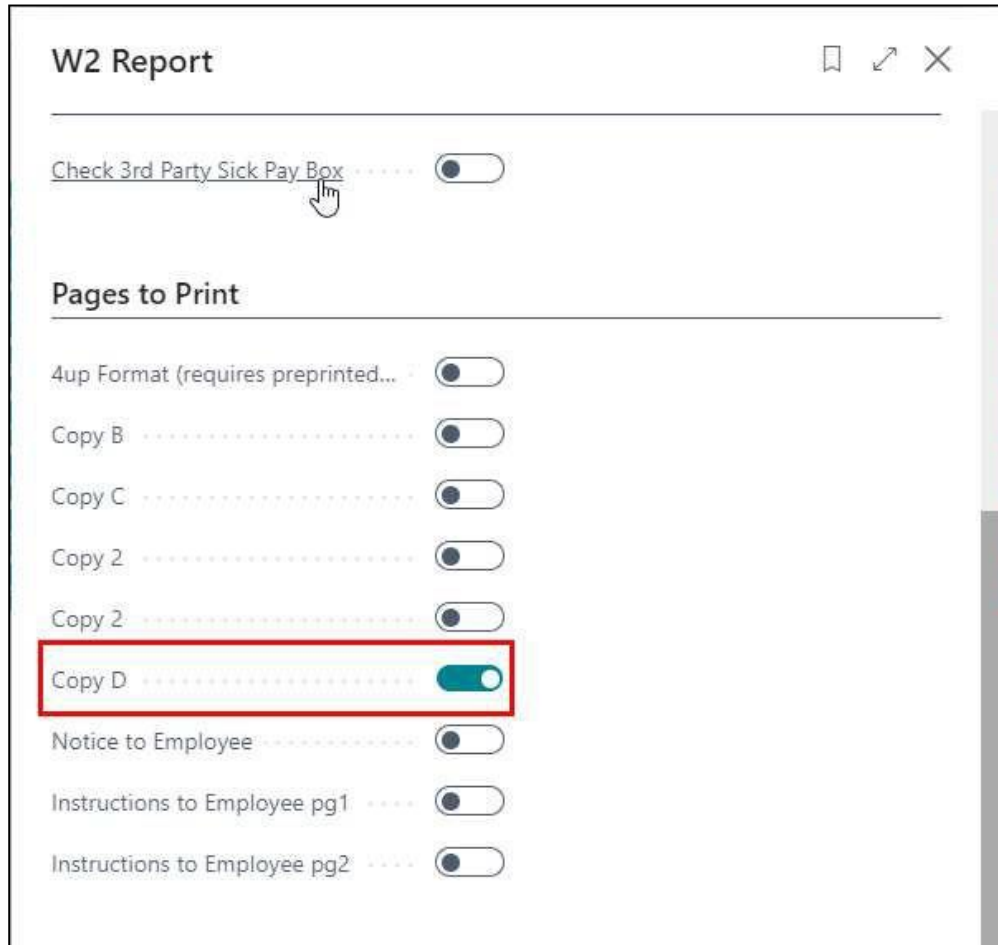
☐ Microsoft Excel Document

☐ Schedule...

OK Cancel

Printing the Employer Copies

To print the employer copies to PDF for your records, you will want to follow the same steps, however scroll down to “Pages To Print”. Toggle off all the options except for Copy D. You will then click the “Send to” button, choose “PDF Document,” then click “OK” to create the PDF file. This can then be saved off for your records.



W2 Report

Check 3rd Party Sick Pay Box ☐

Pages to Print

4up Format (requires preprinted...) ☐

Copy B ☐

Copy C ☐

Copy 2 ☐

Copy 2 ☐

Copy D ☒

Notice to Employee ☐

Instructions to Employee pg1 ☐

Instructions to Employee pg2 ☐

E-Mailing W2's

There is a small amount of setup that needs to be done prior to emailing forms.

Employee Maintenance

The employee email address must be filled in on the Employee Card > Communication.

Communication

Phone No.	999-999-9999	Emergency Contact	
Cell Phone No.		Emergency Contact 2	
E-Mail	first.last@gmail.com	Emergency Number 2	
Emergency Number		Preferred Language	

You will also want to toggle on Paperless W2 Opt-in on the Employee Card > Administration.

Administration

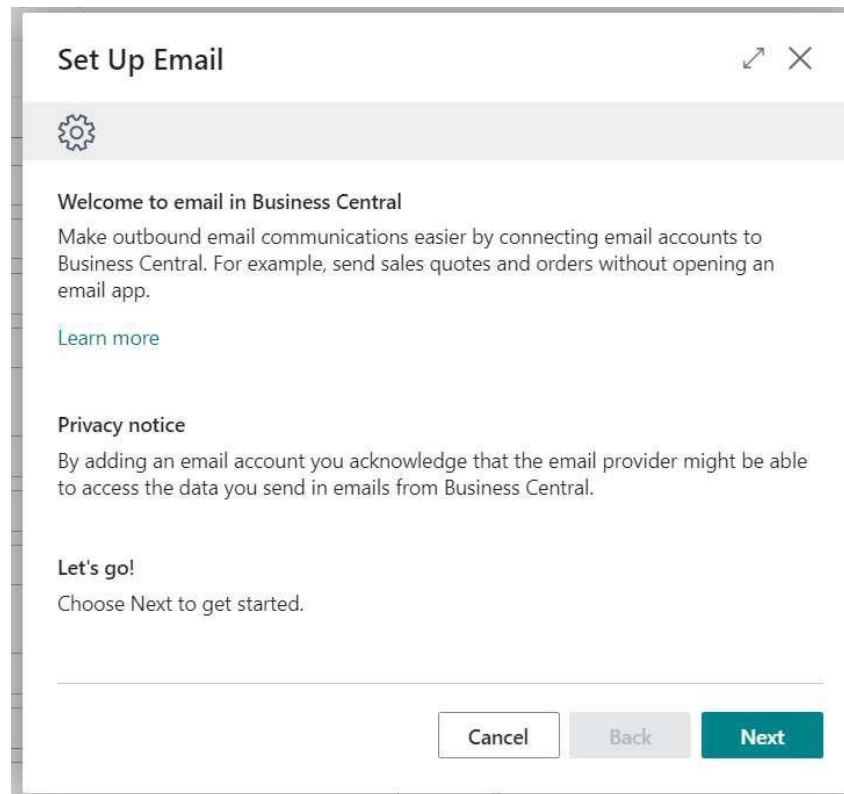
Show less

Employee Type		Salesperson Code	
Payroll Status	Active	Send Check Stub by E-mail	
Hire Date		E-mail Check Stub from Posted Docu...	
Adjusted Hire Date		Paperless W2 Opt-in	
Reported as New Hire		I-9 on File	

Email Setup

Set Up Email must be completed before W2's can be sent.

If you are on premises you can do this in the Payroll Setup. If you are online you must search "Set Up Email" from Business Central.



Password Protect

Navigate to Payroll Setup>Additional Setup and be sure that Password Protect PDF Email Attachments is selected. This is used for both Check Stubs and W2's. The Password will be social security number without any dashes.

Additional Payroll Setup

Actions

General

Show more

Password Protect PDF Email Attachments ☒

Password Protect PDF Email Attachments

If set to true, check stub PDF attachments and W2 attachments will have password protection. The password will be the employee's social security number excluding the dashes.

[Learn more](#)

Use Advanced Payroll Code Position /... ☐

Suppress Emp. State WH Record Not ... ☐

Show Resident State Payroll Code Tab ☒

SSN Verification Requester ID

Skip Fixed Percent Tax Auto-Balance ☐

Skip Salary Employee Auto-Balance ☐

Publishing W2s on the Web Portal

This option will save the W-2's to the Payroll Files Table. Making it accessible via the web portal.

The delimiters in the payroll settings must be setup for documents to show in the employee's card.

Web

Employee No. Prefix: ^

Employee No. Suffix: ^

If they are not filled in, we suggest using the ^ symbol as it is not as common.

You will not be able to use /, or *. The delimiter must be a character that is not found anywhere else in the file name.

Web Portal Company Document Page...

Filter Company Documents By Payroll ... ☐

Web Portal Employee Document Page...

Employee No. Prefix

Employee No. Suffix

Regular Time Approval From Web

PTO Approval From Web

Web Time Entry Method

Check All Companies for Login ☐

Web Direct Deposit Editable ☐

Filter Web Portal Payment Date ☐

Skip Check Custom Layout ☐

You can save to Employee Files while you are printing or creating the Electronic File.

Be sure to toggle on the Save to Employee Files box.

W2 Report 🔖 ↶ ✕

Printer (Handled by the browser) ▾

Options

Additional Copies 

W2 Format to Print Copy B/Copy C/Copy 2 with Instructions ▾

Year 2022

Set Printed to True in W2 Dist. ☒

Adjust Numbers Down ▾

Export to W-2 Electronic File ☒

Save to Employee Files ☐

Collapse Multiple Local ☐

Mask Social Security Number ☒

Once printed you can navigate to *Departments/NAV Payroll/Setup/Administration/Payroll Files* to confirm they have been saved.

These will then show on the Employee's page of the Web Portal.

W2 Downloaded / Signed

This is only valid if you are using the Web Portal.

The W2 File Name Prefix must be filled in so that it knows which document to look at.

You can locate the prefix by navigating to
Departments/NAV Payroll/Setup/Administration/Payroll Files

Edit - Check if W2 Downloaded/Signed
□
×

▼
ACTIONS

Clear Filter
Page

Options
▲

Year:

W2 File Name Prefix:

W2 Distribution Management
▲

Sorting: Year, Company Code, Payroll Employee No. ▼ 2

Show results:

× Where
Downloaded from Self-Service Web Portal ▼ is No

× And
Signed via Self-Service Web Portal ▼ is No

× And
Distribution Completed ▼ is No

× And
Payroll Employee No. ▼ is Enter a value.

× And
Sent via Email ▼ is Select a value

+ Add Filter

Schedule...
OK
Cancel

The report will evaluate the employee documents and see if the W2 has been downloaded, signed, or both. The appropriate boxes in W2 distribution managements will be set to true for the employees that have Downloaded and/or signed the document via the portal.

W2 Distribution Management ▾

Year	Payroll Empl...	First Name	Last Name	Paperless W2 Opt-in	Printed	Sent via Email	Downloaded from Self-Service Web Portal	Signed via Self-Service Web Portal	Distribution Completed
2020	EMP10003A	Mark	Newyork	☐	☐	☐	☒	☒	☐
2020	EMP10005	Harrison	Ford	☐	☐	☐	☐	☐	☐
2020	EMP10007	Debra	Winger	☐	☐	☐	☐	☐	☐
2020	EMP10008	Meg	Ryan	☐	☐	☐	☐	☐	☐
2020	EMP10009	Sandra	Bullock	☐	☐	☐	☐	☐	☐

You can see the actual signature by navigating to the *Employee Card/Navigate/Employee Signature/Download List*.

This shows that the employee has downloaded their W2.

View - HR Document Signature/Download List

HOME

Heather W2

New Edit View Delete Show as List Show as Chart Notes Links Refresh Clear Filter Find

HR Document Signature/Download List ▾

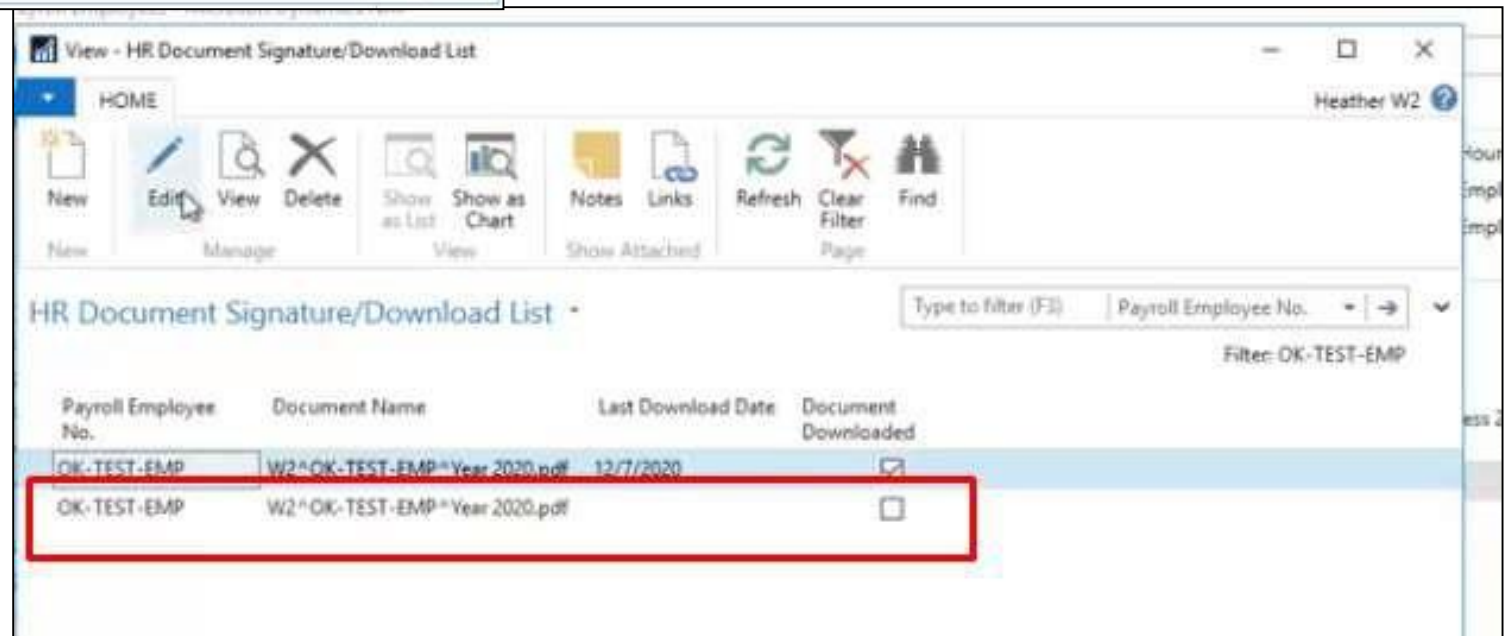
Type to filter (F3) Payroll Employee No. ▾ → Filter: OK-TEST-EMP

Payroll Employee No.	Document Name	Last Download Date	Document Downloaded
OK-TEST-EMP	W2^OK-TEST-EMP^Year 2020.pdf	12/7/2020	☒
OK-TEST-EMP	W2^OK-TEST-EMP^Year 2020.pdf		☐



This is the file that has the signature attached.

By selecting Edit you will be able to see the file.



The W2 distribution management tab will automatically be filled in according to what process you are running.

W2 Print and Mail Services

**You must send all Email W2s or W2s to be posted on the Portal first:*

Step 1: Access the W2 Distribution Management page.

W2 Distribution Management ✓ Saved   

 Search
  New
  Edit List
  Delete
 Process
 Reports
 Automate 
 Fewer options 

 Load W2 Employees
  Email W2 to Employees
  W2 Downloaded / Signed
  Electronic W2 File Setup
  Send to Mail Service
 Send to E-File Service

	Year ↑ ▼	Payroll Employee No. ↑	First Name	Last Name	W2 Opt-in	Printed	Sent via Email	Self-Service	Service Web	Distrib... Compl...	Sent to Mail	Sent to E-File
→	2022	OK-TEST-EMP	OK Test	Employee	☐	☐	☐	☐	☐	☐	☐	☐

Step 2: Select Ok on the W-2 Print Fulfillment Confirmation page.

View - W-2 Print Fulfillment Confirmation

Thank you for choosing Integrity Data W2 Print & Mail Services!

Please take a moment to look through this important information before continuing with your selection.

Submitting W2 forms to Print & Mail Services will result in additional fees, according to your licensing agreement.

Price per form \$2.95

Deadlines

- * W2 forms must be submitted to Print & Mail Services by midnight 1/8/2023 CST.
- * W2 Forms will be postmarked by 1/31/2023

Before Sending to Print & Mail.

- * You must validate the accuracy of the information transmitted to Integrity Data. No corrections or additions are permi...
- * ALL employees have been loaded to the W2 Distribution Management page.
- * W2s must be emailed to employees and posted to the Employee Self Service portal (if applicable) prior to uploading remaining W2s to be printed

OK

Cancel

Step 3: Approve the TOS

Edit - W-2 Print Fulfillment TOS Confirmation

Select link to access Integrity Data Term of Service.

Accept TOS ☐

Decline Terms of Service ☐

OK

Cancel

Step 4: Verify the count of W-2s to be printed and select 'OK'

View - W-2 Print Fulfillment TOS Processing

You have selected 0 out of a total of 5 W2 forms.

These W2s will be postmarked by 1/31/2022

Select Ok to process the W-2s.

OK

Cancel

Step 5: W2 Report will come up and here you can use a filter to select only the employee you would like to send. In the example below we select only employees that opted out for Paperless W2.

Select OK

The screenshot shows the 'W2 Report' dialog box with the 'Options' tab selected. The 'W2 Format to Print' is set to 'Copy B/Copy C/Copy 2 with Instructions'. The 'Year' is set to '2022'. The 'Set Printed to True in W2 Dist.' checkbox is checked. The 'Adjust Numbers Down' dropdown is set to 'None'. The 'Export to W-2 Electronic File' checkbox is checked. The 'Save to Employee Files' checkbox is checked. The 'Collapse Multiple Local' checkbox is checked. The 'Mask Social Security Number' checkbox is checked. The 'Additional Options' section has the 'Check 3rd Party Sick Pay Box' checkbox checked. The 'Pages to Print' section has the '4up Format (requires preprinted...)' checkbox checked and the 'Copy B' checkbox checked.

The screenshot shows the 'W2 Report' dialog box with the 'Filter' tab selected. The 'Filter: Payroll Employee' section has the following filters applied: 'No.' (dropdown), 'Employee Posting Group' (dropdown), 'Blocked' (dropdown), 'Paperless W2 Opt-in' (dropdown, highlighted with a red box and set to 'No'), and 'Payroll Location Code' (dropdown). The 'Filter totals by:' section has a '+ Filter...' button. The 'OK' button is highlighted with a red box.

Step 6: This will generate a PDF that will download to your computer. The PDF will contain all the W2 selected for Mail Service but it will be on blank paper. Please review the PDF to confirm that you captured only the employee you would like to send for mail service. This box will come up and after you confirm the PDF is correct you can select Yes. If you need to make changes you can select No then restart the process.

? Please review downloaded W2 PDF.
Are you sure that you want to send W2 to Mail Service?

Step 7: After you select Yes this window will come up and you can select OK. On the employees you sent you will now see Sent to Mail checked.

i Your W-2 Print and Mail submission was completed successfully.
Check the W2 Distribution Management Window for status update.

W2 Distribution Management ✓ Saved											
Search + New Edit List Delete Process Reports More options											
→	Year ↑ ▼	Payroll Employee No. ↑	First Name	Last Name	Paperless W2 Opt-in	Printed	Sent via Email	Download... from Self-Service Web Portal	Signed via Self-Service Web Portal	Distribution Completed	Sent to Mail
	2022	EMP10001	Fernando	Herdez	☐	☐	☐	☐	☐	☐	☒
	2022	EMP10002	Jeannette	Varner	☐	☐	☐	☐	☐	☐	☒

Uploading W2 E-File for Tax Filing Services

Step 1: User accesses the W2 Distribution Management page.

W2 Distribution Management ✓ Saved

Search + New Edit List Delete **Process** Reports More options

Load W2 Employees Email W2 to Employees W2 Downloaded / Signed Electronic W2 File Setup Send to Mail Service **Send to E-File Service**

Year ↑ ▼	Payroll Employee No. ↑	First Name	Last Name	W2 Opt-in	Printed	Sent via Email	Self-Service	Service Web	Distrib... Compl...	Sent to Mail	Sent to E-File
→ 2022	OK-TEST-EMP	OK Test	Employee	☐	☐	☐	☐	☐	☐	☐	☐

Step 2:

?

This will submit the Federal W2, ALL State W2s and the W3 Report for ALL W2 employees to Integrity Data E-File Services, and will result in a billable event. Would you like to send W2 E-Files?

Yes No

Step 3: Enter the necessary data in the EFW2 Export Request page.

EFW2 Export Request - 2021

Submitter Record

Show less

Preparation

Social Security Admini.. *

Preparer Code

L

Software

Software Vendor Code

1724

Software Code

99

Resubmission

Resub Indicator

☐

Resub WFID

Company

Name

CRONUS USA, INC. 222

Location Address

WESTMINSTER

Delivery Address

7122 SOUTH ASHFORD STR

City

ATLANTA

State Abbreviation

GA

ZIP Code

31772

Submitter

EIN

121234567

Name

CRONUS USA, INC. 222

Location Address

WESTMINSTER

Delivery Address

7122 SOUTH ASHFORD STR

City

ATLANTA

State Abbreviation

GA

ZIP Code

31772

ZIP Code Extension

Foreign State

Foreign Postal Code

Country Code

Contact

Name

MR. WONDERFUL

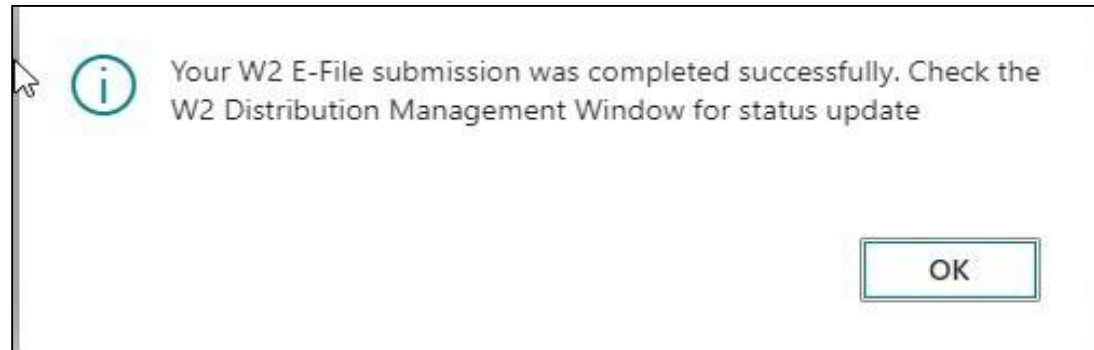
Phone Number

2175551212

OK

Cancel

Step 4: On selecting the OK button on the EFW2 Export Request page, the Federal and State files are uploaded to the Integrity Data Cloud Services BLOB Storage. User will receive the following message upon successful upload.



Creating Electronic File for reporting W2 without Tax Filing Services

Federal – the electronic file is in the SSA format by default, no additional settings need to be entered.

Edit - W2 Distribution Management

ACTIONS

New | View List | Edit List | Delete | Load W2 Employees | Email W2 to Employees | W2 Downloaded / Signed Process | **W2 Report** | Show as List | Show as Chart | Notes | Links | Refresh | Clear Filter | Find

W2 Distribution Management

Type to filter (F3) | Year | Filter: 2020

Year	Payroll Empl...	First Name	Last Name	Pap... W2 ...	Prin...	Sent via ...	Dow... fro...	Sign... via S...	Distr... Co...
2020	EMP10003A	Mark	Newyork	☐	☐	☐	☐	☐	☐
2020	EMP10005	Harrison	Ford	☐	☐	☐	☐	☐	☐
2020	EMP10007	Debra	Winger	☐	☐	☐	☐	☐	☐
2020	EMP10008	Meg	Ryan	☐	☐	☐	☐	☐	☐

Options

Additional Copies

W2 Format to Print

Year

Set Printed to True in W2 Dist. ☒

Adjust Numbers Down

Export to W-2 Electronic File ☒

Save to Employee Files ☒

Collapse Multiple Local ☐

Mask Social Security Number ☒

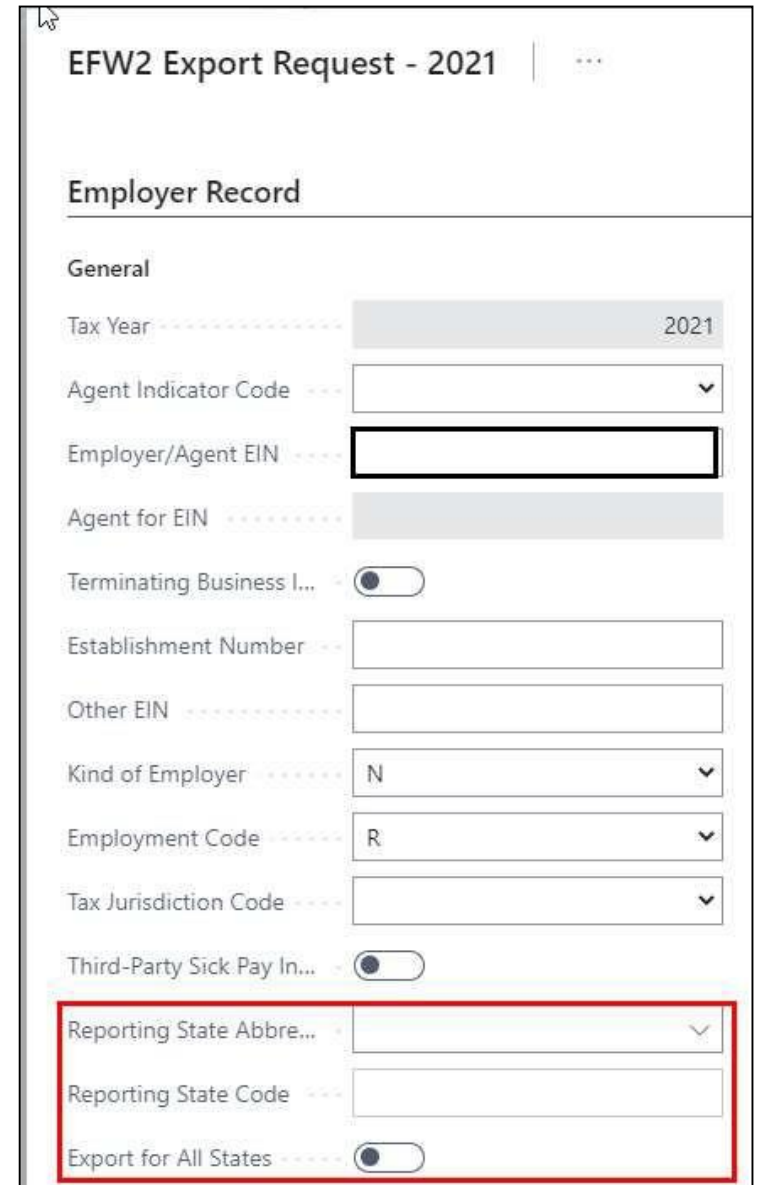
Electronic Filing W2 – States

Individual states require different settings. We have prepared a separate document with instructions for individual State filing. All the state settings can be put in the Electronic W2 File Setup table.

Select W2 Report.

Enter the year you want to print W2's for in the Year Box.

Then select Export to W-2 Electronic File. This will bring up the EFW2 Export Request this data needs verified prior to exporting. Scroll down to the Employer Record and select a specific state or Export for All States and it will create multiple files. The files will go to your downloads folder on your computer.



EFW2 Export Request - 2021

Employer Record

General

Tax Year 2021

Agent Indicator Code ... ▾

Employer/Agent EIN

Agent for EIN

Terminating Business I... ☒

Establishment Number ...

Other EIN

Kind of Employer N ▾

Employment Code R ▾

Tax Jurisdiction Code ... ▾

Third-Party Sick Pay In... ☒

Reporting State Abbre... ▾

Reporting State Code ...

Export for All States ... ☒

Submitter Record:

Fill in the following fields:

A: Social Security Administration User ID

Enter the eight-character BSO User ID assigned to the employee who is attesting to the accuracy of this file. See [Section 5](#) for Further information concerning the difference in using the BSO User ID as a signature and using the BSO User ID to access BSO.

B: Preparer Code

Enter one of the following codes to indicate who prepared this file:

A = Accounting Firm
L = Self-Prepared,
S = Service Bureau
P = Parent Company
O = Other

Note: If more than one code applies, use the code that best describes who prepared this file – normally code L should be selected

Resubmission – Only check if you are resubmitting the electronic file for a second time.

Resub WFID: Enter the WFID displayed on the notice SSA sent you otherwise you can skip this field.

Company & Submitter information will pull from the Company Information Page.

EFW2 Export Request - 2020

HOME ACTIONS Tammy-TLR ?

View Edit Validate Request Notes Links Refresh Clear Filter Go to

Manage Input Show Attached Page

2020

Submitter Record

Preparation

Social Security Administration User ID: TAMMY

Preparer Code: L

Software

Software Vendor Code: 1724

Software Code: 99

Resubmission

Resub Indicator: ☐

Resub WFID:

Company

Name: CRONUS USA, INC.

Location Address: WESTMINSTER

Delivery Address: 7122 SOUTH ASHFO...

City: ATLANTA

State Abbreviation:

ZIP Code: 31772

ZIP Code Extension:

Submitter

EIN: 121234567

Name: CRONUS USA, INC.

Location Address: WESTMINSTER

Delivery Address: 7122 SOUTH ASHFOR...

City: ATLANTA

State Abbreviation: *

ZIP Code: 31772

ZIP Code Extension:

Contact

Name: DREW WINBORN

Phone Number: 123

Extension:

Fax:

E-Mail: DREW.WINBORN...

▼ Show more fields

Employer Record 121234567 CRONUS USA, INC. ▼

Line Creation Settings ▼

OK Cancel

PHYTOPLANKTON LOCATIONS

The contact information will pull from the Payroll Setup – Tax Form Setup

Tax Form Setup

Tax Form Signature	+	Tax Form Phone Number	123-123-4567
Tax Form Name	Company President	Tax Form Email Address	company.president@company.com
Social Security Administration User ID		Tax Form Fax Number	
Tax Form Title	President	Tax Form Rounding	0.00

Employer Record

Tax Year is filled in on the prior screen.

Agent Indicator Code: If applicable, enter one fo the following (normally this is not needed):

2020

Submitter Record

Employer Record

General

Tax Year: 2020

Agent Indicator Code:

Employer/Agent EIN: 121234567

Agent for EIN:

Terminating Business Indicator: ☐

Establishment Number:

Other EIN:

Kind of Employer: N

Employment Code: R

Tax Jurisdiction Code:

Third-Party Sick Pay Indicator: ☐

Reporting State Abbreviation:

Reporting State Code:

State Employer Account No. Position: 248

Local Tax Type to Export:

Employer

Name: CRONUS USA, INC.

Location Address: WESTMINSTER

Delivery Address: 7122 SOUTH ASHFORD STR

City: ATLANTA

State Abbreviation: GA

ZIP Code: 31772

ZIP Code Extension:

Foreign State:

Foreign Postal Code:

Country Code:

Employer Contact

Name:

Phone Number:

Phone Extension:

Fax Number:

E-Mail:

1 = 2678 Agent (Approved by IRS)

2 = Common Paymaster (A corporation that pays an employee who works for two or more related corporations at the same time.)

3 = 3504 Agent

Note: Review [Section 2.1 Agent Determination](#) in Specification for Filing Forms W-2 Electronically before entering 1,2 or 3 in this field. If more than one code applies, use the one that best describes your status as an agent. Otherwise, fill with a blank.

Kind of Employer (default is N):

Employment Code (default is R):

Tax Jurisdiction Code:

N = None apply

T = 501c non-govt (Tax Exempt Employer)

S = State/local non-501c (State and Local Governmental Employer)

Y = State/local 501c (State and Local Tax Exempt Employer)

F = Fedal govt (Federal Government)

R = Regular (all others) (Form 941)

M = Military (Form 941)

A = Agriculture (Form 943)

F = Regular (Form 944)

X = Railroad (CT-1)

H = Household (Schedule H)

Q = Medicare Qualified Government Employment (Form 941)

Blank

P = Puerto Rico

V = Virgin Islands

G = Guam

S = American Samoa

N = Northern Mariana Islands

Once all information is filled in on the EFW2 Export Request – select validate Request this will help to make sure the form is filled out properly. If there is additional information needed you will receive an error message letting you know. Select 'OK'.

When creating the file to export CLEAR ALL in the W2 format to Print, this will eliminate a W2 preview prior to creating the electronic file. Then select Preview this will create the electronic file.

Sample file:

[illegible]