



BC Webinar

Go for Gold
Win the Year-End Olympics



PODIUM SETUP

Webinar Overview

This webinar provides a comprehensive overview of year-end payroll processes and vital updates for professionals.

Key Events Covered

Focus includes Payroll NOW updates, W2 distribution, ACA reporting, and compliance requirements for year-end.

Gold Medal Support

Expert trainers available throughout the session to answer questions and provide guidance for the Olympics participants.





Schedule of Events

GO FOR GOLD



- Payroll Now & Compliance Updates
- Year-End Checklist
- W2 Distribution Management
 - E-Filing W2s
 - Electronic Distribution & Print Services
 - Emailing W2s & Publishing to ESS
 - Reconciliation – Balancing W2s
- ACA Reporting
 - Employer Mandate Overview
 - What's New
 - ACA Penalties & Compliance Tips
 - ACA Deadlines





INTRODUCTION



CARRIE CREIGHTON
Payroll Now Implementer



DAWN BLUE
Professional Services
Engineer & Lead



LAURA HAUKEDAHL
Payroll Tax Filing Specialist



INTRODUCTION



SHELLIE AUSTIN
Onboarding Manager



LISA MOTT
Payroll Tax Filing Assistant



BC Year-End 2025 Webinar

Chat

Shared

Details

Recap

Attendance

Q&A

Polls ▾



PAYROLL NOW AND COMPLIANCE UPDATES

Tax Table and Compliance Updates

Payroll NOW includes updated tax tables and compliance updates.

FUTA Credit Reduction Rates

Recent changes to FUTA credit reduction rates affect payroll calculations for specific states, requiring timely updates.

- California
- Virgin Islands

Resource Center and Guidance

The Integrity Data Resource Center provides essential links and resources for updating BC Payroll NOW effectively.

[ID Resource Center for BC](#)

Timely Year-End Processing

Updating payroll tax tables promptly ensures accurate year-end processing and compliance with regulations.



FAQ: 2025 PAYROLL TAX CHANGES FOR EMPLOYERS (OBBBA)



1. Do I need to change how I withhold taxes on tips and overtime?

No. Continue withholding federal income tax and FICA (Social Security and Medicare) on all wages, including tips and overtime. The “no tax” provisions in OBBBA are income tax deductions for employees—not payroll tax exemptions.

2. Should I update my payroll system to track tips and overtime differently?

Yes. In Payroll NOW:

- Flag “qualified tips” separately.
- Identify the FLSA 0.5× overtime premium portion of time-and-a-half pay. This supports future reporting and helps employees claim their deductions.

Integrity Data will upload a KB article to the resource center with further information regarding these set ups.

3. Do I need to report tips and overtime separately on the 2025 Form W-2?

Not yet. The IRS granted transition relief for 2025. You may use the current W-2 format. Recommended:

- Include tip and overtime breakdowns in Box 14 or a separate statement.
- Begin tracking occupation codes for tipped employees.

4. What changes are coming for 2026 reporting?

Starting in 2026, **employers** must report:

- Box 14b: Treasury tipped occupation code.
- Box 12: Code “TP” for qualified tips, and “TT” for qualified overtime. Update your payroll system to support these fields.

5. What is the new FICA Tip Credit and who qualifies?

The credit now applies to salons, spas, barbershops, and other beauty/wellness businesses. Employers may claim 7.65% of FICA taxes paid on tips (above minimum wage thresholds) if:

- Tips exceed 15% of gross receipts.
- Tips are properly reported and taxed.



FAQ: 2025 PAYROLL TAX CHANGES FOR EMPLOYERS (OBBBA)



6. How do I claim the FICA Tip Credit?

File IRS Form 8846 with your annual business tax return. Partnerships and S Corps pass the credit via Schedule K-1. General filers use Form 3800, Part III, line 4f. You'll need:

- Total reported tips per employee.
- Proof that FICA taxes were paid on those tips.

7. Do I need to retroactively adjust payrolls for earlier in 2025?

No. The IRS allows employers to use reasonable methods to estimate qualified tips and overtime for 2025. You don't need to reprocess payrolls, but you should maintain accurate records. Payroll NOW may use the overtime ledger to support this.

[Payroll Peace of Mind](#) - Click here for more information

8. What should I communicate to employees?

Let employees know:

They may be eligible for new income tax deductions on their 2025 return. You'll provide tip and overtime summaries to support their filings. These deductions do not affect paycheck amounts or payroll withholdings.

Note: Consider using “tax break” or “write-off” instead of “deduction” to avoid confusion with payroll deductions.

9. Will Payroll NOW be updated to support these changes?

Yes. Integrity Data is updating Payroll NOW to:

- Track qualified tips and overtime (using distinct payroll codes).
- Support new W-2 fields for 2026.
- Assist employers in gathering data for the FICA Tip Credit.

10. Where can I find official guidance?

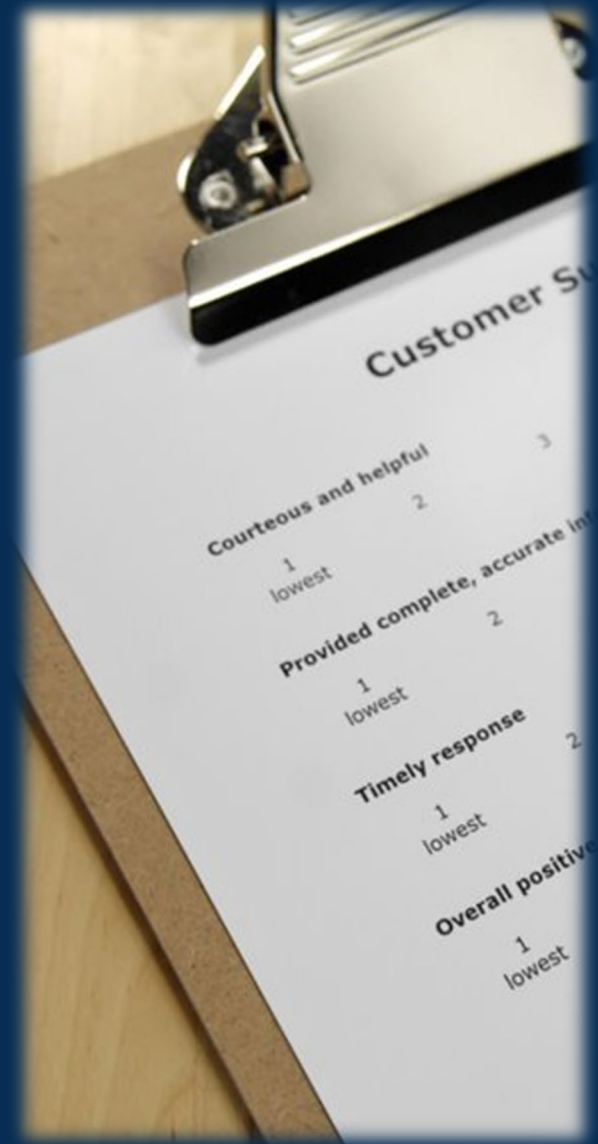
- IRS Fact Sheet FS-2025-03
- IRS Notice 2025-62 (transitional relief)
- IRS Notice 2025-69 (deduction guidance)
- IRS Form 8846 instructions
- Integrity Data Resource Center for Business Central



YEAR-END CHECKLIST OVERVIEW

- ☐ Complete Employee Adjustments
 - ☐ Gross-ups, Fringe Benefits, GTL, Employer portion of Medical Insurance, PUCC, and 3PSP.
- ☐ Preview W-2s
- ☐ Update Tax Tables
- ☐ Update SUI Rates & Wage Limits
- ☐ Update Local Taxes
- ☐ Pay Cycles & Calendars
- ☐ Benefit Rates

▪ **View the detailed YE Checklist:** [Payroll-NOW-Year-End-Checklist](#)



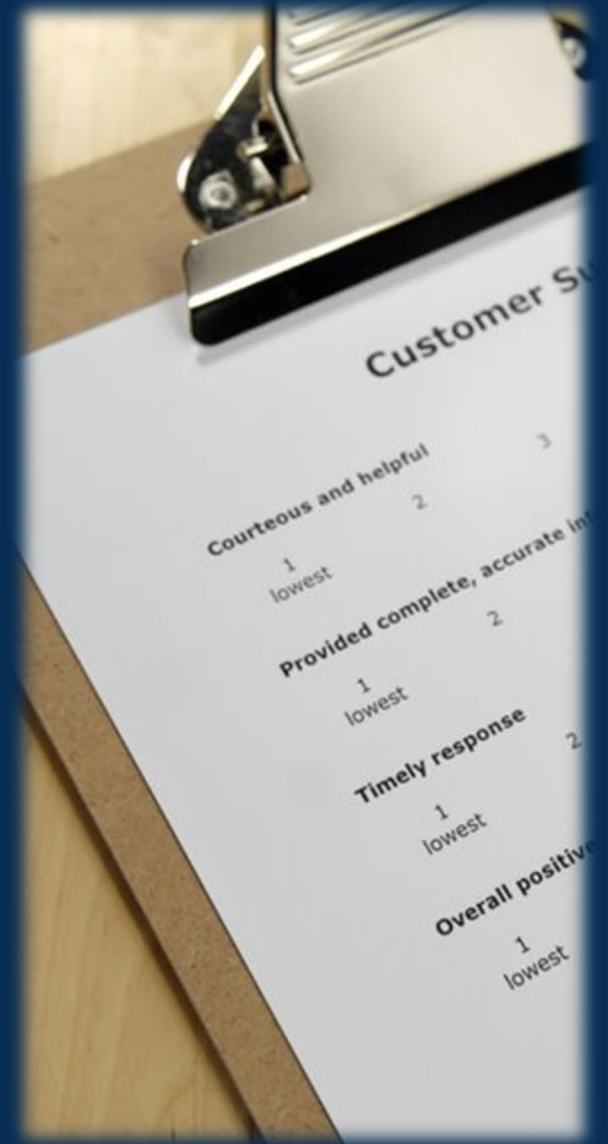
BALANCING QUARTER END

Recommended Reports for Quarterly Balancing

- ☐ 941 Reconciliation Report
- ☐ Futa Report
- ☐ State Income Tax Report
- ☐ Local Income Tax Report
- ☐ Suta Report
- ☐ Additional Taxes Report

RESOURCE CENTER LINK:

[Quarterly and Year-End Payroll Tax Balancing](#)





Resource Center = [BALANCE W2 IN PAYROLL NOW](#)

BALANCING W2S

Importance of Reconciliation

Balancing W2s with 941 reports ensures accurate year-end tax reporting and prevents IRS penalties.

Using Filed 941 Totals

Use actual filed 941 report totals, not reprinted versions, to avoid discrepancies during reconciliation.

Print the W3

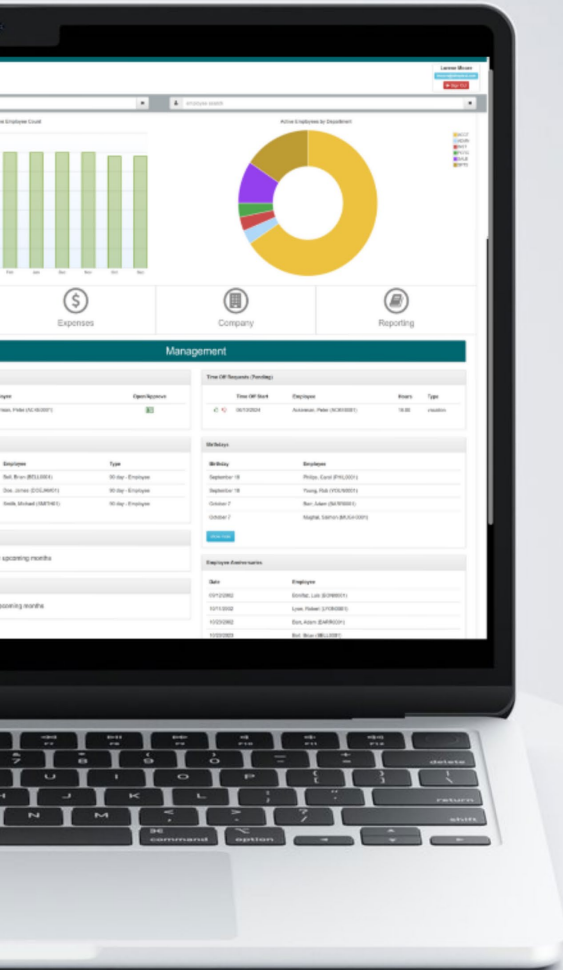
The W3 will give you the year-to-date totals for the tax year.

Reconciliation Tools

The Reconciliation Spreadsheet from the Resource Center simplifies comparing W3 and 941 report totals.



W3 Reports For Reconciliation



Payroll Menu

			Full Payroll Menu
Payroll Processing	Reports	History	Periodic Activities
Payroll Employees	Payroll Report	Posted Payroll	Periodic Processing..
Payroll Processing	US Tax Reports..	Payroll Ledger Entries	Financial Periodic Activities..
Batch Payroll Processing	941 Report	Payroll Statistics	ACA Compliance..
Additional Processing Tables..	940 Report	Posted Batch List	Web Portal Documents..
Payroll Journal	941 Liability Adjustments	PTO Ledger Entries	Create Emp. Info. from Template..
PTO Management..	W2 Report	Hours Detail Entries	Time Transfer Reports..
Enter Hours / Quantity..	W3 Report	Approved PTO Hours	Labor Cost Updates..
Emp. Change Req./Approve..	W2 Distribution Management	Other Ledgers..	Automatic Data Migration..
	943 Report		

- ❑ View the detailed Quarterly and YE Reports in our [Resource Center](#)
- ❑ SEARCH = "BALANCE W2 IN PAYROLL NOW"



Balancing Your Returns

Download/Create a Simple Spreadsheet

Simple Spreadsheet - Example

Item	941 Line	Qtr 1	Qtr 2	Qtr3	Qtr4	Total	W2 Box	W3 Totals	Difference
Federal Wages	941 Line 2	\$ 1,675,594.34	\$ 2,393,678.29	\$ 2,973,602.54	\$ 2,433,728.41	\$ 9,476,603.58	W3 Box 1	\$ 9,476,603.58	\$ -
Federal Withheld	941 Line 3	\$ 212,869.80	\$ 315,529.45	\$ 397,010.58	\$ 338,338.40	\$ 1,263,748.23	W3 Box 2	\$ 1,263,748.23	\$ -
Social Security Wage	941 Line 5a Column 1	\$ 1,791,073.98	\$ 2,279,959.15	\$ 2,197,015.83	\$ 1,574,907.31	\$ 7,842,956.27	W3 Box 3	\$ 7,842,956.27	\$ -
Social Security Tips	941 Line 5b Column 1	\$ -	\$ -	\$ -	\$ -	\$ -		\$ -	\$ -
Social Security Tax	941 Line 5a + 5b Column 2	\$ 222,093.17	\$ 282,714.93	\$ 272,429.88	\$ 195,288.51	\$ 972,526.49	W3 Box 4	\$ 486,263.14	\$ (0.10)
Medicare Wages	941 Line 5c Column 1	\$ 1,791,073.98	\$ 2,493,965.71	\$ 3,064,871.95	\$ 2,479,191.32	\$ 9,829,102.96	W3 Box 5	\$ 9,829,102.96	\$ 0.00
Medicare Tax	941 Line 5c Column 2	\$ 51,941.15	\$ 72,325.01	\$ 88,881.88	\$ 71,896.55	\$ 285,044.59	W3 Box 6	\$ 156,605.19	\$ 0.11
Add'l Medicare Wage	941 Line 5c Column 1	\$ -	\$ 143,688.04	\$ 631,979.73	\$ 789,065.20	\$ 1,564,732.97		\$ -	
Add'l Medicare Tax	941 Line 5c Column 2	\$ -	\$ 1,293.19	\$ 5,687.82	\$ 7,101.77	\$ 14,082.78		\$ -	
Total Adjustments	941 Line Line 7 + 8 + 9	\$ 0.06	\$ -	\$ 0.01	\$ -	\$ 0.01			
Total Tax	941 Line 10	\$ 486,904.18	\$ 671,862.58	\$ 764,010.17	\$ 612,625.23	\$ 2,535,402.10			

Download our Reconciliation Template for Balancing

- [“941-to-W2-Reconciliation-Spreadsheet.xlsx”](#)
- [Balance W-2 in Payroll NOW - Integrity Data](#)

Be sure to use the totals that were filed from the previous quarters.



Balancing Your Returns

Download/Create a Simple Spreadsheet

Simple Spreadsheet - Example

A	B	C	D	E	F	G	H	I	J
Item	941 Line	Qtr 1	Qtr 2	Qtr3	Qtr4	Total	W3 Box	W3 Totals	Difference
Federal Wages	941 Line 2					=SUM(C2:F2)	W3 Box 1		=SUM(I2-G2)
Federal Withheld	941 Line 3					=SUM(C3:F3)	W3 Box 2		=SUM(I3-G3)
Social Security Wages	941 Line 5a Column 1					=SUM(C4:F4)	W3 Box 3		=SUM(I4-G4)
Social Security Tips	941 Line 5b Column 1					=SUM(C5:F5)			=SUM(I5-(G5/2))
Social Security Tax	941 Line 5a + 5b Column 2					=SUM(C6:F6)	W3 Box 4		=SUM(I6-(G6/2))
Medicare Wages	941 Line 5c Column 1					=SUM(C7:F7)	W3 Box 5		=SUM(I7-G7)
Medicare Tax	941 Line 5c Column 2					=SUM(C8:F8)	W3 Box 6		=SUM(I8-((G10+(G8/2))))
Add'l Medicare Wages	941 Line 5d Column 1			0		=SUM(C9:F9)			
Add'l Medicare Tax	941 Line 5d Column 2			0		=SUM(C10:F10)			
Total Adjustments	941 Line Line 7 + 8 + 9			0		=SUM(C11:F11)			
Total Tax	941 Line 10	=SUM(C3,C6,C8, C10,C11)	=SUM(D3,D6,D8, D10,D11)	=SUM(E3,E6,E8, E10,E11)	=SUM(F3,F6,F8, F10,F11)	=SUM(G3,G6,G8, G10,G11)			



W2 DISTRIBUTION AND FILING

E-filing W2s

Uploading W2 Data For Outsourced Tax Filing Services

Publishing to ESS (Employee Self-Service)

Emailing W2s

W2 Print & Mail Services

Printing Forms



PRINTING W2

Report by Employee

- Reports
 - Payroll Report
 - US Tax Reports..
 - 941 Report
 - 940 Report
 - 941 Liability Adjustments
 - W2 Report
 - W3 Report
 - W2 Distribution Management
 - 943 Report

W2 Distribution Management

▼

+ New

Edit List

Delete

Home

Reports

More options

W2 Report

	Year ↑ ▼	Payroll Employee No. ↑	First Name	Last Name	Pap... W2 Opt- in
→	2025				☐



PRINTING W2

Report by Employee

W2ExcelLayout

W2 Report

Printer (Handled by the browser) v

Report Layout 14141213-000001 ...

Options

Additional Copies

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

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 ☒

Report Layouts

Report ID ↑	Report Name	Layout Name	Description	Extensic
14141213	W2 Report	USPYW2Report	USPYW2Report	Primo
→ 14141213	W2 Report	W2ExcelLayout	W2ExcelLayout	Primo



PRINTING W2

Report by Employee

W2 Report

Printer (Handled by the browser) ▾

Report Layout 14141213-000001 ...

Options

Additional Copies 0

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

Year 20

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 ☒

Unless you need to edit, it's safer to stay in Protected View. [Enable Editing](#)

Result Example

F	G	H	I	J	K	L	M	N	O
Address1	Address2	City	State	ZipCode	Email	No.	Box1	Box 2	Box 3
225 Navy Blvd		Virginia Beach	VA	00000		EMP10001-2021	3,076.90	490.00	3,076.90
201 Alexandria Ln		Panama	IN	46001	drewvinson@primopayday.com	EMP10001-2021	20,720.00	2,786.00	20,720.00
147 Poshier Blvd		Panama	IN	46001	info@primopayday.com	EMP10001-2021	6,246.17	782.00	6,246.17
						EMP10001-2021	2,185.39	232.00	2,185.39
						EMP10001-2021	1,150.00	112.00	1,150.00
						EMP10001-2021	1,290.00	40.00	1,290.00
						EMP10001-2021	1,290.00	59.00	1,290.00
						EMP10001-2021	1,700.00	110.00	1,700.00



Choose file type...

- ☐ PDF Document
- ☐ XML Document
- ☐ Microsoft Word Document
- ☒ Microsoft Excel Document (data and layout)
- ☐ Microsoft Excel Document (data only)
- ☐ Schedule...

OK

Cancel



MAPPING

Payroll Code Setup Card

Deduction · HEALTH INSURANCE

Copy from Payroll Code | More options

Payroll Code

Type	Deduction	Blocked	☒
Code	HEALTH INSURANCE	Use Default State Ear...	☐
Description	Health Insurance	Tax Reporting Type	
Manual Input Allowed	☒	943 Payroll Code	☐
W2 Classification	12DD	Leave Type	
W2 Box 14 Caption		Workers Comp Code	☐
State Code		Zero Hour Reason	

- Mapping Payroll Codes to the W2

- Payroll Menu
- Setup column
- Pay Codes
- Find missing pay code
- W2 Classification field
- Select from dropdown



ELECTRONIC DISTRIBUTION & PRINT SERVICES

EMAILING W2S & PUBLISHING TO ESS

Email Setup for W2s

- Configure SMTP settings and ensure accurate employee email addresses for efficient W2 distribution via email.



Document Verification

Verify W2 document downloads and signatures via the ESS portal to ensure compliance and accessibility.

Publishing to ESS Portal

Save W2s to the Payroll Files Table to enable seamless access through the Employee Self-Service portal.



E-FILING W2S

- Load W2 Employees for the New Year

W2 Distribution Management

| [+ New](#) [Edit List](#) [Delete](#) [Home](#) [Reports](#)

[Load W2 Employees](#) [Email W2 to Employees](#) [W2 Downloaded / Si](#)

	Year ↑ ▾	Payroll Employee No. ↑	First Name	Last Name
→	2025			

Load W2 Employees

Options

W2 Year to Load **Enter Accurate Year =** 2025

Filter: Payroll Employee

× No. **LEAVE BLANK for all employees** ▾

× Paperless W2 Opt-in ▾

+ Filter...

Filter totals by:

+ Filter...

[Schedule...](#) [OK](#) [Cancel](#)



UPLOADING W2 E-FILE

- **WITH** OUTSOURCED TAX FILING SERVICES

The screenshot displays the 'W2 Distribution Management' interface. The top navigation bar includes icons for a dropdown menu, search, and a grid, followed by buttons for '+ New', 'Edit List', 'Delete', 'Home' (highlighted with a red box), 'Reports', and 'More options'. Below this, a row of action buttons includes 'Load W2 Employees', 'Email W2 to Employees', 'W2 Downloaded / Signed', 'Electronic W2 File Setup', 'Send to Mail Service', and 'Send to E-File Service' (highlighted with a red box). The main content area features a table with columns for 'Year' (set to 2025), 'Payroll Employee No.', and 'First Name'. A modal dialog box is open, asking: '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?'. The dialog has 'Yes' and 'No' buttons, with 'Yes' highlighted by a red box.

W2 Distribution Management

Home 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 ↑ 2025 Payroll Employee No. ↑ First Name

Printed Sent via Email

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

* The upload of E-files for tax services is due by midnight January 9, 2026.



UPLOADING W2 E-FILE

- **WITH OUTSOURCED TAX FILING SERVICES**

- The upload of E-files for tax services is due by *midnight on February 2nd, 2026.*

EFW2 Export Request - 2021

Submitter Record

Preparation

Social Security Admini. *

Preparer Code

Software

Software Vendor Code

Software Code

Resubmission

Resub Indicator ☐

Resub WFID

Company

Name

Location Address

Delivery Address

City

State Abbreviation

ZIP Code

Submitter

EIN

Name

Location Address

Delivery Address

City

State Abbreviation

ZIP Code

ZIP Code Extension

Foreign State

Foreign Postal Code

Country Code

Contact

Name

Phone Number

OK Cancel

EFW2 Export Request - 2023

General

Tax Year

Agent Indicator Code

Employer/Agent EIN

Agent for EIN

Terminating Business I... ☐

Establishment Number

Other EIN

Kind of Employer

Employment Code

Tax Jurisdiction Code

Third-Party Sick Pay In... ☐

Reporting State Abbre...

Reporting State Code

Export for All States ☒

State Employer Accou...

Local Tax Type to Exp...

Employer

Name

Location Address

Delivery Address

City

State Abbreviation

ZIP Code

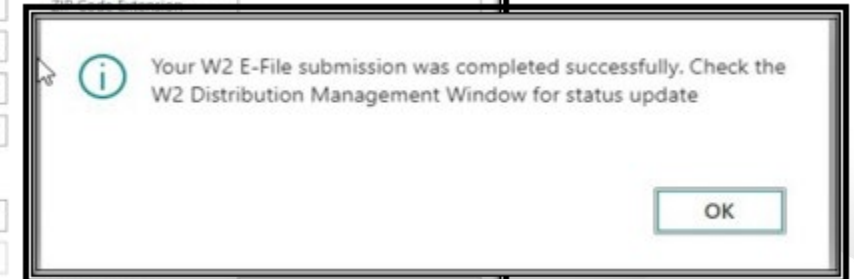
Phone Extension

Fax Number

E-Mail

Line Creation Settings >

OK Cancel



CREATING W2 E-FILES

- **WITHOUT** Outsourced Tax Filing Service

W2 Distribution Management

   | [+ New](#) [Edit List](#) [Delete](#) [Home](#) [Reports](#) | [More options](#)

[W2 Report](#)

	Year ↑ ▼	Payroll Employee No. ↑	First Name	Last Name	Pap... W2 Opt- in
→	2025				☐



CREATING W2 E-FILES

- **WITHOUT**
Outsourced Tax
Filing Service

Federal
Electronic
File

W2 Report



Printer

(Handled by the browser) ▾

Report Layout

14141213-000001 ...

Options

Additional Copies

W2 Format to Print

4up ▾

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

☒

Additional Options:



CREATING W2 E-FILES

- **WITHOUT**
Outsourced Tax Filing Service

State Electronic File

– verify EFW2 data for each state requirements prior to export

EFW2 Export Request - 2025

Submitter Record [Show more](#)

Preparation	Submitter
Social Security Admini.. *	EIN 000900909
Preparer Code L	Name INTEGRITY DATA INC.
Software	Location Address
Software Vendor Code ... 1724	Delivery Address *
Software Code 99	City LINCOLN
Resubmission	State Abbreviation IL
Resub Indicator ☐	ZIP Code 62656
Resub WFID	ZIP Code Extension
Company	Contact
Name INTEGRITY DATA INC.	Name PATRICK DOOLIN
Location Address	Phone Number 217-555-5555
Delivery Address	Extension
City LINCOLN	Fax
State Abbreviation IL	E-Mail *
ZIP Code 62656	

EFW2 Export Request - 2025

Employer Record

General	Employer
Tax Year 2025	Name
Agent Indicator Code ...	Location Address
Employer/Agent EIN 000900909	Delivery Address
Agent for EIN	City
Terminating Business I... ☐	State Abbreviation
Establishment Number ...	ZIP Code
Other EIN	ZIP Code Extension ...
Kind of Employer N	Employer Contact
Employment Code R	Name
Tax Jurisdiction Code ...	Phone Number
Third-Party Sick Pay In... ☐	Phone Extension
Reporting State Abbre...	Fax Number
Reporting State Code ...	E-Mail
Export for All States ☐	



CREATING W2 E-FILES

- **WITHOUT**
Outsourced Tax Filing Service

W2 Report

Mask Social Security Number ☐

Additional Options:

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 ☐

Filter: Payroll Employee

× No.

× Employee Posting Group

Payroll Files

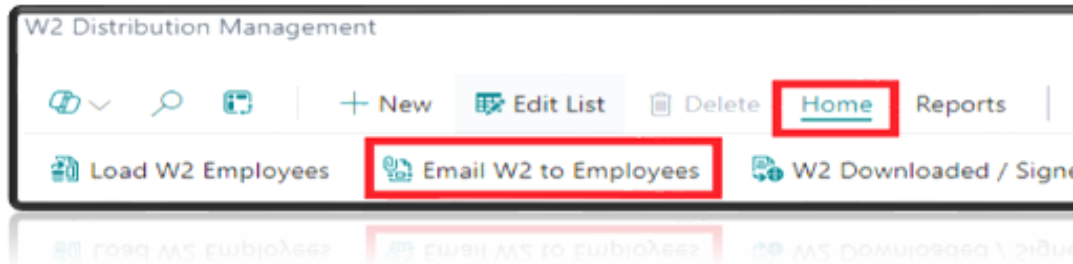
Search Edit List Delete **Download File** Upload File Upload Files from Zip Automate Fewer options

	Path Filter	Name
☒	C:\EMP DOCS\	EFW2-Federal.txt
☒	C:\EMP DOCS\	EFW2-AL.txt
☒	C:\EMP DOCS\	EFW2-AR.txt
☒	C:\EMP DOCS\	EFW2-AZ.txt



EMAILING W2

- Select “Password Protect” on all PDF email attachments



- Employee email address in employee card
- SMTP Mail Setup
- Password Protect

The 'Email W2s to Distribution List' dialog box contains the following sections:

- Pages to Print:** A list of items with toggle switches. 'Copy 1' is off, while 'Copy B', 'Copy C', 'Copy 2', 'Copy 2', 'Copy D', 'Notice to Employee', 'Instructions to Employee pg1', and 'Instructions to Employee pg2' are all on.
- Filter: W2 Distribution Management:** A section with four dropdown menus, the first three of which are highlighted with a red box:
 - '× Paperless W2 Opt-in' is set to 'Yes'.
 - '× Sent via Email' is set to 'No'.
 - '× Distribution Completed' is set to 'No'.
 - '× Payroll Employee No.' is an empty dropdown.

Resource Center:

☐ **Year-End Process Guide - Integrity Data**



PUBLISHING W2S TO ESS

W2 Report

Printer (Handled by the browser) v

Options

Additional Copies 0

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

Year 2025

Set Printed to True in W2 Dist. ☐

Adjust Numbers Down v

Export to W-2 Electronic File ☐

Save to Employee Files ☒

Collapse Multiple Local ☐

Mask Social Security Number ☐

Integrity Data
Your source for payroll

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**View the detailed Payroll
Year End Process Guide & Documents**



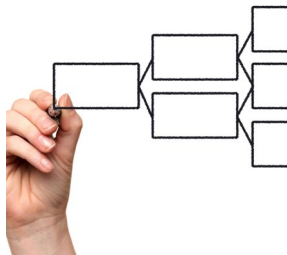
YEAR-END OUTSOURCED TAX SERVICE

Tax Customer are responsible for:

- Send all new SUI rates & wage limit changes to the tax team at ID.
- Terminate any state agencies that you are no longer doing business in:
 - Should include states that you have not paid any employees in the current year, & do not plan on paying any employees in the future, should be terminated.
 - Be sure to let your ID tax team know so we no longer file zero returns to that entity.
- Forward any communications that will affect your tax filings to the tax team.
 - Ex. Changes to your deposit or filing frequencies
- Send out the required W-4 reminder by December 10th to your employees

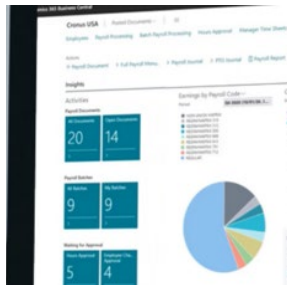


W2 PRINT & MAIL SERVICE



Five-Step Distribution Process

The service involves accessing management, sending files, approving terms, verifying counts, and confirming submission.



Electronic W2 Publication

Employers must publish electronic W2s first to select which forms are printed and mailed.

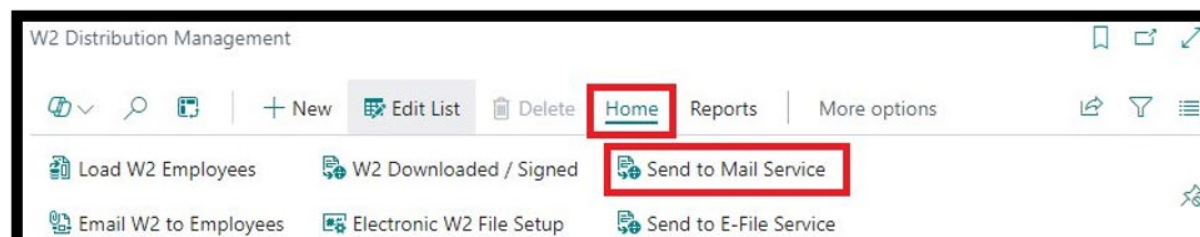


Simplified Compliance

This service streamlines W2 distribution while ensuring IRS compliance for employee document furnishing.



W2 PRINT & MAIL SERVICE



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 **\$3.50**

Deadlines

* W2 forms must be submitted to Print & Mail Services by Midnight **1/12/2026** CST.

* W2 Forms will be postmarked by **2/2/2026**

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



W2 PRINT & MAIL SERVICE



W-2 Print Fulfillment TOS Confirmation

Select link to access Integrity Data Term of Service.

Accept TOS ☒

Decline Terms of Service ☐

OK

Cancel

W-2 Print Fulfillment TOS Processing

You have selected 110 out of a total of 110 W2 forms.

These W2s will be postmarked by **2/2/2026**

Select Ok to process the W-2s.

OK

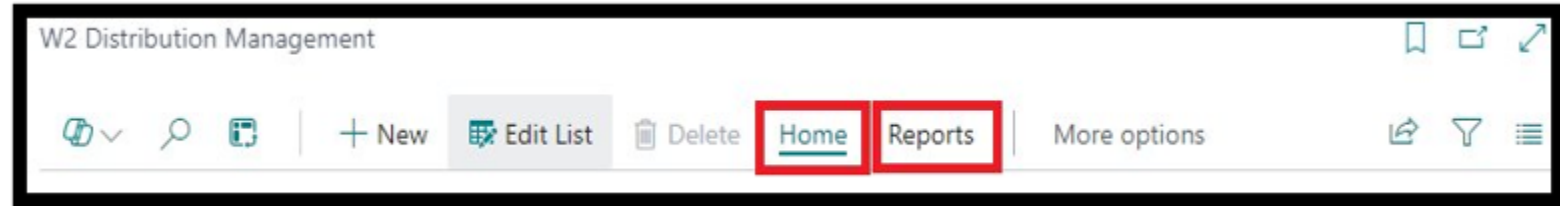
Cancel



PRINTING FORMS



W2 Distribution Management



- ❏ [View the detailed *Payroll Year-End Process Documents* in our Resource Center](#)



PRINTING FORMS

W2 Distribution Management

The Home options include:

- **Load W2 Employees** – This provides a list of all employees with earnings in the current year. This should include any blocked or terminated employees with earnings.
- **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.
- **W2 Downloaded / Signed** – This is only valid if you have Web portal. It provides a list of employees that have downloaded their W2 and signed it digitally.
- **Electronic W2 File Setup** – State Specific Filing setup.

❏ View the detailed *Payroll Year-End Materials* in our [Resource Center](#)



PRINTING FORMS

W2 Distribution Management

The Report options include:

- **W2 Report** – Provides multiple ways to print W2's.
- **Paperless W2 Opt-in:** This is located on each employee card under the Administration tab.
- **Printed:** Once the 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
- **Sent via Email:** This will populate if W2's are emailed
- **Downloaded from Self-Service Web Portal:** This will be populated when employees access the portal and download their W2
- **Signed via Self-Service Web Portal:** This will be populated when employees access the portal, download, and sign their W2 if required.
- **Distribution Completed:** This will be populated if any of the other options are filled in. It allows for quick filtering to see who has completed the necessary steps.



PRINTING W2's

Print Form Options:

- 1 Form per page with layout
- 4 up Form

W2 Report [icon] [icon] [icon]

Printer (Handled by the browser) [v]

Report Layout 14141213-000001 [...]

Options

Additional Copies 0

W2 Format to Print Copy B/Copy C/Copy 2 with Instructions [v]

Year 2025

Set Printed to True in W2 Dist. [toggle]

Adjust Numbers Down [v]

Export to W-2 Electronic File [toggle]

Save to Employee Files [toggle]

Collapse Multiple Local [toggle]

Mask Social Security Number [toggle]

Additional Options:

Check 3rd Party Sick Pay Box [toggle]

Pages to Print

4up Format (requires preprinted...) [toggle]

Copy B [toggle]

Copy C [toggle]

Copy 2 [toggle]

Copy 2 [toggle]

Copy D [toggle]

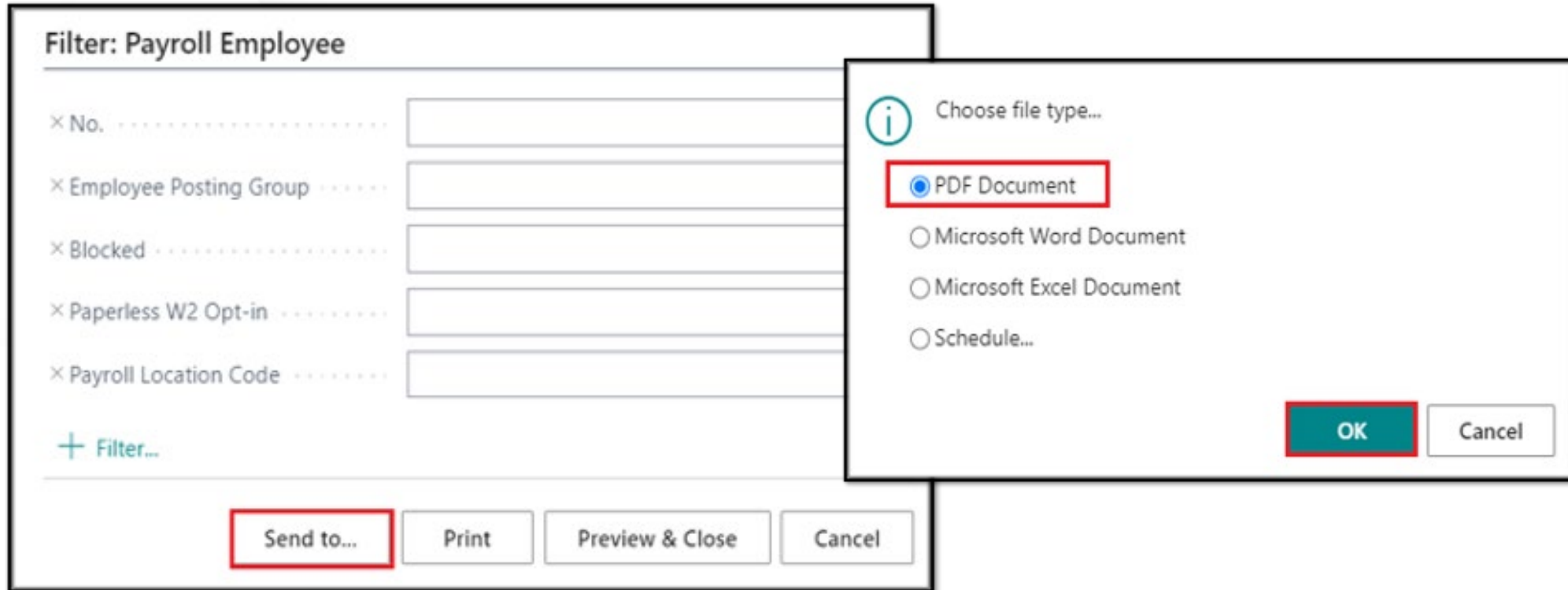
Notice to Employee [toggle]

Instructions to Employee pg1 [toggle]

Instructions to Employee pg2 [toggle]



PRINTING W2's



The screenshot displays a payroll system interface. On the left, a filter menu titled "Filter: Payroll Employee" contains several criteria with checkboxes and input fields: "× No.", "× Employee Posting Group", "× Blocked", "× Paperless W2 Opt-in", and "× Payroll Location Code". Below these is a "+ Filter..." link. At the bottom of the filter menu are four buttons: "Send to...", "Print", "Preview & Close", and "Cancel". The "Send to..." button is highlighted with a red box. Overlaid on the right is a "Choose file type..." dialog box. It features an information icon and five radio button options: "PDF Document" (selected and highlighted with a red box), "Microsoft Word Document", "Microsoft Excel Document", and "Schedule...". At the bottom of the dialog are "OK" and "Cancel" buttons, with the "OK" button highlighted by a red box.

Filter: Payroll Employee

× No.

× Employee Posting Group

× Blocked

× Paperless W2 Opt-in

× Payroll Location Code

+ Filter...

Send to... Print Preview & Close Cancel

Choose file type...

☒ PDF Document

☐ Microsoft Word Document

☐ Microsoft Excel Document

☐ Schedule...

OK Cancel





RESOURCE PAGE

[Resource Center - Integrity Data](https://integrity-data.com)
[\(\[integrity-data.com\]\(https://integrity-data.com\)\)](https://integrity-data.com)





ACA REPORTING



ACA EMPLOYER MANDATE

All Applicable Large Employers (ALE) must comply with the ACA

Applicable Large Employer (ALE)

A U.S. employer with 50 or more full-time employees, including equivalents, in the previous tax year



Who needs to be compliant?



WHAT'S NEW FOR ACA REPORTING IN 2025

- Alternative Furnishing Method
- Electronic Distribution Allowed
- Missing SSN Flexibility
- Extended IRS Penalty Letter Response Time
- Statute of Limitations for ACA Penalties
- Mandatory E-filing Requirements



ACA PENALTIES & COMPLIANCE TIPS

IRS Penalties for ACA Non-Compliance

IRS Penalties Amounts Include:

- ✓ Charges for Not Offering Coverage: (Penalty A): \$2,970 per full-time employee (minus the first 30 employees)
- ✓ Charges for Unaffordable Plans: (Penalty B): \$4,460 per affected employee
- ✓ Charges for Incorrect Reporting: \$330 per return or \$660 per return for non-filing
- ✓ Charges for Lack of Essential Coverage Compliance: \$100 per day per affected employee

Avoiding IRS Penalties

- ✓ Confirm ALE status
- ✓ Track hours & eligibility
- ✓ Offer affordable coverage
- ✓ Audit benefits data
- ✓ Respond to IRS letters timely
- ✓ Automate reporting



ACA DEADLINES

DATE	ACTION	NOTES
Feb 28, 2026	Paper filing of Forms 1094-C and 1095-C	Allowed only for employers filing fewer than 10 aggregated returns
Mar 2, 2026	Furnish Form 1095-C to employees or post a clear notice on website	Notice must remain posted until Oct 15, 2026
Mar 31, 2026	Electronic filing of Forms 1094-C and 1095-C	Mandatory for employers with 10 or more forms via IRS AIR system
Apr 17, 2026	Final corrections due	Submit corrections to compliance service provider before IRS enforcement actions begin





QUESTIONS & ANSWERS

Make Your Year-End Even EASIER!

Form Distribution Services:

We can email, print and mail W-2s for Outsourced Tax Filing Customers!





CONCLUSION & SUPPORT



217-732-3737



CustomerSuccess@integrity-data.com





THANK YOU

Resource Center – Integrity Data.com

<https://www.integrity-data.com/resource-center/>



Your people. Our priority.®

ABOUT US

Since 1996, we have been helping HR and payroll professionals manage and pay their people in Dynamics.

Our Core Values are:

- Operate with **Excellence and Integrity**
- Always eager to **Help and Solve Problems**
- Continue to **Learn, Develop, & Apply**

