

Texas Skyward User Group Conference

W-2 Processing Electronic Printing

Stella Mendoza



W-2 Processing Electronic Printing



W-2 Processing

- Verifying Federal and State Information
- Allowing Employees To Print W-2's
- Reports

Step 1 and Step 1a should probably be built as soon as the September payroll has been processed to make sure all new hires have been set up.

HR\PA\YE\PA\CA\WP - 3084 - W2 Processing

Welcome to the W2 Step by Step Process for Calendar Year 2017

Rates and Maximums are as follows:

FICA Rate: 6.2000 FICA Max: 127,200.00 Medicare Rate: 1.4500 Medicare Max: 9,999,999.99

Step 1 Enter and/or Verify Federal and State Information for W2s

Step 1a (Optional) Allow Employees to Print W2s Electronically

Step 2 Create/Modify/Report W2 Workfile

Step 3 Create W2 Print Files (used to print the W2s)

Step 4 Print the W2s

Step 4a (Optional) Submit Files for Skyward W2 Printing Service

Step 5 Create the W2 Electronic File for Federal and State

Step 6 Create Individual W2 PDF Files

Step 7 W2 Process Final Checklist

Executes federal and state information setup for W2s.

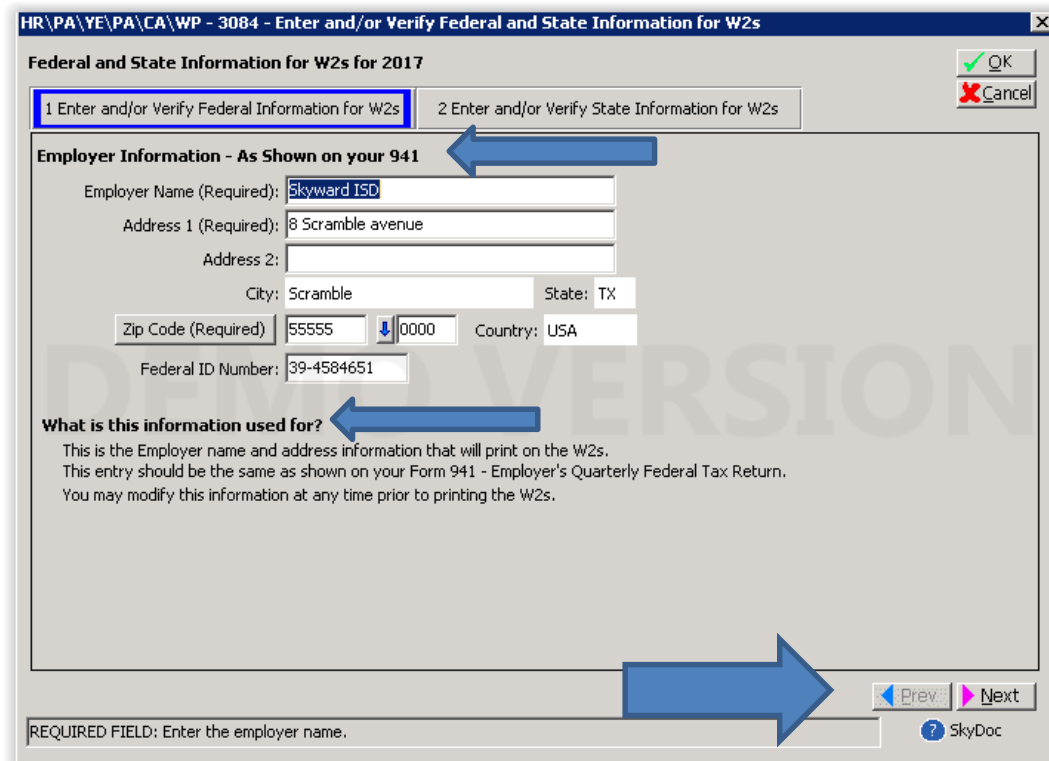
Close

DEMO VERSION

SkyDoc

Information on this tab must match 941.

Click on the tabs to move to the next section or use the “Prev” or “Next” buttons at the lower right corner.



HR\PA\YE\PA\CA\WP - 3084 - Enter and/or Verify Federal and State Information for W2s

Federal and State Information for W2s for 2017

1 Enter and/or Verify Federal Information for W2s 2 Enter and/or Verify State Information for W2s

Employer Information - As Shown on your 941

Employer Name (Required): Skyward ISD

Address 1 (Required): 8 Scramble avenue

Address 2:

City: Scramble State: TX

Zip Code (Required): 55555 0000 Country: USA

Federal ID Number: 39-4584651

What is this information used for?

This is the Employer name and address information that will print on the W2s.
This entry should be the same as shown on your Form 941 - Employer's Quarterly Federal Tax Return.
You may modify this information at any time prior to printing the W2s.

Prev Next

REQUIRED FIELD: Enter the employer name. SkyDoc

#2 Enter State and ID

HR\PA\YE\PA\CA\WP - 3084 - Enter and/or Verify Federal and State Information for W2s

Federal and State Information for W2s for 2017

1 Enter and/or Verify Federal Information for W2s 2 Enter and/or Verify State Information for W2s

W2 Tax States

State	Employer State ID	Active
TX	99-123456	yes

Buttons: + Add, Edit, Delete

HR\PA\YE\PA\CA\WP - 3084 - Tax State Maintenance

Tax State: Active:

State ID #:

Enter the tax state.

Buttons: OK, Cancel, SkyDoc

Prev Next

Highlight Tax State to Edit or Delete.

SkyDoc

Step 1a Will allow employees to request to print their own W-2

HR\PA\YE\PA\CA\WP - 3084 - W2 Processing

Welcome to the W2 Step by Step Process for Calendar Year 2017 Close

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Preview Notification” lists all requirements that must be listed on the Employee Notification letter. There are seven bullet points.

Federal W-2 Notification Reminders (76)

Information from Publication 15-A

Furnishing Form W-2 to Employees Electronically

You may set up a system to furnish Forms W-2 electronically to employees who choose to receive them in that format. Each employee participating must consent electronically (or receive confirmation of any consent made using a paper document), and you must notify the employees of all hardware and software requirements to receive the forms. You may not send a Form W-2 electronically to any employee who does not consent or who has revoked consent previously provided.

To furnish Forms W-2 electronically, you must meet the following **disclosure requirements** and provide a clear and conspicuous statement of each of them to your employees.

- The employee must be informed that he or she may receive a paper Form W-2 if consent is not given to receive it electronically.
- The employee must be informed of the scope and duration of the consent.
- The employee must be informed of any procedure for obtaining a paper copy of any Form W-2 (and whether or not the request for a paper statement is treated as a withdrawal of his or her consent) after giving consent.
- The employee must be notified about how to withdraw a consent and the effective date and manner by which the employer will confirm the withdrawn consent. The employee must also be notified that the withdrawn consent does not apply to the previously issued Forms W-2.
- The employee must be informed about any conditions under which electronic Forms W-2 will no longer be furnished (for example, termination of employment).
- The employee must be informed of any procedures for updating his or her contact information that enables the employer to provide electronic Forms W-2.
- The employer must notify the employee of any changes to the employer's contact information.

You must furnish electronic Forms W-2 by the same due date as the paper Forms W-2. For more information on furnishing Form W-2 to employees electronically, see Regulations section 31.6051-1(i).



Print

Back

Do not need to rebuild prior years.
Click the clone button.

Once done click save . The program
will close.

Allow Employees to Print W2s Electronically Settings

W2 Processing Year: 2017



Allow employees to receive W2s electronically ?

* Dates W2 option visible for employees: 12/01/2017 to 12/31/2017 ?

Email employees once they confirm or deny they would like to receive their W2s electronically.

Confirm Email Body: We have confirmed that you would like to receive your W2 electronically.

Deny Email Body: We have confirmed that you wo

Save
Clone
Back

Report of
Electronic W2
Responses

Confirm Clone

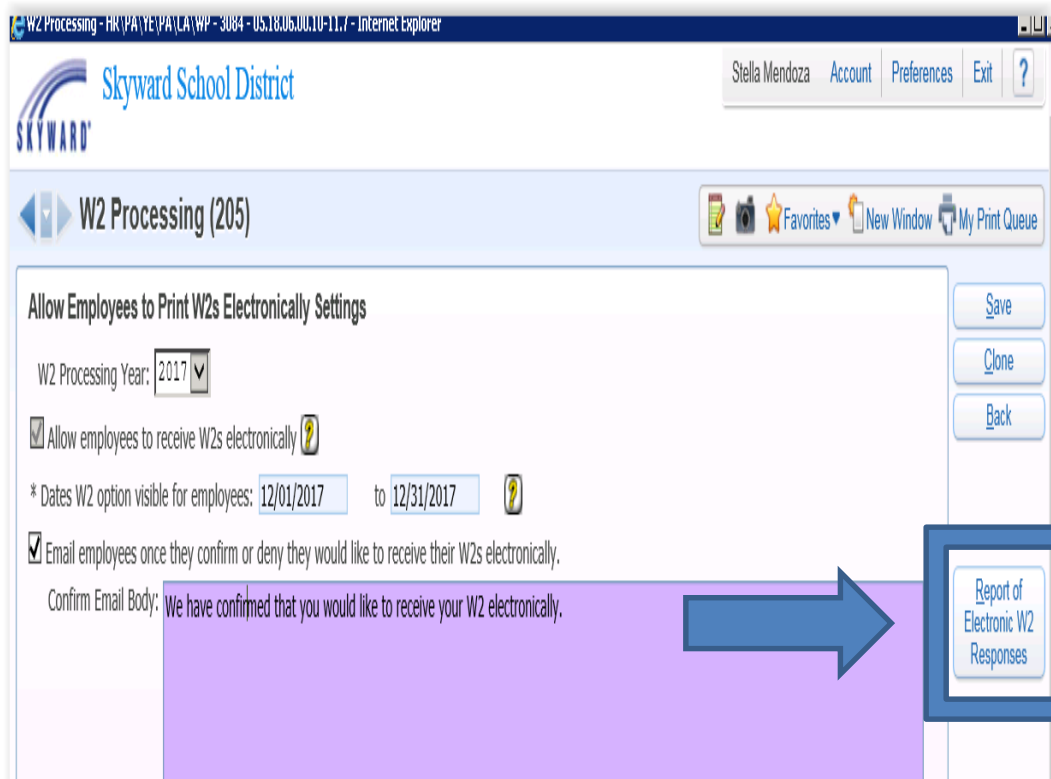
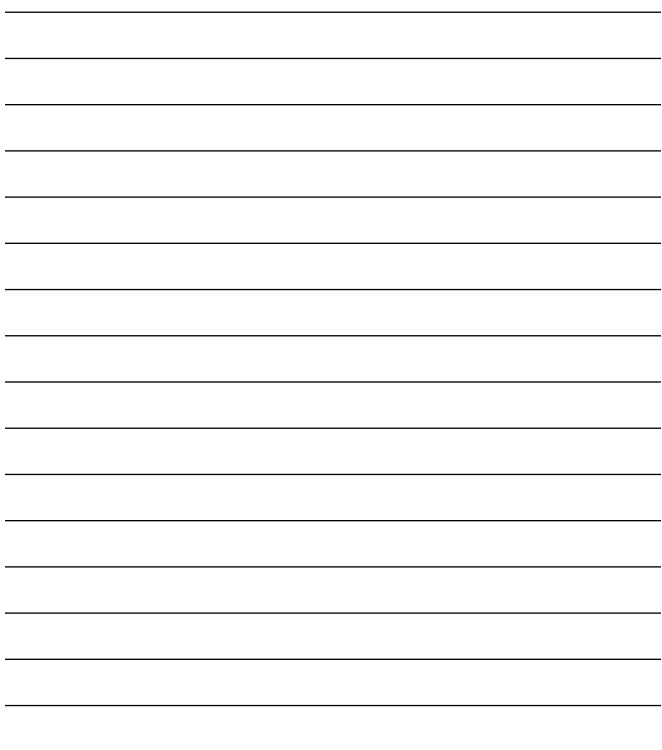
This process will clone the 2017 W2 Electronic settings to 2018.
If settings already exist for 2018, they will be overwritten.

Do you want to continue with the clone option?

Yes

No

Return any time to run reports. The reports will allow you to view your employees response.



Select each option separately and sort.
May select more than one response.

Email Employees - HR\PA\YE\PA\CA\WP - 3084 - 05.18.06.00.10-11.7 - Internet Explorer

Email Employees (79)

Report of Electronic W2 Responses for 2017

Include the following responses:

- Electronic
- Paper
- Ask Later
- No Response


Sort Report by:

- Name Key
- Building
- Check Location

Page break by code

[Print](#)
[Back](#)

Message from webpage

 This process will read the 2017 W2 Workfile.
For each employee in the 2017 W2 Workfile table, the process will print the employee's response on how they would like to receive their W2.
If the employee has not yet responded (No Response), the response will be blank on the report.
Do you want to continue?

[OK](#) [Cancel](#)

Report will show employees, email address and location.

4paw2r30.p 02-4
05.18.06.00.00-11.7

SCRAMBLED DATABASE
Electronic W2 Responses

09/19/18

Page:4
9:00 AM

<u>NAMEKEY</u>	<u>NAME</u>	<u>EMAIL ADDRESS</u>	<u>BUILDING</u>	<u>RESPONSE</u>
BURTSBAR001	Burtscr, Harold C	Scramble1053@start.com	AIM	
MUCKSCYN001	Muckscr, Cynthia N	Scramble1064@start.com	AIM	
STRAINAT001	Stratmanscr, Nathan E	Scramble1200@start.com	AIM	
BUCHOJHA001	Bucholtzscr, Jean H	Scramble1208@start.com	AIM	
FISCHCAR001	Fischscr, Carmen L	Scramble1312@start.com	AIM	
UYSHANIC001	Uysharascr, Nichole B	Scramble1327@start.com	AIM	
VANCUOUP001	Vancurencr, Ophelia C	Scramble1328@start.com	AIM	
VALENIMO001	Valentascr, Inogene C	Scramble1353@start.com	AIM	
FENSTZAN001	Fenstermakerscr, Zana L	Scramble1362@start.com	AIM	
TONYSLE001	Tonyscr, Eleanor A	Scramble1376@start.com	AIM	
CHOJNEIL001	Chojnackiscr, Eileen I	Scramble1484@start.com	AIM	
YAMASANA001	Yamashiroscr, Ana E	Scramble1505@start.com	AIM	
QUANTTER001	Quantscr, Tari X	Scramble1523@start.com	AIM	
TIMLIVIR001	Timlinscr, Virgil A	Scramble1526@start.com	AIM	
DAVILTAM001	Davillascr, Tami J	Scramble1610@start.com	AIM	
JAGUASLA001	Jaquascr, Blanca P	Scramble1616@start.com	AIM	
CAREWROC001	Carewscr, Rochelle I	Scramble1634@start.com	AIM	
FORGIVID001	Forgionescr, Vida L	Scramble1637@start.com	AIM	
UVALLMAN001	Uvallescscr, Manuel B	Scramble1702@start.com	AIM	
EDMISTHE001	Edmistenscr, Therese K	Scramble1786@start.com	AIM	
MANGHTAM001	Mangerscr, Tamika T	Scramble1819@start.com	AIM	
YURICING001	Yurickscr, Inga E	Scramble1980@start.com	AIM	
RIBBLALP001	Ribblescr, Alfred Y	Scramble2091@start.com	AIM	
JULIOMAR001	Julioscr, Marissa P	Scramble3107@start.com	AIM	
ETHINKAT001	Ethingtonscr, Kathryn K	Scramble4549@start.com	AIM	
YABLOGAR001	Yablonskiscr, Garry D	Scramble4581@start.com	AIM	
STAMAJOI001	Stamandscr, Joi U	Scramble5832@start.com	AIM	
ARBEIMAR001	Arbeiterscr, Maria A	Scramble5875@start.com	AIM	
NACHMEAR001	Nachmanscr, Harrison K	Scramble6012@start.com	AIM	
YBARRPAL001	Ybarroscr, Palmer Z	Scramble6873@start.com	AIM	
POPPPETT001	Poepplmanscr, Ettie O	Scramble6966@start.com	AIM	
ACKERJOH001	Ackerleyscr, Johanne P	Scramble7744@start.com	AIM	
YOXALALE001	Yoxallscr, Alease J	Scramble7841@start.com	AIM	

Totals for Building Code: ADM
Number of Employees with No Response

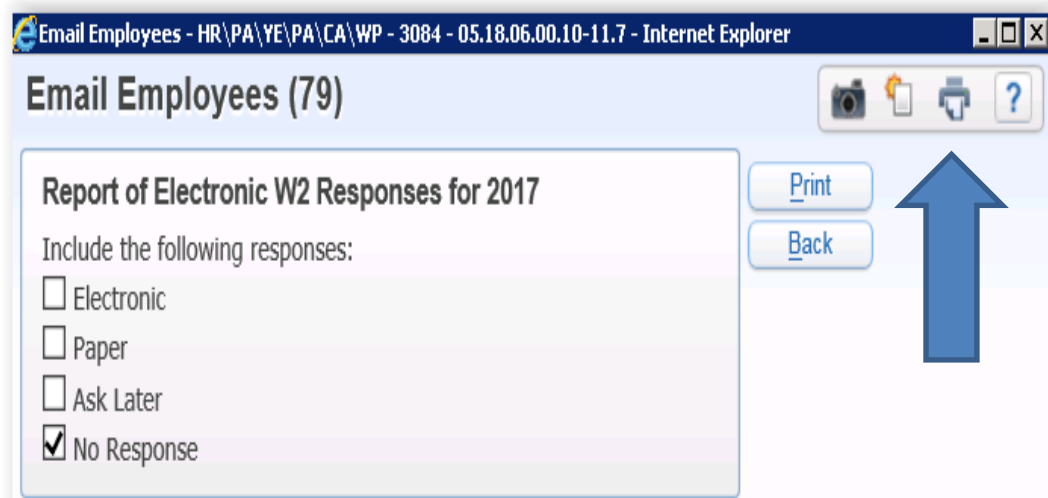




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Click on the Printer Icon



Email Employees - HR\PA\YE\PA\CA\WP - 3084 - 05.18.06.00.10-11.7 - Internet Explorer

Email Employees (79)

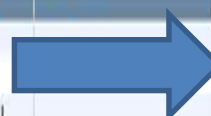
Report of Electronic W2 Responses for 2017

Include the following responses:

- Electronic
- Paper
- Ask Later
- No Response

Print Back

My Print queue select Electronic W2 request and convert to Excel



Print Queue for Stella Mendoza

Date	Time	Report Description	Wait List #	Status	Time	Format	Current Key
09/19/2018	Wed	9:00 AM		Completed	00:00:05	PDF	
09/19/2018	Wed	8:35 AM		Completed	00:00:02	PDF	
09/18/2018	Tue	4:05 PM		Completed	00:00:05	PDF	
10/09/2016	Sun	9:41 PM		Completed	00:00:00	EXCEL	
10/09/2016	Sun	9:40 PM		Completed	00:00:04	PDF	
10/09/2016	Sun	9:25 PM		Completed	23:59:59	PDF	
10/09/2016	Sun	9:23 PM		Error	23:59:59	PDF	
10/09/2016	Sun	9:14 PM		Completed	00:00:03	PDF	
10/09/2016	Sun	9:13 PM		Completed	00:00:03	PDF	
10/09/2016	Sun	8:52 PM		Completed	00:00:01	EXCEL	
10/09/2016	Sun	8:51 PM		Completed	00:00:09	PDF	
10/09/2016	Sun	8:48 PM		Completed	00:00:00	UTILITY	
10/09/2016	Sun	8:46 PM		Completed	23:59:59	PDF	
10/09/2016	Sun	8:36 PM		Completed	00:00:00	UTILITY	
10/09/2016	Sun	8:35 PM		Completed	00:00:01	EXCEL	

Buttons on the right: View, Delete, Run, Convert to Excel, View Status, Tasks, Save This Report, Saved Reports, Back

Copy email address and attach to email.

Tip: First email employee only

Second time email employee and Principal.

	A	B	C	D	E
13	NAMEKEY	NAME	EMAIL ADDRESS	BUILDING	RESPONSE
14	BURTS	Burtsscr, H	Scramble1053@start.com	ADM	
15	MUCKS	Muckscr, C	Scramble1064@start.com	ADM	
16	STRATNA	Stratmans	Scramble1200@start.com	ADM	
17	BUCHOJE	Bucholtzsi	Scramble1208@start.com	ADM	
18	FISCHCAR	Fischscr, C	Scramble1312@start.com	ADM	
19	UYEHANIC	Uyeharasc	Scramble1327@start.com	ADM	
20	VANCUOF	Vancuren:	Scramble1328@start.com	ADM	
21	VALENIM	Valentasc	Scramble1353@start.com	ADM	
22	FENSTZAN	Fensterm:	Scramble1362@start.com	ADM	
23	TONYSELE	Tonyscr, E	Scramble1376@start.com	ADM	
24	CHOJNEIL	Chojnacki	Scramble1484@start.com	ADM	
25	YAMASAN	Yamashirc	Scramble1505@start.com	ADM	
26	QUANTTEI	Quantscr,	Scramble1523@start.com	ADM	
27	TIMLIVIR	Timlinscr,	Scramble1526@start.com	ADM	
28	DAVILTAN	Davillascr,	Scramble1610@start.com	ADM	
29	JAQUABLA	Jaquascr,	Scramble1616@start.com	ADM	
30	CAREWRC	Carewscr,	Scramble1634@start.com	ADM	
31	FORGIVID	Forgiones	Scramble1637@start.com	ADM	
32	UVALLMA	Uvallescr,	Scramble1702@start.com	ADM	
33	EDMISTHE	Edmistens	Scramble1786@start.com	ADM	
34	MANGETA	Mangerscr	Scramble1819@start.com	ADM	
35	MURCINC	Muricksr,	Scramble1888@start.com	ADM	

When employee signs into Employee Access, notification will appear.

In Pac, in the YTD date tab, show what employee elected. If click on the W2 tab will show employee's W2.

Options for Receiving My 2011 W2
 This year you have the option to receive your W2 electronically.

You have until December 31, 2011 to make your decision. If you do not choose by then, you will receive a paper copy.

You will receive an email when your W2 becomes available and it can be printed from Employee Access.

I do not need a printed copy of my 2011 W2 from my employer. I will print my own W2 from Employee Access.
 I want to receive a printed copy of my 2011 W2 from my employer.
 Ask me again later.

ACETOBR1000 | Bridgett P Acetoscr (PROFESSIONAL) | PA PMS

Search | Address | Prsnel | General | Ded/Bei | Pay | Con/Flx | Checks | YTD | Retirmt | Timeoff | Position | Credits

Calendar Year To Date For: 2011

Pay Codes		Deductions		Benefits	
Code	Amount	Code	Amount	Code	Amount
SALPT	5,914.08	CAMCO	60.90	DC46P	70.64
STUPT	600.00	EMPR	600.00	FICA	412.82
		FICA	279.66	EMSTX	200.00
		FTA	100.00	LIFE	0.00
		FTX	877.29	LIFIN	14.78
		LST	4.00	LTD	20.70

Gross Pay: 6,514.08 Deductions: 2,901.61 Benefits: 2,227.82
 TSA's - Before Tax: 600.00 FICA Gross: 6,658.34
 TSA/Retirement: 423.42 Medicare Gross: 6,658.34
 Other Before: 66.46 PA TX Gross: 6,647.62
 Taxable Benefit: 210.72
 Fed Tax Gross: 5,634.92

W2 Distribution Answer
 Electronic
 Paper
 Ask Later
 Change To Paper

When employee signs into Employee Access, notification will appear.
In Web, select W2.

- Personnel
- Yrs of Exp
- Picture
- Employee Letters
- Fast Track
- Fiscal YTD
- Flex
- Leave History
- Org Chart
- Pay Records
- ▼ Position
- Emp Mgt Asn
- Placmnt Trkr
- Sal Neg Asn
- ▶ Retirement
- ▶ State Rpt
- ▶ Sub Tracking
- Task Manager
- Tax - W4
- ▶ Time Off
- ▶ True Time
- ▶ UDF Tables
- W2
- Online Forms

Employee: ABEITHER001 Abeitascr, Herlinda G ← → Ranges Add Delete Notes Attach *History

Employee Type: TEACH User Name: ADMIN9 Name ID: 2405

Building: BUILDING -WJH Check Location:

Customize

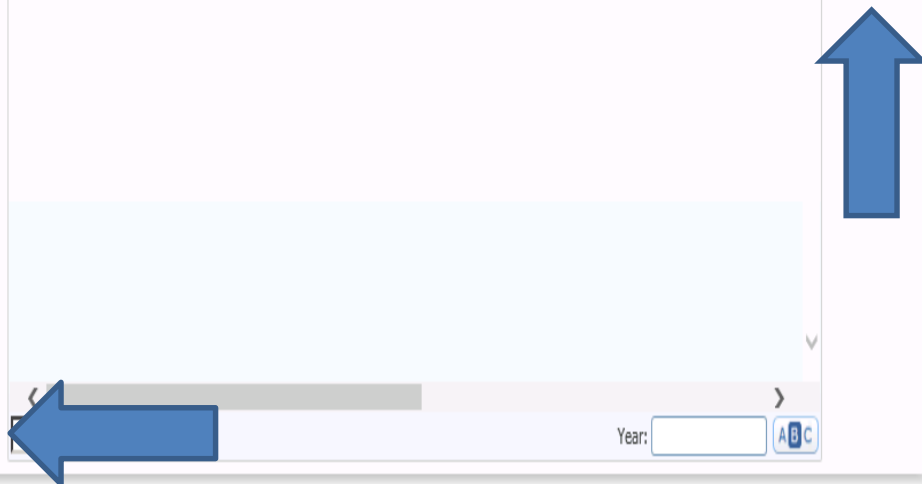
Gender: F Age: 69 Hire Date: 08/02/1996 Birth Date: 06/27/1949

W2 Records

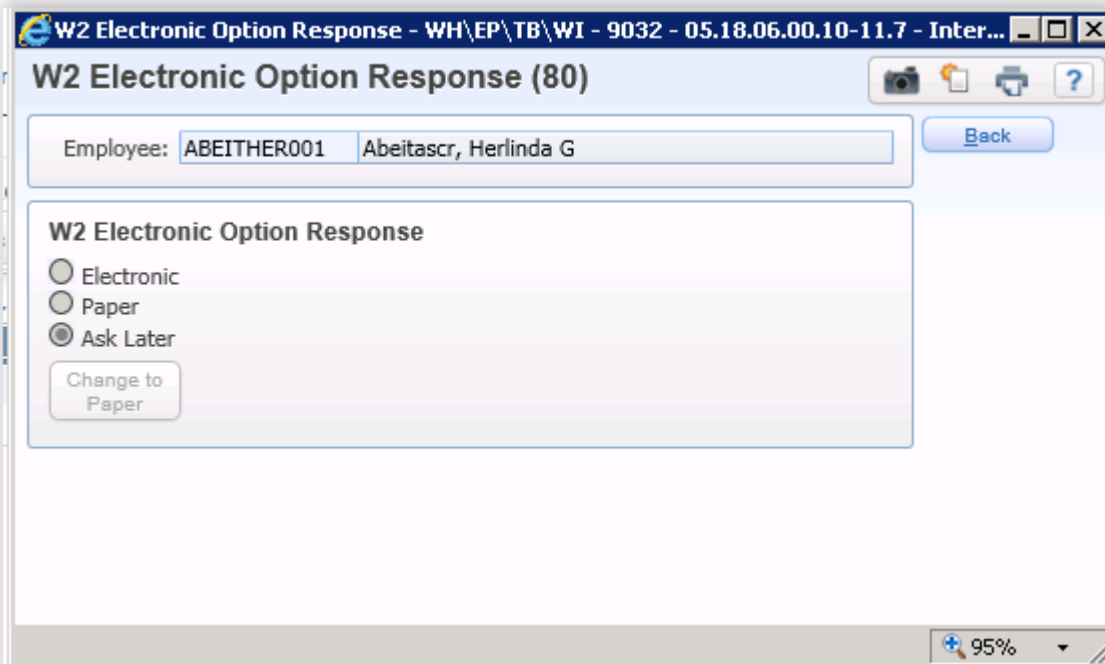
Views: W2 Information Filters: *Skyward Default View W2

Year ▼	Form	Submission	Federal Wages	Federal Tax	Social Security Wages	Social Security Tax	Medicare Wages	
▶ 2017	W-2		53,761.91	4,103.82			58,246.88	
▶ 2016	W-2		26,074.70	2,198.70			28,187.48	
▶ 2015	W-2		26,747.65	2,590.25			28,822.90	

Show W2 Info 2016 W2 Distribution Option



Only have the option to change to paper.



W2 Electronic Option Response - WH\EP\TB\WI - 9032 - 05.18.06.00.10-11.7 - Inter...

W2 Electronic Option Response (80)

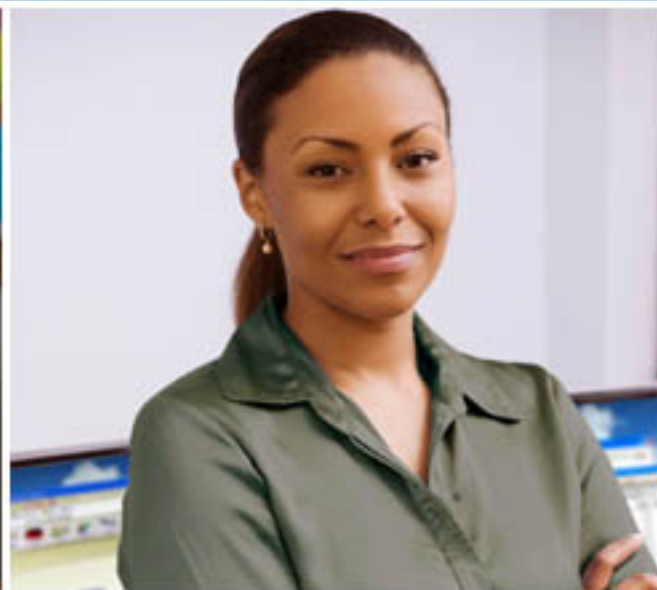
Employee: [Back](#)

W2 Electronic Option Response

Electronic
 Paper
 Ask Later

[Change to Paper](#)

95%



Texas Skyward User Group Conference

THANK YOU FOR ATTENDING!

