



Process	Creating W-2c	Module: Payroll Business Process No. BP-PA-1.42 Date Created: 10/30/08 Date Revised:
Purpose	Create and prepare W-2c Tax Data	
Navigation	See Navigation in the description block.	
Prerequisites	Appropriate Tax updates must be applied to data base. See overview Chart 1	
Helpful Hints	Check current year tax update manual for changes to the process Note all W-2c will be 2001 and future for FAMU	

PROCESS STEPS

STEP	DESCRIPTION	COMMENTS
1.	Navigation: <u>Payroll for North America>US Annual Processing>W-2 Adjustments>Create W2cUS/Territories TAX920US</u>	The system automatically retrieves the most recently submitted original or corrected information for each employee record that you need to update. For each change, you can enter either a new amount or change the current amount. When you make a change the system will calculate the new amounts. See Chart 2
2.	Generate the W-2c Data Audit Report Navigation: <u>Payroll for North America>US Annual Processing>Audit and Error Reports>W-2c Audit US/Territories TAX921US</u>	Program produces a detailed audit listing of the selected W-2c entity in the batch and the W-3c totals for each company, which you see to complete the form W-3c transmittal to be submitted to the Social Security Administration See Chart 3
3.	Specifying W-2c Data Audit Run Parameters	See Chart 4
4.	Processing the Form W-2c Print file Navigation: <u>Payroll for North America>US Annual Processing>W-2c Reporting>Print W-2c US/Territories TAX920US</u>	Run the TAX920US process to generate a W-2c print file for U.S See Chart 5 for form requirements
5.	Run print parameters Navigation: <u>Payroll for North America>US Annual Processing>Define Annual Tax Reporting>Tax Reporting Parameters</u>	Populate Transmitter ID, Organization Type, Type of Employment, and Recording Code in the electronic file. See Chart 6
6.	Navigation: <u>Payroll for North America> U.S. Annual Processing> Define Annual Tax Reporting> Electronic Parameters</u>	Populate the transmitter record (RCA) in the electronic file. Chart 7
7.	Create Federal W-2c File US Navigation: <u>Payroll for North America, U.S. Annual Processing, W-2c Reporting, Create Federal W-2c File</u>	Run TAX922US – Create Federal File W-2c File US to create the file to submit W-2c corrections to the Social Security Administration. See Chart 8



STEP	DESCRIPTION	COMMENTS
	<u>US</u>	
8.	Create the Federal W-2c File Audit Rpt US Navigation: <u>Payroll for North America, U.S. Annual Processing, Audit and Error Reports, Federal W-2c File Audit US</u>	Run TAX923US - Federal W-2c File Audit US to produce an audit report of the data in the Federal W-2c file created by TAX922US. See Chart 9
9.		
10.		
11.		
12.		
13.		
14.		
15.		
16.		
17.		



Chart 1

Overview

PeopleSoft Payroll for North America provides a set of pages for creating W-2c as outlined below:

Tax Year: 2001 and forward

Jurisdiction: US

Form: W-2c

Print Program: TAX920US

Audit Program: TAX921US

Detail navigation will provide on each page.

Summary of Steps:

1. Correct the data
2. Run the data audit, which also produces W-3c transmittal totals.
3. Generate the print file



Chart 2

Access the Create W-2c US/Territories page.

Create W-2c US/Territories

W2 Co: TQZ Year: 2008 Form for: US Emplid: TQ9PAM1 Status: Open Batch#: 2

First Name: ANNA Middle Name: MARIE

Last Name: BRIEN Suffix:

Address 1: 709 Chancellor Dr.

Address 2:

City: Philadelphia

State: PA Country: USA Postal Code: 19107-5458 Control Number:

SSN: 007-22-0651 Statutory Employee Retirement Plan Third-party sick pay **Comments**

W2 Info							
Box	Description	State	Locality	Previous	Corrected	Increase/Decrease	
01	Wages,tips,other compensation			9303.68	9803.68	500.00	+ -

Create W-2c US/Territories

The system enters the W2 Company and other information you entered to access the page.

Status

The status of the currently displayed W-2c record. Values are:

Open: The record is part of a batch that has not yet been processed.

Closed: The record is part of a batch that has been processed to be submitted to the Social Security Administration.

Void: The record is not to be processed.

Batch #

The current batch number assigned by the system. Each time you run the W-2c Process, the system increments this number by one and assigns the new batch number to all W-2c records you enter until the next time you run the process.

The system assigns batch numbers by tax form ID of the form being corrected, so you could have more than one batch #1 if you're creating W-2c forms to correct W-2s for both the U.S. and Puerto Rico or territories, for example.



Control #	An optional field corresponding to an Employee ID or some other number you printed in Box d of the W-2. (If you want this field to be automatically populated when you run the TAX910LD process, you can modify the process.) This value prints in Box J of Form W-2c, marked “Employer’s use.”
Comments	Click to enter comments about an employee’s W-2c record. Your comments do not become part of the printed W-2c form, but they do appear on the W-2c Data Audit Report.
Statutory employee	The page initially indicates the status of this check box as reported on the employee’s original W-2 or most recent W-2c. If you select or clear this check box, the system will report the change on the Form W-2c.
Retirement plan	The page initially indicates the status of this check box as reported on the employee’s original W-2 or most recent W-2c. If you select or clear this check box, the system will report the change in the “Retirement plan” check box on Form W-2c.
Third-party sick pay	The page initially indicates the status of this check box as reported on the employee’s original W-2 or most recent W-2c. If you select or clear this check box, the system will report the change in the “Third-party sick pay” check box on Form W-2c.
Box	Select the Form W-2 box you want to update.
State	Select the state for state-specific information (W-2 boxes 16 and 17).
Locality	Select the locality for locality-specific information (W-2 boxes 18 and 19).
Previous	When you select a W-2 box, the system displays the amount most recently reported in that box.
Corrected	The previous amount is the default. If you enter an amount here, the system calculates and displays the Increase/decrease amount.
Increase/decrease	The default is zero. You can specify an increase or decrease to the Previous amount by any amount you enter here—precede decrease amounts with a minus sign (-). The system calculates and displays the Corrected amount.



Chart 3

W-2c Audit Rpt US/Territories	
Run Control ID: 1	Report Manager Process Monitor <input type="button" value="Run"/>
US/Terr: <input type="text" value="US"/>	
Most Recent W-2c <input type="checkbox"/>	
W-2c Batch Number: <input type="text"/>	

[W-2c Audit Rpt US/Territories](#)

- US/Terr:** This field's default is US, however you should select the appropriate Territory abbreviation if you are processing territory W-2c information.
- Most Recent W-2c:** This is the default. If you want to specify a particular W-2c batch, clear this check box to display the **W-2c Batch Number** field.
- W-2c Batch Number** This field remains hidden until you clear **Most Recent W-2c**. Enter a batch number here to specify a particular W-2c batch. This is a locally generated number.



Chart 4

When running TAX920US or TAX920 to print Form W-2c, create the output file as either a .pdf file or a .lis file, depending on the Form ID selected.

FAMU will use Form ID *LSRO* and the output should be created as a .lis file.



Chart 5
Specifying W-2C Print Run Parameters

W-2c Print US/Territories

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) Run

*US/Territory: ▼

Alignment Count:

*Form Identification: 🔍

Processing Options

Process Current Batch Reprint Employee W-2cs

W2 Info

Customize | Find | View All | First ◀ 1 of 1 ▶ Last

Emplid (preferred)	Most Recent W-2c	W-2c Batch Number		
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	+	-

W-2c Print US/Territories

You can process the current W-2c batch or reprint a W-2c for any number of specified employees.

US/Territory

This field's default is US, however you should select the appropriate Territory abbreviation if you are processing territory W-2c information.

Alignment Count

Enter the number of alignment pages you want to print. The number you enter is the number of forms that will print with alignment characters before the first form with live data.

Form Identification

Enter the Form ID:

LSR01: Laser printer W-2c.

LSR01P: .pdf version of standard laser form. **For this Form ID, the file must be created in .pdf format.**

IMP01: Impact printer W-2c.

Process Current Batch

Select to process the current batch. Specify your Alignment Count, Employees Per Page, and form ID.



- Reprint Employee W-2cs** Select if you want to reprint W-2c forms for specific employees. The system displays the other controls in this group box.
- Employee ID** If you selected **Reprint Employee W-2cs**, enter the employee ID for each employee for whom you want to reprint a W-2c. To reprint an entire batch, leave the Employee ID field blank, and fill in the batch number.
- Most Recent W-2c** To print the employee's most recent W-2c, select this check box and leave **Batch Number** blank.
- W-2c Batch Number** To print the employee's W-2c from a specific batch, clear **Most Recent W-2c** and enter the **Batch Number**.

The delivered Tax Form Print Parameters for the **laser** print W-2c format **LSR01** have been tested using the HP 4250dtn printer with Form W-2c (rev. 1-2006) supplied by RR Donnelly. Test results confirm that all the data fits in the specified boxes and is not printing on the box description verbiage.

FAMU is using Form LSR02A



Chart 6

The screenshot displays the 'Tax Reporting Parameters' web application. The left-hand menu lists various administrative functions, with 'Tax Reporting Parameters' currently selected. The main content area is titled 'Annual Tax Reporting Params 1' and contains the following fields:

- Balance ID:** CY
- *Balances for Year:** 2008
- Electronic Mag Media Rpt Params:**
 - Transmitter ID:** FAM (Florida A&M University)
 - *Organization Type:** Other
 - *Type of Employment:** Regular (All Others)
 - *Recording Code:** ASCII
- Year End Form Parameters:**
 - Alignment Pages:** 1
 - W2 Form ID:** LSR02A
 - Employees/Page:** 1

At the bottom of the form area, there are buttons for 'Save', 'Update/Display', 'Include History', and 'Correct History'. The browser's taskbar at the bottom shows several open applications, including 'Inbox - Microsoft Out...', 'XM Radio Online - Th...', 'Tax Reporting Param...', 'BP-PA-1.42 Create W...', 'YE08US390E - Micros...', and 'Control Panel'. The system clock indicates the time is 3:25 PM on 09/23/13.

Annual Tax Reporting Params 2 is not required to be completed for FAMU.



Chart 7

Access the Electronic Parameters page.



Chart 8
Creating the W-2c Electronic File
Access the Create Federal W-2c File US page

Create Federal W-2c File US	
Run Control ID: 1	Report Manager Process Monitor <input type="button" value="Run"/>
Processing Parameters	
Balances for Year:	2008
Rows ready for electronic file:	1

[Create Federal W-2c File US](#)

(User input is not required for any fields on the Create Federal W-2c File US run control.)



Chart 9

Running the Federal W-2c File Audit Report

Access the Federal W-2c File Audit Rpt US page.

Federal W-2c File Audit Rpt US		
Run Control ID: 1	Report Manager	Process Monitor <input type="button" value="Run"/>
Report Request Parameter(s)		
<input type="checkbox"/> Total Only		

Federal W-2c File Audit Rpt US

Totals Only

Select this option to print a report which includes only the file totals; no individual employee W-2c detail is printed.