



Springbrook – W2 Processing

Enterprise and Cirrus



Agenda

- IRS information
- W2 process – Generate
 - Exceptions
 - Edit
 - Proof List
 - W2
 - Export
 - Commit
- Cloud only tax table updates

IRS information

- General Instructions for W-2

<https://www.irs.gov/pub/irs-pdf/iw2w3.pdf>

- Accuwage

<https://www.ssa.gov/employer/accuwage/index.html>

- Be sure to have an active BSO log in to be able to submit your W2 electronically.
- Springbrook does not give legal advice so will direct you to the resources above to obtain specific code and reporting information.

Prepare for W2s - Balancing

Remember – If the Payroll history is correct in the system W-2's will process without any issues or modifications.

- Complete 4th quarter reports.
- Do any manual check adjustments to handle items like disability pay.
- Total the reported amounts for the year.
- Run a deduction register (Totals only) for the year.
 - Check against W-2 proof list
 - Make sure the totals for FICA/FICAR and MEDI/MEDIR match.
 - MEDI will not match if you have employees that earned over \$200,000.
 - FICA will not match if you had employees with disability pay (depending on plan).

W2 Process (Enterprise and Cirrus)

- Generate – Brings in employee information to the batch.
- Exceptions – Optional step.
- Edit – Optional step.
- Proof List – Summary and Detail available. Used to balance and find errors.
- W2 – Prints the forms.
- Export – Exports data to be uploaded.
- Commit – Sends data to Employee Self Service (ESS). You must commit batch for employees to see W-2 in ESS.

Generate / W-2s

File Window Help

Settings

Year: 2023

Date to Use: Check Date

Sort By: Department Then Name

FICA Max: 160,200.00

SDI Max: 0.00

Federal ID: 999-99-99999

Reporting Group:

Employer: Springbrook

Employer Type: State or Local Government

Address Line 1: 123 Main Steet

Address Line 2:

City: Springbrook

State: KY

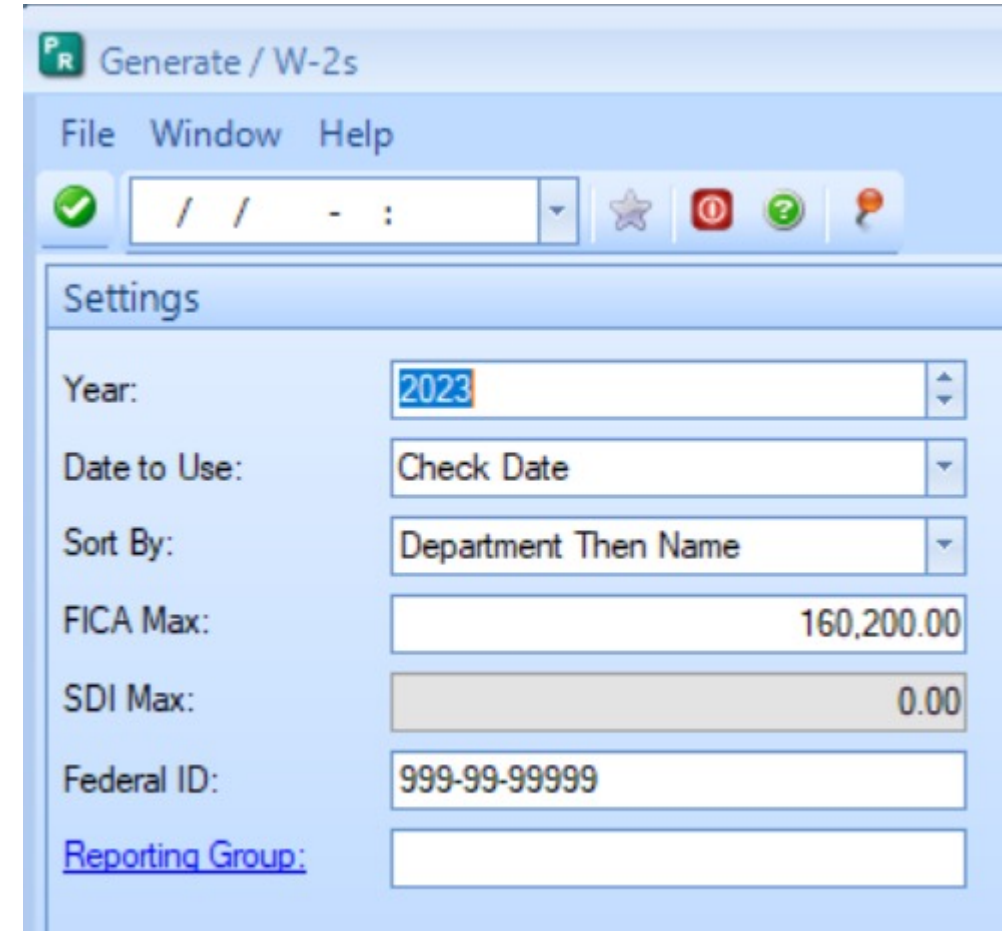
Zip Code: 54220-4543

NY: State wages = Federal wages when printing W2s form

Ded/Ben Code	Description	Box Number	Code	Retirement Plan
OPS ER	OPERS - Employer	0		<input checked="" type="checkbox"/>
OPS PU	OPERS Employer Pic...	0		<input checked="" type="checkbox"/>
OPSUAL	OPSRP UAL	0		<input checked="" type="checkbox"/>
ORSHS	Oregon SHS tax	0		<input type="checkbox"/>
ORTRAN	Transit tax	14	OSTT	<input type="checkbox"/>
OTHER	Metro Tax	19	TAX	<input type="checkbox"/>
PEHP#1	Pol Prof PEHP MO	0		<input type="checkbox"/>
PEHP#2	Police Prof PEHP Mo	0		<input type="checkbox"/>

W2 Process - Generate

- Select 2023 (proper year being reported).
- Always use Check Date.
- Select desired sort for the W2s.
 - Department Then Name
 - Employee Number
 - Last Name
 - Social Security Number
- Check the FICA maximum and change if necessary.
- If California, check the SDI Max.
- Verify the Federal ID is correct.
- Use Reporting Groups only if required.

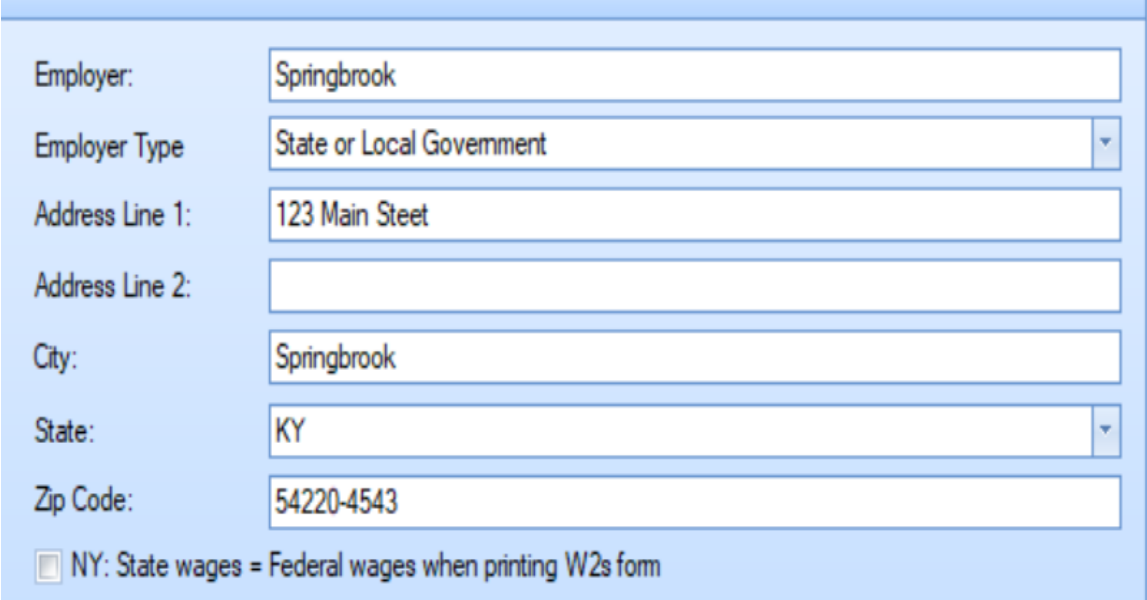


The screenshot shows a software window titled "Generate / W-2s" with a menu bar (File, Window, Help) and a toolbar. Below the toolbar is a "Settings" section with the following fields:

Year:	2023
Date to Use:	Check Date
Sort By:	Department Then Name
FICA Max:	160,200.00
SDI Max:	0.00
Federal ID:	999-99-99999
Reporting Group:	

W2 Process – Generate (cont.)

- Employer Name and Address come from System Setup.
- Employer Type – Does not save in earlier versions.
 - Federal Government
 - Not Applicable
 - State or Local Government
 - State of Local Government tax exempt
 - Tax Exempt
- NY: State wages = Federal wages on W-2 toggle – Used in NY. Forces the State Wages to equal the Federal wages regardless of history.



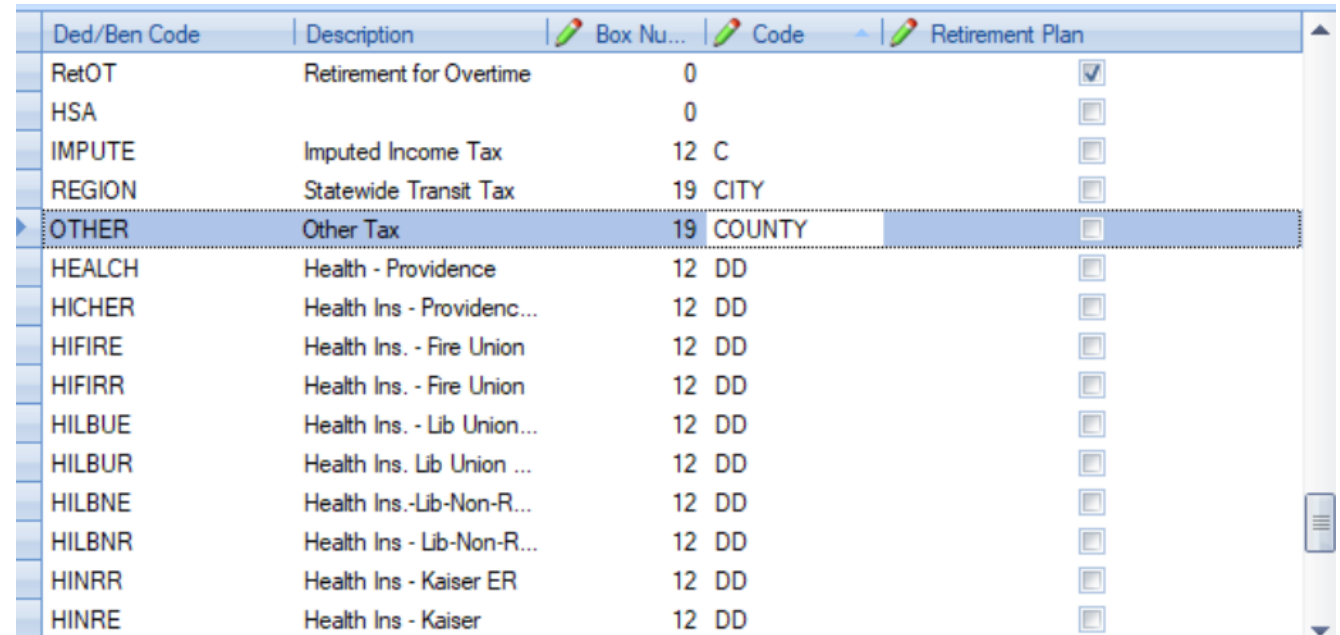
The screenshot shows a form for generating a W2 form. The fields are as follows:

Employer:	Springbrook
Employer Type	State or Local Government
Address Line 1:	123 Main Steet
Address Line 2:	
City:	Springbrook
State:	KY
Zip Code:	54220-4543

NY: State wages = Federal wages when printing W2s fom

W2 Process – Generate (cont.)

- Mark Retirement Plan
 - Mark any deductions or benefits identifying employee is in a Retirement plan.
 - Checks box 13 on the W2.



Ded/Ben Code	Description	Box Nu...	Code	Retirement Plan
RetOT	Retirement for Overtime	0		<input checked="" type="checkbox"/>
HSA		0		<input type="checkbox"/>
IMPUTE	Imputed Income Tax	12	C	<input type="checkbox"/>
REGION	Statewide Transit Tax	19	CITY	<input type="checkbox"/>
OTHER	Other Tax	19	COUNTY	<input type="checkbox"/>
HEALCH	Health - Providence	12	DD	<input type="checkbox"/>
HICHER	Health Ins - Providenc...	12	DD	<input type="checkbox"/>
HIFIRE	Health Ins. - Fire Union	12	DD	<input type="checkbox"/>
HIFIRR	Health Ins. - Fire Union	12	DD	<input type="checkbox"/>
HILBUE	Health Ins. - Lib Union...	12	DD	<input type="checkbox"/>
HILBUR	Health Ins. Lib Union ...	12	DD	<input type="checkbox"/>
HILBNE	Health Ins.-Lib-Non-R...	12	DD	<input type="checkbox"/>
HILBNR	Health Ins - Lib-Non-R...	12	DD	<input type="checkbox"/>
HINRR	Health Ins - Kaiser ER	12	DD	<input type="checkbox"/>
HINRE	Health Ins - Kaiser	12	DD	<input type="checkbox"/>

- Fill in Box Numbers and Codes

- 7.15+ will create second W2s if more information than will fit in boxes 12, 14 and 19

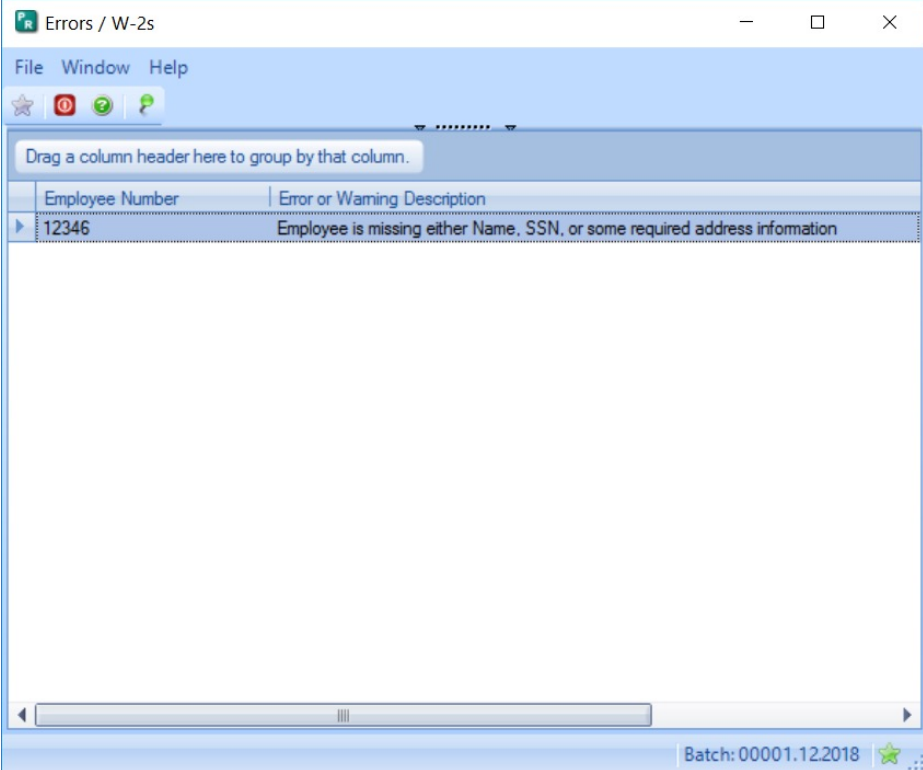
Tip – The down arrow can make entry easier in this section of the window.

Generate Notes

- **Generate settings are not saved from year to year.**
- Local Taxes (boxes 18, 19, 20) on the W2 – Functionality has been added to print the description keyed in the code box if filled in. If blank the description will come from the deduction description (as room allows).
- DON'T forget to toggle the **Retirement Plan** box for any deduction/benefit codes that should mark this box.
- Reporting Groups - Used to report separate Employer tax ID numbers. Not often used unless you report multiple agencies separately. IF USED – MAKE SURE TO CHECK THE EMPLOYEES IN THE REPORTING GROUP BEFORE GENERATING!

Exceptions

- Exceptions include an exception if there are any negative totals brought into the process. These will reject in Accuwage.
- If a Name, SSN or other required information is missing the Exceptions step will warn you.
- **No exceptions will stop the process.** Be sure to check for exceptions.



Errors / W-2s

File Window Help

Drag a column header here to group by that column.

Employee Number	Error or Warning Description
12346	Employee is missing either Name, SSN, or some required address information

Batch: 00001.12.2018

Edit Step

- Do you need to edit anything?
 - Hopefully not any primary information.
 - Make sure the Retirement box checked before making any edits.
 - Change address information on the employee if possible.
- To add a new W-2
 - Typically, only necessary if an employee did not have regular wages but had disability pay for the entire year.
 - Best Practice: Have W2 generated information match Payroll History.

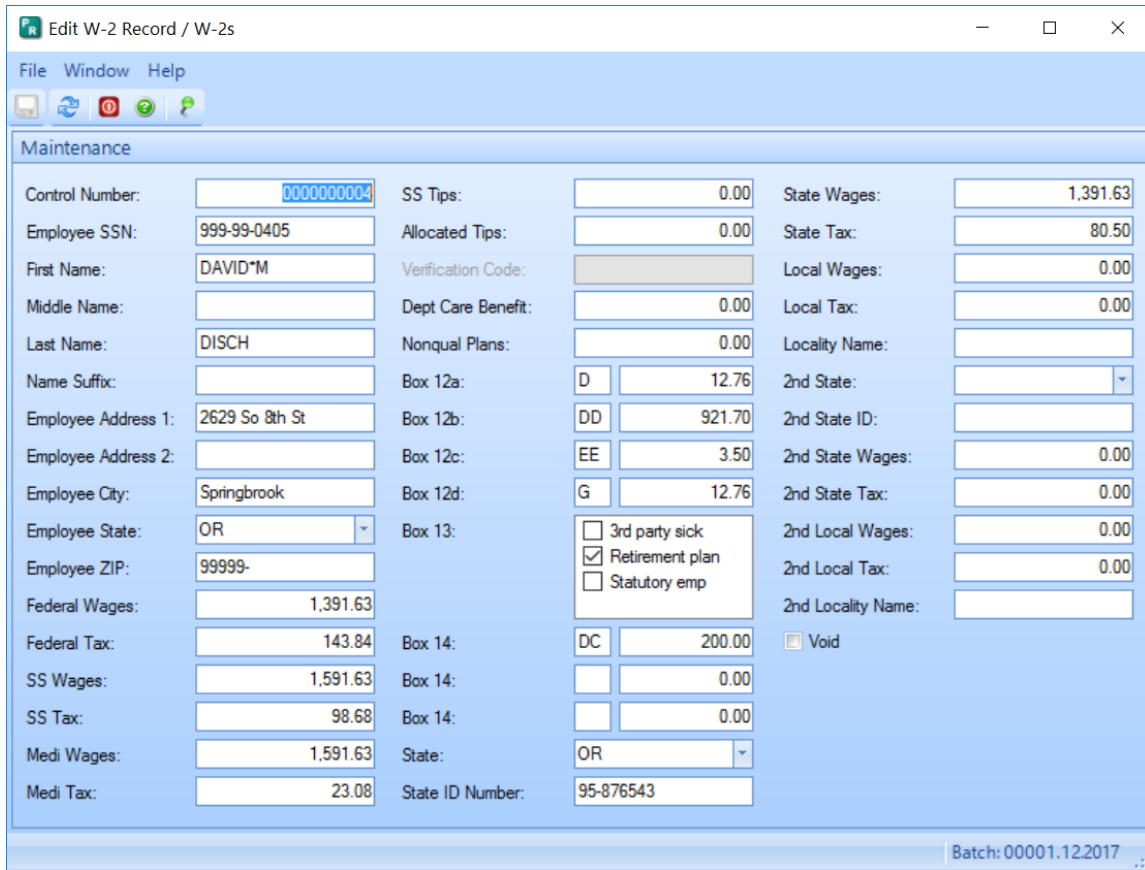
Overflow W-2s

If an employee has more than 4 items in box 12 or more than 2 in box 19 a second page will be created. This is being added for box 14. Not available in all versions.

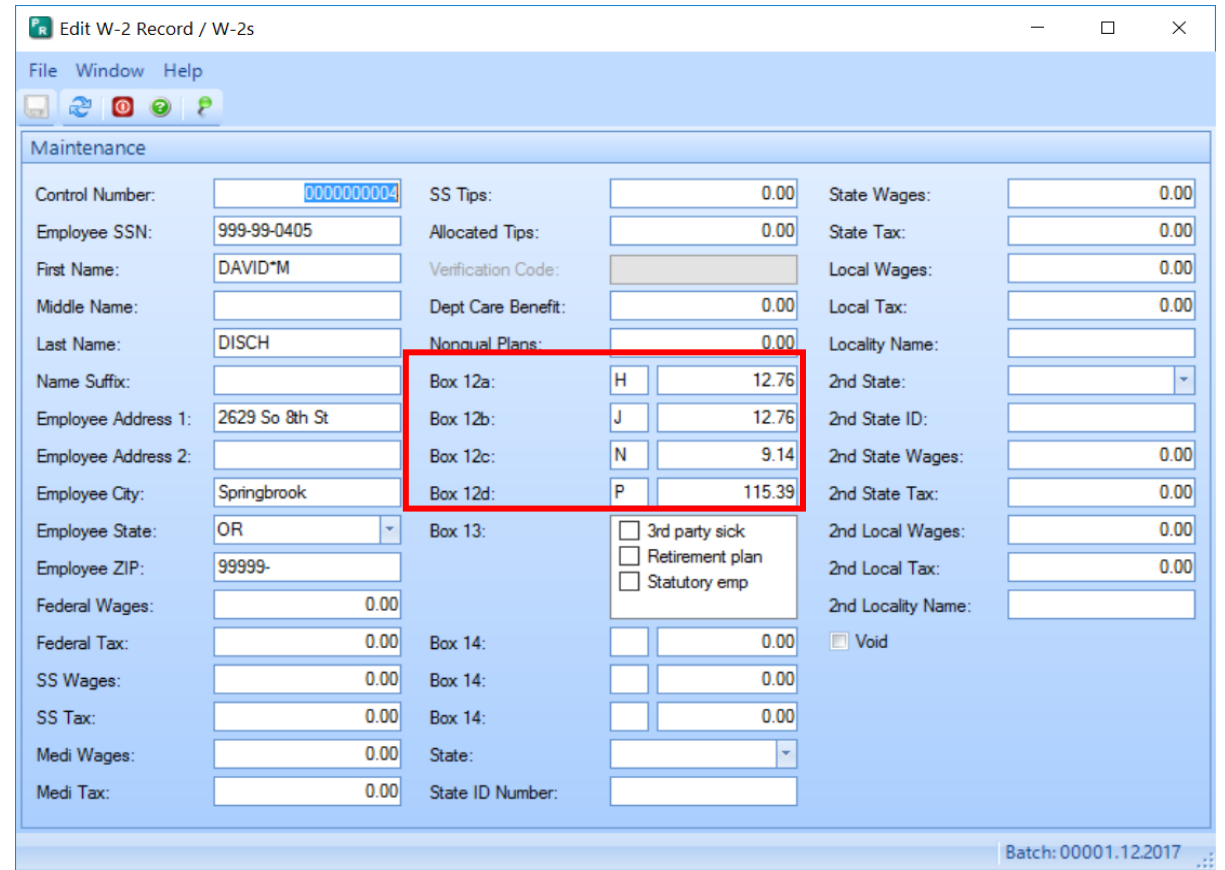
Control Number	Name	Fed Wages	Fed Tax	SS Wages	SS Tax	Medi Wages	Medi Tax	State Wages	State Tax
0000000001	Able, Zena Ann	\$52,323.48	\$2,969.79	\$52,323.48	\$3,244.10	\$52,323.48	\$758.69	\$52,323.48	\$3,235.27
0000000004	Diech, David*M	\$1,391.63	\$143.84	\$1,591.63	\$98.68	\$1,591.63	\$23.08	\$1,391.63	\$80.50
		Overflow 12a	Overflow 12b	Overflow 12c	Overflow 12d	Overflow Localit...	Overflow Localit...		
		H	J	N	P				
0000000005	Glaeser, Kevin D	\$2,366.57	\$280.08	\$2,325.77	\$144.20	\$2,325.77	\$33.72	\$2,366.57	\$147.01
0000000006	Hagenow, Lee*...	\$1,572.12	\$232.41	\$1,722.12	\$106.77	\$1,722.12	\$24.97	\$1,572.12	\$94.58
0000000007	Junk, Rudolf L	\$2,261.67	\$223.96	\$2,263.49	\$140.34	\$2,263.49	\$32.82	\$2,261.67	\$140.19
0000000008	Keil, Jeffery R	\$1,646.45	\$182.06	\$1,646.45	\$102.08	\$1,646.45	\$23.87	\$1,646.45	\$100.20
0000000013	Knowles, Kelly K	\$23,170.98	\$1,791.05	\$23,530.98	\$1,458.93	\$23,530.98	\$341.18	\$23,170.98	\$1,207.23
0000000009	Lacroix, Paul A	\$1,659.33	\$174.00	\$1,659.33	\$102.88	\$1,659.33	\$24.06	\$1,659.33	\$101.04
0000000002	Palmer, Carol A	\$39,736.49	\$5,949.27	\$39,736.49	\$2,401.64	\$39,736.49	\$561.65	\$38,736.49	\$2,329.79
0000000010	Rhode, Randal L	\$1,690.35	\$178.65	\$1,690.35	\$104.80	\$1,690.35	\$24.51	\$1,690.35	\$103.06
0000000003	Rubio, Anthony M	\$44,043.79	\$4,808.85	\$44,043.79	\$2,730.77	\$44,043.79	\$638.65	\$44,043.79	\$2,699.24
0000000011	Sorenson, Roger...	\$1,665.59	\$154.74	\$1,665.59	\$103.27	\$1,665.59	\$24.15	\$1,665.59	\$101.45
0000000012	Soukup, David E	\$11,849.40	\$1,132.62	\$11,849.40	\$734.64	\$11,849.40	\$171.81	\$11,849.40	\$448.80

The Plus  indicates the second W-2 record.

If you edited one of the records you must also edit the second record.



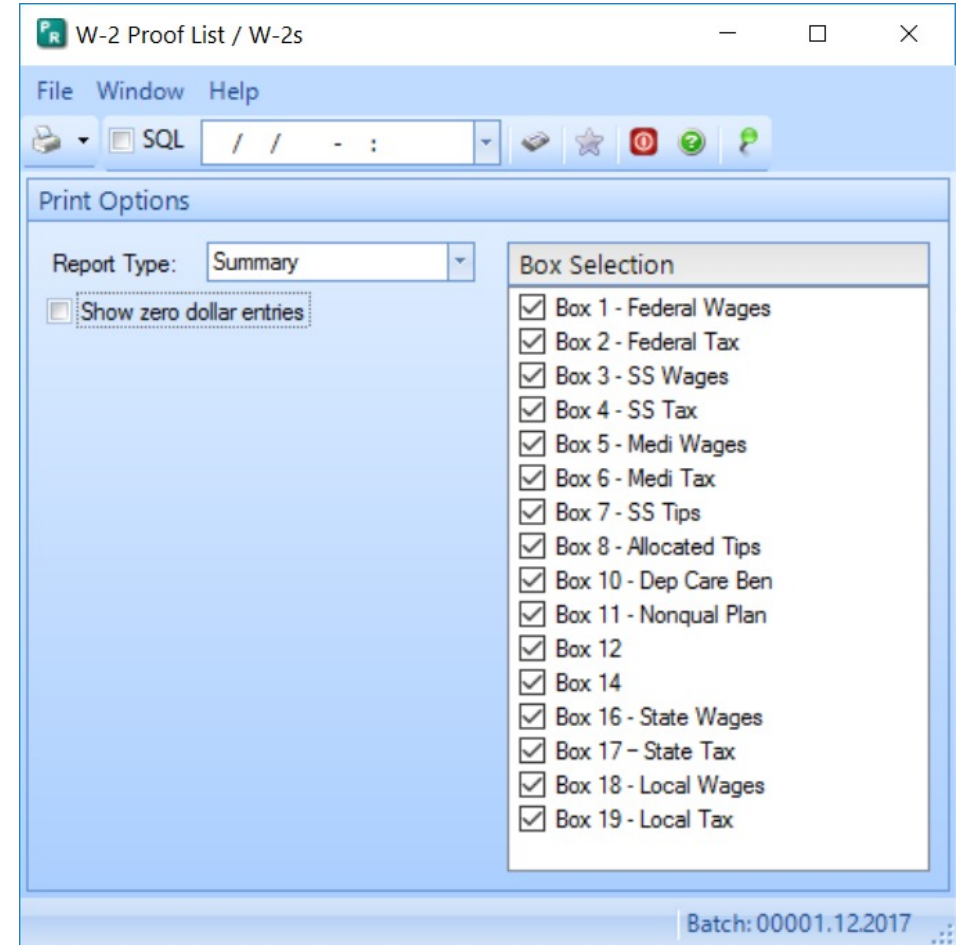
Control Number: SS Tips: State Wages:
Employee SSN: Allocated Tips: State Tax:
First Name: Verification Code:
Middle Name: Dept Care Benefit: Local Wages:
Last Name: Nonqual Plans: Local Tax:
Name Suffix: Box 12a: 2nd State:
Employee Address 1: Box 12b: 2nd State ID:
Employee Address 2: Box 12c: 2nd State Wages:
Employee City: Box 12d: 2nd State Tax:
Employee State: Box 13: 3rd party sick
 Retirement plan
 Statutory emp
2nd Local Wages:
Employee ZIP: Void
2nd Local Tax:
Federal Wages: 2nd Locality Name:
Federal Tax: Box 14:
SS Wages: Box 14:
SS Tax: Box 14:
Medi Wages: State:
Medi Tax: State ID Number:
Batch: 00001.12.2017



Control Number: SS Tips: State Wages:
Employee SSN: Allocated Tips: State Tax:
First Name: Verification Code:
Middle Name: Dept Care Benefit: Local Wages:
Last Name: Nonqual Plans: Local Tax:
Name Suffix: Box 12a: 2nd State:
Employee Address 1: Box 12b: 2nd State ID:
Employee Address 2: Box 12c: 2nd State Wages:
Employee City: Box 12d: 2nd State Tax:
Employee State: Box 13: 3rd party sick
 Retirement plan
 Statutory emp
2nd Local Wages:
Employee ZIP: Void
2nd Local Tax:
Federal Wages: 2nd Locality Name:
Federal Tax: Box 14:
SS Wages: Box 14:
SS Tax: Box 14:
Medi Wages: State:
Medi Tax: State ID Number:
Batch: 00001.12.2017

Proof List

- Run Summary first. You will need to change from Detail to Summary.
- Detail can be run for a single box that doesn't balance to other reports.
 - Tip: Send detail to Excel as well as the deduction register (summary) or General Wage report.
- If you want to save the detail, go back and run the detail for all boxes.
- Only the last version run will be retained in the batch.



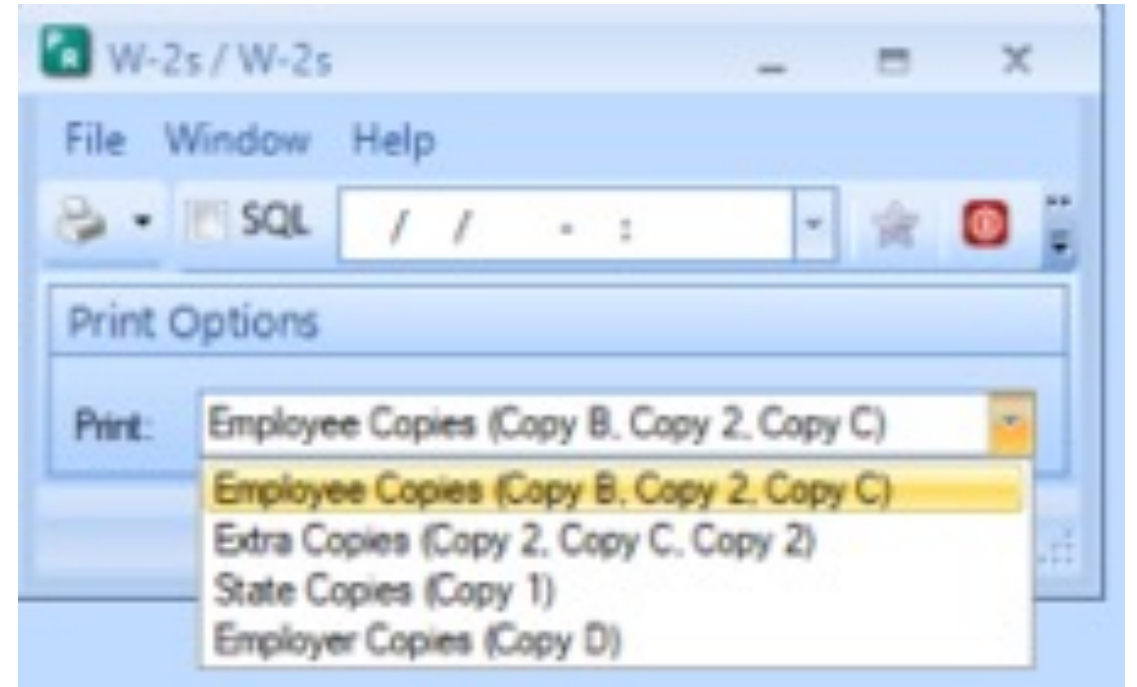
Balance W2 data to Payroll

- Run a deduction register (Totals only) for the year by check date.
- Check against W-2 Summary proof list.
- Make sure the totals for FICA and FICAR match each other and between the reports.
- If no employees exceed \$200,000 , MEDI and MEDIR will match.
- Balance wage totals (FED, STATE, FICA, MEDI) to the Quarterly Wage report for 4th quarter.
- Use General Wage report or export (7.17+) to balance local wages.
 - Other has been added as a Subject Wages option to the General Wage report.

Print W2s

This step prints the W2 forms.

- Employee Copies (B, 2, C)
- Extra Copies (2, C, 2)
- State Copies (1)
- Employer Copies (D)



W2s print the entire form 3 to a page so no line-ups are needed.

Forms

- Springbrook prints the entire front of the W-2
- 3 W2s to a page
- Approved vendor – Some print on plain paper.
- - The Solv Group– 800.388.3650
 - <https://www.thesolvgroup.com/>
 - This link takes you to their forms page - <https://tinyurl.com/SpringbrookEnter>

a Employee's social security number 999-99-3963		OMB No. 1545-0008		Copy B To Be Filed With Employee's FEDERAL Tax Return			
b Employer identification number (EIN) 396-00-5599		1 Wages, tips, other compensation 1480.59		2 Federal income tax withheld 90.56			
c Employer's name, address, and ZIP code Springbrook 123 Main Street Springbrook, OR 54220-4543		3 Social security wages 1780.59		4 Social security tax withheld 110.40			
		5 Medicare wages and tips 1780.59		6 Medicare tax withheld 25.82			
		7 Social security tips		8 Allocated tips		9 Verification code	
		10 Dependent care benefits		11 Nonqualified plans		12a Code	
d Control Number 0000000001		12b Code		12c Code		12d Code	
e Employee's name, address and ZIP code DEBORAH A NEUSER 5201 Reifs Mills Rd Springbrook, OR 99999		13 Statutory employee		14 Other			
		Retirement Plan					X
		Third-party sick pay					
15 State	Employer's state ID number UT 95-876543	16 State wages, tips, etc. 1,480.59	17 State income tax 87.44	18 Local wages, tips, etc.	19 Local income tax	20 Locality name	
		0.00	0.00				

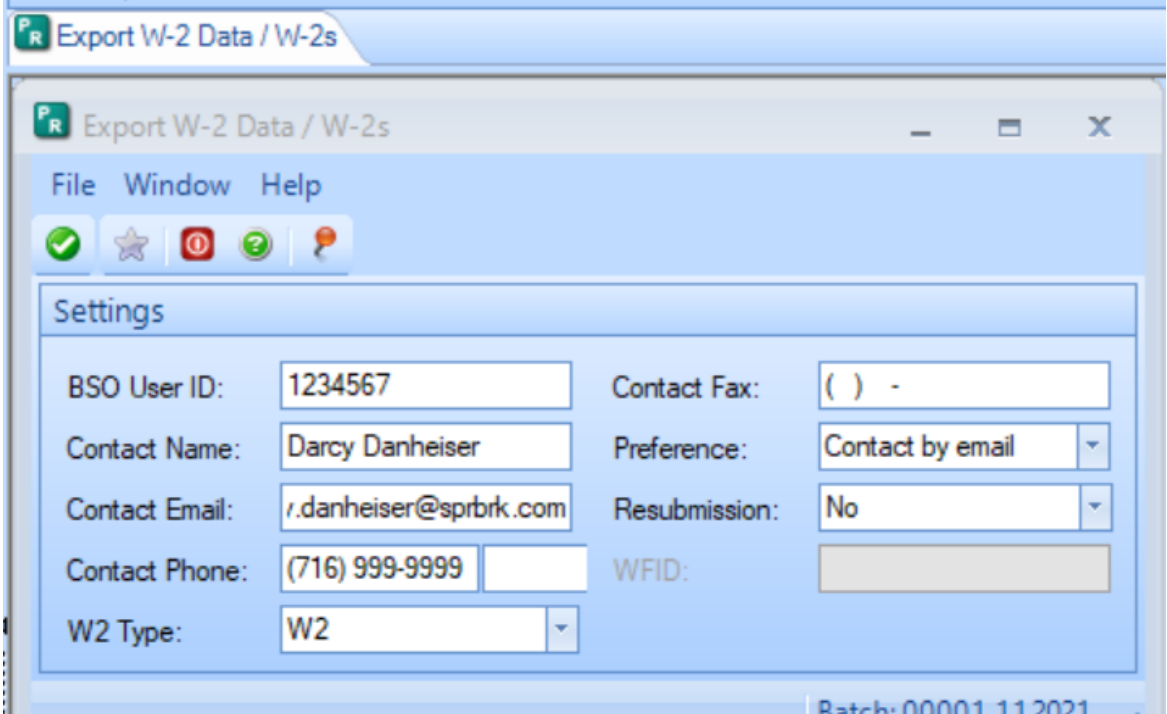
Form W-2 Wage and Tax Statement 2018

Department of the Treasury - Internal Revenue Service

a Employee's social security number 999-99-3963		OMB No. 1545-0008		Copy 2 To Be Filed With Employee's State, City, or Local Tax Return			
b Employer identification number (EIN) 396-00-5599		1 Wages, tips, other compensation 1480.59		2 Federal income tax withheld 90.56			

Export

- Springbrook does not create a printed W3.
- All reporting is done electronically.
- NOTE: No record layout changes to the Federal file for 2023 reporting.



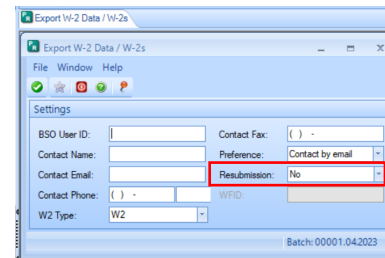
The screenshot shows a software window titled "Export W-2 Data / W-2s". The window has a menu bar with "File", "Window", and "Help". Below the menu bar is a toolbar with icons for a checkmark, a star, a red circle with a white exclamation mark, a green circle with a white question mark, and a speech bubble. The main area of the window is a "Settings" form with the following fields:

BSO User ID:	1234567	Contact Fax:	() -
Contact Name:	Darcy Danheiser	Preference:	Contact by email
Contact Email:	r.danheiser@sprbrk.com	Resubmission:	No
Contact Phone:	(716) 999-9999	WFID:	
W2 Type:	W2		

At the bottom right of the window, there is a status bar that reads "Batch: 00001 11/2021".

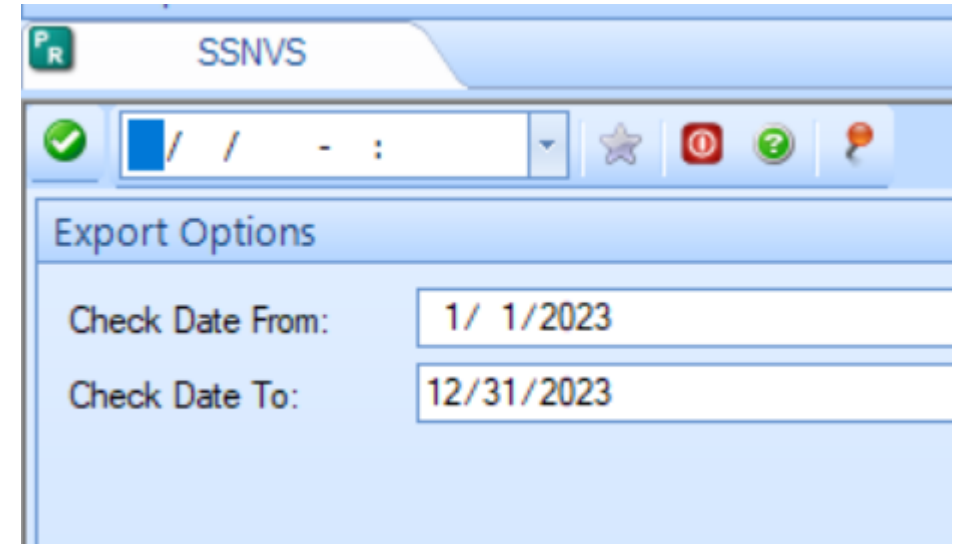
Oregon Clients ONLY

- Oregon Transit Tax is reported in Box 14 for Federal Filing.
- After uploading your file to Accuwage –
- Generate a second W2 batch to upload to the State of Oregon.
- This time, code the Oregon Transit Tax to Box 19, code ORSTTT to submit to iWire.
- If you made edits to your original file, you will have to make them again.
- On the Export Step, say NO to Resubmission.
- Run through the steps and export again to upload to OPRS.



SSNVS – Social Security Number Verification Service

- Checks employee names to SSNs.
- Export available in both Enterprise and Cirrus: **Payroll > Utilities > SSNVS.**
- Exports a file that can be uploaded to BSO SSNVS for Social Security Number verifications prior to sending W2s.




SSNVS - Notepad

File	Edit	Format	View	Help
999994045TPV214THEEL		ADAM	R	07011980M
999922674TPV214GROELLE		DEAN	A	03141974M
999993963TPV214NEUSER		DEBORAH	A	12021964F
999997627TPV214VOLT		JOHN	C	07241964M
999999001TPV214KRACHT		RALPH	V	01311973M
999997825TPV214MUELLER		MIKE	J	11131964M
999997448TPV214VOGT		RICKY	L	02281961M
999998952TPV214LEMBERGER		CHARLES	E	08091949M

NEW for 2024: IRS Regulations have been amended, lowering the threshold to 10 Employees. Meaning that if you have **10 or more** W-2s to issue, you **must** file electronically for tax year 2023.

[E-file information returns | Internal Revenue Service \(irs.gov\)](#)



E-file information returns | Internal Revenue Ser...
10 or more returns: E-filing now required Starting tax year 2023, if you have 10 or more information returns, you mu...
www.irs.gov

[New electronic filing requirements for Forms W-2 | Internal Revenue Service \(irs.gov\)](#)



New electronic filing requirements for Forms W...
Regulations section 301.6011-2 was amended by Treasury Decision 9972, published February 23, 2023, which lowers...
www.irs.gov

There is also a change to how an employer can access Business Services Online (BSO) in order to be able to submit W-2's to the Social Security Administration.

Go to [Business Services Online](#) for more information and the steps to create/use a Social Security online account, Login.gov, or ID.me credential to gain access to the BSO application.

We would encourage you to create your accounts sooner rather than later as this would eliminate frustration when it comes time to file W-2s.

Alert

**Do you need to submit W-2's to SSA?
Business Services Online (BSO) Registration has changed!**

What does this mean for you?

Your existing BSO User ID and password is no longer used to access BSO employer services. You must use a Social Security online account, Login.gov, or ID.me credential to gain access to the BSO application.

Start by visiting our [Social Security Sign in page](#).

If you do not have a Social Security online account, a Login.gov or ID.me credential, you will need to create one from our [BSO Welcome page](#). Scroll down and select "Create Account" in the "Employers" box.

Extra security is a requirement to access the following BSO employer services:

- Wage file upload
- W-2/W-2C online
- AccuWage online
- Social Security Number Verification Service (SSNVS)
- View wage report name/SSN errors

You will not be able to use the above services without adding the additional levels of security to your account.

BSO – Business Services Online

- Check now to make sure you can log In to BSO.
 - You can add additional services (SSN checking) if you need it.

<https://www.ssa.gov/bso/bsowelcome.htm>

- Accuwage – Used to upload the W2 file export.
 - Must log in to BSO to get to Accuwage Online.
 - Instructions on the page linked below.

<https://www.ssa.gov/employer/accuwage/index.html>

Accuwage

The screenshot shows the top portion of a web browser displaying the Social Security Administration's AccuWage Online Information page. The browser's address bar shows the URL: https://www.ssa.gov/employer/accuwage/index.html. The page header features the Social Security Administration logo on the left, followed by the text "Social Security". To the right of the logo are navigation options: "SEARCH", "MENU", "LANGUAGES", and "SIGN IN / UP". Below the header is a dark blue navigation bar with five menu items: "Home", "Employer W-2 Filing", "Verify SSNs", "Reconciliation", and "Publications & Forms". Below this bar is a light beige banner with the text "AccuWage Online Information".

[What is AccuWage Online?](#) | [How do I access AccuWage Online](#) | [Helpful Tips](#) | [More Information](#)

What is AccuWage Online?

AccuWage Online is a free application from Social Security Administration that enables you to check W-2 (Wage and Tax Statement) and W-2C (Corrected Wage and Tax Statement) Wage reports for format correctness before uploading them to the Electronic Wage Reporting (EWR) system. AccuWage is a part of Business Services Online (BSO) which allows organizations and individuals to exchange wage information with SSA securely over the internet.

Quick Links

[Business Services Online Home Page](#)

[EFW2 - EFW2C Publications](#)

[AccuWage Online Help Guide](#)

[AccuWage Online FAQ](#)



BSO Help and Information

Questions so far?



FFCRA – Families First Coronavirus Response Act

IRS Notice 2020-54

- Requirement to report FFCRA wages in box 14 of the W2.
- Springbrook has added functionality to import data into this and other boxes.
 - Added because we don't have any way of posting specific pay codes to boxes on the W2s.

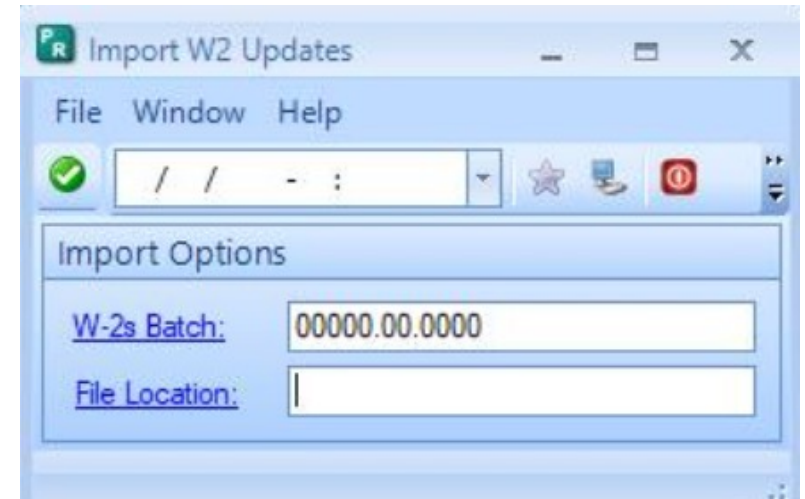
<https://www.irs.gov/newsroom/treasury-irs-issue-guidance-on-reporting-qualified-sick-and-family-leave-wages-paid>

Payroll > Utilities > Import W2 Updates

- A utility is available to import data into specific boxes on the generated W2. Available in versions 7.15+ and Cirrus.
- Menu Security will need to be added to access the Utility.
- Can only be used to import data into boxes 12, 14 and 19.
 - Box 12 – Currently has 4 available boxes. Currently creates overflows
 - Box 14 – Currently has 3 available boxes. Does not currently have overflow capability.
 - Box 19 – also fills boxes 18 (wages) and 20 (code). Currently creates overflows.

Import W2 information

- Import will create an overflow W2 if the boxes are full.
- Will NOT overwrite existing data in the boxes.
- You will need to export and combine the information that will be imported into the W2.
 - Use the Pay Type Register sent to excel (totals by employee) for Box 14 FFCRA data.
 - Use the General Wage Report (7.15 and 7.16) or the General Wage Export to get box 19 data.
- Payroll > Utilities > Import W2 Updates window



Import W2 information – File Format

This will be a CSV file import. File must have all 7 columns.

- A. Employee Number *
 - B. SSN *
- } Either field but not both. Leave the unfilled field blank
- C. Box Number (12, 14, 19)
 - D. Box Code (optional for box 19 – Required for boxes 12 and 14)
 - E. Amount – This amount will go in the box noted.
 - F. Wages (blank for Box Number 12 and 14. Will go in box 18 if Box Number is 19).
 - G. Description (blank for Box Number 12 and 14. Will go in box 20 if box number is 19).

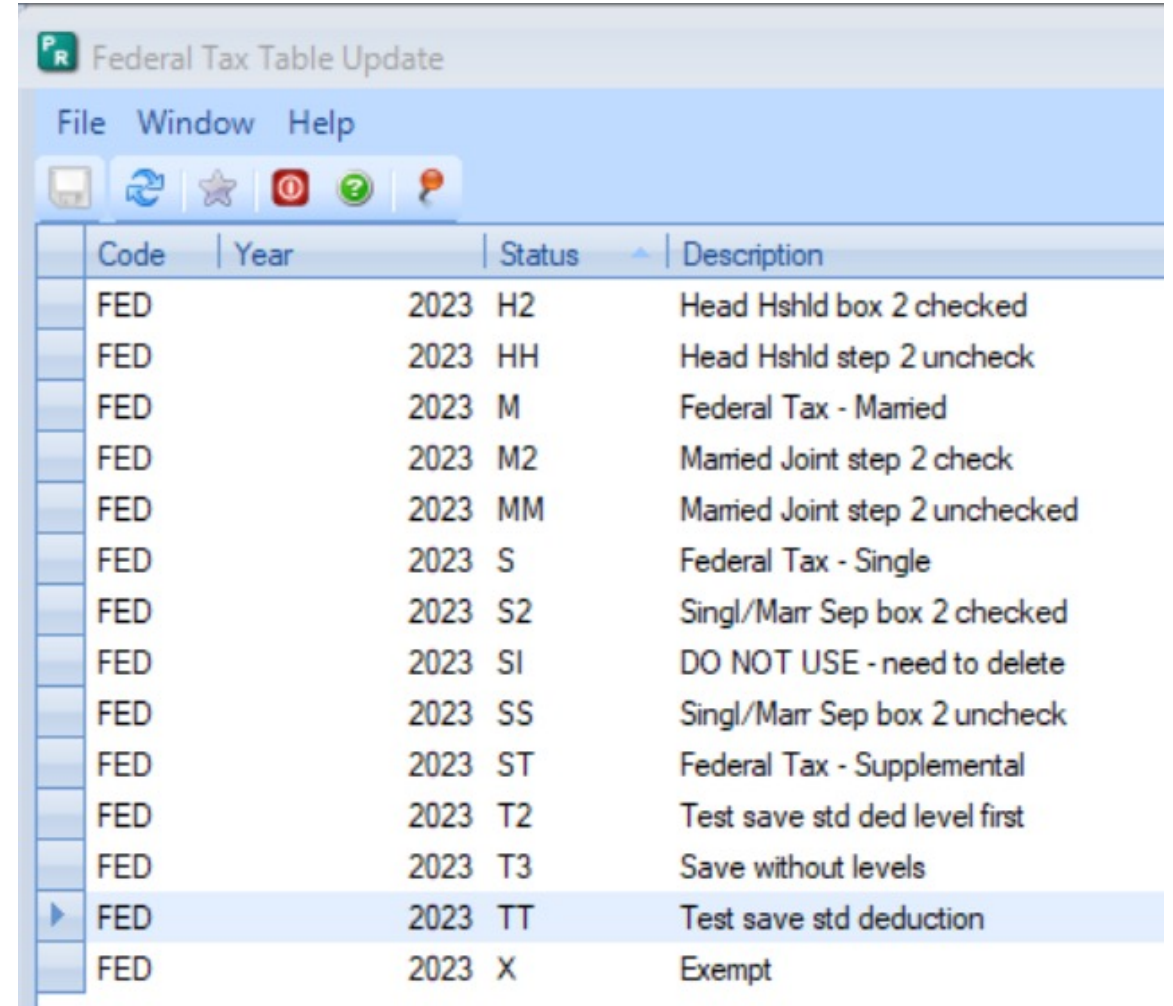
Import W2 information – Process

- After the W2 Generate is completed, the import can be done.
- The import process will create a job in the Job Viewer.
- After the import completes the batch will reset to the Edit step for review.
- If incorrect data is imported or imported twice you will need to regenerate the W2 batch and import again.
- Result if there is a problem with the import.
 - Errors will display in the job viewer.
 - As long as the file imports (the fields and format are correct), any valid data will import to the W2s.
 - Invalid information will display in the job viewer.

7.18 and Cloud Only – Federal Tax Table Updates

Payroll > Utilities > Federal Tax Table Update

- Available for 7.18 and Cloud databases only.
- If you can't see Federal Tax Table Update – You will need to update Menu Security to access it.
- Will **NOT** update State tax tables.
- When the Year says 2024 (the next calendar year), the tables are available to update.
 - This window says 2023 which indicates the 2024 tax tables are not available yet.



The screenshot shows a software window titled "Federal Tax Table Update". It has a menu bar with "File", "Window", and "Help". Below the menu bar is a toolbar with icons for refresh, star, error, success, and help. The main area contains a table with the following columns: Code, Year, Status, and Description. The table lists various tax codes for the year 2023, with the "TT" code selected.

Code	Year	Status	Description
FED	2023	H2	Head Hshld box 2 checked
FED	2023	HH	Head Hshld step 2 uncheck
FED	2023	M	Federal Tax - Married
FED	2023	M2	Married Joint step 2 check
FED	2023	MM	Married Joint step 2 unchecked
FED	2023	S	Federal Tax - Single
FED	2023	S2	Singl/Marr Sep box 2 checked
FED	2023	SI	DO NOT USE - need to delete
FED	2023	SS	Singl/Marr Sep box 2 uncheck
FED	2023	ST	Federal Tax - Supplemental
FED	2023	T2	Test save std ded level first
FED	2023	T3	Save without levels
FED	2023	TT	Test save std deduction
FED	2023	X	Exempt

Cirrus > Payroll > Utilities > Federal Tax Table Update

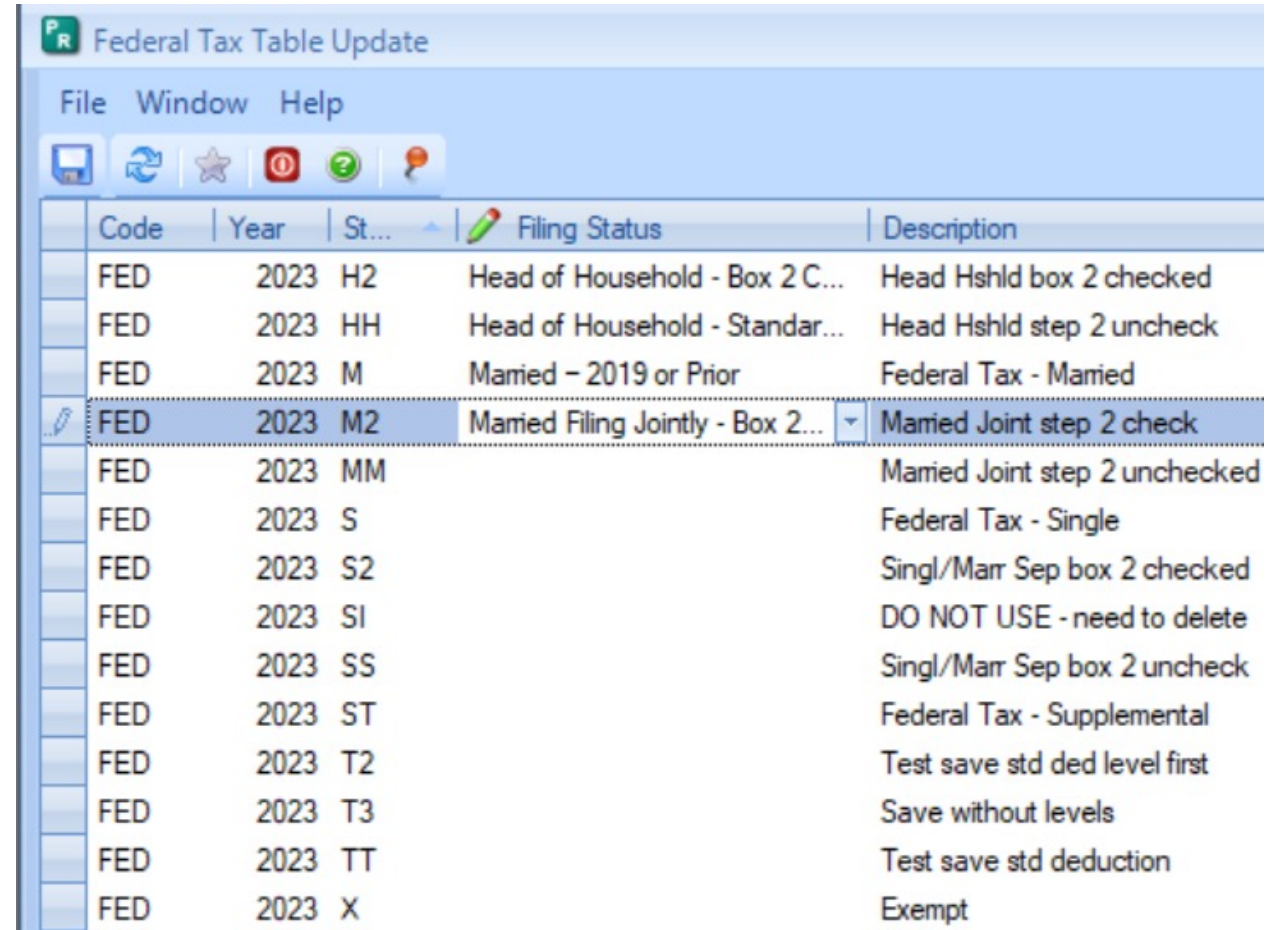
☆ PR Federal Tax Table Update

UPDATE × CANCEL

Code	Year	Status	↑	Filing Status	Description
FED	2023	H2			HEAD HSLD BOX 2 CHECK
FED	2023	HH			HEAD HOUSE BOX 2 UNCK
FED	2023	M			2023 MARRIED TAX (prior 2020)
FED	2023	M2			MARR JOINT BOX 2 CHECK
FED	2023	MM			MARRIED JOINT BOX 2 UNCK
FED	2023	S			2023 SINGLE TAX (Prior 2020)
FED	2023	S2			SINGLE/ MAR SEP BOX 2 CHECK
FED	2023	SS			SINGLE/ MARR SEP BOX 2 UNCK
FED	2023	ST			FEDERAL TAX - SUPPLEMENTAL
FED	2023	X			EXEMPT TAXES

Federal Tax Table Update

- Select your tax table that matches the code in the window. These are the codes and descriptions on your tax tables.
- Click in the Filing Status box to display the down arrow to select the table with the update information.
- Select each table to update. You can do this in several steps if desired.



The screenshot shows a software window titled "Federal Tax Table Update" with a menu bar (File, Window, Help) and a toolbar. Below the toolbar is a table with the following columns: Code, Year, St..., Filing Status, and Description. The table lists various tax tables for the year 2023, with the row for Code "FED", Year "2023", and Filing Status "M2" (Married Filing Jointly - Box 2...) selected and highlighted.

Code	Year	St...	Filing Status	Description
FED	2023	H2	Head of Household - Box 2 C...	Head Hshld box 2 checked
FED	2023	HH	Head of Household - Standar...	Head Hshld step 2 uncheck
FED	2023	M	Married - 2019 or Prior	Federal Tax - Married
FED	2023	M2	Married Filing Jointly - Box 2...	Married Joint step 2 check
FED	2023	MM		Married Joint step 2 unchecked
FED	2023	S		Federal Tax - Single
FED	2023	S2		Singl/Marr Sep box 2 checked
FED	2023	SI		DO NOT USE - need to delete
FED	2023	SS		Singl/Marr Sep box 2 uncheck
FED	2023	ST		Federal Tax - Supplemental
FED	2023	T2		Test save std ded level first
FED	2023	T3		Save without levels
FED	2023	TT		Test save std deduction
FED	2023	X		Exempt

Federal Tax Table Update

- Available selections match Publication 15-T table information.
- Standard indicates Box 2 is unchecked.
 - Single – Standard
 - Married Filing Jointly – Standard
 - Head of Household – Standard
 - Married Filing Separately (same as single)
 - Married Filing Jointly-Box 2 checked
 - Head of Household-Box 2 checked
 - Married Filing Separately – Box 2 checked

Federal Tax Table Update

- Save your changes.
- If any table(s) have a current revision with the date 1/1/YYYY you will get an error.
- You can either change the revision date or delete the revision to resolve.
- Change the error line to blank to save the rest, then check the others to resolve the issue(s).

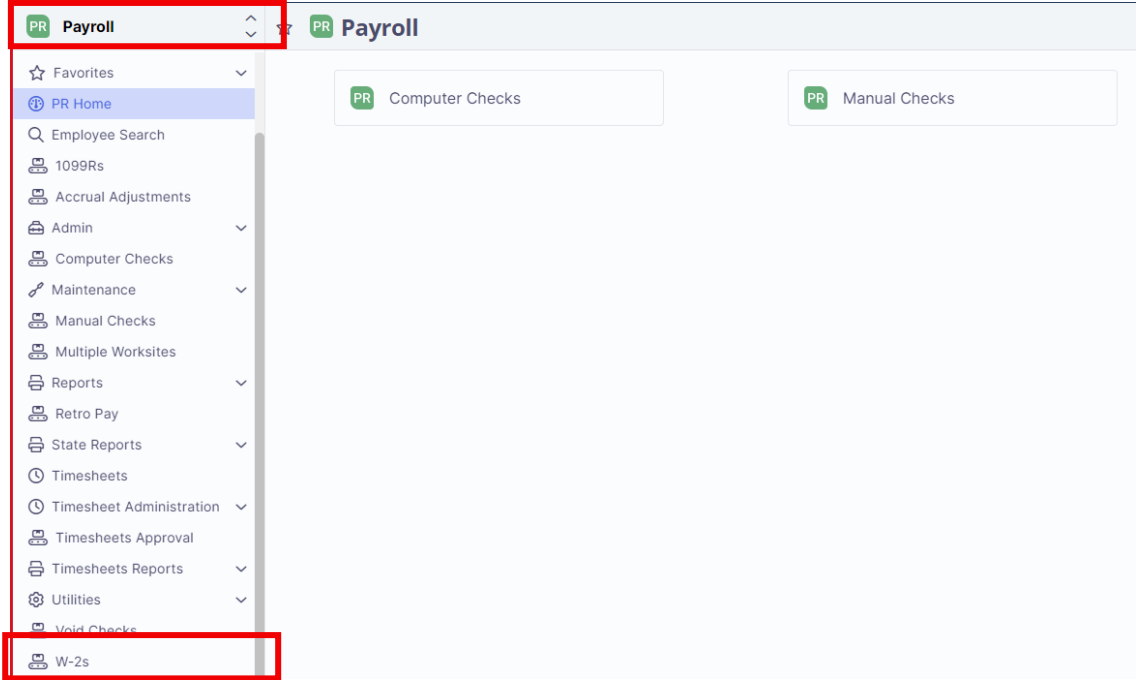
Code	Year	Status	Filing Status	Description
FED	2022	S2	Single - Box 2 Chec...	Singl/Marr Sep box 2 ch...
FED	2022	S	Single - 2019 or Prior	Federal Tax - Single
FED	2022	M	Married - 2019 or Prior	Federal Tax - Married
FED	2022	ST		Federal Tax - Supplemen...
FFD	2022	T2		Test save etd ded level fi

Questions?

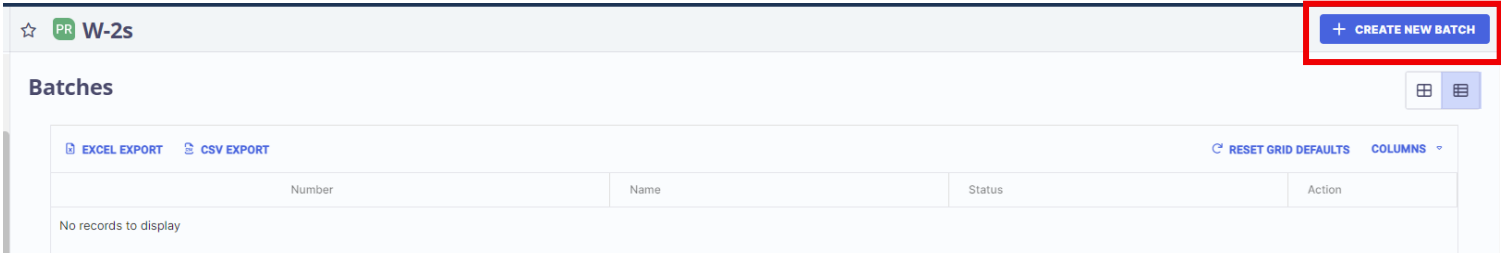


W2 Process in Cirrus

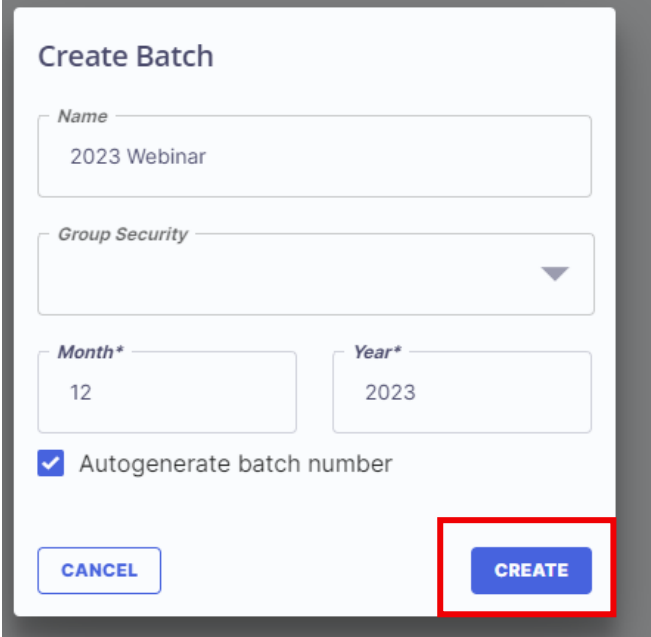
As in Enterprise, to access the W-2 process in Cirrus go to **Payroll > W-2s**



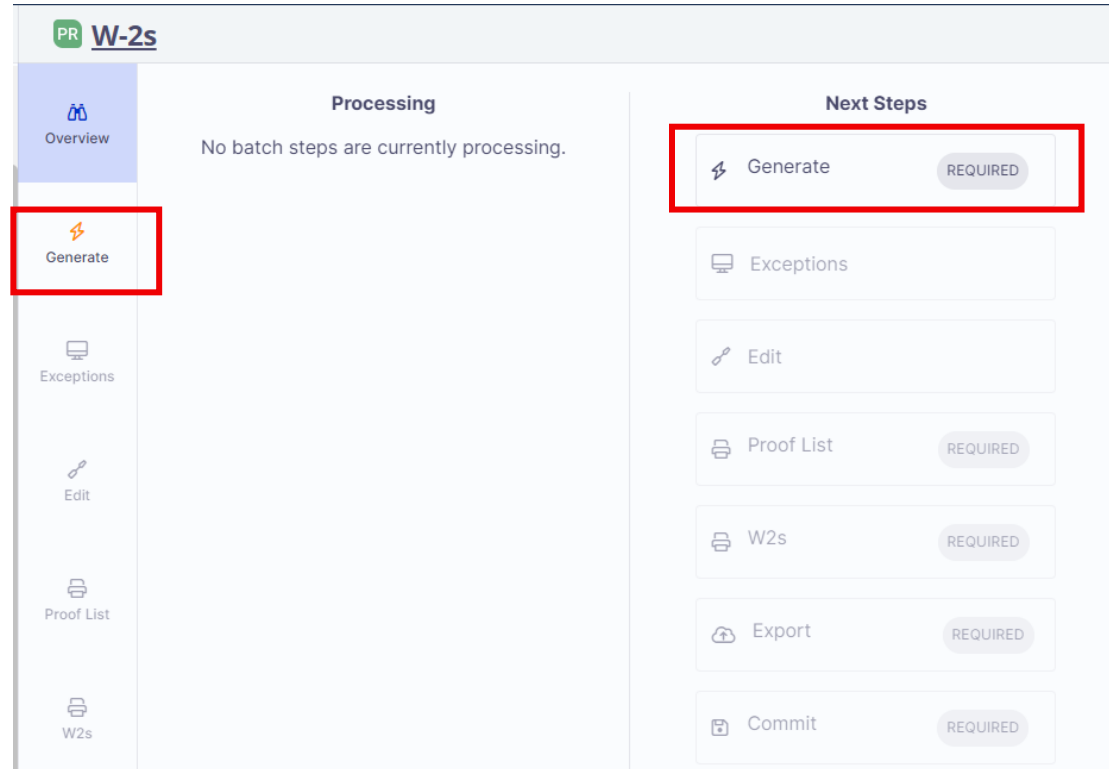
After you have clicked on W-2s, you will then have the option to Create New Batch. Click on it.



In the box that pops up, enter in the Name (if you want to name this batch it is not required), confirm that the month is 12 and the year is 2023 and the toggle is checked next to Autogenerate batch number. Select Create.



Once the Batch is created, you will then see the steps for the batch process. You will then need to click on Generate to begin.



Within the Generate step, this is where you will confirm the Year, verify that your entity's information is correct, enter in the FICA max and then for your deduction codes, as in Enterprise, fill in the Box Number and applicable code or if a retirement plan check the toggle. Once entered, click Submit.

PR W-2s 2023 WEBINAR

Year
2023

Employer
Springbrook

Date To Use
Check Date

Employer Type
State or Local Government

Sort By
Last Name

Address Line 1
123 Elm St.

FICA Max
160,200.00

Address Line 2

SDI Max
0.00

City
Portland

Federal ID
94-1234567

State
OR

Reporting Group

Zip Code
93631-1908

NY: State wages = Federal wages when printing W2s form

UPDATE **CANCEL** COLUMNS

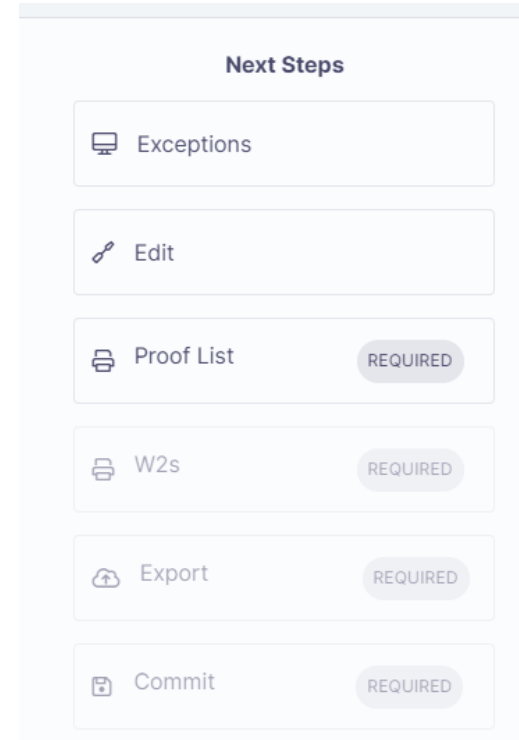
Ded/Ben Code	Description	Box Number	Code	Retirement Plan
OTHER	Medi			<input type="checkbox"/>
REGION	Regional Income Tax			<input type="checkbox"/>
IMPUTE	Life Ins Txble Benefit +50K	12	C	<input type="checkbox"/>
P-SC	PERS Service Credit			<input type="checkbox"/>
H-4850	Health Pop	12	DD	<input type="checkbox"/>
P-FCL4	PERS Safety Fire Classic 4850			<input checked="" type="checkbox"/>
P-MCR	PERS Misc. Classic ER			<input checked="" type="checkbox"/>
R-C457	CalPERS 457 Plan			<input type="checkbox"/>
ZZDDF2	Direct Deposit Flat Amt 2			<input type="checkbox"/>
P-FCL	PERS Safety Fire -Classic			<input type="checkbox"/>
U-POA	KPOA Union Dues			<input type="checkbox"/>

SUBMIT

As in Enterprise, check to see if there are **Exceptions**. The fact that you have exceptions will not stop the process, it is only to notify you that something is incorrect

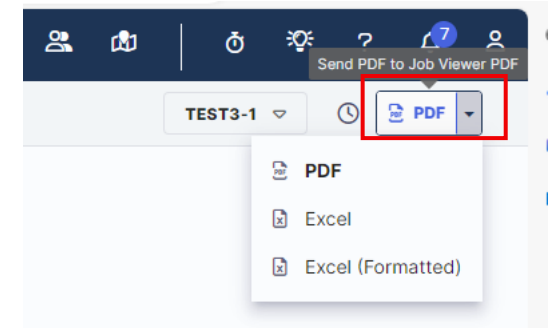
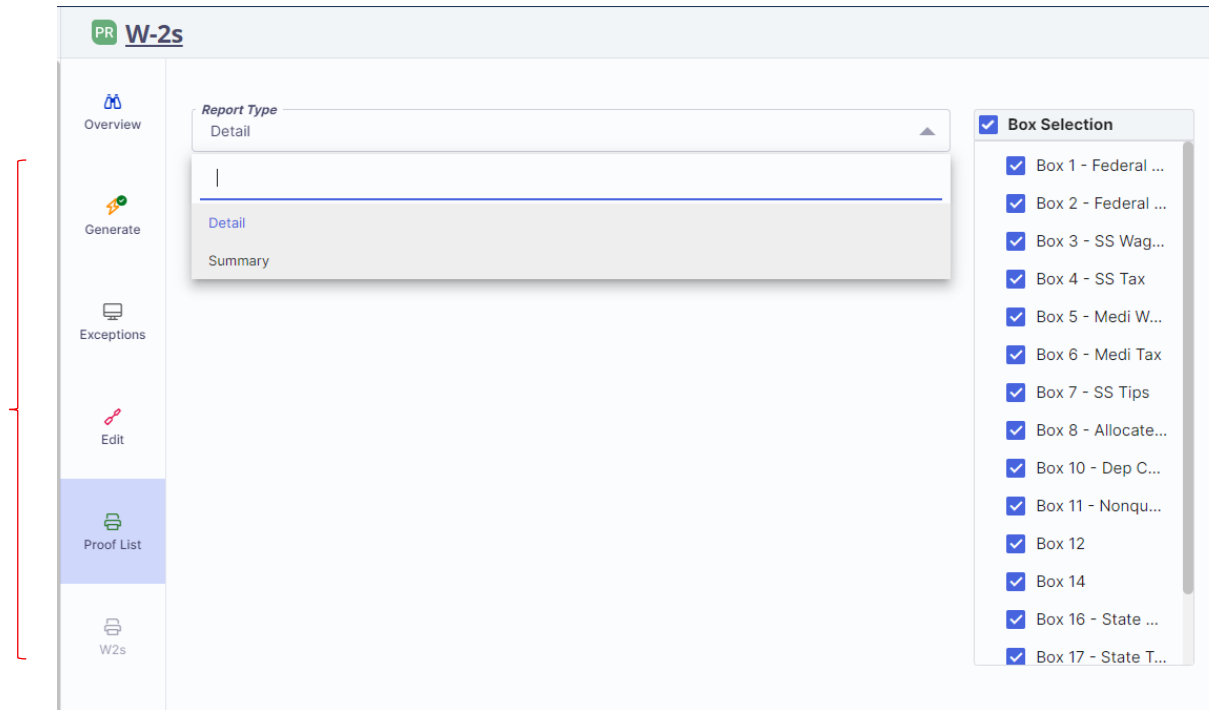
The **Edit** step will provide the list of employees receiving a W-2 and their wages and taxes for the year. Just as in Enterprise, you have the option to go in to review and make corrections.

The next required step is the **Proof List**. Click on it to run.

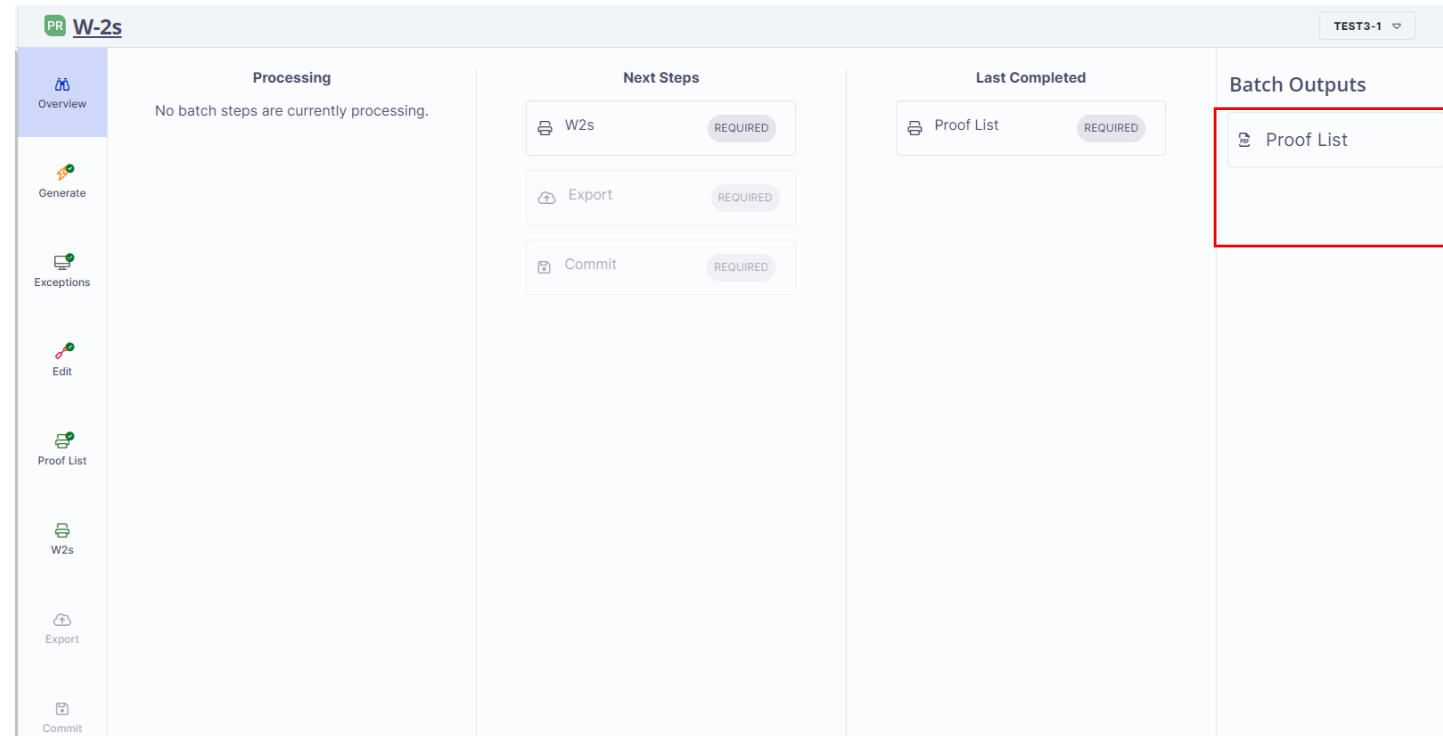


You have the option to run the Proof list by Detail or Summary. Make your selection then in the upper righthand corner there will be a drop down, where you can select how you would like to report to run, either in Excel or PDF.

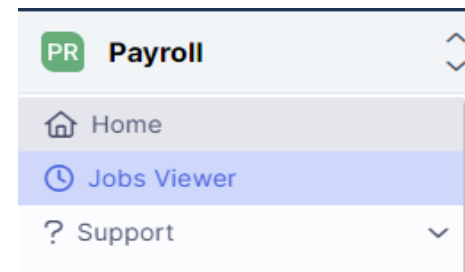
At any time if you need to go back to a previous step, you can just click on the step here on the side and it will take you back.



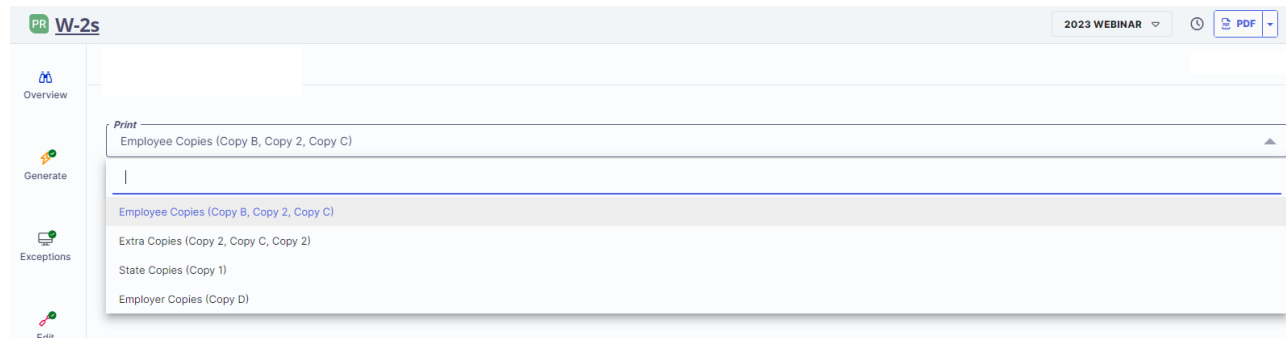
Once the Proof List is finished running, it will be accessible under **Batch Outputs** or under **Jobs Viewer**. If you ran the Summary Proof List, you can go back and run the Detail Proof List.



OR



The W-2s step is where you will create the file to be able to print the W-2s.



And the Export step is where you will enter in the information needed for the file to send to the IRS. Once entered select Submit.

A screenshot of the 'Export' step in the W-2s interface. The top bar includes 'PR W-2s', '2023 WEBINAR', and a blue 'SUBMIT' button. The sidebar on the left has icons for 'Overview', 'Generate', and 'Exceptions'. The main form area contains several input fields: 'BSO User ID*', 'Contact Name*', 'Contact Email*', 'Contact Phone*' (with separate boxes for area and number), 'W2 Type' (a dropdown menu showing 'W2'), 'Contact Fax' (with a format '() - -'), 'Preference' (a dropdown menu showing 'Contact by email'), 'Resubmission' (a dropdown menu showing 'No'), and a greyed-out 'WFID' field.



Thank you!

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