



Springbrook – W2 Processing

Enterprise and Cirrus



Agenda

- IRS information
- W2 process – Generate
 - Exceptions
 - Edit
 - Proof List
 - W2
 - Export
 - Commit
- 7.18 and 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.

No Tax on Overtime under the One, Big, Beautiful Bill (OBBB)

Effective for 2025 through 2028, individuals who receive qualified overtime compensation may deduct the pay that exceeds their regular rate of pay – such as the “half” portion of “time-and-a-half” compensation -- that is required by the Fair Labor Standards Act (FLSA) and that is reported on a Form W-2, Form 1099, or other specified statement furnished to the individual. (Click [here](#) for more details.)

Per the IRS, Forms W-2 and 1099 for tax year 2025 will not be updated to account for the OBBB-related changes.

The IRS suggests “employers and payors are encouraged to provide employees and payees with separate accountings of overtime compensation, so the employee or payee has readily available the information necessary to claim the deduction for qualified overtime compensation for tax year 2025”. (Click [here](#) for more details.)

In Springbrook, for 2025, employees can use their last pay stub of 2025 to find their yearly overtime earnings, or you can run the Pay Type Register only for the OT pay codes with Totals by Employees as the Report Type. Employees can then furnish this information to their tax preparer to take the proper deduction.

Our Engineering team will review to see what changes are needed for 2026 W-2 reporting.

An additional informative resource is a webinar from the Government Finance Officers Association (GFOA) provides in depth review of the new law and what constitutes eligible Overtime earnings. We strongly suggest you review this webinar as it may answer many of your questions and provide additional information.

[GFOA Implementing No Tax on Overtime](#)

(This is a YouTube video and starts with a short ad, which you can skip.)



[No Tax on Overtime FAQ](#)

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: 2024

Date to Use: Check Date

Sort By: Last Name

FICA Max: 168,600.00

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: IA

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 type="checkbox"/>
OPS PU	OPERS Employer Pic...	0		<input type="checkbox"/>
OPSUAL	OPSRP UAL	0		<input type="checkbox"/>
ORSHS	Oregon SHS tax	0		<input type="checkbox"/>
ORTRAN	Transit tax	0		<input type="checkbox"/>
OTHER	Metro Tax	0		<input type="checkbox"/>
PEHP#1	Pol Prof PEHP MO	0		<input type="checkbox"/>
PEHP#2	Police Prof PEHP Mo	0		<input type="checkbox"/>

Batch: 00001.12.2024

W2 Process - Generate

- Select 2024 (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.

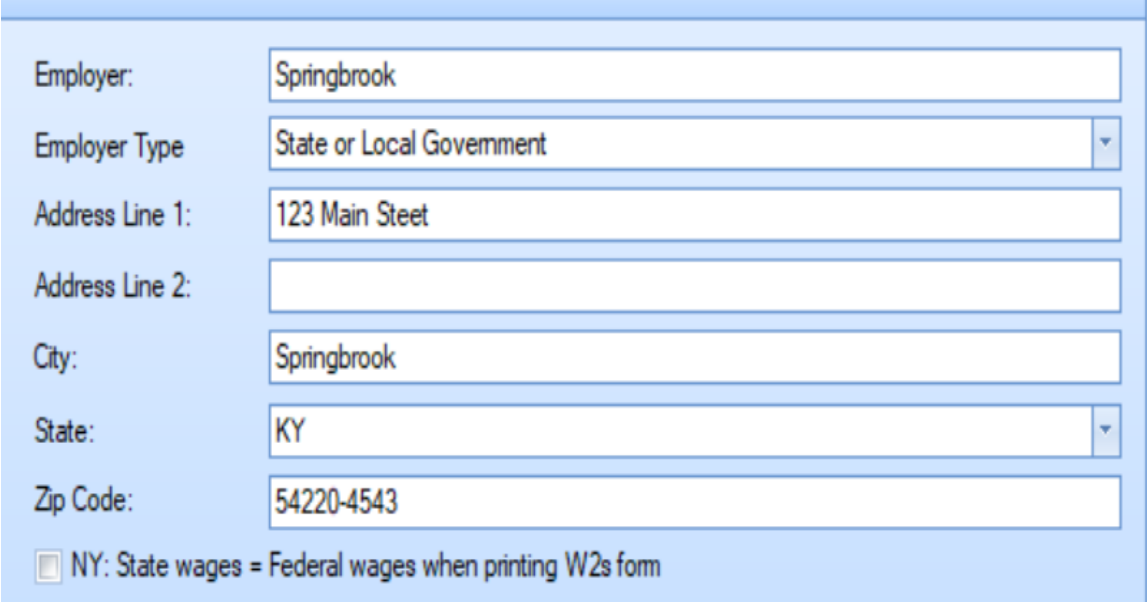
The screenshot shows a web application window titled 'Generate / W-2s'. The interface includes a 'Settings' section with the following fields:

- Year:** A dropdown menu set to '2024'.
- Date to Use:** A dropdown menu set to 'Check Date'.
- Sort By:** A dropdown menu set to 'Last Name'.
- FICA Max:** A text input field containing '168,600.00'.
- SDI Max:** A text input field containing '0.00'.
- Federal ID:** A text input field containing '999-99-99999'.
- Reporting Group:** An empty text input field.

Below the 'Reporting Group' field, there is a link labeled '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 displays a form for generating W2s. 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
<input type="checkbox"/> NY: State wages = Federal wages when printing W2s form	

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.
- Fill in Box Numbers and Codes
 - 7.15+ will create second W2s if more information than will fit in boxes 12, 14 and 19

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"/>

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!

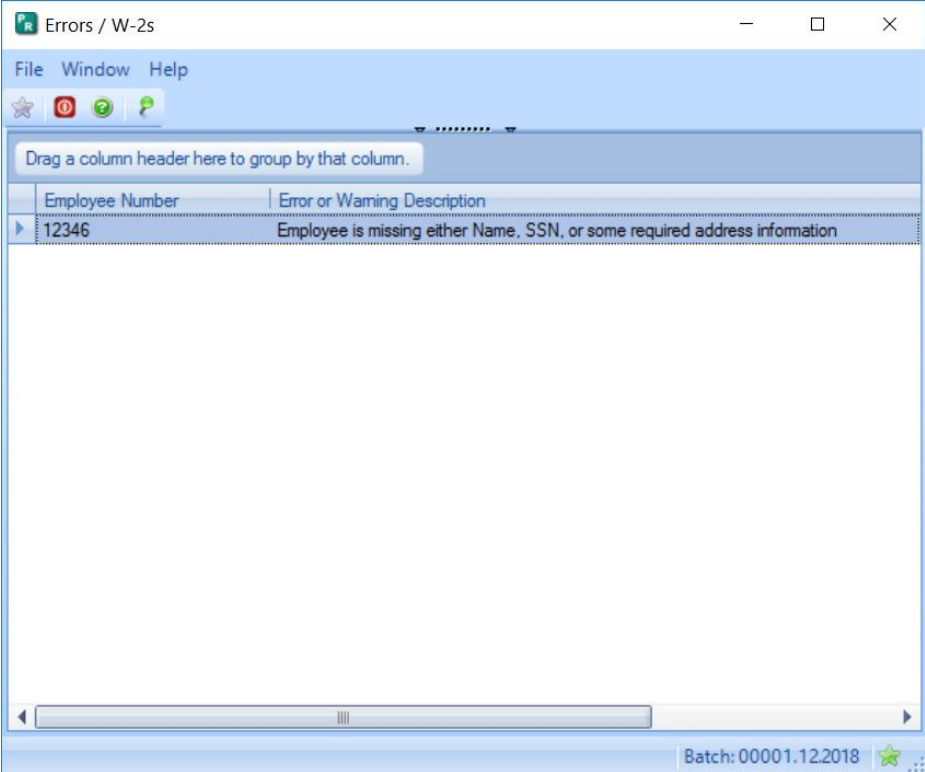
Form W-2 Reference Guide for Box 12 Codes

A	Uncollected social security or RRTA tax on tips	L	Substantiated employee business expense reimbursements	Y	Deferrals under a section 409A nonqualified deferred compensation plan
B	Uncollected Medicare tax on tips (but not Additional Medicare Tax)	M	Uncollected social security or RRTA tax on taxable cost of group-term life insurance over \$50,000 (former employees only)	Z	Income under a nonqualified deferred compensation plan that fails to satisfy section 409A
C	Taxable cost of group-term life insurance over \$50,000	N	Uncollected Medicare tax on taxable cost of group-term life insurance over \$50,000 (but not Additional Medicare Tax) (former employees only)	AA	Designated Roth contributions under a section 401(k) plan
D	Elective deferrals under a section 401(k) cash or deferred arrangement plan (including a SIMPLE 401(k) arrangement)	P	Excludable moving expense reimbursements paid directly to members of the Armed Forces	BB	Designated Roth contributions under a section 403(b) plan
E	Elective deferrals under a section 403(b) salary reduction agreement	Q	Nontaxable combat pay	DD	Cost of employer-sponsored health coverage
F	Elective deferrals under a section 408(k)(6) salary reduction SEP (this includes elective deferrals made to a Roth SEP IRA)	R	Employer contributions to an Archer MSA	EE	Designated Roth contributions under a governmental section 457(b) plan
G	Elective deferrals and employer contributions (including nonelective deferrals) to a section 457(b) deferred compensation plan	S	Employee salary reduction contributions under a section 408(p) SIMPLE plan (this includes salary reduction contributions made to a Roth SIMPLE IRA)	FF	Permitted benefits under a qualified small employer health reimbursement arrangement
H	Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan	T	Adoption benefits	GG	Income from qualified equity grants under section 83(i)
J	Nontaxable sick pay	V	Income from exercise of nonstatutory stock option(s)	HH	Aggregate deferrals under section 83(i) elections as of the close of the calendar year
K	20% excise tax on excess golden parachute payments	W	Employer contributions (including employee contributions through a cafeteria plan) to an employee's health savings account (HSA)	II	Medicaid waiver payments excluded from gross income under Notice 2014-7

For more information on the Box 12 Codes click [here](#).

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.
- Be sure to check for Exceptions and make any corrections even if it is not a stop error.




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

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.

The Plus  indicates the second W-2 record. If you edit one of the records you must also edit the second record.

W-2 Selection / W-2s

File Window Help

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	Disch, 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

Batch: 00001.12.2017

Example of a W-2 with overflow in the Edit step. Box 12 on the first entry is full and the additional Box 12 entries will print on a second W-2 which is the second entry.

Edit W-2 Record / W-2s

FileWindowHelp

Maintenance

Control Number:

0000000004

Employee SSN:

999-99-0405

First Name:

DAVID*M

Middle Name:

Last Name:

DISCH

Name Suffix:

Employee Address 1:

2629 So 8th St

Employee Address 2:

Employee City:

Springbrook

Employee State:

OR

Employee ZIP:

99999-

Federal Wages:

1,391.63

Federal Tax:

143.84

SS Wages:

1,591.63

SS Tax:

98.68

Medi Wages:

1,591.63

Medi Tax:

23.08

SS Tips:

0.00

Allocated Tips:

0.00

Verification Code:

Dept Care Benefit:

0.00

Nonqual Plans:

0.00

Box 12a:

D

12.76

Box 12b:

DD

921.70

Box 12c:

EE

3.50

Box 12d:

G

12.76

Box 13:

☐ 3rd party sick

☒ Retirement plan

☐ Statutory emp

Box 14:

DC

200.00

Box 14:

0.00

Box 14:

0.00

State:

OR

State ID Number:

95-876543

State Wages:

1,391.63

State Tax:

80.50

Local Wages:

0.00

Local Tax:

0.00

Locality Name:

2nd State:

2nd State ID:

2nd State Wages:

0.00

2nd State Tax:

0.00

2nd Local Wages:

0.00

2nd Local Tax:

0.00

2nd Locality Name:

Void

Batch: 00001.12.2017

Edit W-2 Record / W-2s

FileWindowHelp

Maintenance

Control Number:

0000000004

Employee SSN:

999-99-0405

First Name:

DAVID*M

Middle Name:

Last Name:

DISCH

Name Suffix:

Employee Address 1:

2629 So 8th St

Employee Address 2:

Employee City:

Springbrook

Employee State:

OR

Employee ZIP:

99999-

Federal Wages:

0.00

Federal Tax:

0.00

SS Wages:

0.00

SS Tax:

0.00

Medi Wages:

0.00

Medi Tax:

0.00

SS Tips:

0.00

Allocated Tips:

0.00

Verification Code:

Dept Care Benefit:

0.00

Nonqual Plans:

0.00

Box 12a:

H

12.76

Box 12b:

J

12.76

Box 12c:

N

9.14

Box 12d:

P

115.39

Box 13:

☐ 3rd party sick

☐ Retirement plan

☐ Statutory emp

Box 14:

0.00

Box 14:

0.00

Box 14:

0.00

State:

State ID Number:

State Wages:

0.00

State Tax:

0.00

Local Wages:

0.00

Local Tax:

0.00

Locality Name:

2nd State:

2nd State ID:

2nd State Wages:

0.00

2nd State Tax:

0.00

2nd Local Wages:

0.00

2nd Local Tax:

0.00

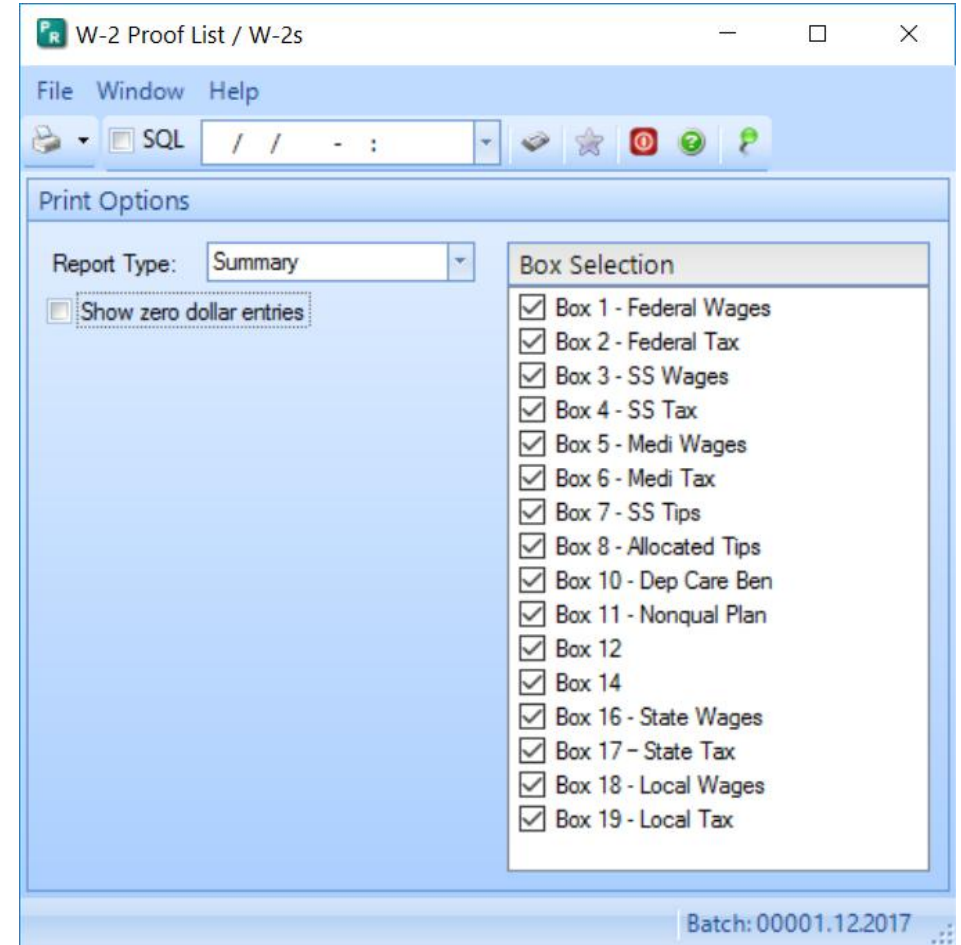
2nd Locality Name:

Void

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.



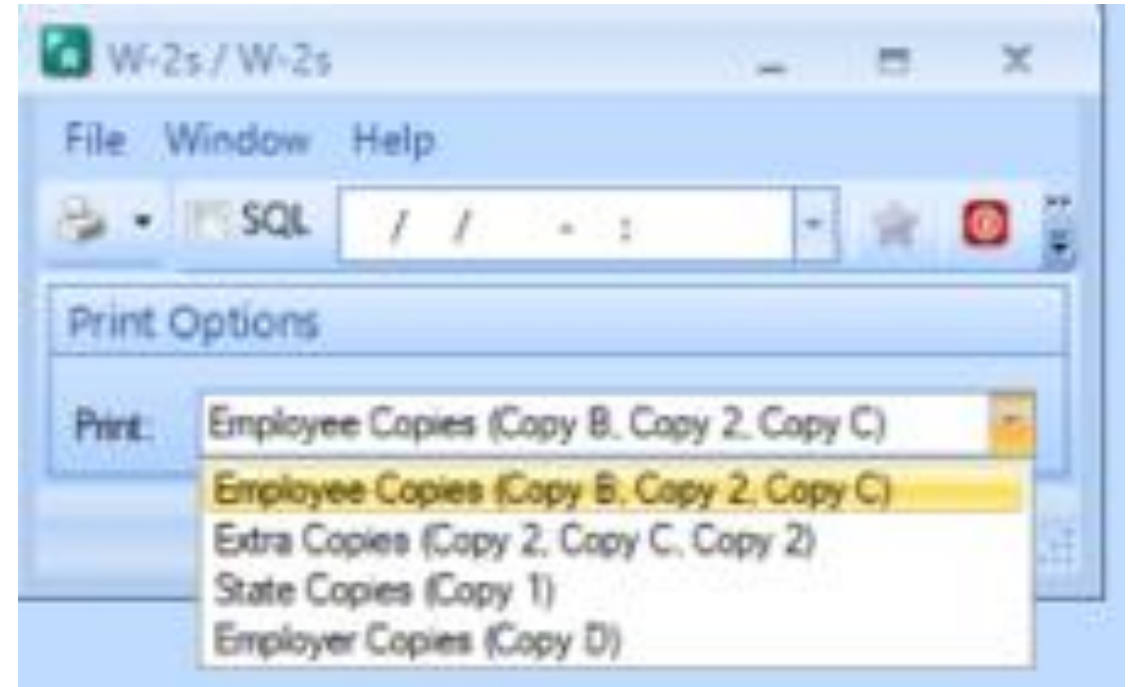
Balance W2 data to Payroll

- 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)
(this is what needs to print to send W-2s to ESS)
- 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 - [Forms](#)

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		14 Other			
		Statutory employee					
		Retirement Plan		X			
		Third-party sick pay					
15 State	Employer's state ID number UT	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				

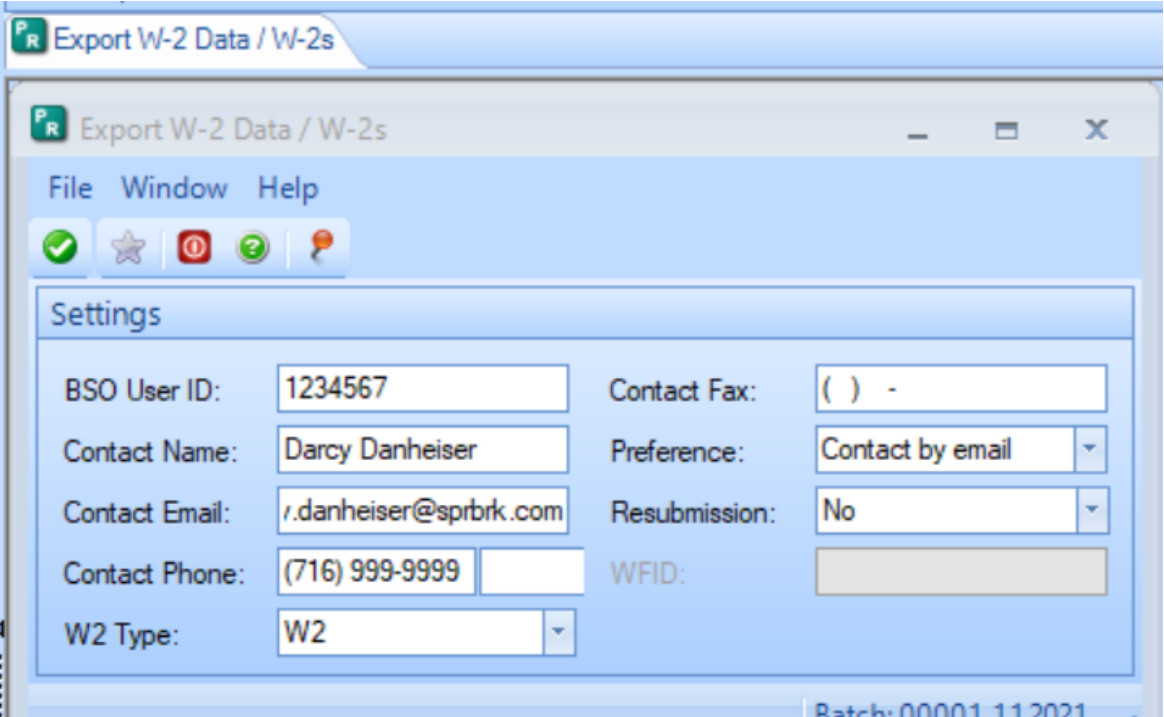
Form W-2 Wage and Tax Statement 2018

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 2025 reporting.



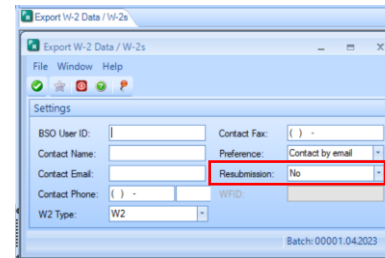
The screenshot shows a software window titled "Export W-2 Data / W-2s". It features a menu bar with "File", "Window", and "Help". Below the menu bar is a toolbar with icons for a checkmark, a star, a red circle with a white exclamation mark, a green circle with a white question mark, and a red circle with a white speech bubble. The main area is labeled "Settings" and contains 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, the text "Batch: 00001 11/2021" is visible.

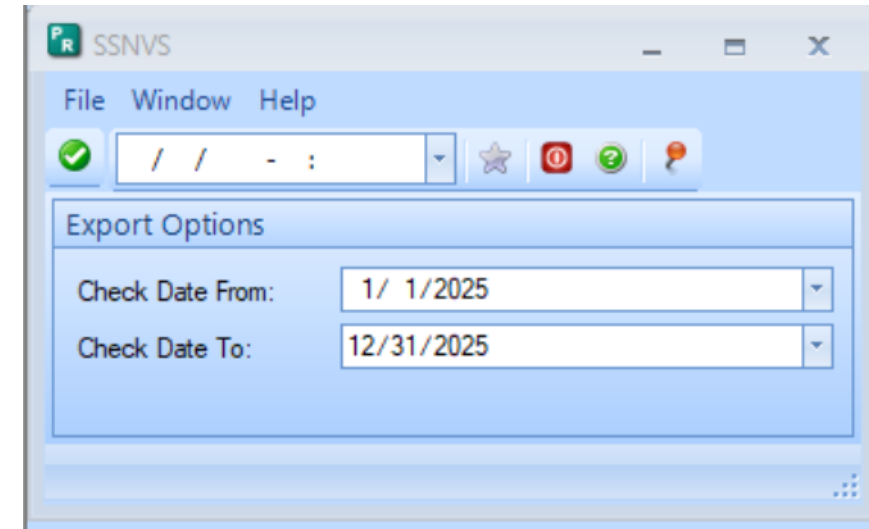
Oregon Clients ONLY

- 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.
- Link to [SSNVS](#)




The screenshot shows the SSNVS application window with a menu bar (File, Window, Help) and a toolbar. Below the toolbar is the 'Export Options' dialog box. It contains two date selection fields: 'Check Date From:' set to '1/ 1/2025' and 'Check Date To:' set to '12/31/2025'.

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	

IRS Regulations were amended in 2023, lowering the threshold to 10 Employees. Meaning that if you have **10 or more** W-2s to issue, you ***must*** file electronically going forward.

[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

 **Social Security**

SEARCH MENU LANGUAGES SIGN IN / UP

HomeEmployer W-2 FilingVerify SSNsReconciliationPublications & Forms

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

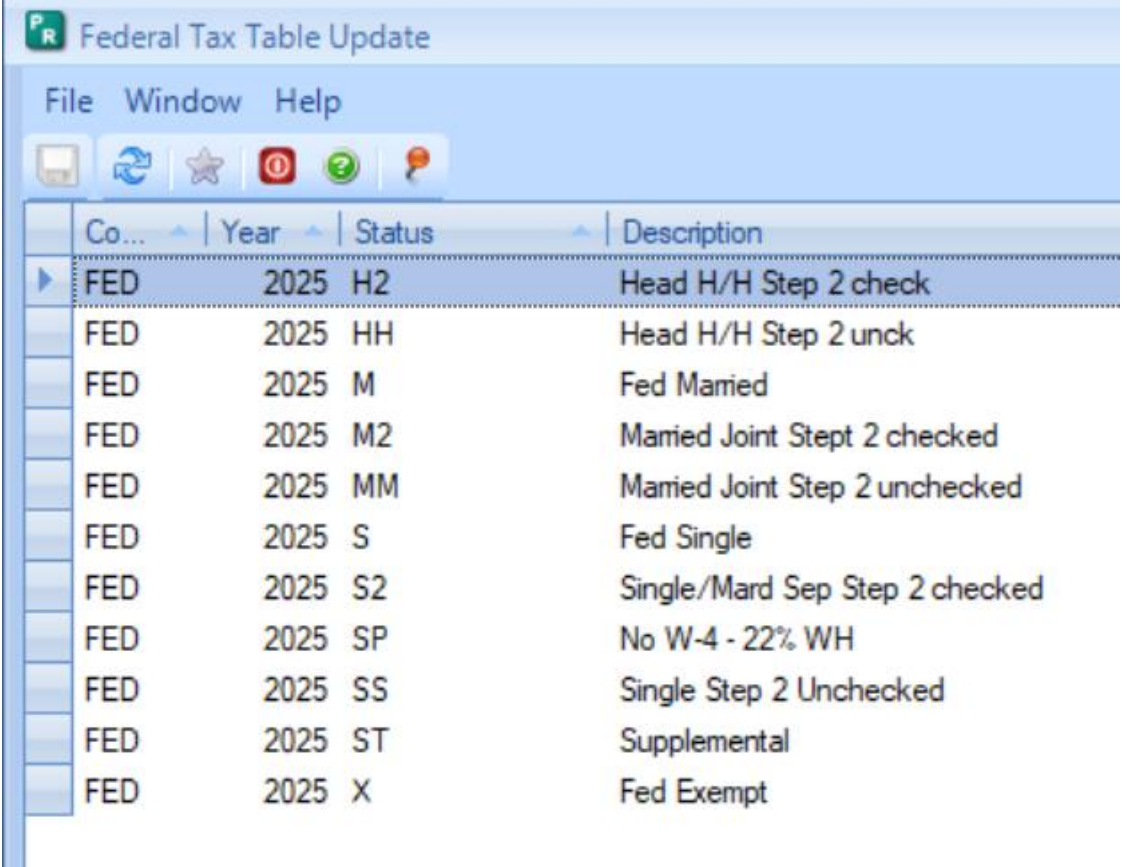
Questions so far?



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 2026 (the next calendar year), the tables are available to update.
 - This window says 2025 which indicates the 2026 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 file operations and help. The main area contains a table with four columns: "Co...", "Year", "Status", and "Description". The table lists various tax tables for the year 2025, including Head H/H Step 2 check, Head H/H Step 2 unck, Fed Married, Married Joint Step 2 checked, Married Joint Step 2 unchecked, Fed Single, Single/Mard Sep Step 2 checked, No W-4 - 22% WH, Single Step 2 Unchecked, Supplemental, and Fed Exempt.

Co...	Year	Status	Description
FED	2025	H2	Head H/H Step 2 check
FED	2025	HH	Head H/H Step 2 unck
FED	2025	M	Fed Married
FED	2025	M2	Married Joint Step 2 checked
FED	2025	MM	Married Joint Step 2 unchecked
FED	2025	S	Fed Single
FED	2025	S2	Single/Mard Sep Step 2 checked
FED	2025	SP	No W-4 - 22% WH
FED	2025	SS	Single Step 2 Unchecked
FED	2025	ST	Supplemental
FED	2025	X	Fed Exempt

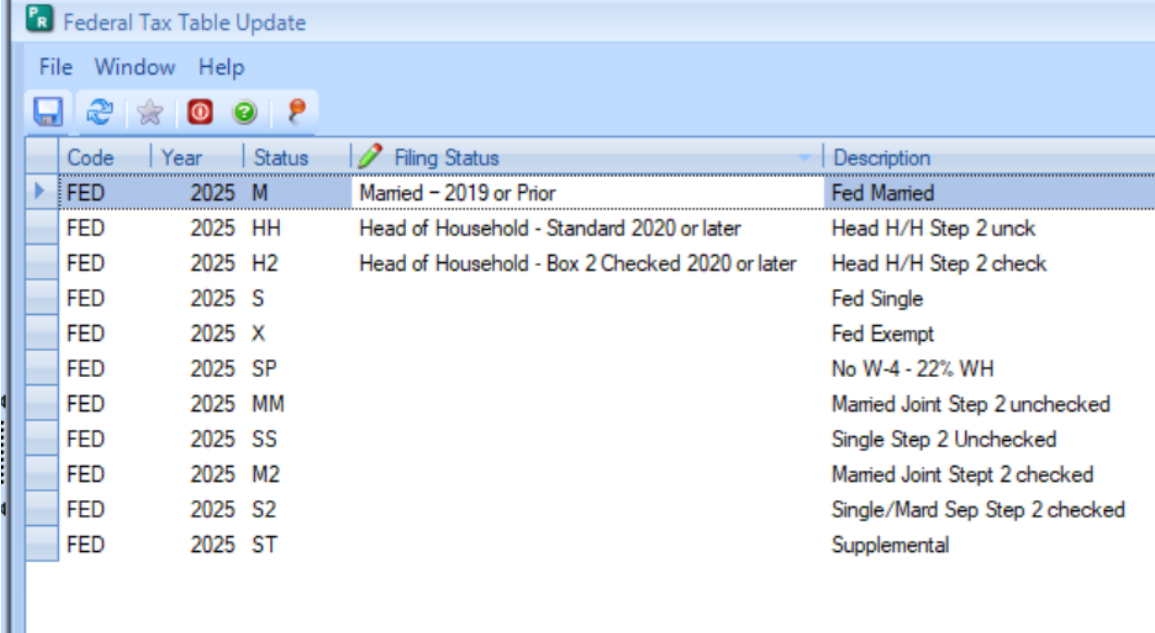
Cirrus > Payroll > Utilities > Federal Tax Table Update

☆ PR Federal Tax Table Update

UPDATE X CANCEL					
Code	Year	Status	↑	Filing Status	Description
FED	2025	H2			Head H/H Step 2 check
FED	2025	HH			Head H/H Step 2 unck
FED	2025	M			Fed Married
FED	2025	M2			Married Joint Stept 2 checked
FED	2025	MM			Married Joint Step 2 unchecked
FED	2025	S			Fed Single
FED	2025	S2			Single/Mard Sep Step 2 checked
FED	2025	SP			No W-4 - 22% WH
FED	2025	SS			Single Step 2 Unchecked
FED	2025	ST			Supplemental
FED	2025	X			Fed Exempt

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". It has a menu bar with "File", "Window", and "Help". Below the menu bar is a toolbar with icons for a printer, a refresh/cancel button, a star, a red stop button, a green question mark, and a speech bubble. The main area contains a table with the following columns: Code, Year, Status, Filing Status (with a dropdown arrow), and Description. The table lists various tax tables for the year 2025, including Married, Head of Household, Single, Exempt, and Supplemental tables.

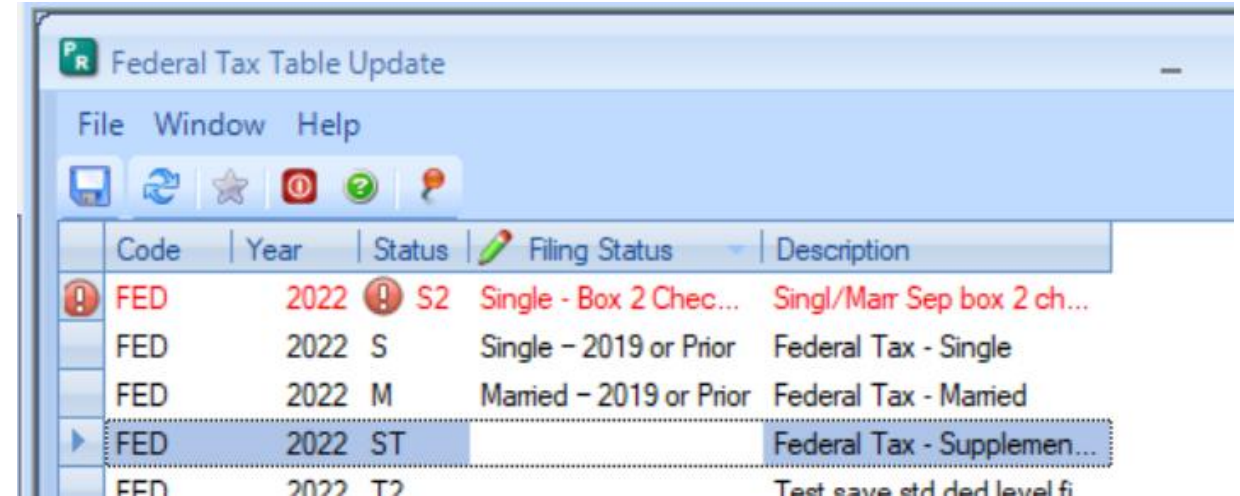
Code	Year	Status	Filing Status	Description
FED	2025	M	Married - 2019 or Prior	Fed Married
FED	2025	HH	Head of Household - Standard 2020 or later	Head H/H Step 2 unck
FED	2025	H2	Head of Household - Box 2 Checked 2020 or later	Head H/H Step 2 check
FED	2025	S		Fed Single
FED	2025	X		Fed Exempt
FED	2025	SP		No W-4 - 22% WH
FED	2025	MM		Married Joint Step 2 unchecked
FED	2025	SS		Single Step 2 Unchecked
FED	2025	M2		Married Joint Step 2 checked
FED	2025	S2		Single/Marid Sep Step 2 checked
FED	2025	ST		Supplemental

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).



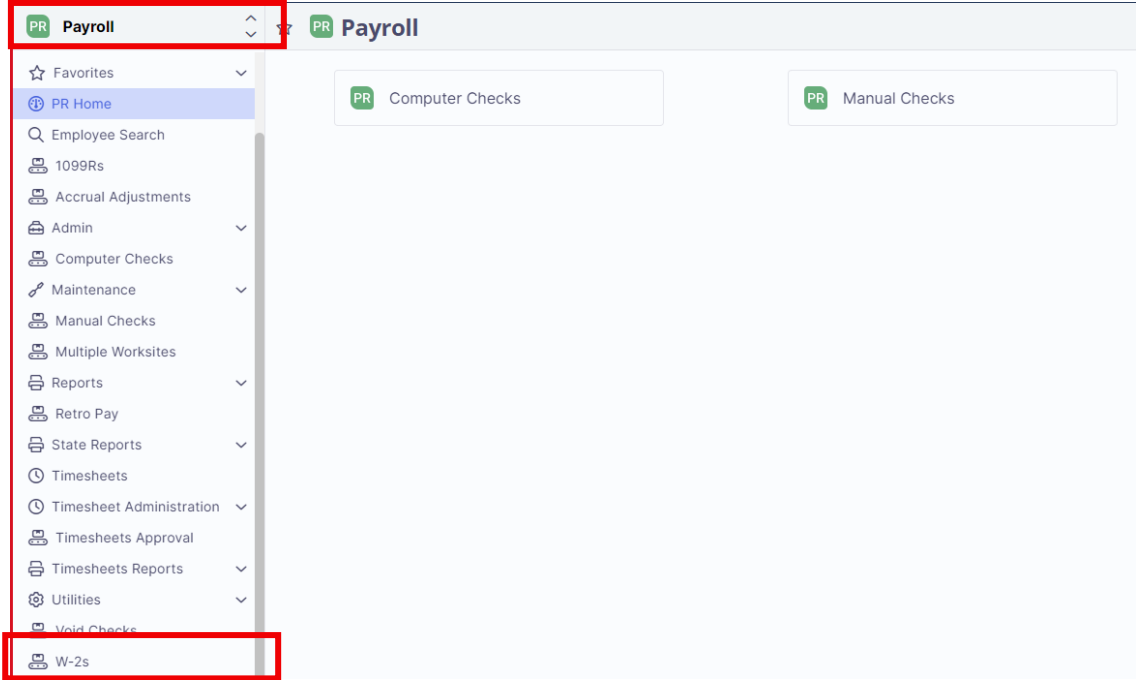
Code	Year	Status	Filing Status	Description
FED	2022	S2	Single - Box 2 Chec...	Singl/Marr Sep box 2 ch...
FED	2022	S	Single - 2019 or Prior	Federal Tax - Single
FED	2022	M	Married - 2019 or Prior	Federal Tax - Married
FED	2022	ST		Federal Tax - Supplemen...
FED	2022	T2		Test save old level fi

Questions?

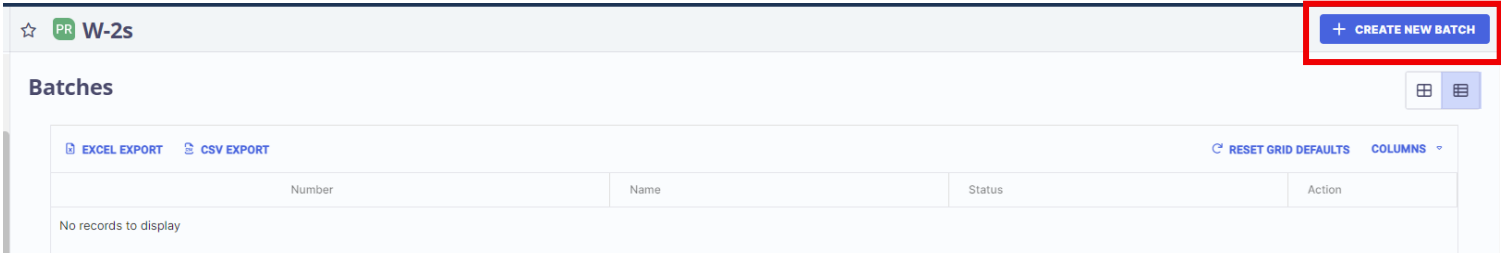


W2 Process in Cirrus

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



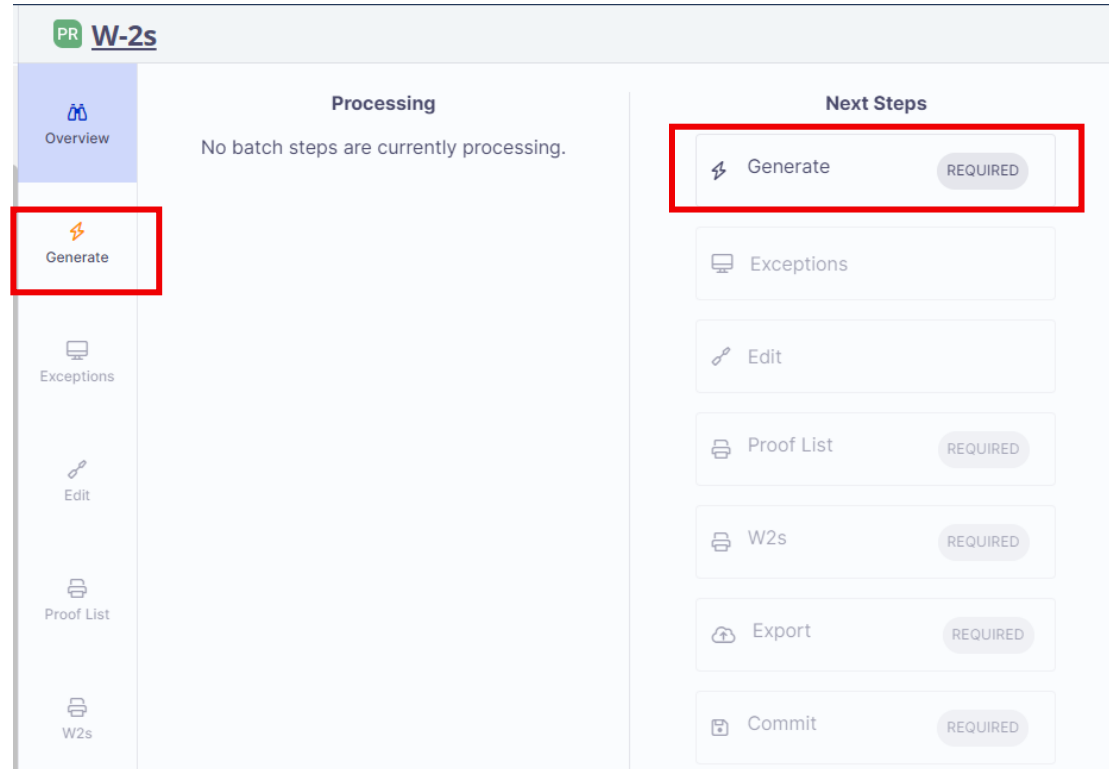
After you have clicked on W-2s, you will then have the option to Create New Batch. Click on it.



In the box that pops up, enter in the Name (if you want to name this batch it is not required) and the toggle is checked next to Autogenerate batch number. The batch month is usually 01 and the current year. Select Create.

A screenshot of a 'Create Batch' form. The form has a title 'Create Batch' at the top. Below the title, there are four input fields: 'Name' (containing '2024 Webinar'), 'Group Security' (with a dropdown arrow), 'Month*' (containing '12'), and 'Year*' (containing '2024'). Below these fields, there is a checkbox labeled 'Autogenerate batch number' which is checked. At the bottom of the form, there are two buttons: 'CANCEL' and 'CREATE'. The 'CREATE' button is highlighted with a red rectangular box.

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

TEST

SUBMIT

Overview

Generate

Exceptions

Edit

Proof List

W2s

Export

Year

2025

Federal ID

999-99-99999

Address Line 1

123 Main Steet

Date To Use

Check Date

Reporting Group

Sort By

Last Name

Employer

Springbrook

City

Springbrook

State

IA

FICA Max

176,100.00

Employer Type

State or Local Government

Zip Code

54220-4543

SDI Max

0.00

☐ NY: State Wages = Federal Wages When Printing W2 forms


Ded/Ben Code	Description	Box Number	Code	Retirement Plan
OTHER	Metro Tax			<input type="checkbox"/>
REGION	Statewide Transit Tax			<input type="checkbox"/>
IMPUTE	Imputed Income Tax	12	C	<input type="checkbox"/>
ASSOC	Association Dues			<input type="checkbox"/>
CR UN	Credit Union			<input type="checkbox"/>
DENTAL	Dental Ins. - Employee			<input type="checkbox"/>
DENTER	Dental - Employer			<input type="checkbox"/>
NOSHOR	Deferred Comp - North Shore			<input checked="" type="checkbox"/>
NATION	Deferred Comp - Nationwide			<input checked="" type="checkbox"/>
WIDEF	Deferred Comp			<input checked="" type="checkbox"/>
HEALCH	Health - Providence	12	DD	<input type="checkbox"/>


As in Enterprise, check to see if there are **Exceptions**. Be sure to review any Exceptions and make the necessary corrections.


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.


Next Steps

 Exceptions


 Edit

 Proof List


REQUIRED

 W2s

REQUIRED

 Export

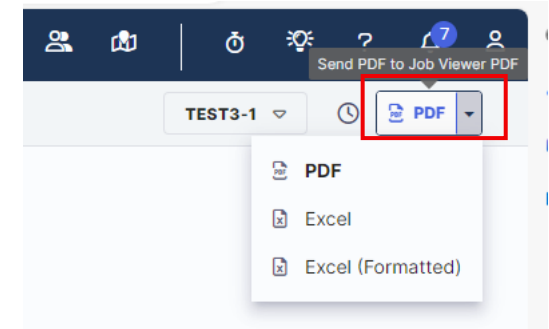
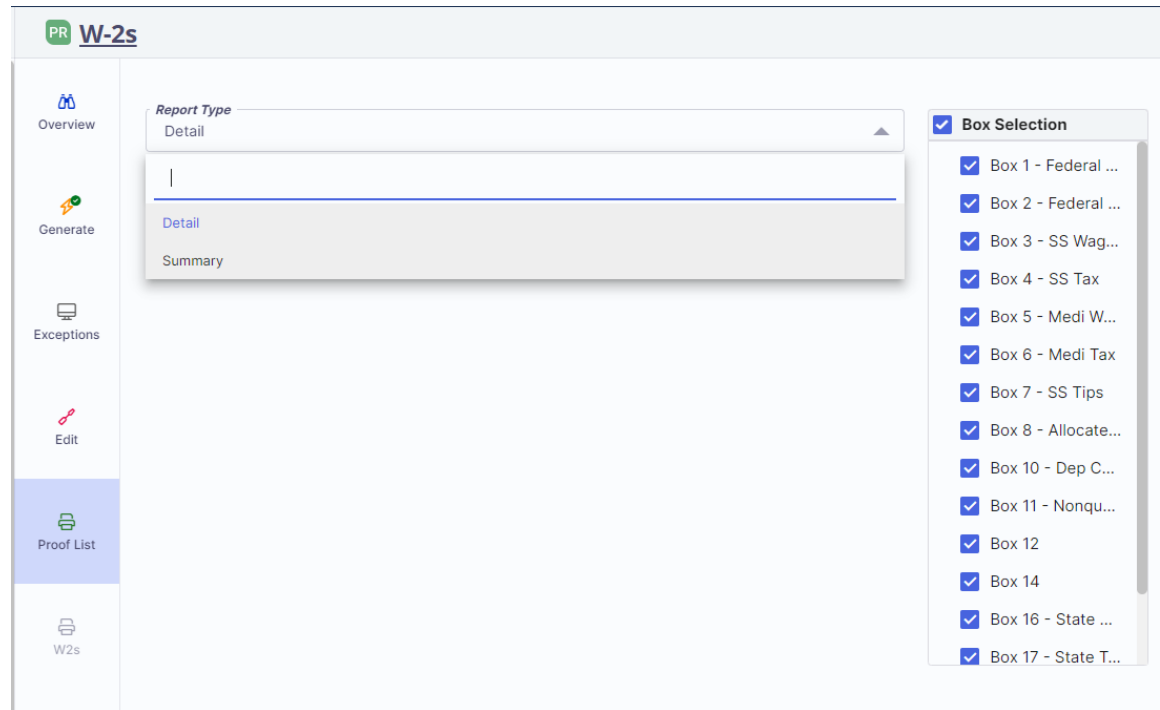
REQUIRED

 Commit

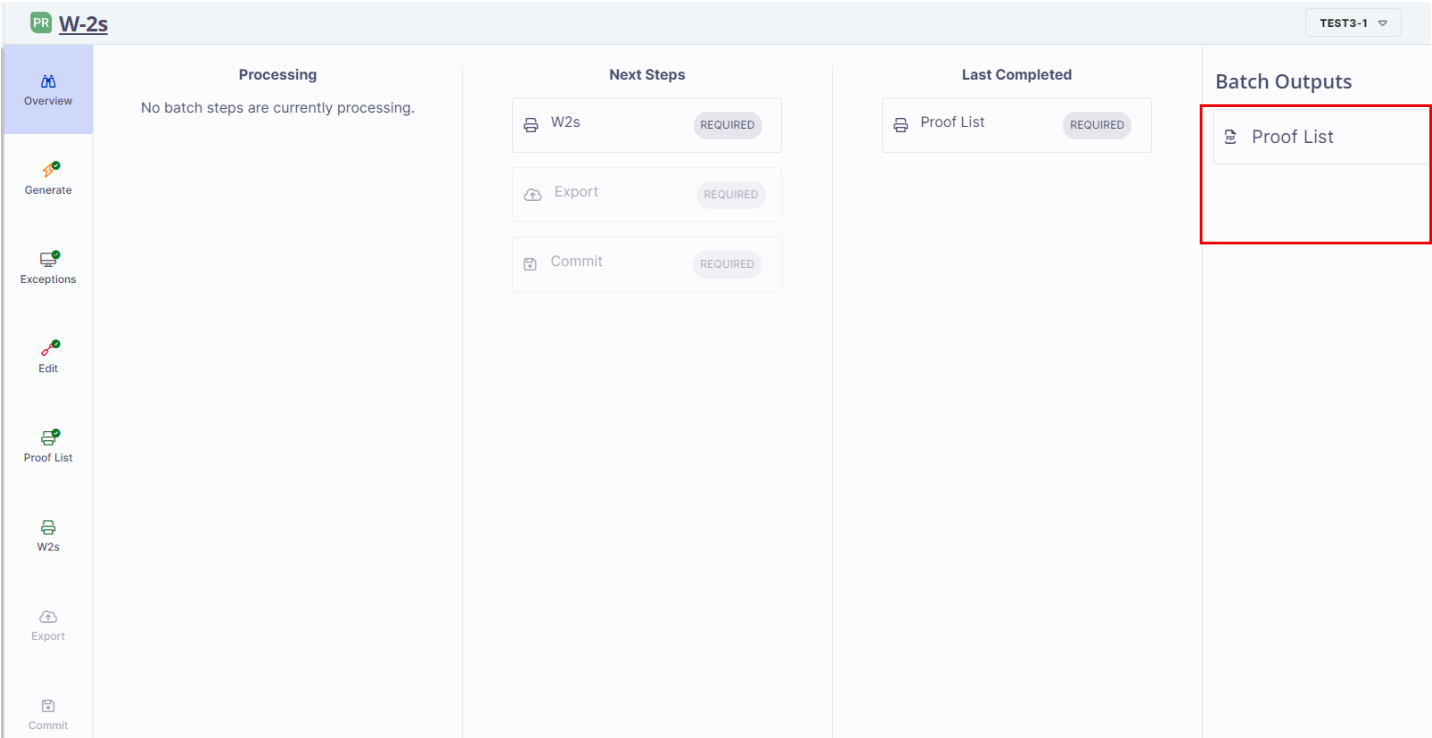
REQUIRED

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.

The screenshot shows the 'W-2s' interface with a sidebar on the left containing 'Overview', 'Generate', 'Exceptions', and 'Edit'. The main area has a 'Print' dropdown menu open, showing options: 'Employee Copies (Copy B, Copy 2, Copy C)', 'Extra Copies (Copy 2, Copy C, Copy 2)', 'State Copies (Copy 1)', and 'Employer Copies (Copy D)'. The top right of the interface includes a '2023 WEBINAR' dropdown and a 'PDF' icon.

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.

The screenshot shows the 'W-2s' interface with a sidebar on the left containing 'Overview', 'Generate', and 'Exceptions'. The main area contains a form with the following fields: 'BSO User ID*', 'Contact Name*', 'Contact Email*', 'Contact Phone*' (with area code and number sub-fields), 'W2 Type' (dropdown menu showing 'W2'), 'Contact Fax' (with area code and number sub-fields), 'Preference' (dropdown menu showing 'Contact by email'), 'Resubmission' (dropdown menu showing 'No'), and 'WFID'. The top right of the interface includes a '2023 WEBINAR' dropdown and a 'SUBMIT' button.



Thank you!

support@sprbrk.com

