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Generate the W-2 Validation report to review your W-2 totals. Also, verify the totals against the [Payroll > Reports > Year To Date Reports > HRS3000 - Calendar Year To Date Report](#) and [Payroll > Reports > Quarterly/Annual Reports > HRS5200 - Third Party Sick Pay Report](#).

- The combined totals for the Calendar YTD and Third Party Sick Pay reports should balance to the Validation report. Although the third-party sick pay withholding tax displays as a separate amount on the Validation report, it is included in the employee's withholding tax amount.
- Refer to the [How W-2 Box Amounts are Populated](#) page for clarification about how third-party sick pay amounts and 457 deferred compensation contributions and/or withdrawal amounts are handled.

Notes:

The Roth annuity is not displayed on the Validation report, but it is displayed in Box 12 - BB on the W-2. **DO NOT** continue until all reports are balanced.

If any manual processes are performed (e.g., check issues, check voids, or deduction refunds) that change the employee's calendar year-to-date information, generate the reports again to verify the amounts.



All parameters below the **Tax Year (####)** parameter are used only when generating the W-2 submission file (W2REPORT).

Print the last page and use the Grand Totals in the balancing process.

Note: The Calendar YTD, Quarterly 941 Worksheet, and W-2 total amounts should match. Identify and correct any discrepancies if necessary.