HRS5100 - W-2 Forms

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The report prints W-2 wage and earnings statements for each individual. It can also create a W2REPORT file that is saved to a user-defined drive/folder allowing you to file using the electronic file format. When W-2s are verified and completed, you can then create a W-2 historical file that populates the employee's W2 Inquiry tab on the Calendar YTD page. The W-2 historical file data can be updated or changed as often as required by selecting Y for the final run. Changes are added and updated in the W-2 historical file.

How W-2 box amounts are populated

❑ Use the Tables > District HR Options page to select your **W-2 Print Options**. These options allow you to select the amounts (TRS, HLTH, CAF, NTA, TXA, TFB) to be printed on the employee W-2 form (Box 14). These options also apply to W-2 forms that are printed from ASCENDER EmployeePortal.

❑ The district’s name and address from the District Administration > Tables > District Information > District Name/Address tab is used when the W-2 forms are printed. The district’s name and address are used as parameters when the W-2 file is created using the Quarterly/Annual Reports > HRS5100 - W-2 Forms.

IMPORTANT: If you have already submitted W-2 information to the Business Services Online (BSO), W-2 form or file corrections **cannot** be created in ASCENDER. Contact BSO to create corrected W-2 forms or files.

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

Parameter	Parameter Description
Validation Rpt (V); W2 Forms - Copy A (A), Non-preprinted 3 Up (N); or W2REPORT File (F)	V - Print the validation report. A - Print the statement on Form LW2A. N - Print the front and back (instructions) of the W-2 on regular paper in three-up format (three times per page), and print the statement on Form L3BL. This is the recommended option and form to avoid printer alignment issues when printing W-2 Forms. If the tax year is greater than 2018, use the following parameter to indicate your printing preference for the form instructions. If the tax year is less than or equal to 2018, no instructions are printed on the back of the form regardless of the selection in the following parameter. F - Create a W-2 extract file only. This is a required field.
For Tax Year > 2018, Include instructions (Y/N) or Print instructions only (I)	If the **Non-preprinted 3 Up (N)** option is selected in the parameter above and the tax year is greater than 2018, use this parameter to indicate your printing preference for the form instructions. If the tax year is less than or equal to 2018, no instructions are printed on the back of the form regardless of the selection in this parameter. Y - Print forms and instructions. N - Print forms only, no instructions. I - Print only the instructions. This is a required field.
Final Run - Create W-2 Historical Record? (Y/N)	Y - Create the W-2 historical record on the final run. N - Do not create the W-2 historical record on the final run. This is a required field.
Sort by Alpha (A), SSN (S), or Pay Campus (C)	A - Sort the report alphabetically. S - Sort the report by social security number. C - Sort the report by pay campus. This is a required field.
Tax Year (####)	Type the tax year in the YYYY format, which will be included on the report. This is a required field.
Select Frequency(ies), or blank for ALL	Type a one-digit frequency number separating multiple frequency numbers with a comma (e.g., 5, 6). Or, click to search for payroll frequencies. Otherwise, leave blank to use all payroll frequencies.
Select Pay Campus(es), or blank for ALL	Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.

Parameter	Parameter Description
Select Employee(s), or blank for ALL	Type the employee number separating multiple employee numbers with a comma. Or, click ⋮ to search for employees. Otherwise, leave blank to use all employee numbers.
Company Name (up to 57 characters)	Type the company name to be displayed on the report. This field can be a maximum of 57 characters.
Company Street (up to 22 characters)	Type the company street address to be displayed on the report. This field can be a maximum of 22 characters.
Company Location Address (up to 22 characters)	Type the submitter's location address (e.g., Attention, Suite, Number, etc.). This field can be a maximum of 22 characters. **Example**: 2nd Floor, Suite 234
Company City (up to 22 characters)	Type the company city to be displayed on the report. This field can be a maximum of 22 characters.
Company State : (2 characters)	Type the company state to be displayed on the report. This field can be a maximum of 2 characters.
Company Zip (#####-####)	Type the company zip code to be displayed on the report. This field can be a maximum of 9 digits.
Resubmit W2 Indicator (0) or (1)	0 - Set the W2 indicator to 0 if the RA - submitter record file is not being resubmitted. 1 - Set the W2 indicator to 1 if the RA - submitter record file is being resubmitted.
Resubmit WFID sent by SSA	If the **Resubmit W2 Indicator (0) or (1)** report parameter is set to 1, type the WFID (Wage File Identifier) displayed on the notice sent to you by the Social Security Administration. Otherwise, leave blank.
Problem Notification Code (1) or (2)	1 - Indicate that the preferred method of contact is by e-mail or Internet. 2 - Indicate that the preferred method of contact is by US Postal Service.
Preparer Code (A), (L), (S), (P) or (O)	A - Indicate the statement was prepared by an accounting firm. L - Indicate the statement was self-prepared. S - Indicate the statement was prepared by a service bureau. P - Indicate the statement was prepared by a parent company. O - Indicate the statement was prepared by other.
User ID (8 characters)	Type the user identification to be displayed on the report. This field can be a maximum of 8 characters.
Contact Name (up to 27 characters)	Type the contact name to be displayed on the report. This field can be a maximum of 27 characters.
Contact Phone Number (###-###-####)	Type the contact phone number to be displayed on the report.
Contact Phone Extension (#####)	Type the contact phone extension to be displayed on the report.
Contact E-mail (up to 40 characters)	Type the contact e-mail address to be displayed on the report. This field can be a maximum of 40 characters. This is a required field.

Parameter	Parameter Description
Contact Fax (###-###-####)	Type the contact fax number to be displayed on the report.
Business Terminated? (Y/N)	Y - Indicate this as the last tax year that W-2s will be filled for this employer ID number. N - Do not indicate this as the last tax year that W-2s will be filled for this employer ID number.
Kind of Employer (F), (S), (T), (Y), (N)	F (**Federal govt.**) - Indicate the employer is a federal government entity or instrumentality. S (**State/local non-501c**) - Indicate the employer is a state or local government agency or instrumentality (this includes cities, townships, counties, special-purpose districts or other publicly-owned entities with governmental authority). T (**501c non-govt**) - Indicate the employer is a non-governmental tax-exempt section 501© organization (types of 501© non-governmental organizations include private foundations, public charities, social and recreation clubs and veterans organizations). Y (**State/local 501c**) - Indicate the employer is a state or local government or instrumentality where the employer received a determination letter from the IRS indicating that they are also a tax-exempt organization under section 501©(3). N - Indicate that none of the options apply. This is a required field when creating the W-2 file. Leave blank if the Tax Jurisdiction Code in position 220 of the RE Record is P (Puerto Rico).
Use Consent for Terminated Employees? (Y/N)	Y - Use the W-2 electronic consent for each terminated/inactive employee (from EmployeePortal) to determine whether or not to print a W-2. • If electronic consent is Y, do not print a W-2. • If electronic consent is N, print a W-2. • If electronic consent is blank, print a W-2 for all terminated/inactive employees. N - Do not use the W-2 electronic consent. Print W-2s for all terminated/inactive employees. This is a required field. **Notes**: • If the LEA does not have the **W-2 Electronic Consent** option enabled on the Payroll > Tables > District EP Options > EmployeePortal Options, then print W-2s for all employees (active, inactive, terminated). • The **Pay Status** field on the Payroll > Maintenance > Staff Job/Pay Data > Pay Info tab must be set to *2 - Inactive* to correctly identify terminated/inactive employees for this process.

Generate the report.


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