



W2s - Printing

ARKONA QuickStart Guide

December 2006

Use this QuickStart Guide to learn how to print W2s for all employees and print the W3 Summary.

- Important change for tax year 2006: ARKONA now requires that all companies submit W2s to the IRS electronically. See the QuickStart Guide W2s – Electronic Filing for help with the federal submission.
- It is not necessary to run any year-end procedures before running W2s on the ARKONA system.
- W2s may be run before or after the first payroll of the new year.
- W2s may be reprinted in batch or individually at any time.

1. Check to make sure the following items have been completed:

- The last payroll of the year has been posted to the general ledger.
- The quarterly 941 report for the 4th quarter have been printed and submitted.

2. Review the deduction codes to make sure they have been set up correctly.

- a. From the Payroll and Personnel Management menu take option **50=Application Environment**, then take option **1=Select** by Deduction Codes.
- b. Take option **2=Edit** by each deduction code that will be associated with the W2s to display the deduction code setup.
- c. Enter the proper W2 Box and W2 Tax Code for each deduction code that needs to print on the W2 as shown below.
 - **Note:** Any deduction code that you want to print in any box on the W2 should have a unique W2 Tax Code. If multiple deduction codes have the same W2 Tax Code, they will be combined on the printout of the W2.
 - For instructions on W2 boxes and codes, see the back of Copy C of the W2s.

```

PY017DE                                A R K O N A                                12/16/04
JIM                                     Payro
=====
Options: 2=Edit  4=Delete
  Opt  Code  Description
  ---  ---  ---
  -   TT   TIRES
  -   UNI   UNIFORMS
  -   YMI   YW C/P MED/DE
  -   YSD   YW SDI
  -   YUN   YUN
  -   WLI   WASH L&I TAX
  -   Z     401K- DLR PLA
  -   Z1    OTHER 401K
  -   115   8 MISC. DED.
  -   34    A/R DEDUCTION
  -   Z     401K
  -   41    401K PRE-TAX

Deduction Code Update/Add
Code          401
Description   401K
G/L Account* 2130
Control #
Y/N
Put Employee Name In Description
Deduction Exempt From:
Y Federal Tax
N FICA
N Medicare
Y Federal Unemployment
Y State Tax
Y State Unemployment
Y State Disability Insurance
Y County Tax
Y City Tax
Y Worker's Compensation Insurance

W2 Box      12
W2 Tax Code D

F4=Prompt  F12=Cancel
F3=Exit  F6=Add  F12=Cancel
  
```

Deduction Code Update/Add Screen

3. Test print a W2 for a single employee.

- a. Take option **40=Employees** from the Payroll and Personnel Management menu.
- b. Change the year field to the correct year.

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PY030A                                A R K O N A                                12/16/04
JIM                                     Employee Master
=====
Options: 1=Notes      2=Update Master      5=Display      7=Print
          9=Benefits   10=Change Employee # 11=Performance  16=Job Code
Year: 2004 Month: ALL
Position to:
Op  Number Name                Phone D T P Job Description
---  ---  ---
  59 MCCABE, RICHARD            622-3298 4 H W
  188 MEREDITH, MIKE           766-9603 1 C B
  139 NORWICH, JENNIFER L.     652-1566 2 H W
  160 ODAI, PATRICK            452-1541 1 S W
  171 PALMER, ANDREW           635-6372 4 H W
  14 PALMER, WILLIAM           635-6372 2 S W
  147 PERRY, PAUL C.          471-5725 1 S W
  63 PYZDROWSKI, ANDREW       668-9606 1 C B
  101 QUAY, CARRIE            593-8904 2 H W
  128 RAPPAPORT, SHERRY       637-7313 1 S W
  153 RAYMOND, JOEL R.        695-2952 1 S W
  159 RAYMOND, JOHN M.        699-8900 4 S W
  161 RIEL, CHUCK H.          478-0763 1 S W

More...
F5=Refresh  F6=Add  F7=Print  F11=Change Mode  F13=Sort
F1=Help     F3=Exit  F12=Cancel F16=Job Description
  
```

Employee Master Screen

- c. Take option **7=Print** by the employee you want to test print for and press [ENTER] to display the Select Reports window.
- d. Take option **1=Select** by Print W2s and press [ENTER]. Change the printer if necessary at the Printer Selection dialogue box and press [ENTER] to display the Print W2 Selection screen.

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PY560                                A R K O N A                                12/16/04
JIM                                  Print W2 Selection
=====
Options: 1=Select
_ Print W2 Forms

Box #   Box 12 Deduction           Box #   Box 12 Deduction
Code    Code   Description           Code    Code   Description
12      J     DIS  DISABILITY           12      J     DS6  NONTAX DISABLT
13      D     A     A                   13      D     A1   401K VOLUNTARY
14      C     C     UNIFORMS - C       14      D     CRU  CREDIT UNION
14      B     DEM  DEMO USE           14      B     DE1  DEMO PAY
-----
F3=Exit  F12=Return

```

Print W2 Selection Screen

- e. Review Box Numbers and Reference Codes of the deduction codes in the table at bottom of screen. These pull from the Deduction Code setup you reviewed earlier.
- f. Take option **1=Select** by Print W2 Forms and press [ENTER] to print.
 - The forms will normally be loaded in the plain paper tray with the blank side down and the top of the form oriented toward the front of the printer.
 - Check to make sure the form was loaded correctly: that the pre-printed instructions are on the back with the correct side up.

4. Print W2s for all employees.

- **Important note:** When printing the W2s in batch, the system prints one employee per sheet on the blank 4-part perforated forms with the IRS instructions pre-printed on the back. These forms are available through ARKONA.
- a. Load enough of the 4-part W2s into your printer to accommodate the number of employees you will be printing W2s for.

- Keep in mind that you will be printing W2s for all employees (terminated and active) that received wages in the reporting year.
 - b. Take option **40=Employees** from the Payroll & Personnel Management menu to display the Employee Master screen.
 - c. Change the year field to the correct year.
 - d. Use function **F7=Print** to display the Select Reports window.
 - e. Take option **1=Select** by Print W2s and press [ENTER].
 - Change the printer if necessary at the Printer Selection dialogue box and press [ENTER] to display the Print W2 Selection screen.
 - f. Review Box Numbers and Reference Codes of the deduction codes in the table at bottom of screen. These pull from the Deduction Code setup you reviewed earlier.
 - g. Load the first set of forms into the drop down tray face up and bottom of the form closest to you.
 - **Note:** If your company must file W2s with the IRS electronically because of the number of employees, it is not necessary to print Copy A for the SSA.
 - h. Take option **1=Select** by Print W2 Forms and press [ENTER] to display the confirmation window.
 - They system will print a W2 for all employees who received wages in the selected year.
- 5. Submit the W2s and W3 summary to the IRS electronically.**
- See the QuickStart Guide W2s – Electronic Filing for more information.