

NextGen Payroll

2024 W-2 Process

Payroll Calendar Year End Processing

Please review the entire instructions before starting your calendar year end process.

Important things to know before starting:

1. Be sure you are running the latest version of NextGen (24.4.3.4 or higher) before processing your first 2025 payroll check run or beginning the 2024 W-2 process. To check your version of NextGen, click on 'Tools' tab on the ribbon bar. Click 'About' button. 'NextGen Database version number at top and NextGen.exe at bottom of the list should have the same version number. (You can disregard date and time included with version of NextGen Database at top of the list.)
2. To view the current release number of Nextgen, go to <https://lqc-tn.com/>. Log in and go to Support, Releases, then Nextgen releases and click on the Current Release Number.
3. W-2s are due to employees by January 31st.

IRS has set a deadline of January 31, 2025, for submission of W-2 information to the Social Security Administration. This applies for paper filing as well as electronic filing. **Under a new IRS rule, the threshold has been lowered to 10 for which employers must file certain information returns electronically. The new threshold is effective for information returns required to be filed in calendar years beginning with 2024. The new rules apply to tax year 2023 and forward. Forms W-2 are required to be filed by January 31, 2025. For more details see the following IRS website: <https://www.irs.gov/forms-pubs/new-electronic-filing-requirements-for-forms-w-2>**

In order to submit W-2's electronically, you must first be registered with (SSA) Social Security Administration and have your User ID. Registration information can be obtained by calling 1- 800-772-6270 or by visiting the SSA's web site at <http://www.socialsecurity.gov/bsowelcome.htm>.

12/16/2024

4. Please work on W-2's as early as possible to ensure timely submission of information. **LGC is not responsible for late or missed submission of this information to the SSA. LGC is no longer responsible for the filing of W-2 information to the Social Security Administration.**
5. If LGC is printing your W2 forms, the deadline for W2 data files to be submitted is January 17, 2025.
6. These instructions do not include information for ACA (Affordable Care Act) reporting. The ACA process is a separate set of instructions.
7. Before you run the last payroll of the calendar year, be sure you have accounted for all taxable vehicle usage (fringe benefit) and dependent care.
8. Before beginning W-2 processing, be sure all payrolls for the reporting tax year (2024) have been completed.
9. Be sure you have entered all manual payroll checks.
10. Be sure you have taken care of all voided payroll checks.
11. Be sure you have entered all third-party sick pay.
12. Balance and prepare your quarterly tax return for the fourth quarter.
13. Balance calendar year-to-date totals with the sum totals of your quarterly 941 reports.
14. If you have differences between the sum of quarterly reports and history reports, you should first check voided checks and manual checks.
15. Be sure you have the correct spelling of names for each employee. Also be sure their social security number is correct.
16. Be sure you have the correct mailing address for each employee, including those who have left throughout the calendar year.
17. 'Visa SSN' parameter is on employee Other tab. If employee 'Visa social security number' box is checked, the edit check during the W-2 process will not exclude the employee. The employee will show up with a 'WARNING' on the W-2 Error/Warning Report.
18. Be sure you have set up deduction types and/or benefit types for reporting of Employer-Sponsored Health Care.
19. Employee AccuWage Edit Report has been added to the Nextgen Payroll reports, please run this report prior to starting W-2s to check for errors in Employee Name and W-2 Contact information.

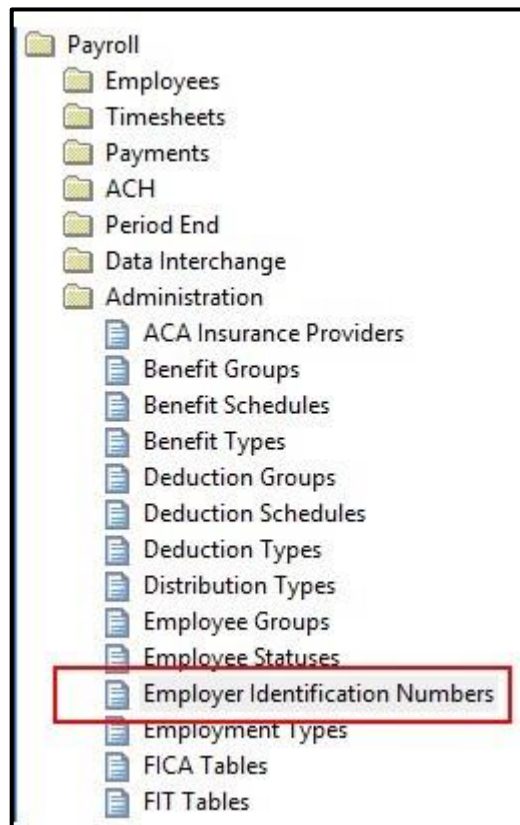
After you have balanced your calendar year-to-date totals back to the totals of the four quarterly reports, you are ready to begin the process of preparing W-2 forms for your employees.

For complete instructions on filing W-2 and W-3 information, see <http://www.irs.gov/pub/irs-pdf/iw2w3.pdf>

Reminder: Backups should be done daily. Please check backup logs to ensure they are getting done. Administration parameters to verify or set up prior to W-2 processing.

The backup process for LGCOne Backup customers can be found [here](#).

(Payroll, Administration, Employer Identification Numbers)



Click 'Find' to see a list of EIN (Employer Identification Number) records. Open each EIN record. Verify accuracy of information on General, W-2 Submitter, and W-2 Employer tabs.

PY Division:

EIN:

Active only

Search Results Grid ▾ | 1

Division	EIN	W-2 Submitter	Active
Payroll Division	16-4946112		Yes
Payroll Division	62-1234567	Yes	Yes

General tab – This will be your site’s information. If anything is incomplete or incorrect, change as necessary.

62-1234567 - Employer Identification Number

Home > Employer Identification Numbers > Employer Identification Number

General | W-2 Employer | ACA Employer* | ACA Employer Tax Years* | W-2 Submitter

PY Division:

EIN:

Active

This EIN is a W-2 submitter

W-2 Submitter:

Office: _____

Name:

Address 1:

Address 2:

City:

State:

Zip Code:

Contact Name:

Phone Number: Ext:

Unemployment Transmitter:

'This EIN is a W-2submitter' check box – If your site submits its own W-2 electronic file, 'This EIN is a W-2 submitter' should be checked. When checked, W-2 Submitter tab will exist.

- If you have more than one EIN and all W-2 records are included in one electronic file submission, 'This EIN is a W-2 submitter' should not be checked for every EIN. Click the check box for the main submitter EIN. On all other EIN's, leave the box unchecked and select W-2 Submitter EIN from the dropdown list.

W-2 Submitter tab is used to designate submitter of your W-2 electronic file. In most cases, this is your office information. If you believe this should be something other than your office, contact LGC Help Desk to discuss.

W-2 Build By gives you the option to build the W-2 file by Name or SSN. This option defaults to Name. When changed to SSN, W-2s are built in SSN order. W-2 Reports, and W-2 Forms are then printed in SSN order.

Truncate SSN on Printed W-2 Forms flag is automatically checked. When W-2s are printed, SSN will be masked where only the last 4 digits are printed. If you do not wish to truncate/mask SSN, the flag will need to be unchecked before printing W-2s.

Below is an example of truncated/masked W-2. (Note: IRS refers to this as truncated/LGC typically calls this masked)

***-**-9664	6423.76	36.00	***-**-9664	6423.76	36.00
	6717.18	57.35		6717.18	57.35
86-1241472	6717.18	97.40	86-1241472	6717.18	97.40
Sample Government 714 Armstrong Lane 714 Armstrong Lane Columbia, TN 38401			Sample Government 714 Armstrong Lane 714 Armstrong Lane Columbia, TN 38401		
Vivian Renee Abrams 2001 Thomas Drive Columbia, TN 38401			Vivian Renee Abrams 2001 Thomas Drive Columbia, TN 38401		
X	DDNTB 43.94 St Ret 293.42		X	DDNTB 43.94 St Ret 293.42	

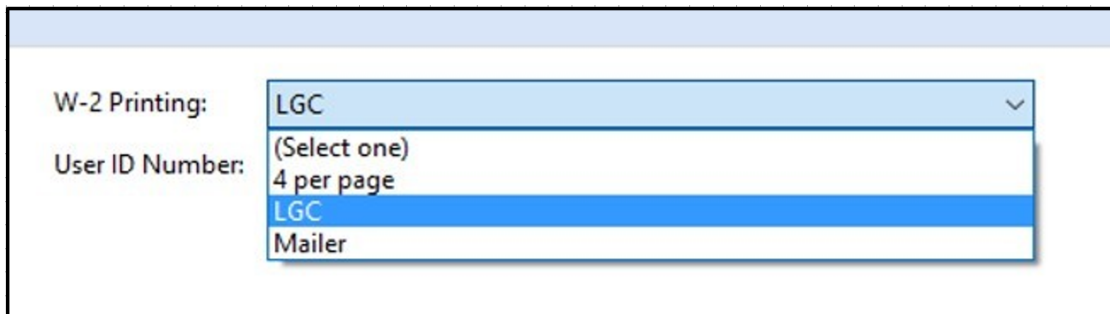
'W-2 Printing' dropdown – Select type of form printing to be used.

If LGC is printing your W-2 forms, this should be LGC.

If you are printing your forms, valid options are '4 per page' and 'Mailer.'

'4 per page' prints on 8 ½ x 11 form. One employee prints in each of the four squares on the W-2; entire page goes to the employee. Submission of forms to SSA is via electronic filing.

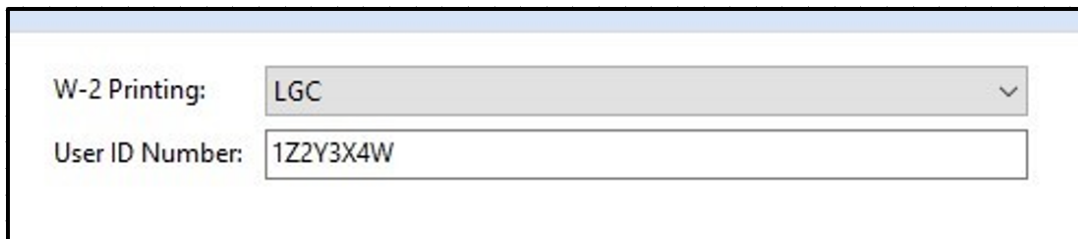
'Mailer' prints on 8 ½ x 14 form, typically pressure-sealer type form. One employee prints in each of the four squares on the form and mailing information is at the bottom. Pressure-sealer machine is used to fold and seal the form. Submission of forms to SSA is via electronic filing.



The screenshot shows a web form with two fields. The first field, 'W-2 Printing:', is a dropdown menu with 'LGC' selected. The second field, 'User ID Number:', is a dropdown menu with '(Select one)', '4 per page', 'LGC', and 'Mailer' as options. The 'LGC' option is currently selected in the dropdown.

'User ID Number' – 8 alpha-numeric user ID assigned to you by Social Security Administration for W2 electronic filing. Electronic filing is encouraged.

- In order to submit W-2's electronically, you must first be registered with (SSA) Social Security Administration and have your User ID. Registration information can be obtained by calling 1- 800-772-6270 or by visiting the SSA's web site at <http://www.socialsecurity.gov/bsowelcome.htm>



The screenshot shows a web form with two fields. The first field, 'W-2 Printing:', is a dropdown menu with 'LGC' selected. The second field, 'User ID Number:', is a text box containing the alphanumeric string '1Z2Y3X4W'.

W-2 Employer tab – If you have only one EIN, W-2 Employer tab is generally the same information as W-2 Submitter tab. *****Delivery Address must be filled in.*****

Home > Employer Identification Numbers > Employer Identification Number

General	W-2 Employer	ACA Employer*	ACA Employer Tax Years*	W-2 Submitter
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Contact Name: John Williams

Location Address: 714 Armstrong Lane

Delivery Address: 714 Armstrong Lane

City: Columbia

State: Tennessee

Zip Code: 38401

Phone Number: 9313811155 Ext:

Fax Number: 9313811156

Email: jwil@loalgotcor.com

Kind Of Employer: State and Local Governmental Employer

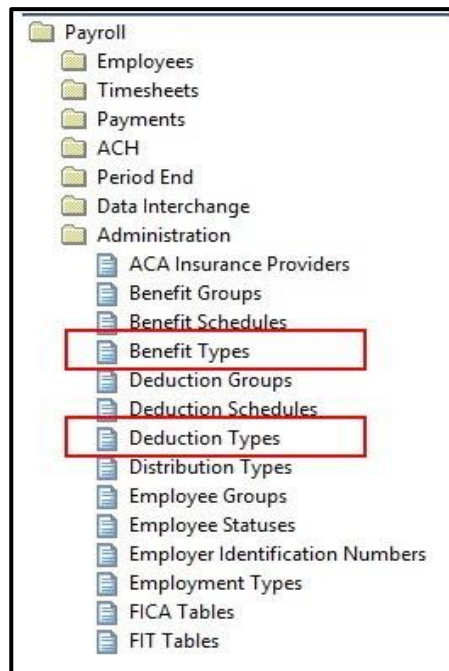
'Kind of Employer'

- Federal Government – Federal government entity or instrumentality
- State and Local Government – State and Local Government (non 501c) – State or local government or instrumentality. (This includes cities, townships, counties, special-purpose districts or other publicly-owned entities with governmental authority.)
- State and Local Tax Exempt Employer – State and Local Tax Exempt Employer (501c) – State or local government or instrumentality where the employer received a determination letter from the IRS indication that they are also a tax-exempt organization under section 501(c)(3).
- Tax Exempt Employer – Tax Exempt Employer (501c non-govt) – Non-governmental tax exempt 501(c) organization. (Types of 501(c) non-governmental organizations include private foundations, public charities, social and recreation clubs and veterans organizations.)
- (None) – None apply.

File W-2s can be done by EIN. If a site has multiple EINs, one or more can be flagged as submitter and File W-2s done for each submitter. If a site has multiple EINs flagged as Submitter, warning 'Additional W2 Submitter EIN exists' on W-2 process error/warning report. This is just a warning there are multiple EINs. You will need to file W-2s for each EIN flagged as a submitter.

Date/Time:		City of Anytown W-2 Error/Warning Report Tax Year 2024			
Warning List - Should Check Before Printing W-2's - Employee will receive W-2					
SSN	Emp ID	Emp Name	EIN	Type	Message
				Warning	Additional W2 Submitter EIN 62-1078566 exists.
				Warning	Additional W2 Submitter EIN 62-6020370 exists.

Benefit Types and Deduction Types (Payroll, Administration, Benefit Types / Deduction Types) – Verify accuracy of Benefit Types and/or Deduction types for printing on W-2.



Use **W-2 Tab** of deduction and benefit types to designate how and where the deduction/benefit amounts will print on the W-2.

Aflac - Pre Tax - Deduction Type

Home > Deduction Types > Deduction Type

General | Additional* | Deduction Groups | Deduction Schedules | Pay Types | GL Accounts* | W-2* | Invoices

Box 12: (None)

Include employer contribution in W-2 box 12

Box 10 - Dependent care

Retirement plan

Cafeteria plan

Also use W-2 tab of deduction and benefit types to set up reporting of employer-sponsored health coverage. The Affordable Care Act requires employers to report the cost of coverage under an employer-sponsored group health plan. The IRS provides a Q&A document on their website regarding the reporting.

<https://www.irs.gov/newsroom/employer-provided-healthcoverageinformational-reporting-requirements-questions-and-answers>

Sample of W-2 tab for reporting of employer-sponsored health coverage:

Cigna Emp - Deduction Type

Home > Deduction Types > Deduction Type

General | Additional* | Deduction Groups | Deduction Schedules | Pay Types | GL Accounts* | W-2* | Invoices*

Box 12: DD - Cost of employer-sponsored health coverage

Include employer contribution in W-2 box 12

Box 10 - Dependent care

Retirement plan

Cafeteria plan

Note: When Benefit Types are linked to Deduction Types you will not have access to the W-2 tab of the Benefit Type.

The screenshot shows the 'Cigna Emp - Deduction Type' configuration page. The 'W-2*' tab is selected. The 'Benefit Type' field is highlighted with a red box and contains the value 'Cigna Emp'. Other fields include 'PY Division: Payroll Division', 'Description: Cigna Emp', 'Code: 0011', 'Amount Type: Flat', 'Flat Amount: \$30.90', 'Classification: Voluntary Deduction', 'Effect On: Deduct From', 'FIT Wages: Deduct From', 'SIT Wages:', 'Social Security Wages: Deduct From', 'Medicare Wages: Deduct From', 'Employer Contribution: Cigna Emp', 'Total Premium: \$309.00', 'Employer Amount: \$278.10', and 'Employer Percent:'.

Pay Types (Payroll, Administration, Pay Types)

Pay Types can be flagged as reportable on W-2 box 14. This is primarily for Alabama customers for reporting Overtime Exempt from State Income Tax. There is a W-2 tab on the Pay Type. When 'Use W-2 box 14 description' is checked, 'Box 14 Description' is required. Default description of 'EXOT' can be changed but limited to six characters. Pay types flagged as W-2 box 14 will accumulate during W-2 build process and print on W-2 reports as well as the W-2 form.

The screenshot shows the 'Overtime - Pay Type' configuration page. The 'W-2*' tab is selected. The 'Use W-2 box 14 description' checkbox is checked. The 'Box 14 Description' field contains the value 'EX OT'.

Employee AccuWage Edit Report has been added under the Nextgen Payroll Reports. This report should be run prior to starting the File W-2 process to check for errors in the employee's name and the W2 submitter information. The IRS has previously accepted files with these errors but may start rejecting files due to these errors soon. This report does not check the W2Report file. The report was created to check the data in the Nextgen software.

Example of report shown below:

<input checked="" type="checkbox"/>	Description
<input checked="" type="checkbox"/>	Invalid character(s) found in Contact Name
<input checked="" type="checkbox"/>	Invalid character(s) found in Contact Phone Number
<input checked="" type="checkbox"/>	Invalid character(s) found in Employee First Name
<input checked="" type="checkbox"/>	Invalid character(s) found in Employee Last Name
<input checked="" type="checkbox"/>	Invalid character(s) found in User Identification
<input checked="" type="checkbox"/>	Missing Contact Name
<input checked="" type="checkbox"/>	Missing Contact Phone Number
<input checked="" type="checkbox"/>	Missing Employee First Name
<input checked="" type="checkbox"/>	Missing Employee Last Name
<input checked="" type="checkbox"/>	Missing User Identification

Date/Time:

**Sample Government
Employee AccuWage Edit Report**

PY Division: Sample Government

Exception Type: Error

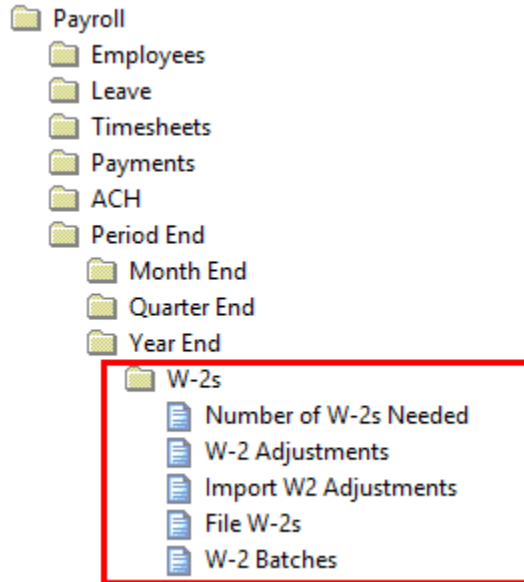
Employee: Adam\$, Anna

Employee ID: 2886

Invalid character(s) found in Employee Last Name

W-2 Process

(Payroll, Period End, Year End, W-2s)



Number of W-2s Needed – Report that gives an estimated count of W-2’s needed for the specified tax year. Enter the 4-digit tax year (2024) and click Next.

Number of forms purchased should be increased some to account for printer jams, reprints, etc.

Select Criteria - W2 Number Needed Report

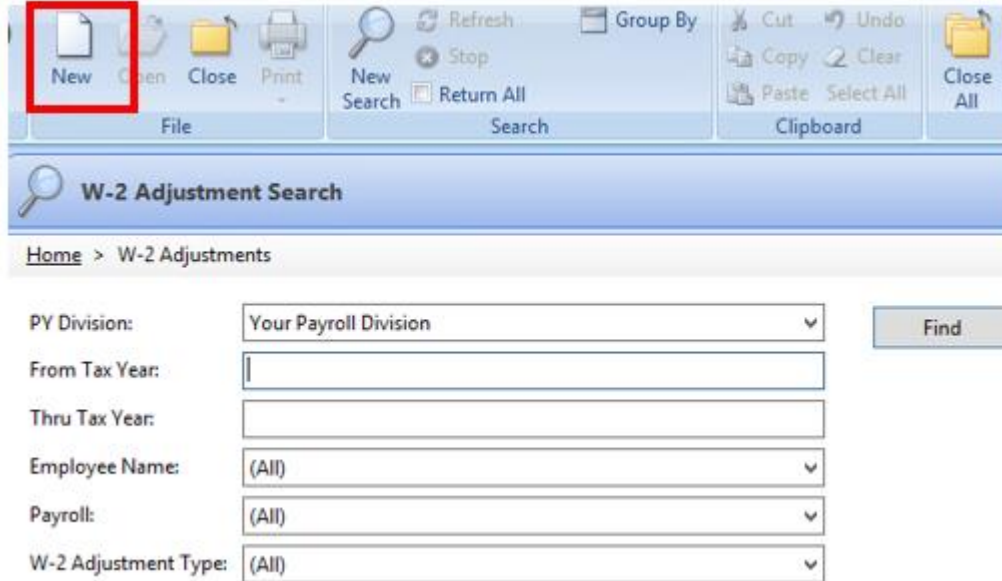
Home > W2 Number Needed Report

PY Division:

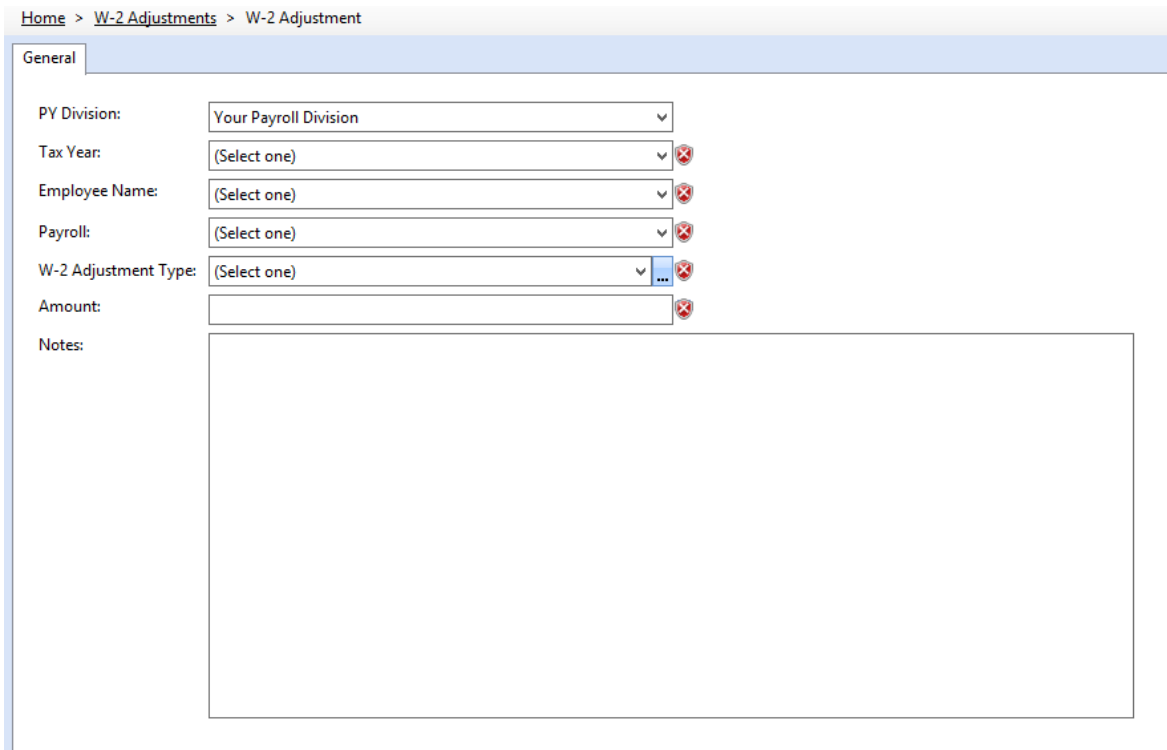
Year:

Your Payroll Division	Number of W-2's Needed
	709 Estimated W-2's needed

W-2 Adjustments - Select this option to update Box 12 Codes on the W-2. To add a W-2 Adjustment for an employee, select New from the ribbon bar.



The below screen will appear.



Select the Tax Year (2024), Employee Name, Payroll, and W-2 Adjustment type from the corresponding drop-down menu. New W-2 Adjustment types can be added by choosing the ellipses and selecting Add New W-2 Adjustment Type. Enter the amount that should be added to the Box 12 code chosen on the adjustment type.

Home > W-2 Adjustments > W-2 Adjustment

General

PY Division: Sample Government

Tax Year:

Employee Name: Abrams Anthony

Payroll: 0003 General Purpose

W-2 Adjustment Type: (Select one)

Amount: \$1,500.00

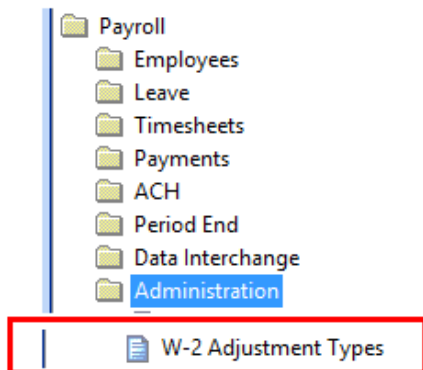
Notes:

Add New W-2 Adjustment Type

Edit W-2 Adjustment Type

W-2 Adjustment Types can also be added by selecting Payroll, Administration, W-2 Adjustment Types

W-2 Adjustment Types



Select Find to see all W-2 Adjustment Types

Home > W-2 Adjustment Types

PY Division:

Description:

Active only

Select New from the Ribbon Bar to add a W-2 Adjustment Type

File Search Clipboard

W-2 Adjustment Type Search

Home > W-2 Adjustment Types

PY Division:

Description:

Active only

Enter the Description of the W-2 Adjustment Type and select the appropriate Box 12 Code. Save and close to finish adding the W-2 Adjustment Type.

Home > W-2 Adjustment Types > W-2 Adjustment Type

General

PY Division:

Description:

Box 12:

Active

View File

Import W-2 Adjustments

LGC has added the ability to import W-2 Adjustments from a file. File Definitions will need to be setup for the import to work. File Definitions are set up by going to Payroll, Administration, File Definitions and choosing New from the ribbon bar. Once new is chosen the below screen will appear. You will need to fill in any boxes with a red shield next to them. Once these are filled in, choose next.

The screenshot shows a web application interface for defining a file. The title bar reads "File Definition Information - File Definition". Below the title bar is a breadcrumb trail: "Home > File Definitions > File Definition". The form contains several fields:

- Division: Sample Government 1 (dropdown)
- Description: Import W2 Adjustments (text input)
- Type: Import W2 Adjustment (dropdown)
- Delimiter: Comma (dropdown)
- Default Path: (empty text input with a browse button)
- Default File: (empty text input with a browse button)
- Edit Access: Public (dropdown)

At the bottom of the form, there are two checked checkboxes:

- This file contains a header row
- Active

You may choose any W-2 Adjustment Type Defaults that you wish to import.

The screenshot shows a web application interface for setting W-2 Adjustment Defaults. The title bar reads "W2 Adjustment Defaults - File Definition". Below the title bar is a breadcrumb trail: "Home > File Definitions > File Definition > W2 Adjustment Defaults". The form displays a grid of dropdown menus for various W-2 boxes:

W2 Adjustment Type Defaults	
Box 12-A: (None)	Box 12-R: (None)
Box 12-B: (None)	Box 12-S: (None)
Box 12-C: (None)	Box 12-T: (None)
Box 12-D: (None)	Box 12-V: (None)
Box 12-E: (None)	Box 12-W: (None)
Box 12-F: (None)	Box 12-Y: (None)
Box 12-G: (None)	Box 12-Z: (None)
Box 12-H: (None)	Box 12-AA: (None)
Box 12-I: (None)	Box 12-BB: (None)
Box 12-J: (None)	Box 12-CC: Cost Of Employer-Sponsored Health Insurance
Box 12-L: (None)	Box 12-EE: (None)
Box 12-M: (None)	Box 12-FF: (None)
Box 12-N: (None)	
Box 12-P: (None)	
Box 12-Q: (None)	

Next you will set up the column names and the field numbers. The field number should match the field the information is on the CSV file that you will create to import. For example, Field 1 would be Column A on the CSV file. Choose next and then Finish to complete the setup of the file definition.

Column Name	Formatting	Field Number
Employee ID		1
EmployeeName		2
Payroll Number		3
Box 12-DD Amount	9999.99	4

Below is a sample CSV file to be imported. If the payroll numbers contain leading zeros, the column will need to be set as a text column so the leading zeros can be entered.

A	B	C	D
EmployeeID	Employee Name	Payroll Number	Box 12-DD Amount
3288	Cali M. Acuff	0016	1500

Once you have created your CSV file and added the information you are ready to import. To start the import, go to Payroll, Period End, Year End, W-2s, Import W2 Adjustments. Below screen will appear. Fill in all fields. Choose next.

File Definition - Import W2 Adjustment

[Home](#) > Import W2 Adjustment

PY Division:

Tax Year:

File Definition:

File:

Notes on the adjustment will let you know that it was imported.

Home > W-2 Adjustments > W-2 Adjustment

General

PY Division: Sample Government 1

Tax Year:

Employee Name: Acuff Cali M.

Payroll: 16 - 12 Month Teachers

W-2 Adjustment Type: Cost Of Employer-Sponsored Health Insurance

Amount: \$1,500.00

Notes: Imported by jennawilliams@l on

W2 Adjustment Reports- The **W2 Adjustments by Employee Report** and **W2 Adjustments Report** have been added under Payroll>Reporting>Reports that can be ran for W2 adjustments entered.

Date/Time: Sample Government W2 Adjustments By Employee Report User: Page 1 of 1

Employee ID	Employee Name	Box 12	Previous Amount	W2 Adjustment Amount	Adjusted W2 Amount
906	Wayne, Melissa M	DD - Cost of employer-sponsored health coverage	\$641.00	\$500.00	\$1,141.00
Grand Totals:			\$641.00	\$500.00	\$1,141.00

Date/Time: Sample Government W2 Adjustments Report User: Page 1 of 1

Employee ID	Employee Name	W2 Adjustment Type	Tax Year	Amount	Notes
Payroll: 4 - Water Department					
906	Wayne, Melissa M	Fix DD Totals	2020	\$500.00	
Employees: 1	Payroll Totals: 4 - Water Department			\$500.00	
Employees: 1	Grand Totals:			\$500.00	

File W-2s – Select this option when you are ready to begin working on W2's. **All payrolls for the tax year being processed should be complete before beginning this process.**

Select 2024 from 'Tax Year' drop down then begin going through each Action.

Note: If EIN's W-2 Submitter (Administrator, Employer Identification Numbers, W-2 Submitter tab) has 'LGC' selected for W-2 Printing, you will NOT see 'W-2 Forms' in the action list.

Customer Printing



Action
<input type="checkbox"/> Verify EIN W-2 Information
<input type="checkbox"/> Build W-2s
<input type="checkbox"/> Error/Warning Report
<input type="checkbox"/> Totals Report
<input type="checkbox"/> W-2 Report
<input type="checkbox"/> W-2 Forms
<input type="checkbox"/> Create W-2 Electronic File
<input type="checkbox"/> Close Batch

LGC Printing



Action
<input type="checkbox"/> Verify EIN W-2 Information
<input type="checkbox"/> Build W-2s
<input type="checkbox"/> Error/Warning Report
<input type="checkbox"/> Totals Report
<input type="checkbox"/> Verify W-2 Totals
<input type="checkbox"/> W-2 Report
<input type="checkbox"/> Create LGC Printing Files
<input type="checkbox"/> Close Batch

If you need to save the process and return to it later, click 'Save & Close'. This will save the current process as a W-2 Batch that you can return to later. When the batch is saved, the next time you select 'File W-2s' from the menu you will see a list of open batches. Put a check in the PY (payroll) Division selection box and click Next to continue W-2 processing for that batch.



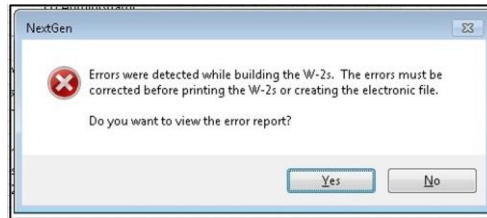
Click '**Verify EIN W-2 Information**' action check box. This will take you to Employer Identification Number and display a list of EIN records. This is the same Employer Identification Number information that was verified earlier. Open each EIN record to confirm all information is correct. Select 'Save and Close' if any information is changed. After verifying all EIN records, click 'Back' on ribbon bar to return to W-2 Batch process. You will see 'Completed' status and 'EINs verified' message.

Action	Status	Message
<input checked="" type="checkbox"/> Verify EIN W-2 Information	Completed	EINs verified.
<input type="checkbox"/> Build W-2s		
<input type="checkbox"/> Error/Warning Report		
<input type="checkbox"/> Totals Report		
<input type="checkbox"/> W-2 Report		
<input type="checkbox"/> W-2 Forms		
<input type="checkbox"/> Create W-2 Electronic File		
<input type="checkbox"/> Close Batch		

Click '**Build W-2s**' action box. This will start the process of building W-2 records. While W-2s are being built status will indicate 'Running.'

Action	Status	Message
<input checked="" type="checkbox"/> Verify EIN W-2 Information	Completed	EINs verified.
<input checked="" type="checkbox"/> Build W-2s	Running	Building W-2s...
<input type="checkbox"/> Error/Warning Report		
<input type="checkbox"/> Totals Report		
<input type="checkbox"/> W-2 Report		
<input type="checkbox"/> W-2 Forms		
<input type="checkbox"/> Create W-2 Electronic File		
<input type="checkbox"/> Close Batch		

If any warnings or errors are detected, a notification box will display. You must print the Error/Warning report and verify the W-2 information.



Warnings are for your information but should be researched to ensure the information is correct. Employees with warnings will receive a W-2.

Errors must be corrected before proceeding. If you are unsure how to correct an error, contact LGC Software Help Desk for assistance.

Click '**Error/Warning Report**' check box. Status will indicate 'Running' while the report is being built.

Action	Status	Message
<input checked="" type="checkbox"/> Verify EIN W-2 Information	Completed	EINs verified.
<input checked="" type="checkbox"/> Build W-2s	Completed	366 W-2s created.
<input type="checkbox"/> Error/Warning Report	Running	Creating error/warning report...
<input type="checkbox"/> Totals Report		
<input type="checkbox"/> W-2 Report		
<input type="checkbox"/> W-2 Forms		
<input type="checkbox"/> Create W-2 Electronic File		
<input type="checkbox"/> Close Batch		

Sample W-2 Error/Warning Report:

Warning List - Should Check Before Printing W-2's - Employee will receive W-2					
Payroll:					
SSN	Emp ID	Emp Name	EIN	Type	Message
978-80-4848	1050	Helena Hawkes	62-1234567	Warning	Social Security Number is a Visa Number.
976-60-2320	1023	Jackson Logan	62-1234567	Warning	Invalid Social Security Number.
749-98-6416	1041	Emma Randall	62-1234567	Warning	Employee deceased - check wages.
946-63-8560	1045	Barbara Walker	62-1234567	Warning	Invalid Social Security Number.

When changes are made to correct warnings and/or errors, '**Build W-2s**' action should be run again.

Select '**Totals Report**' action. Status will indicate 'Running' while report is being built. W-2 Totals Report will list totals by FICA Type for each EIN and gives totals for each EIN.

Action	Status	Message
<input checked="" type="checkbox"/> Verify EIN W-2 Information	Completed	EINs verified.
<input checked="" type="checkbox"/> Build W-2s	Completed	366 W-2s created.
<input checked="" type="checkbox"/> Error/Warning Report	Completed	1 report created.
<input type="checkbox"/> Totals Report	Running	Creating W-2 Totals report...
<input type="checkbox"/> W-2 Report		
<input type="checkbox"/> W-2 Forms		
<input type="checkbox"/> Create W-2 Electronic File		
<input type="checkbox"/> Close Batch		

Sample W-2 Totals Report:

EIN: 62-1234567	Employer: Your Office Name	FICA Type: Q
Total W-2's: 11		
FIT Wage:	\$59,395.73	FIT: \$5,084.44
Medi Wage:	\$59,395.73	Medi Tax: \$861.21
		SS Wage: \$4,043.60
		SS Tax: \$250.70
		Dep Care: Non-Q Plan:
EIN: 62-1234567	Employer: Your Office Name	FICA Type: R
Total W-2's: 328		
FIT Wage:	\$5,436,508.00	FIT: \$609,670.77
Medi Wage:	\$5,462,879.65	Medi Tax: \$79,211.79
AA:	\$1,610.03	D: \$3,016.81
DDNTB:	\$215,109.05	DD: \$931,203.15
		G: \$23,354.84
EIN: 62-1234567	Employer: Your Office Name	Totals
Total W-2's: 339		
FIT Wage:	\$5,495,903.73	FIT: \$614,755.21
Medi Wage:	\$5,522,275.38	Medi Tax: \$80,073.00
AA:	\$1,610.03	D: \$3,016.81
DDNTB:	\$215,109.05	DD: \$931,203.15
		G: \$23,354.84

Totals should be balanced to appropriate year end totals before proceeding. Each quarter's 941 totals and Summary Report are good reports to aid with balancing. Use any other reports or supporting documents necessary to ensure W-2 amounts are correct. Once you have reviewed this report and feel satisfied the numbers are correct, proceed to the next action.

Sample 'Summary Report' for a calendar year is shown below.

Use this report and any other information necessary to ensure W-2 amounts and totals are correct. Compare FIT wages, Social Security wages, Medicare wages, federal income tax, Social Security and Medicare deductions, and any other amounts that print on W-2s.

Amounts on Summary Report below should agree with W-2 Totals Report on previous screenshot.

Gross Salary:		\$467,306.09
Wages Exempt From FICA:		
Wages Exempt From Social Security:		
Wages Over Social Security Max:		
FIT Wage:		\$417,890.37
Social Security Wage:		\$440,585.94
Medicare Wage:		\$440,585.94
SIT Taxable Gross:		
LIT Taxable Gross:		
State Retirement Gross:		\$453,908.63
FIT:		\$38,206.83
Social Security	Employee:	\$27,316.32
	Employer:	\$27,316.32
Medicare	Employee:	\$6,388.50
	Employer:	\$6,388.50
SIT:		
LIT:		
State Retirement	Employee:	\$22,695.57
	Employer:	\$26,643.75
Other Deductions	Employee:	\$30,295.78
	Employer:	\$43,950.51
Benefits Employee:		
Cafeteria Plan:		
Deductions 'Sheltered From'		FIT:
	Social Security:	\$27,220.15
	Medicare:	\$27,220.15
	SIT:	\$96.36
	Retirement:	\$124.26
Net Pay:		\$342,403.09
Unemployment Wage:		\$239,908.71
Unemployment:		\$7,196.88
Benefits	Employer	
Fringe Benefit	\$500.00	

Understanding the History Summary Report

*Fringe Benefit can affect your FIT Taxable Gross, SS, and Medicare wage. Fringe Benefits will be listed in the Benefits section at the bottom of the report. If you mark an employee as **Deceased** on the **Other Tab** of the Employee Record, No FIT or FIT Taxable will be reflected for the next check paid.*

The difference between Social Security and Medicare Wages could be an employee who is exempt from Social Security or has met the Social Security Maximum Limit. An employee that is retired or marked to be exempt from FICA could affect your wage amounts. This will be shown as "Wages Exempt from FICA" under the Gross Salary amount.

**DDNTB stands for Deductible Non-Taxable Benefits.

**NDNTB stands for Non-Deductible Non-Taxable Benefits.

FIT Taxable Amount = Take Gross Salary minus State Retirement Employee, minus Deductions sheltered from FIT, plus Fringe Benefits.

Social Security Wage = Take Gross Salary minus Deductions 'Sheltered from Soc Sec.' plus Fringe Benefits.

Medicare Wage = Take Gross Salary minus Deductions 'Sheltered From' Medicare plus Fringe Benefits.

State Retirement Employee = Take the Retirement Gross and multiply by the % that the employees pay in.

State Retirement Employer = Take the Retirement Gross and multiply by the % that the employer pays in.

Other Deductions Employee = Total of all deductions listed at bottom of this report.

Cafeteria Plan = Total of only those deductions with the Cafeteria Plan box checked on the W-2 Tab of the Deduction Type.

Deductions 'Sheltered From' FIT: = Reads check history for all deductions marked as being sheltered from FIT.

Deductions 'Sheltered From' Soc. Sec.: = Reads check history for all deductions marked as being sheltered from Social Security.

Deductions 'Sheltered From' Medicare: = Reads check history for all deductions marked as being sheltered from Medicare

Wages Exempt From Soc. Sec.: = Amount from employees that are marked to be exempt from Social Security

Wages Exempt from Medicare: = Amount from employees that are marked to be exempt from Medicare

Employment Security Wage: = Reads check history for all wages being marked as subject to Emp. Sec

Verify W-2 Totals-this step will appear if LGC is printing the W-2 forms. This step will take all the information from the W-2 Totals Report and display it on a grid. To complete this step, the user must 'Check here to enable and the Finish button and continue to approve the W-2 Totals'. By completing this step, the user has verified and confirmed those totals to be correct for W-2 form printing. Once this is done, the user can continue with W2 Report and Create LGC Printing Files.

EIN	Tax Year	FICA Type	Field 1 Desc	Field 1 Amount	Field 2 Desc	Field 2 Amount	Field 3 Desc	Field 3 Amount	Field 4 Desc	Field 4 Amount
55-1046400	2024	Q	FIT Wage:	\$68,082.80	FIT:	\$5,927.84	SS Wage:	\$0.00	SS Tax:	\$0.00
55-1046400	2024	Q	Medi Wage:	\$71,102.28	Medi Tax:	\$1,020.99	Dep Care:	\$0.00	Non-Q Plan:	\$0.00
55-1046400	2024	Q	DD:	\$6,768.16		\$0.00		\$0.00		\$0.00
55-1046400	2024	Q	DDNTB:	\$954.56	State Ret:	\$3,019.48		\$0.00		\$0.00
55-1046400	2024	R	FIT Wage:	\$289,185.18	FIT:	\$22,146.70	SS Wage:	\$301,498.23	SS Tax:	\$18,692.89
55-1046400	2024	R	Medi Wage:	\$301,498.23	Medi Tax:	\$4,371.70	Dep Care:	\$0.00	Non-Q Plan:	\$0.00
55-1046400	2024	R	DD:	\$78,621.63		\$0.00		\$0.00		\$0.00
55-1046400	2024	R	DDNTB:	\$5,012.98	State Ret:	\$12,313.05		\$0.00		\$0.00
55-1046400	2024	T	FIT Wage:	\$357,267.98	FIT:	\$28,074.54	SS Wage:	\$301,498.23	SS Tax:	\$18,692.89
55-1046400	2024	T	Medi Wage:	\$372,600.51	Medi Tax:	\$5,402.69	Dep Care:	\$0.00	Non-Q Plan:	\$0.00
55-1046400	2024	T	DD:	\$85,389.79		\$0.00		\$0.00		\$0.00
55-1046400	2024	T	DDNTB:	\$5,967.54	State Ret:	\$15,332.33		\$0.00		\$0.00

Check here to enable the 'Finish' button and continue to approve the W-2 Totals

Ready < Back Finish Cancel

Select '**W-2 Report**' action. Print W-2 Report dialog box will display. The most common Criteria Option is 'Print All' to print all employees for all EINs.

Action	Status	Message
<input checked="" type="checkbox"/> Verify EIN W-2 Information	Completed	EINs verified.
<input checked="" type="checkbox"/> Build W-2s	Completed	366 W-2s created.
<input checked="" type="checkbox"/> Error/Warning Report	Completed	1 report created.
<input checked="" type="checkbox"/> Totals Report	Completed	1 report created.
<input type="checkbox"/> W-2 Report		
<input type="checkbox"/> W-2 Forms		
<input type="checkbox"/> Create W-2 Electronic File		
<input type="checkbox"/> Close Batch		

Criteria Option: Print All

Employee

From Employee: []

Thru Employee: []

EIN / FICA Type

EIN: (All)

FICA Type: (All)

OK Cancel

The report can be printed for one or more employees by selecting 'Employee' as the Criteria Option and selecting From and Thru Employee. Use the ellipsis button to select from and thru employees.

Criteria Option: Employee

Employee

From Employee: []

Thru Employee: []

EIN / FICA Type

EIN: (All)

FICA Type: (All)

OK Cancel

Another option for printing the report is Criteria Option of 'EIN/FICA Type. Use EIN and FICA Type drop down to select valid EINs and/or FICA Types. Most only have one EIN.

Each employee is listed. Totals are given by FICA Type, totals for each EIN and grand totals.

Sample report when printed for individual employee:

EIN: 62-1234567	FICA Type: R	Employer: City Of Anytown				
SSN:	411-12-1234	Barry Gordon				
FIT Wages:	\$23,373.02	FIT:	\$758.92	SS Wage:	\$24,631.15	SS Tax: \$1,527.13
Medi Wages:	\$24,631.15	Medi Tax:	\$357.15	Dep Care:		Non-Q:
Other:						St. Ret. \$1,258.13
DDNTB:	\$531.36					
Fica Type: R Totals		Total W-2s 1				
FIT Wages:	\$23,373.02	FIT:	\$758.92	SS Wage:	\$24,631.15	SS Tax: \$1,527.13
Medi Wages:	\$24,631.15	Medi Tax:	\$357.15	Dep Care:		Non-Q:
Other:						St. Ret. \$1,258.13
DDNTB:	\$531.36					
EIN: 62-1234567 Totals		Total W-2s 1				
FIT Wages:	\$23,373.02	FIT:	\$758.92	SS Wage:	\$24,631.15	SS Tax: \$1,527.13
Medi Wages:	\$24,631.15	Medi Tax:	\$357.15	Dep Care:		Non-Q:
Other:						St. Ret. \$1,258.13
DDNTB:	\$531.36					

Check information on the report to be sure it is correct before proceeding.

When you are sure W-2 amounts are correct, the next step is printing the forms.

If LGC is printing your W-2 forms, the W-2 Forms (printing) option is not available. Proceed to 'Create LGC Printing Files' option.

Select '**W-2 Forms**' action. Print W-2 dialog box will display. Use 'Criteria Option' to print all W-2's, print an individual employee or range of employees, or print for designated EIN and/or FICA contract. The most common Criteria Option is 'Print All' to print W-2's for all employees under all EINs. Click 'Printer' dropdown to select from the available printer list. It is advisable to test print on plain paper before printing on actual forms.

Action	Status	Message
<input checked="" type="checkbox"/> Verify EIN W-2 Information	Completed	EINs verified.
<input checked="" type="checkbox"/> Build W-2s	Completed	366 W-2s created.
<input checked="" type="checkbox"/> Error/Warning Report	Completed	1 report created.
<input checked="" type="checkbox"/> Totals Report	Completed	1 report created.
<input checked="" type="checkbox"/> W-2 Report	Completed	1 W-2 report created.
<input type="checkbox"/> W-2 Forms		
<input type="checkbox"/> Create W-2 Electronic File		
<input type="checkbox"/> Close Batch		

Print W-2
✕

Criteria Option: Print All ▼

Employee _____

From Employee: ...

Thru Employee: ...

EIN / FICA Type _____

EIN: (All) ▼

FICA Type: (All) ▼

Printer _____

Printer: (Select one) ▼

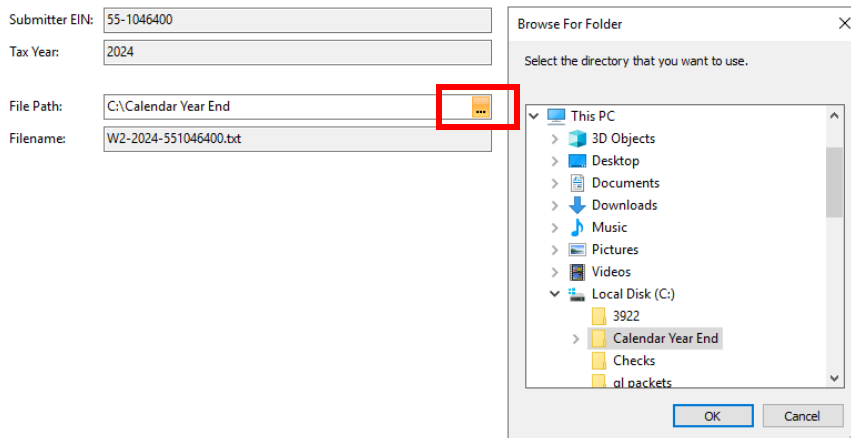
W-2 Printing: 4 per page ▼

OK
Cancel

Once forms are printed, the next step is to create W-2 electronic file. Select '**Create W-2 Electronic File**' option from action list.

Action	Status	Message
<input checked="" type="checkbox"/> Verify EIN W-2 Information	Completed	EINs verified.
<input checked="" type="checkbox"/> Build W-2s	Completed	366 W-2s created.
<input checked="" type="checkbox"/> Error/Warning Report	Completed	1 report created.
<input checked="" type="checkbox"/> Totals Report	Completed	1 report created.
<input checked="" type="checkbox"/> W-2 Report	Completed	1 W-2 report created.
<input checked="" type="checkbox"/> W-2 Forms	Completed	367 W-2s forms created.
<input type="checkbox"/> Create W-2 Electronic File	Running	Creating W-2 Electronic File...
<input type="checkbox"/> Close Batch		

Click the ellipsis button to browse to a location of where the W-2 electronic file will be saved. 'Browse For Folder' box will display. Browse to the location on your computer of where the file will be saved, highlight the folder, and click OK. Remember the location of where you are saving the file, as you will need it when submitting the file to Social Security Administration, Business Services Online.



Selected File Path will display. Filename defaults to W2-TaxYear-EIN.txt (e.g., W2-2024-551046400.txt) Filename cannot be changed. Click 'Next' and 'Finish.'

Submitter EIN:

Tax Year:

File Path: ...

Filename:

A summary will display with the EIN, Tax Year (2024), File Path and Filename. Click 'Finish' to continue.

Submitter EIN:	55-1046400
Tax Year:	2024
File Path:	C:\Calendar Year End
Filename:	W2-2024-551046400.txt

W-2 electronic file confirmation totals will be displayed. Confirm totals agree with totals on other year end reports. Click 'Close' to complete the process.

The LGC printing files have been created.

Employer EIN	FICA Type	Number of employees	FIT Wages	FIT Amount	Social Security Wages	Social Security Amount	Medicare Wages	Medicare Amount
60-5691904	Q - Medicare...	16	\$310,483.69	\$39,309.57	\$0.00	\$0.00	\$323,096.54	\$4,684.89
60-5691904	R - Regular	1,169	\$28,304,249.88	\$2,373,201.89	\$30,314,457.26	\$1,879,496.58	\$30,348,503.97	\$440,053.49

Once this file has been created, follow instructions in SSA Publication 42-007 (EFW-2 Tax Year 2024) for file submission. <https://www.ssa.gov/employer/efw/24efw2.pdf>

Submitting your W-2 File

Once you have printed your forms and verified them for accuracy you may submit your **W2-TaxYear-EIN.TXT** to the IRS.

If LGC printed is printing your forms, you will want to wait until you receive your forms and confirm they are correct before submitting your **W2-TaxYear-EIN.TXT** to the IRS.

Once you have reviewed your W2s for accuracy and created the **W2-TaxYear-EIN.TXT** file, you will log into Business Services Online <https://www.ssa.gov/bsowelcome.htm> and go to the Electronic Wage Report (EWR).

First, you will need to run your file through AccuWage Online to confirm there are no issues with the file. From the AccuWage Online tab click on the link AccuWage Online. Under Select Submission Type choose the option W-2 Regulars. Then click on Start Testing. Browse for your W-2 file W2REPORT.TXT that was created from Nextgen. Then a Test Results screen will be displayed. You do not get any totals to confirm. It is mainly to check for any issues. You can then filter records by levels: critical, error, alert, or info.

Types of Records on AccuWage report:

Critical – those MUST be corrected within the software and the file rebuilt to submit the file.

Error – those SHOULD be corrected within the software and the file rebuilt before submission, BUT you can submit the file with errors. This could cause the IRS to reject the file.

Alert – those are things that should be corrected or at least looked at to confirm they are indeed correct before next year, but you do not have to rebuild the file to submit.

Info – things to be aware of but the file does not have to be rebuilt.

If you correct any errors in Nextgen and rebuild your W2REPORT.txt file, then it should be run through AccuWage again to be sure the error(s) no longer exist.

You will want ample time to run your file through AccuWage before the deadline for submission in case there are issues that need to be corrected.

Once you have run your file through AccuWage and have no critical errors to be corrected, you can then choose the link Submit a Formatted Wage File to submit your file. Once your file is submitted, any issues will have to be resolved with W-2c's.

Registering for Business Services Online

As of March 25, 2023, the Social Security Administration changed the process for accessing Business Services Online (BSO). Therefore, LGC will no longer be filing W-2s for the tax year 2024 (and following tax years) and/or any W-2Cs on your behalf. You will need to register with BSO to access the W-2/W-2C online process. Per their guidelines "BSO users will need a Social Security online account. You can use your personal mySocialSecurity account that was created before September 18, 2021 or an existing Login.gov or ID.me credential." The updated registration process may be found at <https://www.ssa.gov/bsowelcome.htm#registration> If you have specific questions about the registration process, please contact BSO directly at 1-800-772-6270.

Final action of W-2 process is '**Close Batch.**' (Note: If you use online pay stubs thru Backpack, once the batch is closed, your employees will be able to see the W2s in Backpack.) After selecting this option, you will click on 'Save and Close'. This completes the W-2 process.

Action	Status	Message
<input checked="" type="checkbox"/> Verify EIN W-2 Information	Completed	EINs verified.
<input checked="" type="checkbox"/> Build W-2s	Completed	366 W-2s created.
<input checked="" type="checkbox"/> Error/Warning Report	Completed	1 report created.
<input checked="" type="checkbox"/> Totals Report	Completed	1 report created.
<input checked="" type="checkbox"/> W-2 Report	Completed	1 W-2 report created.
<input checked="" type="checkbox"/> W-2 Forms	Completed	367 W-2s forms created.
<input checked="" type="checkbox"/> Create W-2 Electronic File	Completed	366 W-2s reported.
<input type="checkbox"/> Close Batch		

Be sure forms are submitted to employees in a timely manner, and submission to Social Security Administration is done by the due date.

If LGC is printing your W-2 forms, contact us at this point so we can get the print file. The 'Create LGC Printing Files' step will create the W-2 mailer, W-2 4 Square form PDFs, the W-2 Electronic File and the W-2 Totals report PDF in a password protected, zipped file. **Since the W-2 Totals Report is now included in the files, the customer is no longer required to send in a signed copy of the W-2 Totals Report. This report will have in the heading the Username and Date that the user verified the totals giving LGC the confirmation that those totals are correct to use for W-2 printing.**

W-2 Batches

(Payroll, Period End, Year End, W-2s, W-2 Batches)

By default, only open batches display when 'Find' is clicked. To see closed batches, uncheck 'Open batches only' and click Find. A list of batches will be displayed for selection.

PY Division:

Open batches only

From Year:

Thru Year:

Descending year order

General tab of batch displays summary of payroll division, tax year, submitter EIN, user who created batch and batch status.

General Submitter* Employers* Messages* W-2s

PY Division:

Tax Year:

Submitter EIN:

Created By:

Current Status:

Allow employees to view W-2's in Backpack

W-2 Totals Report approved by

Submitter tab displays submitter information used with W-2 process.

General Submitter* Employers* Messages* W-2s

EIN: User ID Number:

Office Name:

Contact Name:

Location Address:

Delivery Address:

City:

State:

Zip Code:

Phone Number: Ext:

Fax Number:

Email:

Employers tab displays employer information used with W-2 process.

General Submitter* Employers* Messages* W-2s

EIN	Office Name	Contact Name	Phone Number	Fax Number	Email
62-1234567	City Of Anytown	Contact Person Name	9313811155	9313811155	emailaddress@email.com

Messages tab displays warnings that existed with W-2 process. (Note: When batch is open you may see warnings and errors. Since a batch cannot be closed when you have errors, you will never see errors on a closed batch. Once the batch is closed, only warnings will exist on this tab. Employees with warnings will receive a W-2.)

Submitter EIN	Employer EIN	Last Name	First Name	Middle Name	Type	Message
62-1234567	62-1234567	Hawkes	Helena		Warning	Social Security Number is a Visa Number.
62-1234567	62-1234567	Logan	Jackson		Warning	Invalid Social Security Number.
62-1234567	62-1234567	Randall	Emma		Warning	Employee deceased - check wages.
62-1234567	62-1234567	Walker	Barbara		Warning	Invalid Social Security Number.

W-2s tab allows you to see employee W-2s in the batch. Click 'Load W-2s' in bottom right corner to see a list of employees in the W-2 batch.

Employer E...	FICA Type	Control N...	Last Name	First Name	Middle Na...	Suf...	Social Security Nu...	Wages	FIT Amount	Social Security Amo...	Medicare Amo...
50-5384256	R - Regu...	1	Abrams	Edward	L		***-**-2768	\$176.20	\$0.00	\$10.92	\$2.55
50-5384256	R - Regu...	2	Aelius	David	L	II	***-**-8432	\$403.83	\$0.00	\$25.03	\$5.86
50-5384256	R - Regu...	3	Allen	Carter			***-**-8496	\$792.90	\$0.00	\$49.16	\$11.50
Count: 259								\$6,432,671,000	\$571,208.97	\$400,155.07	\$93,584.69

You can double-click any employee record in the list to see their individual W-2 record. This consists of General tab and Box 12 Codes tab.

General	Box 12 Codes*
Tax Year: 2019	Wages, Tips and Other Compensation: \$33,628.22
Employer EIN: 62-1234567	FIT Withheld: \$2,365.01
FICA Type: R - Regular	Social Security Wages: \$35,428.10
Social Security Number: ***-**-****	Social Security Tax Withheld: \$2,196.54
First Name: William	Medicare Wages and Tips: \$35,428.10
Middle Name:	Medicare Tax Withheld: \$513.71
Last Name: Bertinelli	Dependant Care Benefits:
Suffix:	Non-qualified Plan 457:
Location Address:	Non-qualified Plan Not 457:
Delivery Address: 10 Hickory Lane	Retirement Plan:
City/State: Columbia TN	Third-Party Sick Pay FIT Wages:
Zip Code: 38401	Third-Party Sick Pay FIT Amount:
<input type="checkbox"/> Statutory Employee	State Retirement Amount: \$1,799.88

Box 12 Codes tab displays all available codes for box 12 with amount for any applicable code on the employee.

Code	Description	Amount
C	Taxable cost of group-term life insurance over \$50,000	
D	Elective deferrals under section 401(k) cash or deferred arrangement (plan)	
E	Elective deferrals under a section 403(b) salary reduction agreement	
F	Elective deferrals under a section 408(k)(6) salary reduction SEP	
G	Elective deferrals and employer contributions (including non-elective deferrals) to any governmental or nongovernmental section 457(b) deferred compensation plan	
H	Elective deferrals under section 501(c)(18)(D) tax-exempt organization plan	
J	Nontaxable sick pay	
K	Excise tax on excess golden parachute payments	
L	Substantiated employee business expense reimbursements	
M	Uncollected social security or RRTA tax on taxable cost of group-term life insurance over \$50,000 (for former employees)	
N	Uncollected Medicare tax on taxable cost of group-term life insurance over \$50,000 (for former employees)	
P	Excludable moving expense reimbursements paid directly to employee	
Q	Nontaxable combat pay	
R	Employer contributions to an Archer MSA	
S	Employee salary reduction contributions under a section 408(p) SIMPLE plan	
T	Adoption benefits	
V	Income from the exercise of non-statutory stock option(s)	
W	Employer contributions to a health savings account (HAS)	
Y	Deferrals under a section 409A nonqualified deferred compensation plan	
Z	Income under a nonqualified deferred compensation plan that fails to satisfy section 409A	
AA	Designated Roth contributions under section 401(k) plan	
BB	Designated Roth contributions under a section 403(b) plan	
DD	Cost of employer-sponsored health coverage	\$335.52
EE	Designated Roth contributions under a government section 457(b) plan	

You also have 'Options' wheel on the ribbon bar where you can print an individual employee's W-2.

The screenshot shows a software interface with a ribbon bar at the top. The 'Options' menu is highlighted with a red box, showing options for 'Print W-2 Report' and 'Print W-2 Form'. Below the ribbon bar, the interface displays employee information and a summary table.

Employee Information:

- Employer EIN: 62-1234567
- Employee: Bertinelli, William - W-2

Summary Table:

Tax Year:		Wages, Tips and Other Compensation:	\$33,628.22
Employer EIN:	62-1234567	FIT Withheld:	\$2,365.01
FICA Type:	R - Regular	Social Security Wages:	\$35,428.10
Social Security Number:	***-**-****	Social Security Tax Withheld:	\$2,196.54
First Name:	William	Medicare Wages and Tips:	\$35,428.10
Middle Name:		Medicare Tax Withheld:	\$513.71
Last Name:	Bertinelli	Dependant Care Benefits:	

You can access employee's W-2 from Employees menu option, W-2s tab. When on the W2s tab, click 'Load W-2s' button in lower right corner to display W-2 for the employee. You can open the W-2 record and reprint from Options wheel.

The screenshot shows a software interface with a top navigation bar containing tabs: General, Other, Dependents, Payrolls*, Employee Notes, State Retirement Contributions, W-2s (highlighted with a red box), and ACA. Below the tabs, there are input fields for employee information: PY Division (City of Anytown), Employee ID (1025), Name and Address (Name: William Bertinelli), and Employee Information (SSN, Date Of Birth, Sex). Below this, a table displays W-2 records:

Tax Year	Employer EIN	Type	FICA Type	Wages
62	62-1234567	W-2	R - Regular	\$33,628.22

W-2c's

(Payroll, Period End, Year End, W-2cs)

These menu options allow for building and printing of W-2c forms. Once W-2's are filed to SSA and a correction needs to be made, W-2c process is the method to make corrections. If you believe you need to use this option, contact LGC Software Help Desk for assistance.

Updating TCRS Base Amount

(Payroll, Administration, Retirement Types)

The Base Amount for TCRS contributions changes every year according to what the IRS sets as the Social Security max amount. This will need to be changed manually if you have this provision with TCRS and have employees who will exceed that amount in retirement gross for the year. If you are unsure if you have this provision, then you will need to contact TCRS to find out this information. Please see below example.

General	
PY Division:	Sample Government 2
Description:	Retire Code 51
Code:	051
Base Rate:	5.0000%
KRS Health Insurance Rate:	
KRS Employee Rate:	
Base Amount:	\$147,000.00
Excess Rate:	5.5000%
RSA Overtime Limit:	
<input checked="" type="checkbox"/> Active	

Employee Year End Process

(Payroll, Period End, Year End, Employees, Employee Year End)

This menu option is used to clear or roll leave, reset leave year-to-date earned and year-to-date taken, reset employee deduction times or total taken, or reset benefit times or total taken. You may run portions of these options. If any of the options are run at fiscal year-end, you may skip that option.

Print 'Leave Employee Report' before and after running Employee Year End option.

PY (payroll) Division is displayed. If you wish to run the option for selected Payrolls and or Locations, click appropriate check box and select one or more from the dropdown selection list and click Next to continue. If running options for all payrolls, all locations it is not necessary to check the boxes; click Next to continue.

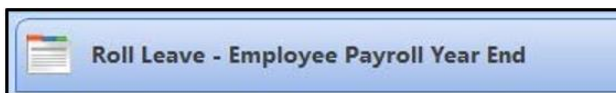
PY Division: City of Anytown

Selection options

Payrolls: [Dropdown]

Locations: [Dropdown]

Roll Leave: Allows you to roll an amount from one leave type to another leave type.



If you do **NOT** wish to roll excess leave to another leave type, uncheck 'Roll the employee excess accumulated leave to another leave type.' If you wish to roll excess leave to another leave type, leave 'Roll the employee excess accumulated leave to another leave type' checked, enter roll transaction date, and select applicable leave types.

Home > Employee Payroll Year End > Roll Leave

Roll the employee excess balance to another leave type.

Roll Transaction Date: [Field]

Leave Types To Roll	Roll From	Action	Add To YTD Taken	Roll To	Add To YTD Earned	Roll Over/Up To Amount
<input checked="" type="checkbox"/>	Personal	Roll Available Balance	<input type="checkbox"/>	Sick	<input type="checkbox"/>	

Valid Actions are:
 Clear Available Balance
 Roll Balance Over Amount
 Roll Balance Up to Amount
 Roll Available Balance

Only one action may be selected for each leave type. It may be necessary to execute this option multiple times based on payroll and/or location policies.

Select 'Leave Types To Roll', 'Action', 'Roll To' leave type, 'Roll Over/Up To Amount' and indicate if amount being rolled needs to 'Add To YTD Taken.'

In the below example we are rolling Vacation leave to Sick leave for any amount over 120.

Roll the employee excess accumulated leave to another leave type.
 Roll Transaction Date:

Leave Types To Roll	Action	Add To YTD Taken	Roll To	Add To YTD Earned	Roll Over/Up To Amount
<input checked="" type="checkbox"/> Personal/Prof.	Roll Accumulated Over Amount	<input type="checkbox"/>	Sick	<input type="checkbox"/>	120,0000

Click Next to continue.

Reset Leave: Clears year-to-date leave taken and year-to-date earned for a new year.



If you do **NOT** wish to reset YTD leave taken and earned, uncheck 'Reset the employee YTD leave taken and earned for a year.' If you wish to reset leave, leave 'Reset the employee YTD leave taken and earned for a new year' checked and select applicable leave types.

Click Next to continue.

Reset Deductions: Resets deduction types or total amount taken for a new year.



If you do **NOT** wish to reset deduction times or total amount taken, uncheck 'Reset the employee deduction times/total amount taken for a new year.' If you wish to reset deduction times/total taken, 'Reset the employee deduction times/total amount taken for a new year' should remain checked and select applicable deduction types to reset.



Click Next to continue.

Reset Benefits: Resets benefit times or total amount taken for a new year.

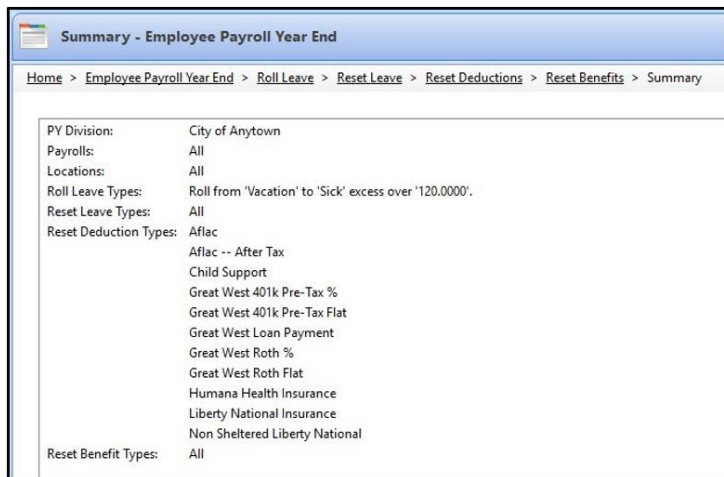


If you do **NOT** wish to reset benefit times or total amount taken, uncheck 'Reset the employee benefit times/total amount taken for a new year.' If you wish to reset benefit times/total taken, 'Reset the employee benefit times/total amount taken for a new year' should remain checked and select applicable benefit types to reset.

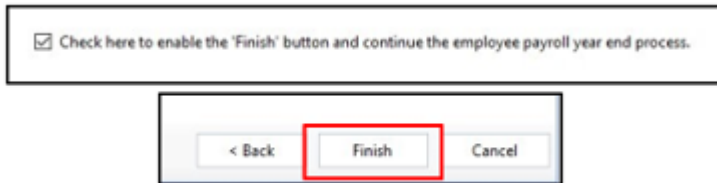


Click Next to continue.

Summary screen will display showing information that will be rolled and/or reset.



You must click the checkbox to the left of the 'Check here to enable the 'Finish' button to continue the employee payroll year end process. Once checked, Finish button is enabled, and you can click it to finish the process.



Confirmation screen will display when process is complete.



Congratulations. You have completed the **NextGen Payroll W-2** process!

Contacting LGC Support



You may contact LGC Support by phone or by submitting a support request on our website:

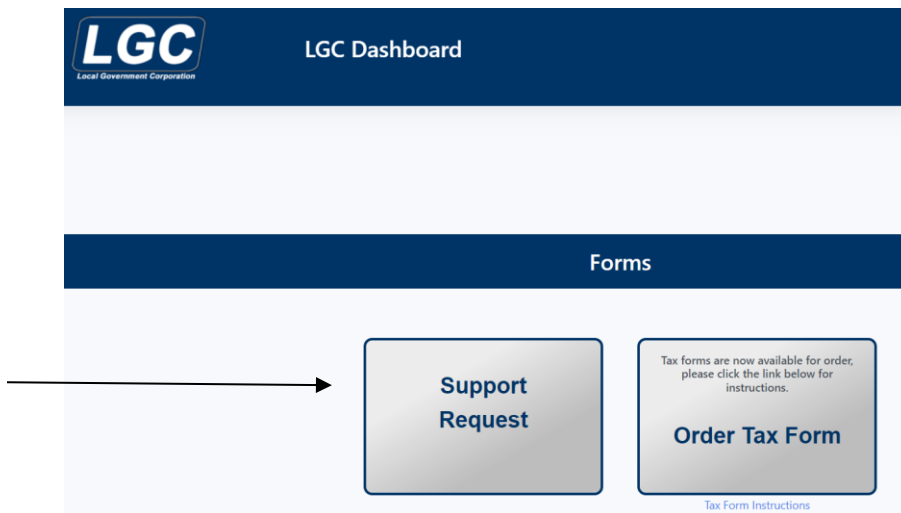
800-737-1826

7:00 a.m. - 5:00 p.m.
Central Standard Time

Online request from our LGC website for assistance:

<https://www.lgc-tn.com>

Login to our website and under the *LGC Dashboard* on the left side of the screen, select the "Support Request".



The [LGC](https://www.lgc-tn.com) website contains additional information about our products, training, and support services. You may also submit online support requests from our website.