

2009 W2 Processing Webinar – Q & A

Q: When Generating the W2 file can Escape Online 5 run the Pay26 & Pay27 reports automatically and have them saved to the Report Warehouse?

A: Yes, the Reports can be set up to create the Pay26 & Pay27 reports in the Report Warehouse when the Task to Load and the Task to Generate is used. Please contact your Escape Customer Care representative and they can work with you on the setup.

Q: Where does Escape Online save the W2 test file?

A: On the Server in the Input\Output\PayrollTaxes folder.

Q: Are the Orgs (Districts) just responsible for verifying and correcting errors in W2s?

A: That is correct. Orgs are responsible for verifying and correcting information.

Q: If an employee needs a copy of their W2 before the county has printed the W2s, what should I do?

A: Go to the HR/Payroll – Processes – Tax Reporting – Employee W2 activity, open the employee record, and select “Print Employee Form Copy” from the task menu. This copy can be printed at any time after W2s have been loaded.

Q: Is there a step by step process that the individual orgs need to do?

A: Step-by-Step Instructions are documented in the W2 User Guide. Users can view it from the Employee W2 Activity and clicking on the How To. Here’s a brief Step by Step:

1. Open the W2 Reporting activity. (You must be an org-all user to access this activity.)
2. Select Load task to load the payroll detail.
3. Click Yes to confirm you want to load the data. It may take a few minutes.
4. Review all employees from the Employee W2 activity. Look for errors. If there is an error, Escape Online will display the appropriate code (O-out of range; C-calculation; E-employee) in the Problem column of the list.
5. If there are any changes, you must modify the payroll detail by creating a manual payroll (Payroll, Pay Manual Checks using an action of Create Manual Pay).
6. Re-load the information using the W2 Reporting activity until all errors are resolved and all W2 information is satisfactory.

Q: Do we create a manual pay cycle in January for a W2 correction?

A: Only use a manual pay cycle prior to January 1st. After 12/30/XX set up a W-2 Regular Pay Cycle with pay dates in 2008. Use Additional Pay to add the employees to the Pay Cycle and then make all adjustments through Adjust Pay.