FOUNDATION software

Printing W2s

Printing W2s in Foundation is a fairly easy process, but there a few things you should keep in mind.

Regardless of the number of states or localities an employee has worked in, only one Federal W2 should be submitted to the Federal Government. Please note that if an employee worked in more than two states and localities, the word "MANY" will display in boxes 15 and/or 20 of the Federal W2.

If an employee has worked in two or fewer states and two or fewer localities, you only need to generate a Federal W2 for that employee.

If an employee worked in more than two states and/or more than two localities, you need to generate a Federal W2 and a State or Local W2.

If you are uncertain about the number of W2s you should create and/or what should display in boxes 15 and 20, please consult your accountant.

When printing W2s please note the following items:

- FOUNDATION does not produce a preprinted W2 form; you must purchase W2 forms. Foundation Software Inc. recommends purchasing from Dynamic Systems by calling 800-782-2946 or visiting their website at www.dswebtoprint.com/foundation. Forms from other vendors may work, but Foundation Software Inc cannot guarantee they will align correctly.

- Foundation Software Inc. highly recommends you print your W2s on blank paper prior to printing on printed forms. By printing on blank paper first you can review the information for accuracy and you can test the alignment with your forms. To test the alignment hold the W2 printed on blank paper and a W2 form up to light.
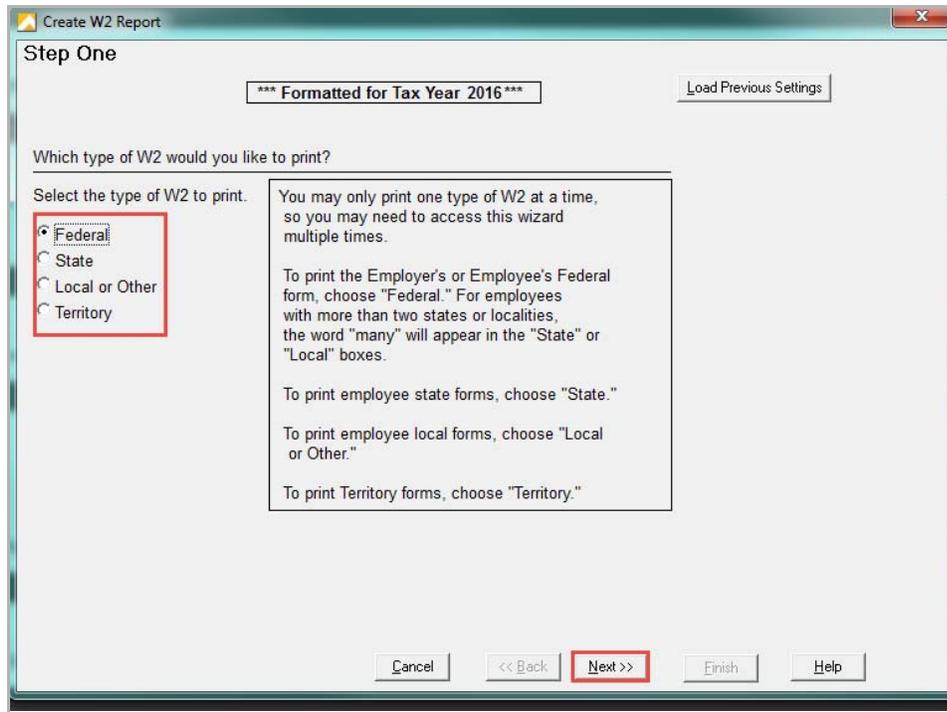
1. Open the Print W2 Wizard

From the Main Menu, go to ***Payroll > Reports > Print W2.***

a. Verify you are using the proper format by looking at the top of the window where it says "Formatted for Tax Year 20XX." If the current year is not listed, you need to download the year-end update.
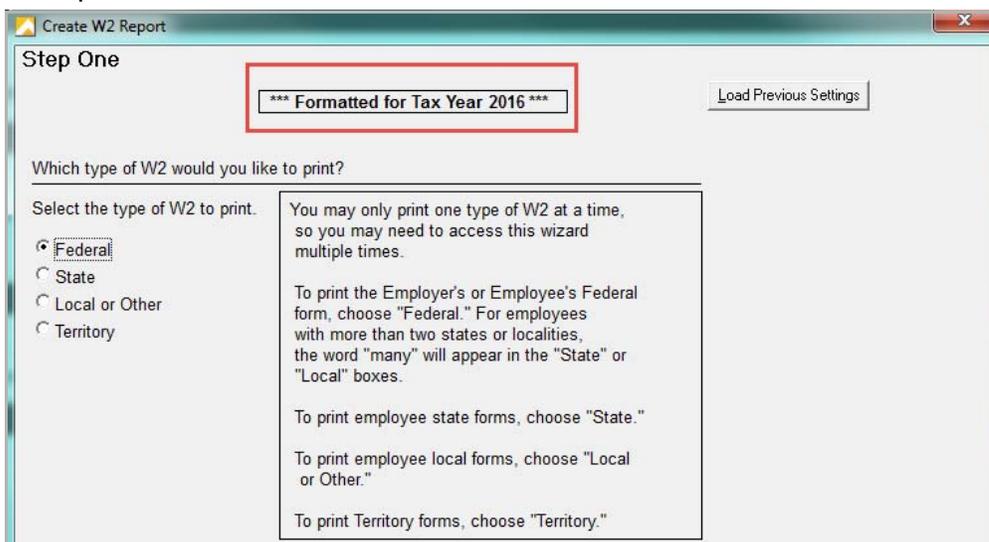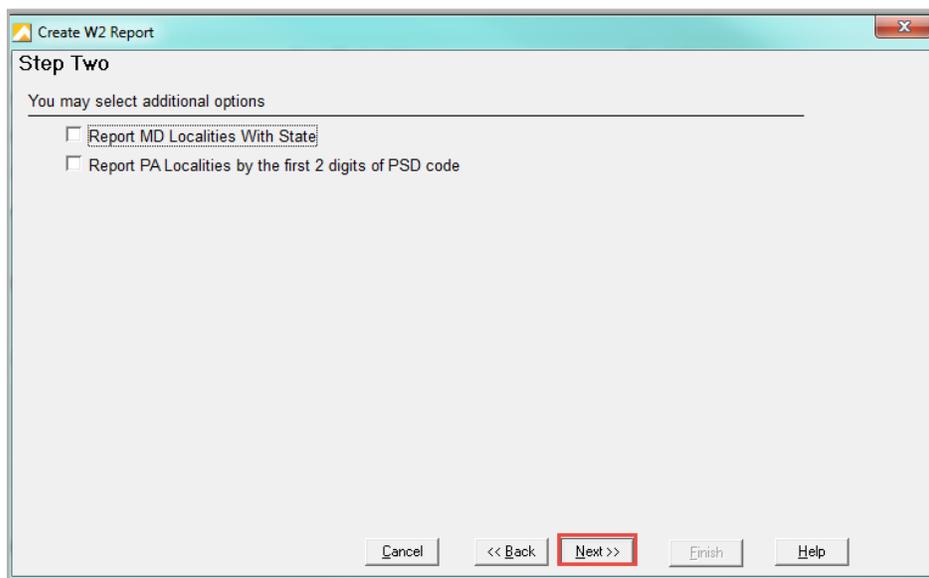
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2. Select the type of W2 you are printing and click [Next >>].

3. If applicable, choose additional reporting options.

    a. If you have Maryland taxes to report, enable the *Report MD Localities With State* checkbox to combine state and local taxes, as required by the state of Maryland.

    b. If you have Pennsylvania taxes to report, enable the *Report PA Localities by the first 2 digits of PSD code* checkbox to report PA localities under the first two digits of their Political Subdivision (PSD) code, as entered in the *District Code* field on the Local Tax Table Record.
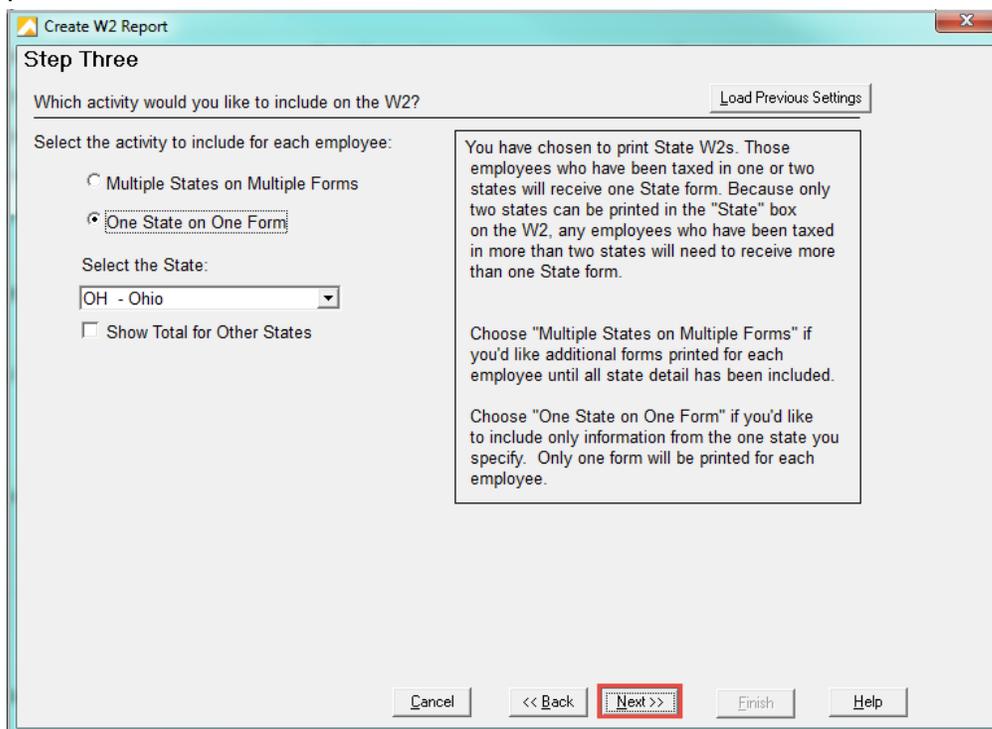
    c. Click [Next >>].

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4. Select the type of activity to include on the W2.
This window is only applicable if you selected "State" or "Local or Other" in step 2. If you selected "Federal" skip to step 5 on page 5.

    a. If you selected "State" you have the following options:

        • "Multiple States on Multiple Forms" - This option lets you print additional forms for each employee until all state detail is included. Two states will print on each W2.

        • "One State on One Form" - This option enables the *Select the State* field. Only W2s for employees who worked in that state will be printed. Only one W2 for the selected state will print.


    b. If you selected "Local or Other," you have the following options:

        • "Multiple Localities on Multiple Forms" - This option prints additional forms for each employee until all local detail has been included. Two localities will be included on each W2.

        • "One Locality on One Form" - This option enables the *Select the Locality* field. Only W2s for the employees who worked in that locality will be printed. Only one W2 for the selected locality will print.
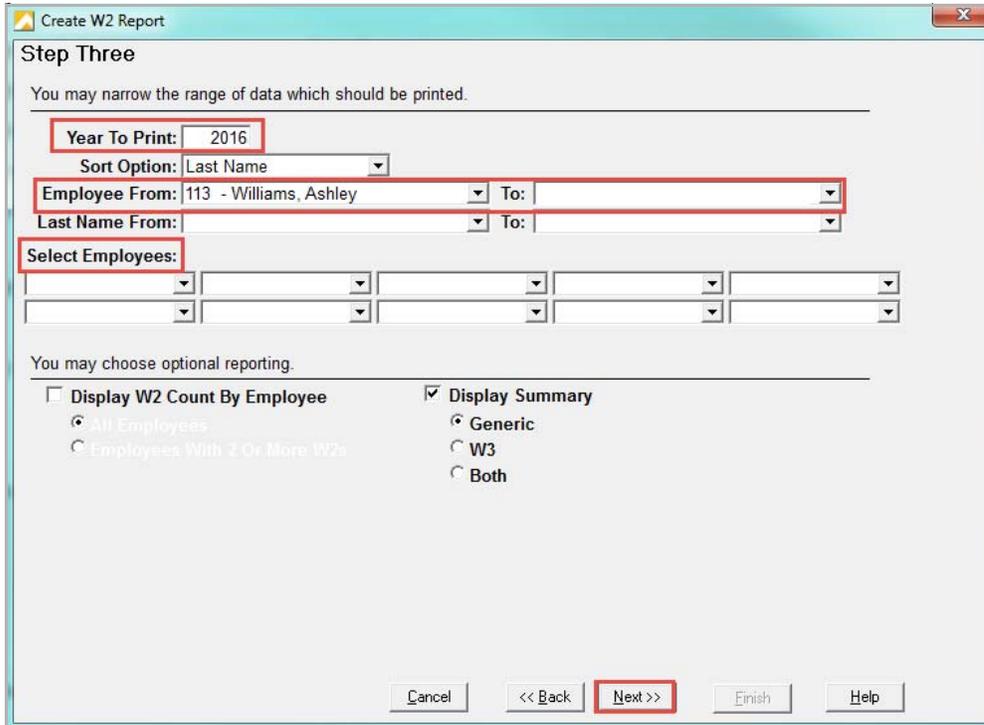
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- "One Agency, Multiple Localities on Multiple Forms" - This option enables the *Select the Agency* field. Only W2s for localities with that agency will be printed.
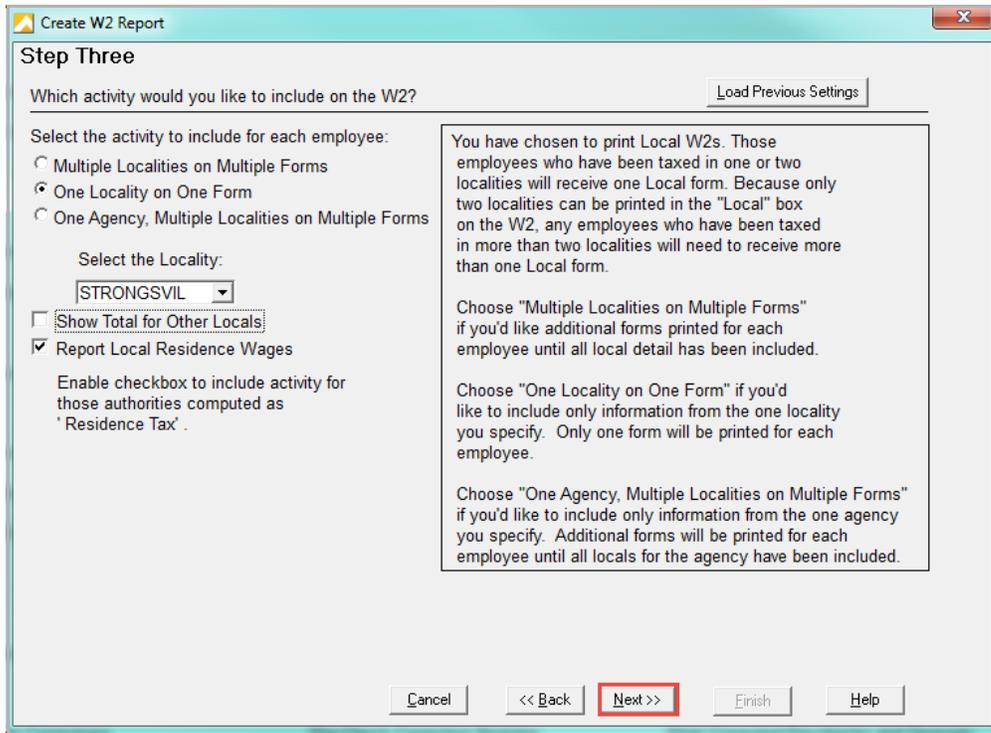
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5. Select the date and the employees for which you are entering W2s.

   a. In the *Year To Print* field, enter the four-digit year for which you are printing W2s. In the example below we are using "2015."

   b. Select the employees for whom you are entering W2s using the *Employee From and To* fields or the *Select Employee* fields.
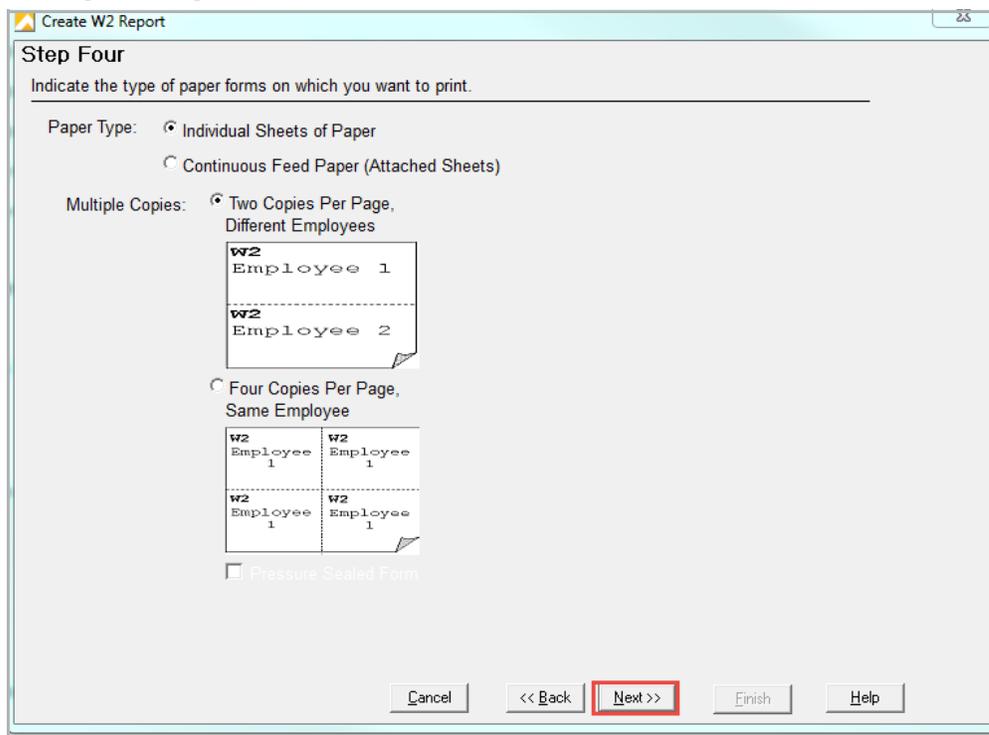
   c. Click [Next >>].

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6. Select the forms you are using.

    a. In the *Paper Type* field, select if you are printing on "Individual Sheets of Paper" or "Continuous Feed Paper (Attached Sheets)." If you select "Individual Sheets of Paper" the *Multiple Copies* options will be available.

        •In the *Multiple Copies* field, choose if you want two copies per page, or four copies per page.

        •If you select "Four Copies Per Page, Same Employee" the *Pressure Sealed Form* checkbox will be available. You can enable this checkbox if you have the correct pressure sealed equipment for printing pressure sealed forms.

    b. Click [Next >>].

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6. Review the summary of your settings.

   a. If you see errors and need to correct them, do so by clicking the [<<Back] button until you get to the appropriate window.

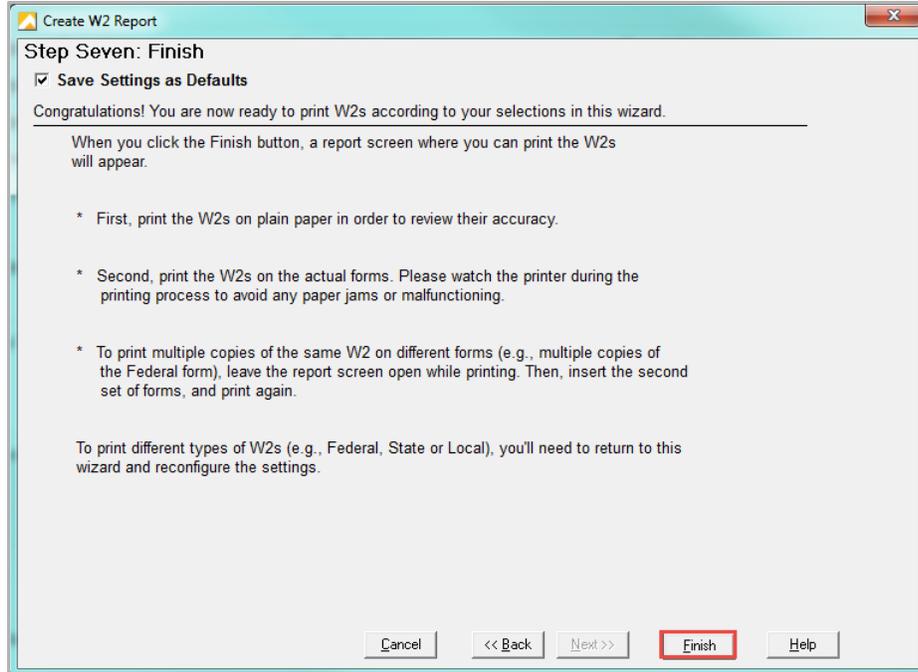   **b.** If the information is correct, click [Next >>].

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7. Verify the form alignment.

    a. Test the alignment by clicking the [Print] button to print a test copy of the W2 with all of the information populated, either on blank paper or an actual W2.

    b. If you need to make adjustments, do so using the fields in the *Adjust Form* groupbox.

    Note: Using the blank paper method is only an estimate. For exact alignment, you should always print a single test page on a W2 form.
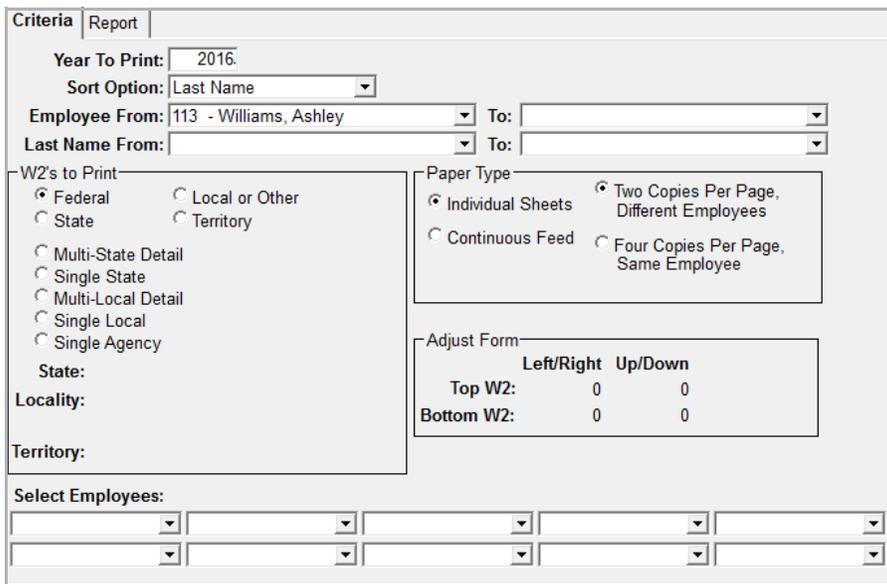
    c. Click [Next >>].

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8. Click [Finish].

9. Run the report.

  a. Review the Print W2 "Criteria" tab.

  b. The information on this tab cannot be modified. If you see information that needs to be changed, click [Close] and start the Print W2 process again.

  c. If everything is correct, click the "Report" tab.
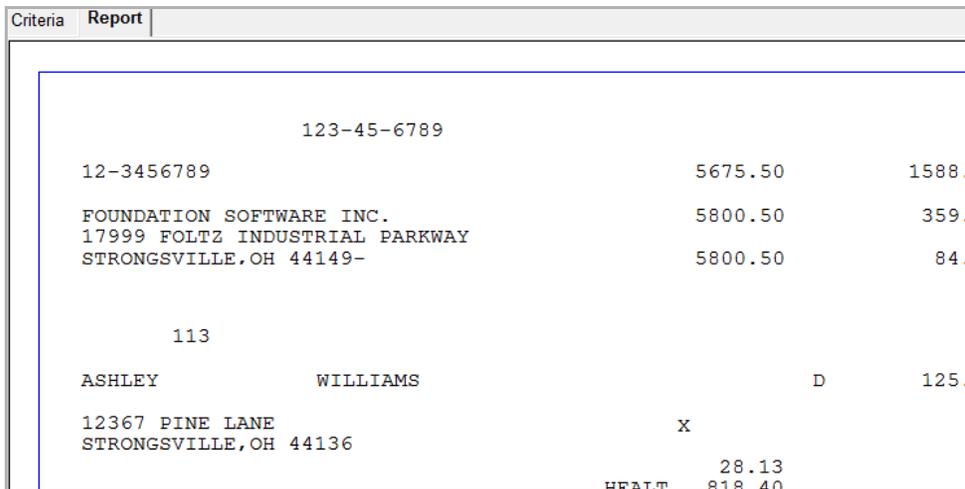
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10. Correct any errors.

If there are any errors, the Errors List will display after you click on the "Report" tab. In the example below, the employee's social security number is invalid.

a. Correct any errors before continuing.
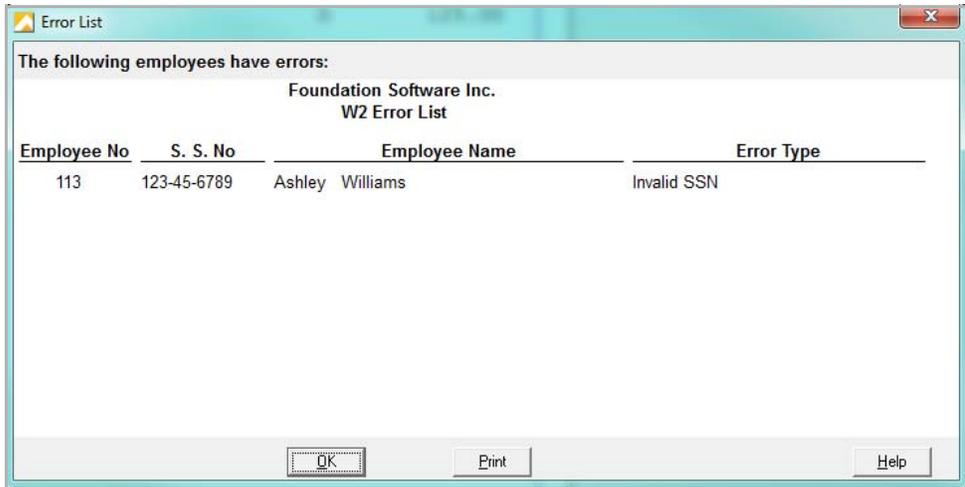
11. Print the W2s.

a. Foundation Software, Inc. recommends you print all of the W2s on blank paper and double check all of the information.

b. After verifying all of the information, print the W2s on the correct W2 forms.

c. Click [Close].

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12. Review the Summary window.

    a. Review the W2 Summary.

    b. If you would like to, you can print the summary by clicking the [Print] button.

    c. Click [OK].