

2018 W2 Guide

To provide greater functionality and more value to our customers MIP FUND ACCOUNTING has partnered with Aatrix® to handle all W2 processing and filing. You have the option to electronically file both federal and state W2 filings as well as print and file. This document covers how to produce your W2's through MIP FUND ACCOUNTING/Aatrix®.

IMPORTANT NOTES

You should be on Version 19.1.0 or later to process your tax forms.

Due to program changes it is not possible to eFile or print final copies of tax forms unless you are in 19.1.0 or later.

All printing and filing of W2s in MIP FUND ACCOUNTING is done through Aatrix®.

See the Quick Start Guide on the next page for simplified instructions.

There is no charge for filing the Federal copy of W2s.

All state filings will incur a charge.

Pre-printed forms are not required and will not work with Aatrix®.

You will need blank perforated forms. See Section 5 for the proper forms. Better yet use the complete filing option to save time and money.

2018 W2 Quick Start Guide

This document is a quick walkthrough of the 2018 W2 process. If you have any problems or questions on any of the steps please refer to the complete guide.

Step 1—Select Forms

- 1—Go to Activities> Payroll >Tax Reporting> Tax Forms and eFiling by Aatrix®.
- 2—Select 2018 W-2/W-3
- 3—Click on the Form Updates button if available to get the latest forms and updates.
- 4— Make sure to enter 2018 in your Year.

Select Form

Form Type: Federal
State: FE
Form: 2018 W-2/W-3

Form Description
[Annual] Use this form to process W-2s/W-3. After completing the process you can make corrections, reprint, or process additional copies.

Form Updates

Full-time Employees
 Calculate
 Calculate

Select Date Range
Period Type: One Year
Period:
Year: 2018

Ignore this Section

Step 2—Select if you want to Test or Actually File

W-2 Setup Wizard

W-2 Setup Wizard

We noticed that you have not processed any W-2s for the current filing year. Before you begin filing your W-2s, would you like to do any of the following?

I want to test drive the W-2/W-3 Wizard with only the first 25 of my employees.
 I want to test drive the W-2/W-3 Wizard with all of my employees.
 No thanks, start processing my W-2/W-3s.

NOTE: The W-2/W-3 Wizard test drive allows you to see how the process works but does NOT save any of your information.

< Back Next > Cancel

Step 3—Confirm Your Company Information

Get Started Printing or eFiling Your W-2s

Please verify this company's Federal Employer Identification Number (FEIN). This number is used on ALL payroll forms and MUST be correct. If this number is NOT correct, you MUST return to your accounting/payroll software to make the correction.

Company FEIN
7 4 - 4 5 6 8 4 8 9

Company Information

Company name: JPS Training Corporation Trade name:
Address line 1: 10800 Pecan Park Blvd
Address line 2: Suite 400
City: Austin State: TX ZIP code: 78750

Step 4—Confirm your State and Local Numbers

W-2 Setup Wizard

State & Local Tax Items

Properly formatted tax account numbers are required for W-2 reconciliation and year-end forms. Avoid rejected forms and eFiles! MOST filing errors are due to incorrectly formatted withholding or unemployment account numbers.

State Tax Items

State	Tax Name	Tax Account Number
NM	State Unemployment	12345646
TX	State Unemployment	01-235456-5
NM	State Withholding	05-655656-005

Local Tax Items

State	Tax Name	W-2 Name	Tax Type	Tax Account Number
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Step 5—Data Verification

W-2 Setup Wizard

Data Verification

1. Do you have any employees who are exempt from any part of Medicare or Social Security taxes?
 Yes No

2. Do you have any employees who earn SS Tips that must be reported?
 Yes No

This step allows you to verify that all of your employee information is correct. The system will ask a number of questions to most efficiently verify your data.

Step 6—W3 Information

W-2 Setup Wizard

W-3 Information

Control number (Box a):

Kind of Payer (Box b - check all that apply)

941 Military 943 (Agriculture) 944

CT-1 (Railroad) Household Employer Medicare Government Employer

Kind of Employer (Box b):

Step 7—Multiple Payroll Data Files

Use only if you have multiple databases with the same FEIN

W-2 Setup Wizard

Multiple Payroll Data Files

Please Read Carefully
Answering incorrectly may require you to restart the filing process.

Do you use multiple payroll data files for the **same federal EIN**?

You may be using multiple payroll data files in your accounting software to handle:

- multiple companies
- multiple departments
- multiple divisions
- multiple sites

all under the same federal EIN.

Yes, I use multiple payroll data files for this EIN.

No, I use a single payroll data file for this EIN.

Step 8—The Preparer Grid

The values pulled up in the verification grid should match to the values and totals you have in your payroll Tax History reports, not necessarily your earnings history reports.

Verify Employee Information						Next Step				
TOTALS:	Employees (5)					\$208042.56	\$39996.12	\$216622.56	\$13430.60	\$216622.56
Box a	Box e	Box e	Box e	Box e	Box f	Box 1	Box 2	Box 3	Box 4	Box 5
SSN	Last Name	First Name	Middle Name	Name Suffix	Address Lin	Fed Wages	Fed Withheld	SS Wages	SS Withheld	Medicare Wages
1	433-33-3333	Jeffries	Dana	R	8522 Louisia	23455.20	1806.00	23455.20	1454.22	23455.20
2	454-99-8765	Martin	Anna Belle		8765 Mercu	94050.00	22536.48	99000.00	6138.00	99000.00
3	222-52-6464	Michaels	Scott	Y	6201 Airplar	51870.00	10158.96	54600.00	3385.20	54600.00
4	211-19-8787	OToole	Ken	Z	2346 Hamilt	21567.36	2130.48	21567.36	1337.18	21567.36
5	221-21-1212	Savage	Natalie	P	5555 Oak M	17100.00	3364.20	18000.00	1116.00	18000.00

Any errors will come up with a description of what the error is. If you look in the grid the fields that have the error will be highlighted in red. The errors should be corrected before continuing. Errors can be corrected either by getting out of the W2 process, entering the correction into MIP and then starting over or they can be typed directly into the Aatrix® grid.

Error / Warning Description:

If Box 5 (medicare wages) is greater than the wage limit [106800 for 2009], then Box 3 (social security wages) + Box 7 (social security tips) must equal the wage limit or must be equal to zero [1 errors found]

433-33-3333	26203.32	1624.56	26203.32	379.92	
454-99-8765	90000.00	5580.00	109200.00	1583.40	
222-52-6464	59150.00	3667.30	59150.00	857.73	

Step 9 -Select Your Printing/Filing Options

*The Complete Filing Option is provides complete e-filing as well as W2 printing and mailing for only \$1.99/employee (\$1.69 before 1/12).

*eFiling your Federal W2/W3 copies is free of charge

*Printing of the employee copies should be on blank perforated 4 part forms. The federal copies can be printed on plain paper.

W-2/1099 Preparer

W-2 Printing and Filing Options

eFile Services allow you to pick Filing Dates. FREE Corrections before selected Filing Dates. [More info?](#)

Complete W-2 eFiling Service **Next Business Day Mailing!** **# Employees** **Price/Emp** **Subtotal**

The eFile Center will:

- Print and Mail Employee Copies 5 \$1.99 \$9.95
- eW-2 Only Employee Copies [What's This?](#) 0 \$0.99 \$0.00
- File your Fed W-2s and W-3 to the SSA included FREE
- File your State W-2s and Reconciliation Forms included FREE
- eW-2s Available for All Employees included FREE

Total Cost **Minimum** **\$24.95**

Other Options [eFileers receive Free Corrections before selected Filing Dates](#)

- Print my Employee W-2s
- eFile Federal W-2s and W-3 5 \$0.00 \$0.00
- eFile State W-2s and Reconciliation Forms 5 \$0.69 \$0.00
- Print Federal W-2s and W-3
- Print State W-2s and Reconciliation Forms

Official Employer W-2s will display when Federal W-2s are selected **Total Cost** \$ 0.00

< Back Next > Cancel

Step 9—Continued

You can choose to include dividers between the forms as well as look at summary of your filings and printings.

Divider sheets provide important information about how to file your forms. Would you like to include a divider sheet to separate reports or forms?

- Yes, include divider sheets when printing.
- No, do not include divider sheets.

Confirm Processing Options

Based upon your selections the following actions will be taken:

Federal
eFile Federal W-2
eFile Federal W-3
Employee
Print Employee W-2
Print W-2 Notice

If you would like a copy for your records of the actions that will be taken, click Print.

Step 10—Printing the W2's

File Edit View Tools Help

Report 1 of 4: Employee W-2

1 7 pages

Click Print Final, then click Next Step.

Print Draft Print Final Prev Step Next Step

a Employee's SSN 325-95-8157	1 Wages, tips, other compensation 9,066.20	2 Federal income tax withheld 316.16
OMB No. 1545-0048	3 Social security wages 9,066.20	4 Social security tax withheld 562.12
b Employer identification number 01-9999992	5 Medicare wages and tips 9,066.20	6 Medicare tax withheld 131.43
c Employer's name, address, and ZIP code Social Service Agency 313 East Anderson Lane		

This step brings up the form viewer. This is where you can review and print your W2s.

1—Lets you look through your forms at what will actually print.

2— Print final will print the forms.

3—Next Step will take you to the next set of forms that need to be printed.

Print all of your various forms

Step 11—eFile (Optional)

If you have selected an eFiling option you will log in and complete your efilng. First time users should create a new eFile account. You can do this through Payroll, select Activities> Tax Reporting> Filing and Electronic Payments by Aatrix® or go to <https://efile.aatrix.com/>

Secure eFile Login

181234567-67325095-8a9a-806029

Username

Password

[Forgot your login?](#)

Login

Remember Me

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FINISHED!

File Edit View Tools Help

Report 1 of 4: Employee W-2

1 7 pages

Click Print Final, then click Next Step.

Print Draft Print Final Prev Step Next Step

a Employee's SSN 325-95-8157	1 Wages, tips, other compensation 9,066.20	2 Federal income tax withheld 316.16
OMB No. 1545-0048	3 Social security wages 9,066.20	4 Social security tax withheld 562.12
b Employer identification number 01-9999992	5 Medicare wages and tips 9,066.20	6 Medicare tax withheld 131.43
c Employer's name, address, and ZIP code SOCIAL SERVICE AGENCY		

1 4 pages

Click Print Copy for your copy, then click Next Step.

Print Draft Print Copy Prev Step Next Step

22222	For Official Use Only OMB No. 1545-0048	a Employee's social security number 325-95-8157
b Employer identification number (EIN) 01-9999992	1 Wages, tips, other compensation 9066.20	2 Federal income tax withheld 316.16
c Employer's name, address, and ZIP code SOCIAL SERVICE AGENCY	3 Social security wages 9066.20	4 Social security tax withheld 562.12

1 1 page

Click Print Copy for your copy, then click Next Step.

Print Draft Print Copy Prev Step Next Step

33333	a Control number For Official Use Only OMB No. 1545-0048	
b Kind of Payer 01	1 Wages, tips, other compensation 323738.80	2 Federal income tax withheld 17722.55
c Total number of Forms W-3 7	3 Social security wages 128633.56	4 Social security tax withheld 7975.26
d Establishment number 7	5 Medicare wages and tips 323738.80	6 Medicare tax withheld 1865.21

Table of Contents

Table of Contents	2
Introduction	6
Section 1 – Producing W2s	7
Select From Screen	7
Processing.....	8
Multiple Payroll Data Files	9
Data Verification	11
Section 2 – The W2 Preparer Grid	13
The W2 Preparer Grid	13
Making corrections.....	14
Correcting the Error through MIP FUND ACCOUNTING:	14
Correcting the error through Aatrix®:	14
Section 3 - Filing and Printing.....	16
Complete W2 eFiling.	16
eW-2 Only Employee Copies	17
eFile Federal W2 & W3.....	17
eFile State W2 and Reconciliation Forms	17
Printing Options	17
Section 4 - W2 Form Viewer.....	19
eFiling.....	21
Section 5 - Required Forms.....	22
Section 6 - Corrections, W2C's and Additional filings	23
How to Process Additional New Filings.....	25
How to Reprint Completed W2s.....	26
Correcting W2s.....	28
W2C	30
Starting Over	30
Section 7 - Adding State and Localities to your W2	32
Section 8 – Electronic Distribution of W2.....	35
Section 9 - Advanced Grid Operations	37
Sorting.....	38
Inserting a Row.....	38
Section 10: Auditing and Correcting Your W2's	40
Auditing Boxes 1-6.....	40
Auditing Boxes 15-20.....	41
Auditing Boxes 7-14.....	41
Health Insurance Reporting Requirements.....	42

Introduction

What is Aatrix®?

Aatrix® is a leading provider of online filing and compliance for payroll and tax forms. MIP FUND ACCOUNTING has integrated the functionality of Aatrix® to provide support for additional forms and services and simplify the filing process for our customers. The advantage of using Aatrix® for filing W2s means that you can now:

- Print W2s on plain perforated paper (or even blank paper) without having to purchase pre-printed forms
- Print and file W3s and other supporting forms
- Electronically file Federal W2s for free
- Electronically file State W2s for a modest price.
Have Aatrix® handle all of your printing, stuffing, mailing and filing with their complete service option.
- Print and file many State Tax Forms.

All W2 filing is done through Aatrix®.

NOTE: The screenshots and documentation in this document may vary from what you see due to updates.

Section 1 – Producing W2s

To begin the W2 process go to Payroll>Activities>Tax Reporting>Tax Forms and eFiling by Aatrix®.

If this menu option does not appear in the dropdown menu, you have not been granted rights to produce W2s. You will need to have rights granted to you. For instructions on how to do this see KB 951.

Select From Screen

This menu selection will bring up the Aatrix® selection box. This will allow you to make selections for the form you want to process.

The screenshot shows the 'Select Form' interface with several callouts:

- 1- Choose Federal**: Points to the 'Form Type' dropdown menu.
- 2 Choose W2/W3**: Points to the 'Form' dropdown menu.
- 3-Select One Year**: Points to the 'Period Type' dropdown menu.
- 4-Type in Current Tax Year**: Points to the 'Year' input field.
- Click Form Updates if Available**: Points to the 'Form Updates' button.
- Filters are not Normally used**: A cloud-shaped callout pointing to the 'Filters' section.

The 'Form Description' box contains the text: "[Annual] Use this form to process W-2s/W-3. After completing the process you can make corrections, reprint, or process additional copies."

Selected Filter	Compares To	Criteria 1	Criteria 2
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1. Form Type

To produce W2s you will want to choose Federal.

2. Form

For W2s select 2018 W-2/W-3. This selection will not be available until December 20th, 2018. If you do not see the form you wish to process, click the Form Updates Button if it is available. This will load the latest forms from Aatrix®. If you don't see a form in the drop down list after installing the most recent update try logging out and logging back in again.

3. Date Range

This should be One Year.

4. Year

It is possible to mix and match the form year and the year it calculates the data for, so be sure that if you are printing on a 2018 form that you choose 2018 as the year.

5. Filter

The filter allows you to limit the data that is processed in Aatrix®. Some companies only need to produce forms for a subset of their employees. You can accomplish this by using the filter. Aatrix® will only calculate and produce forms for the information that you have selected.

NOTE: If you filter on a set of employees and then go back to run your W2's again it will automatically use the same set of employees. To use a different set (or all employees) you must disregard history and start over.

Form Updates

The Form Updates feature will automatically check to make sure you have the latest updates from Aatrix®. The Form Updates button is only available if there is an update from Aatrix®. It is recommended that you download updates whenever they are available.

Processing

Test Drive

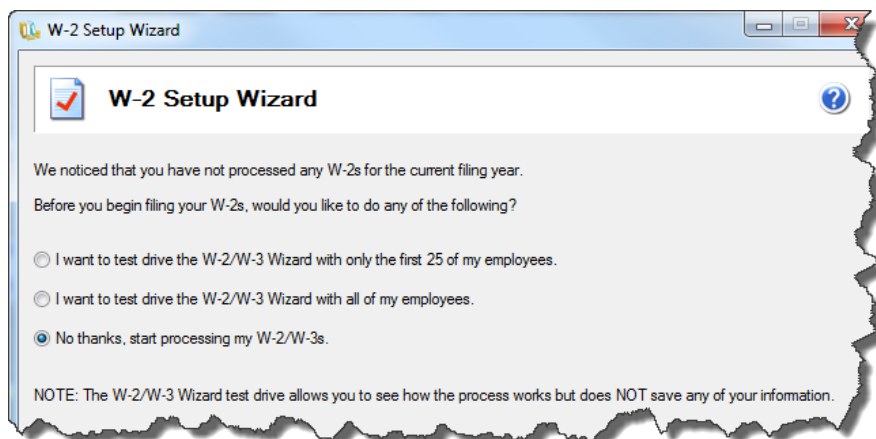
After you have made your selections on the form click OK and launch the W-2 Wizard. The first screen will give you options for running through the process in test mode.

If you have not used Aatrix® before, going through the process in test mode is a good idea.

This can be helpful for detecting any problems or corrections that need to be made to the data. NOTE: Any changes you make here WILL NOT be saved or carry forward onto your W2's.

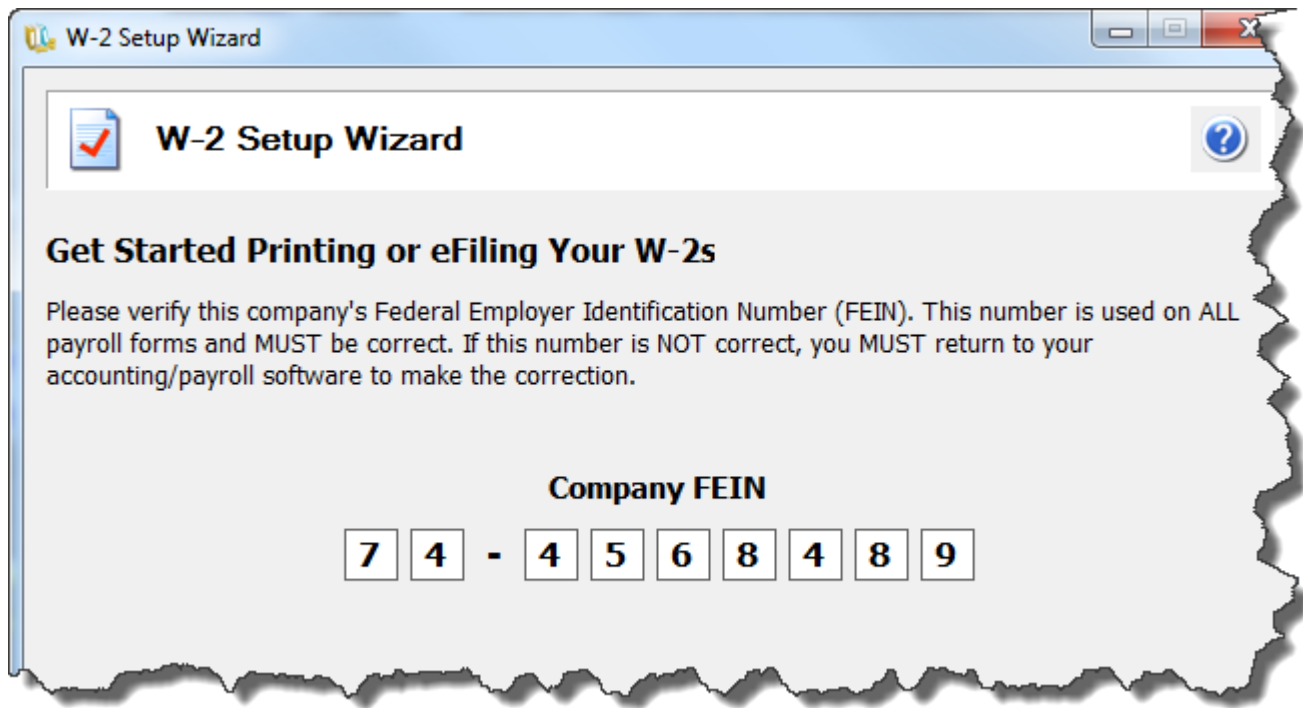
If you choose to test drive Aatrix® it will go through the entire process. If you choose to efile it will even prompt you to log in and submit the file and give you a filing number. Any printouts that you make in test mode will have a do not file watermark on them.

This is a good way to go through the entire Aatrix® process and make sure that everything is working properly.

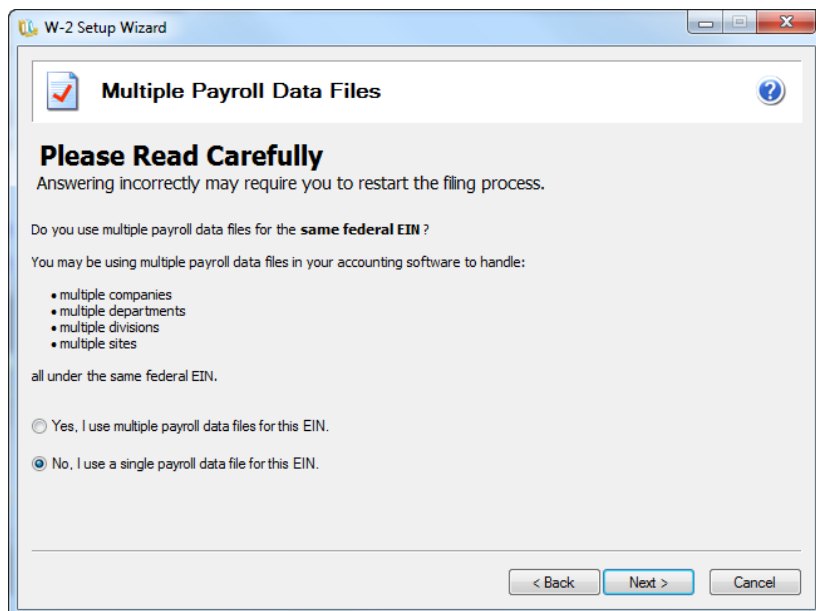


The next screen of the wizard asks you to confirm your company FEIN. If this number is not correct it cannot be changed in the wizard. You must exit the wizard and go into

Organization>Organization Information and update your Federal Tax ID number there, then log out and back into MIP and restart the Aatrix® process.



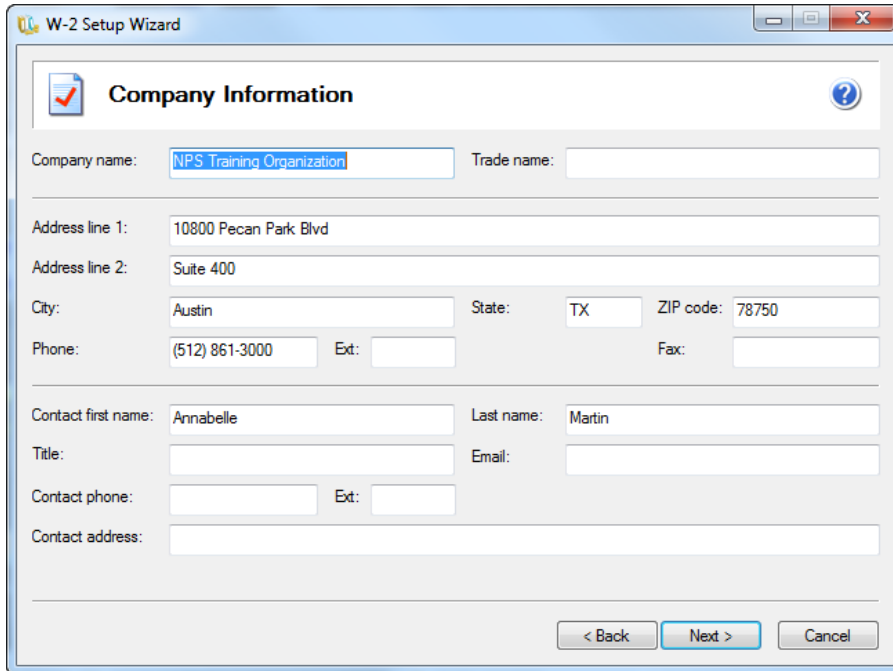
Multiple Payroll Data Files



You will be asked if you want to use multiple payroll data files for the same EIN. In most cases you should click no. If you are using multiple databases with the same EIN see KB 8061.

The next screen pulls in your company information.

This information should pull from what you have recorded in the Administration module. You can edit or update any incorrect or missing information in this screen.



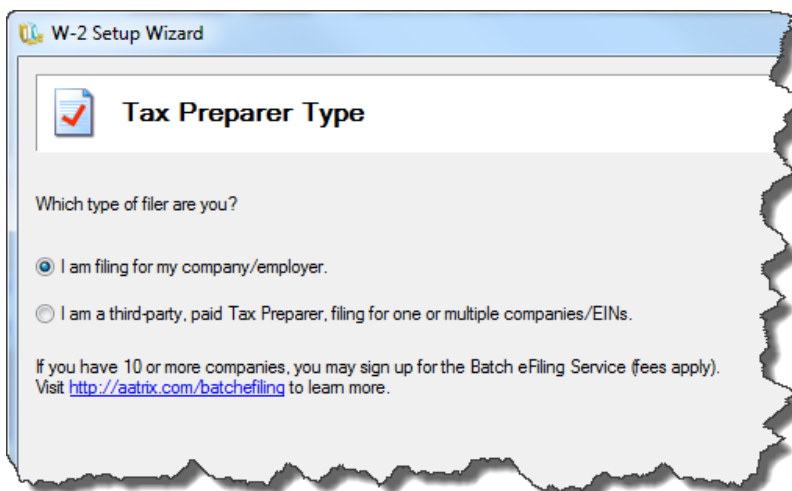
The screenshot shows a window titled "W-2 Setup Wizard" with a sub-header "Company Information". The form contains the following fields:

- Company name: NPS Training Organization
- Trade name: (empty)
- Address line 1: 10800 Pecan Park Blvd
- Address line 2: Suite 400
- City: Austin
- State: TX
- ZIP code: 78750
- Phone: (512) 861-3000
- Ext: (empty)
- Fax: (empty)
- Contact first name: Annabelle
- Last name: Martin
- Title: (empty)
- Email: (empty)
- Contact phone: (empty)
- Ext: (empty)
- Contact address: (empty)

At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

If this information is incorrect or changes after you have started the Aatrix® process it can be updated on the Aatrix® Grid under Edit>Update Company information.

Tax Preparer Type



The screenshot shows a window titled "W-2 Setup Wizard" with a sub-header "Tax Preparer Type". The form contains the following text and options:

Which type of filer are you?

- I am filing for my company/employer.
- I am a third-party, paid Tax Preparer, filing for one or multiple companies/EINs.

If you have 10 or more companies, you may sign up for the Batch eFiling Service (fees apply). Visit <http://aatrix.com/batchefiling> to learn more.

Unless you are a CPA or Tax service doing returns for someone else you should choose "I am filing for my company/employer."

State and Local Tax Items

After confirming your company information, you will have the option to add columns to your W2. Columns can be added for State and Local Tax items. For instructions on how to do this see [Section 7: Adding State and Local Tax Items](#).

The screenshot shows the 'W-2 Setup Wizard' window with the 'State & Local Tax Items' tab selected. The window title is 'W-2 Setup Wizard'. Below the title bar, there is a header with a checkmark icon and the text 'State & Local Tax Items'. A help icon is in the top right corner. Below the header, there is a warning message: 'Properly formatted tax account numbers are required for W-2 reconciliation and year-end forms. Avoid rejected forms and eFiles! MOST filing errors are due to incorrectly formatted withholding or unemployment account numbers.' The main area is divided into two sections: 'State Tax Items' and 'Local Tax Items'. The 'State Tax Items' section contains a table with three columns: 'State', 'Tax Name', and 'Tax Account Number'. There are three rows of data. To the right of the table are three buttons: 'Add...', 'Edit...', and 'Remove'. The 'Local Tax Items' section contains a table with five columns: 'State', 'Tax Name', 'W-2 Name', 'Tax Type', and 'Tax Account Number'. This table is currently empty. To the right of this table are three buttons: 'Add...', 'Edit...', and 'Remove'. At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'.

State	Tax Name	Tax Account Number
NM	State Unemployment	12345646
TX	State Unemployment	01-235456-5
NM	State Withholding	05-655656-005

State	Tax Name	W-2 Name	Tax Type	Tax Account Number
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Data Verification

This screen asks questions that allow the system to effectively verify your data based on your filing needs. In most cases you should say NO to the questions unless you have employees who meet one of the listed conditions.

The screenshot shows the 'Data Verification' window. The window title is 'Data Verification'. Below the title bar, there is a header with a checkmark icon and the text 'Data Verification'. A help icon is in the top right corner. The main area contains four questions, each with radio button options for 'Yes' and 'No'. The questions are: 1. Do you have any employees who are exempt from any part of Medicare or Social Security taxes? 2. Do you have employees who are members of the clergy? 3. Do you want to use control numbers on your W-2s? 4. Do you have any employees who elected to only receive W-2 forms electronically? At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'.

1. Do you have any employees who are exempt from any part of Medicare or Social Security taxes?
 Yes No
2. Do you have employees who are members of the clergy?
 Yes No
3. Do you want to use control numbers on your W-2s?
 Yes No
4. Do you have any employees who elected to only receive W-2 forms electronically?
 Yes No

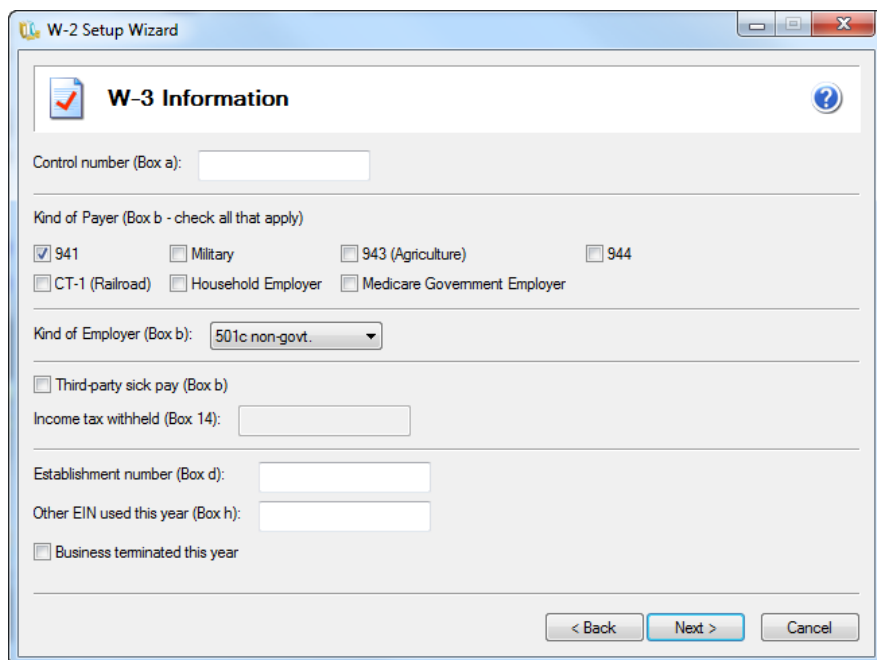
One exception common to Governments, Indian Tribes and Non-profit organizations is the first question:

“Do you have any employees who are exempt from any part of Medicare or Social Security taxes?”

This means do you have an earnings code that is subject to MC or SS Taxes but not both (one or the other). If you say yes to this question please see KB 6146 for detailed instructions. This will also enable you to put information into Box 14 in compliance with Revenue Ruling 59-354.

W-3 Information Screen

Next you will be prompted to enter the information that goes on your W3. Some of this information may already be in the System from the values entered in Organization>Organization Information>Electronic Filing. This information is also available to be edited once you are in the actual grid.



The screenshot shows a software window titled "W-2 Setup Wizard" with a sub-tab "W-3 Information". The window contains several input fields and checkboxes:

- Control number (Box a): [Empty text box]
- Kind of Payer (Box b - check all that apply):
 - 941
 - Military
 - 943 (Agriculture)
 - 944
 - CT-1 (Railroad)
 - Household Employer
 - Medicare Government Employer
- Kind of Employer (Box b): [Dropdown menu showing "501c non-govt."]
- Third-party sick pay (Box b)
- Income tax withheld (Box 14): [Empty text box]
- Establishment number (Box d): [Empty text box]
- Other EIN used this year (Box h): [Empty text box]
- Business terminated this year

At the bottom of the window are three buttons: "< Back", "Next >", and "Cancel".

A reminder message will come up to verify the amounts in the W2 boxes with a W2 Information report from MIP FUND ACCOUNTING. For information on how to run this report please see KB 6166. This message may be hidden behind the screen and you need to move MIP to find it.



The screenshot shows a warning message box titled "W-2/1099 Preparer". The text inside the box reads:

ATTENTION: Please verify all W-2 box amounts with the Abila MIP Fund Accounting W-2 Information Report.

For more information please see Article 6166 in the Knowledgebase at: <http://kb.abila.com/node/6166>

At the bottom of the box is an "OK" button.

Section 2 – The W2 Preparer Grid

The W2 Preparer Grid

The next section of the W2 process is the W2 Preparer grid. You will use this grid to edit and verify your W2 information.

TOTALS:		Employees (5)					\$208042.56	\$39996.12	\$216622.56	\$13430.60	\$216622.56	\$3141.12	
Box a	Box e	Box e	Box e	Box e	Box f	Box 1	Box 2	Box 3	Box 4	Box 5	Box 6	Box 7	B
SSN	Last Name	First Name	Middle Name	Name Suffix	Address Line	Fed Wages	Fed Withheld	SS Wages	SS Withheld	Medicare Wages	Medicare Withheld	SS Tips	FE
1	433-33-3333	Jeffries	Dana	R	8522 Louisia	23455.20	1806.00	23455.20	1454.22	23455.20	340.08		
2	454-99-8765	Martin	Anna Belle		8765 Mercur	94050.00	22536.48	99000.00	6138.00	99000.00	1435.56		
3	222-52-6464	Michaels	Scott	Y	6201 Airplan	51870.00	10158.96	54600.00	3385.20	54600.00	791.76		
4	211-19-8787	OToole	Ken	Z	2346 Hamiltc	21567.36	2130.48	21567.36	1337.18	21567.36	312.72		
5	221-21-1212	Savage	Natalie	P	5555 Oak M	17100.00	3364.20	18000.00	1116.00	18000.00	261.00		

1. W2 Validation Step

This details what validation step you are on as well as giving you an overall progress bar throughout the validation process. The number and type of validations depend on the answers you provided earlier in the wizard.

2. Employee Information Window

This window displays all of the basic non-financial information about your employees such as name, SS#, address etc. It is split from the other window to allow you to make this section bigger or smaller when you are using it.

3. W2 Box Number Window

This window displays all of the W2 box numbers and their values for all employees.

4. Column Totals.

Gives you a total of all columns at the top. Use this amount to check your numbers against your MIP Payroll reports.

5. Next Step Button

When you have completed a validation, you will click Next to move onto the next one. If you need to go back you can click Previous Step.

6. Help and Tips.

Information specific to the operation you are on.

7. Company Setup.

If you need to run through the previous wizard to change Local Tax Account Codes, Company Address or Filter Type information click this button.

After verifying all information in the grid, click next to move on. If you try and click next when some information is missing or incorrect you will receive a validation error message. In addition to the message the cell that has the problem will be highlighted in red.

	TOTALS:	Employees (5)	
	Box a	Box e	
	SSN	Last Name	
1	433-33-3333	Jeffries	Dan
2		Martin	An
3	222-52-6464	Michaels	Scot
4	211-19-8787	OToole	Ken
5	221-21-1212	Savage	Nat

This problem must be corrected prior to moving to the next step.

Making corrections

Make corrections through MIP FUND ACCOUNTING or within the Aatrix® preparer grid.

Correcting the Error through MIP FUND ACCOUNTING:

To correct the error through MIP FUND ACCOUNTING you will need to exit out of the W2 process making sure *not* to save any changes.

Once out of the W2 process you will need to go into MIP FUND ACCOUNTING to make the appropriate corrections.

For corrections to basic employee information such as name and address go to Maintain>Employee Information. Pull up the employee ID and make the necessary changes.

For corrections to W2 box information you must make adjustments in payroll. For detailed instructions see [Section 10: Auditing and Correcting W2s](#).

After you have made the necessary changes in MIP FUND ACCOUNTING, start the W2 process over again. This ensures that Aatrix® will process the changes you have made. After you get back to the preparer grid you will want to make sure the changes are there.

Correcting the error through Aatrix®:

Rather than exiting the Aatrix® process and making changes in MIP FUND ACCOUNTING it is possible to simply correct the values directly on the Aatrix® grid. Simply edit the cells within the grid. You can use the tab key to automatically move between cells with error messages.

	TOTALS:	Employees (5)	
	Box a	Box e	Box e
	SSN	Last Name	First Name
1	433-33-3333	Jeffries	Dana
2	225-56-15	Martin	Anna Belle
3	222-52-6464	Michaels	Scott
4	211-19-8787	OToole	Ken
5	221-21-1212	Savage	Natalie

After you have made the correction you can click next and move onto the next validation. The disadvantage of this method is that changes made directly on the grid will not update MIP FUND ACCOUNTING Payroll. If you create a new W2 file the changes you made will not be present in the new file.

You can copy/paste, add new columns, and manipulate data within the grid. See [Section 9 - Advanced Grid Operations](#).

Section 3 - Filing and Printing

After verifying your W2 information you will be able to select what options you want for eFiling and printing.

W-2/1099 Preparer X

W-2 Printing and Filing Options

eFile Services allow you to pick Filing Dates. FREE Corrections before selected Filing Dates. [More info?](#)

<input checked="" type="radio"/> Complete W-2 eFiling Service Next Business Day Mailing! The eFile Center will:		# Employees	Price/Emp	Subtotal
<ul style="list-style-type: none"> - Print and Mail Employee Copies - eW-2 Only Employee Copies What's This? - File your Fed W-2s and W-3 to the SSA - File your State W-2s and Reconciliation Forms - eW-2s Available for All Employees 	5 0 included included included	\$1.99 \$0.99 included included included	\$9.95 \$0.00 FREE FREE FREE	
	Total Cost		Minimum	\$24.95

<input type="radio"/> Other Options eFilers receive Free Corrections before selected Filing Dates				
<input type="checkbox"/> Print my Employee W-2s <input type="checkbox"/> eFile Federal W-2s and W-3 <input type="checkbox"/> eFile State W-2s and Reconciliation Forms <input type="checkbox"/> Print Federal W-2s and W-3 <input type="checkbox"/> Print State W-2s and Reconciliation Forms	5 5	\$0.00 \$0.69	\$ 0.00 \$ 0.00	
Official Employer W-2s will display when Federal W-2s are selected	Total Cost			\$ 0.00

< Back
Next >
Cancel

Complete W2 eFiling.

The cost is \$1.99 per employee with a \$24.95 minimum charge. If you select this option Aatrix® will electronically file your State and Federal W2s as well as print and mail your W2s to your recipients. With this option is it also possible to post W2s to a secure website in addition to having them printed and mailed. Employees can access this website for additional copies if needed. You will also have the option to print a paper copy if you desire. You should complete your filing and have it submitted to Aatrix® by Jan 29th at 3pm CST ensure timely delivery of your W2 Filing.

NOTE: There is a promotional discount on the Complete eFiling Solution. If you use this option and file between Dec 20, 2018 and Jan 12, 2019 the cost will be \$1.84 per employee with the same \$24.95 minimum.

When you consider that the required paper + envelope is \$1.48 + shipping and postage is \$.47 the price of the complete filing option is very attractive and spares you the need to print, stuff and stamp envelopes.

If you have to efile state W2's it is cheaper to use the complete filing option as that service is included vs costing another .69 per record on top of paper and mailing costs.

Also if you elect the complete filing option for W2's AND 1095-C you will be get a combined price of \$2.95/Employee. To get this combined filing, you would produce your W2's with the complete filing option. When entering information on the Aatrix efile site you will be asked when you would like to have your filing submitted for processing. Choose the last period available.

Later, when you produce your 1095 forms, choose the complete filing option. It should automatically detect your pending W2 process and will ask if you want to combine them. If your W2 filing has already been processed this discount will not be available.

eW-2 Only Employee Copies

This is an additional option to the Complete W2 eFiling. Instead of having Aatrix® print and mail the W2s they will post them to a secure website that employees can access with a unique password. The cost for this is \$.99/employee. It is an additional option of the Complete W2 eFiling Package. Not all employees have to participate in this. If you select this option only the employees who have opted to receive the eW2 will be included. The rest will receive their W2s in the mail from Aatrix® as part of the Complete Filing package.

For detailed instructions on the Express eW2 Filing option see Section 8- Electronic Distribution of W2's.

eFile Federal W2 & W3

Aatrix® will file your Federal W2's at no charge. You still may have to complete payment information in the process but your credit card will not be charged. You will also have the option to print the Employee, Federal, State and employer copies of your W2's. Be sure to purchase the appropriate forms for printing your own copies. See Section 5 - Required Forms.

eFile State W2 and Reconciliation Forms

The cost is \$.69 per employee with a \$24.95 minimum charge. Aatrix® will file your State W2s for you. You will have the option of printing the Employee, Federal, State and employer copies of your W2's. Be sure to purchase the appropriate forms for printing your own copies. (See section 5).

eFile Local W2-W3

If you have any Local W2 information it may be possible to eFile Local W2/W3's you will see this option further in the process.

Printing Options

You will have the option of printing the Employee, Federal, State and employer copies of your W2's. Be sure to purchase the appropriate forms for printing your own copies. See Section 5 - Required Forms.

For the purposes of this documentation we will use an eFile example for Federal forms and print the Employee and State copies.

Other Options [Fed or State eFilers receive Free, Easy Corrections!](#)

Print my Employee W-2s

<input type="checkbox"/> eFile Federal W-2s and W-3	5	\$0.00	\$ 0.00
<input type="checkbox"/> eFile State W-2s and Reconciliation Forms	5	\$0.69	\$ 0.00

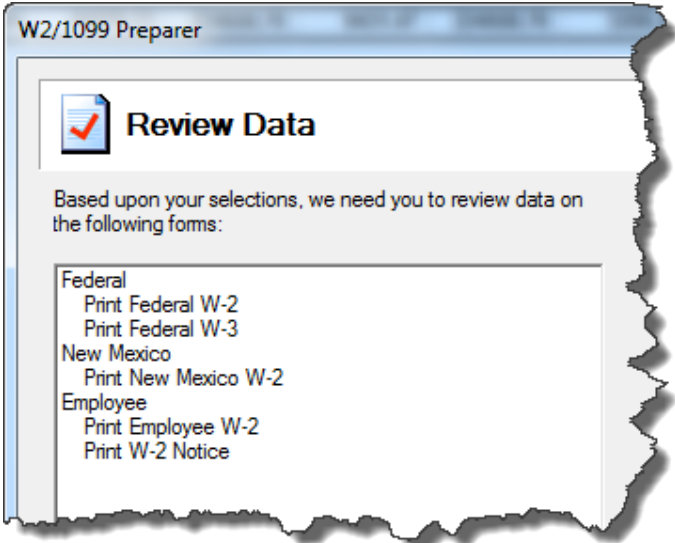
Print Federal W-2s and W-3 (Official Copy)

Print State W-2s and Reconciliation Forms (Official Copy)

	Total Cost	Minimum	\$ 0.00
--	-------------------	----------------	----------------

Print Employer Copy

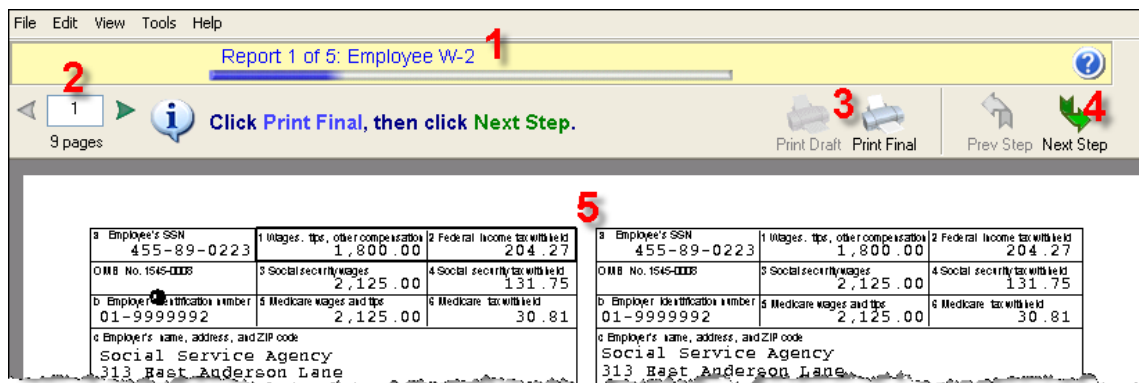
You will then get a summary of what is going to be printed out. You can print this list if you like.



After clicking continue, the W2 Form Viewer screen will come up.

Section 4 - W2 Form Viewer

The W2 Form viewer is the final step before printing and filing. It gives you the opportunity to see what the form will look like when printed/filed. In this case it is the Employer Copy of the W2s that will be eFiled.



1. Form Record

This section lets you know what form you are looking at. As you move between forms (ie W2 Employer Copy vs W2 Employee Copy) you will see the progress bar advance.

2- Page Record on the Form

This shows you which page of the current form you are on. It lets you select which page you want to view.

3. Print Buttons

Print Draft will print a watermarked copy that cannot be used for filing while Print Final will print the actual form for filing. NOTE: "Print Final" can be selected multiple times. For example, if you want three copies of a document, simply click "Print Final" three times before proceeding to the Next Step.

NOTE: If you have selected to efile, certain forms may only have print draft available. This is to avoid accidental duplicate filings.

4- Next Step

Once you have completed reviewing and printing these forms click this to move on to the next form in your list. For W2 filing the Previous Step button is disabled. If you have to go back to an earlier form you will need to start the process over again.

After you have clicked Next Step on the first form it will take you to the next form on your list as well as asking if you would like to print the final copy of the form. Once you have advanced to the next form **you cannot go back to a previous form without restarting the process.** Look in the Form record section (pictured in yellow) to see what type it is. In this case, it is the Employer W2.

File Edit View Tools Help

Report 2 of 5: Employer W-2

1 3 pages Click Print Final, then click Next Step. Print Draft Print Final Prev Step Next Step

a Employee's SSN 455-89-0223	1 Wages, tips, other compensation 1,800.00	2 Federal income tax withheld 204.27	a Employee's SSN 433-33-3333	1 Wages, tips, other compensation 50,009.28	2 Federal income tax withheld 4,611.92
OMB No. 1545-0008	3 Social security wages 2,125.00	4 Social security tax withheld 131.75	OMB No. 1545-0008	3 Social security wages 52,893.97	4 Social security tax withheld 3,279.34
b Employer identification number 01-9999992	5 Medicare wages and tips 2,125.00	6 Medicare tax withheld 30.81	b Employer identification number 01-9999992	5 Medicare wages and tips 52,893.97	6 Medicare tax withheld 766.91

Clicking the Next Step button will bring the next form and so on.

File Edit View Tools Help

Report 3 of 5: Federal W-2

2 5 pages Click Print Final, then click Next Step. Print Draft Print Final Prev Step Next Step

22222	Void <input type="checkbox"/>	a Employee's social security number 433-33-3333	For Official Use Only OMB No. 1545-0008
b Employer identification number (EIN) 01-9999992		1 Wages, tips, other compensation 50009.28	2 Federal income tax withheld 4611.92
c Employer's name, address, and ZIP code		3 Social security wages 52,893.97	4 Social security tax withheld 3,279.34

File Edit View Tools Help

Report 4 of 5: Federal W-3

1 1 page Click Print Final, then click Next Step. Print Draft Print Final Prev Step Next Step

33333	a Control number	For Official Use Only OMB No. 1545-0008			
b Kind of Payer	941 Military <input type="checkbox"/>	943 <input type="checkbox"/>	944 <input type="checkbox"/>	1 Wages, tips, other compensation 431337.15	2 Federal income tax withheld 83319.56
	CT-1 <input type="checkbox"/>	Hshld. emp. <input type="checkbox"/>	Medicare govt. emp. <input type="checkbox"/>	Third-party stock pay <input type="checkbox"/>	3 Social security wages 344810.89

The final Page is the Employee Instructions. If you do not have forms with these instructions printed on the back you can print them out now and distribute them to your employees.

File Edit View Tools Help

Report 5 of 5: W-2 Notice

1 1 page Click Print Final, then click Next Step. Print Draft Print Final Prev Step Next Step

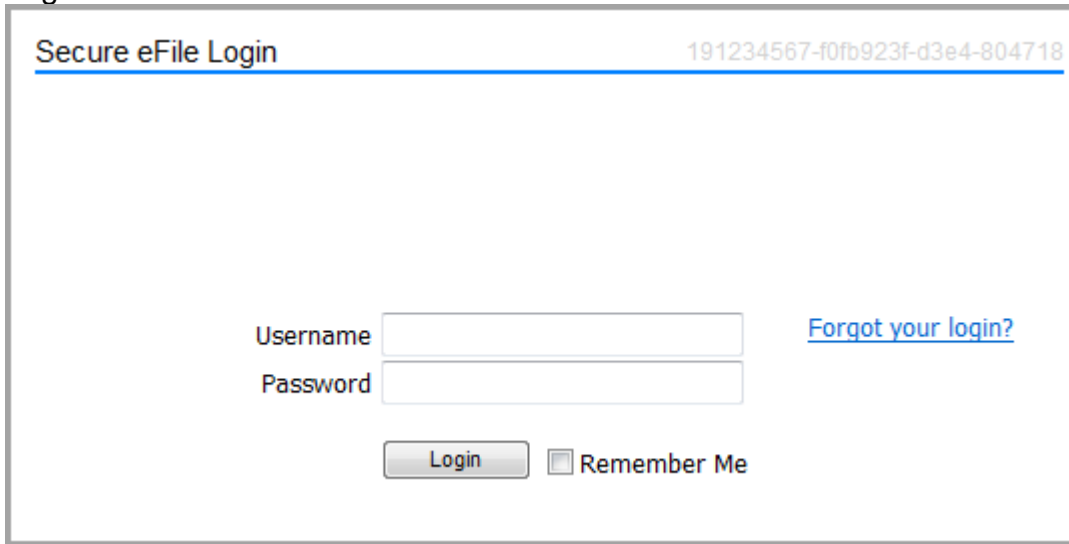
Notice to Employee

Refund. Even if you do not have to file a tax return, you should file to get a refund if box 2 shows federal income tax withheld or if you can take the earned income credit.

Box 12. The following list explains the codes shown in box 12. You may need this information to complete your tax return. Exclude deferral (codes D, E, F, and G) and designated Roth contributions (codes AA and BB). Under all plans are generally limited to a total of \$5,000 (\$4,000 if you only have SIMPLE plans; \$9,500 for

eFiling

After you have done all of your printing, if you selected to do any eFiling you will be prompted to Log into the Aatrix® Website.



Secure eFile Login 191234567-f0fb923f-d3e4-804718

Username

Password

Remember Me

[Forgot your login?](#)

Use your Aatrix® username and password, not your MIP Fund Accounting username and password. If your organization's FIEN # has already been registered with Aatrix® and you do not know your user name or password contact the person who registered. If they are not available contact Aatrix® directly for your options. They can be reached at helpme@atrix.com or 1-701-746-6814,

If this is your first time using Aatrix® or your organization does not have an account click the [Forgot your Login?](#) Link followed by the [Enroll](#) Link on the page that loads. To complete your enrollment you will need to have your organization's information, a credit card number. **You will need to print then fax or mail an authorization form before anything can be filed through Aatrix®. (This includes free Federal filings)**

After you have eFiled you can exit out of the process or do more processing. For instructions on additional processing or to do corrections see Section 6.

Section 5 - Required Forms

NOTE: W2's, 1095-C's and 1099's will be done through Aatrix®. You may wish to order your 1099 or 1095-C forms when you order your W2's. For more information on how to do 1099's through Aatrix® see KB 12806. For information on 1095-C forms see the required section of KB 13801.

MIP FUND ACCOUNTING Fund Accounting includes the "Tax Forms and eFiling by Aatrix®" functionality for Payroll tax forms. This new feature eliminates the need for some or all pre-printed forms-allowing you to eFile or print your tax forms on plain paper instead. If you chose to print forms note the requirements.

Form Requirements for W2

- The Employee copy of the W2 should be printed on the blank 4 part perforated paper.
- The State copy (if any) should be printed on the blank 4 part perforated paper.
- The Employee Notice is printed on the back of the 4 part perforated forms or it can be printed separately on plain copier paper
- The Federal copy of the W2 can be printed on plain copier paper, no forms needed.
- The Federal copy of the W3 can be printed on plain copier paper, no forms needed.
- The Employer copy of the W2 can be printed on plain copier paper, no forms needed

Below is a pricing list including the form numbers for Abila Checks and Forms. To Order call 1-844-857-2898 or log on to

<http://abila.checks-and-forms.com/homePage.do>

Only the below part numbers are compatible with MIP FUND ACCOUNTING.

W-2 Forms	25	50	100	200
W-2 Laser – Form Only – One employee per page				
LW2BLANK4 One Part	\$13.95	\$17.95	\$22.95	\$32.95
Bundle W-2 Laser Package Set – Forms and matching envelopes.				
LW2BK4DWS	\$36.95	\$47.95	\$54.95	\$81.95

Prices are subject to change without notice.

W-2 Forms have the following features:

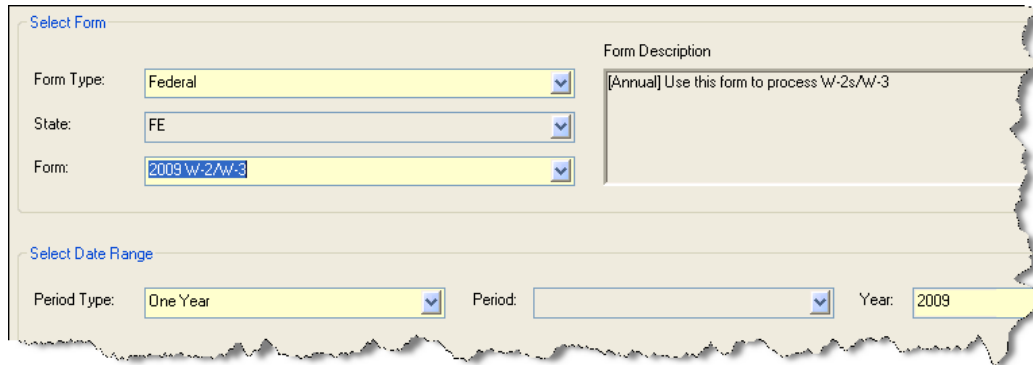
- IRS-Required Plain Perforated Paper
- Laser W-2 for use with Laser or Inkjet printers.
- Each 8 1/2" x 11" sheet is perforated according to IRS regulations
- Fully compliant with IRS Publication 1141
- Employee filing instructions already printed on the back to save you time and money
- Form only option also available upon request.
- Free W-3 Transmittal form with every W-2 order (not needed).

Question-If I have forms left over from last year can I use them?

Answer-The blank perforated stock does not change from year to year. Any unused stock from last year can be used this year. Pre-printed forms are year specific and cannot be reused.

Section 6 - Corrections, W2C's and Additional filings

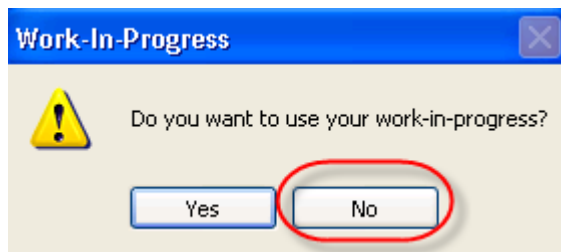
To do a correction, W2C, reprinting or additional filing you should select the Federal, W-2/W-3 option from the initial window. Selecting History will achieve similar results but you will not have the option to start over.



The screenshot shows a 'Select Form' dialog box with the following fields:

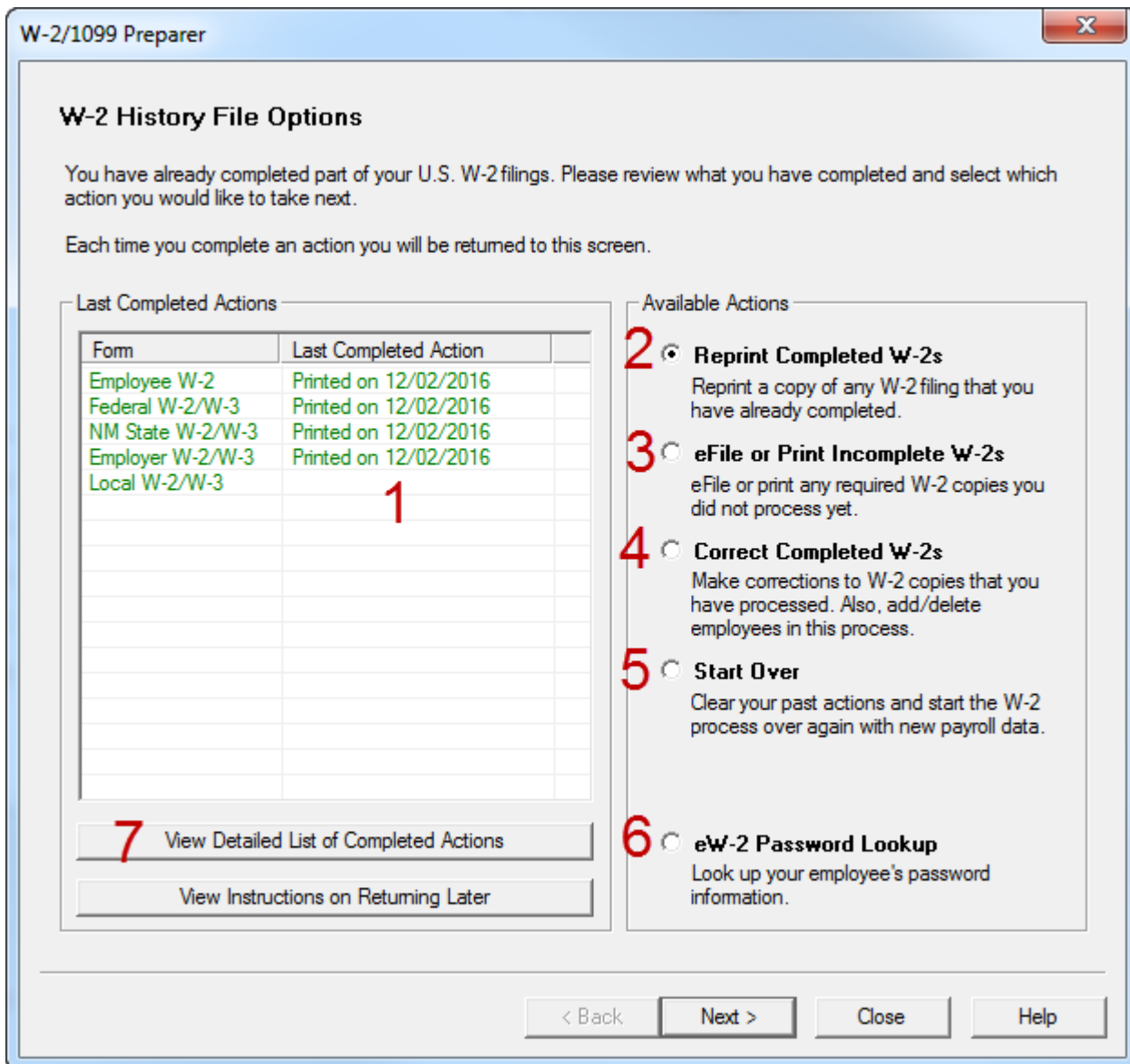
- Form Type:** Federal
- State:** FE
- Form:** 2009 W-2/W-3
- Form Description:** [Annual] Use this form to process W-2s/W-3
- Select Date Range:**
 - Period Type:** One Year
 - Period:** (empty)
 - Year:** 2009

After you have entered any information into Aatrix® or saved any information the next time you go back in you will be asked a question if you want to continue using the Work in Progress. It is best to say NO to this question (saying yes will take you directly to the Aatrix® grid).



The screenshot shows a 'Work-In-Progress' dialog box with a yellow warning icon and the text: "Do you want to use your work-in-progress?". There are two buttons: "Yes" and "No". The "No" button is circled in red, indicating the recommended action.

Saying NO will bring up the W2 History File Options screen. This will let you do reprints, additional filings or corrections.



1 – This is a list of the current status of your filing.

2 – Reprint Completed W2s

You would use this action to reprint any copy of the W2 that has been taken to completion (either through printing, filing or e-filing). This is the option you would use to replace a lost W2 or give an employee an additional copy.

3- Process Non-Filed W2 Copies

You would use this action if you have not fully completed your W2 filing. For example, you may have printed the employee copies but not e-filed. Or you may have filed the federal copies but not the state copies.

4- Correct Completed W2s

You would use this option if you need to make a correction to a W2 that has already been distributed or filed. For example, you print and e-file your W2's and then an employee points out a mistake. You would not use this option to produce a W2 that was missed or skipped.

5 – Start Over

This option will delete your previous W2's and start over again. You will lose any changes or modifications you have made to the W2's in the Aatrix® grid and the data will be pulled from MIP FUND ACCOUNTING. If you have eFiled this option will not be available.

6 – eW2 Password Lookup

After you have filed W2's using the express filing or complete filing methods this option will be available to look up the employee's password for their eW2's.

7 – View all Completed Actions

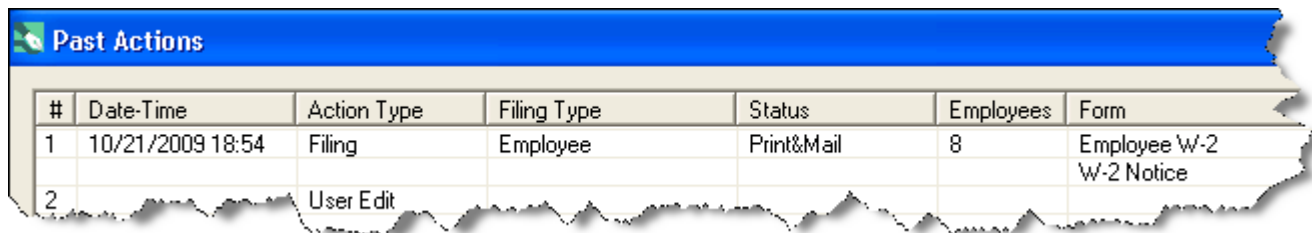
This gives you a history of your past W2 actions. It is a good record of what was done when.

The status column gives you the status of the various actions. The different status values are.

Print&Mail – The record of a W2 that made it to the printing process.

eFile- The record of a set of W2's that were eFiled. This doesn't mean that an eFiling was actually sent to the government. Only that it was selected as an option.

Record – This is the record of the information in the W2 Preparer Grid.



#	Date-Time	Action Type	Filing Type	Status	Employees	Form
1	10/21/2009 18:54	Filing	Employee	Print&Mail	8	Employee W-2 W-2 Notice
2		User Edit				

How to Process Additional New Filings

If you did not do all of your filings the first time (for example you skipped your Employee filing) you have the option to go back and do them. To do this you would choose Option 4 – Process Non-Filed W2 copies.



Form	Last Completed Action
Employee W-2	
Federal W-2/W-3	Printed on 12/07/2012
State W-2/W-3	
Local W-2/W-3	

Available Actions

- Reprint Completed W-2s
Reprint a copy of any W-2 filing that you have already completed.
- eFile or Print Incomplete W-2s
eFile or print any required W-2 copies you did not process yet.
- Correct Completed W-2s

In this example notice that the check box for “Print Federal W2s and W3” is grayed out because of past actions.

Other Options [Fed or State eFilers receive Free, Easy Corrections!](#)

Print my Employee W-2s

eFile Federal W-2s and W-3 5

eFile State W-2s and Reconciliation Forms 5

Print Federal W-2s and W-3

Print State W-2s and Reconciliation Forms

After selecting that, you will be asked a few questions in the Wizard and then you will get the screen showing what actions will be taken.

Based upon your selections, we need you to review data on the following forms:

Employee
 Print Employee W-2
 Print W-2 Notice

You will get the form viewer screen with the forms selected to print. After successfully printing all the forms you will see that your actions have been updated.

Last Completed Actions

Form	Last Completed Action
Employee W-2	Printed on 12/07/2012
Federal W-2/W-3	Printed on 12/07/2012
State W-2/W-3	
Local W-2/W-3	

[View Detailed List of Completed Actions](#)

How to Reprint Completed W2s

After printing once, if you need to reprint a W2, you can do that from the W-2 History File Options. You select the Reprint Completed W-2s action.

Form	Last Completed Action
Employee W-2	Printed on 12/07/2012
Federal W-2/W-3	Printed on 12/07/2012
State W-2/W-3	
Local W-2/W-3	

Available Actions

- Reprint Completed W-2s**
 Reprint a copy of any W-2 filing that you have already completed.
- eFile or Print Incomplete W-2s**
 eFile or print any required W-2 copies you did not process yet.
- Correct Completed W-2s**

If you select this, you will get the Reprint Options screen. This will let you select from your already printed forms which ones you wish to reprint.

Reprint Options

Select which copies of previously completed W-2s that you want to reprint and, if you are reprinting Federal and/or State copies, select which type of copy you require.

Any grayed out items have not been printed or eFiled. Click the Back button to return to the history options screen and select eFile or Print Incomplete to access those reports.

Reprint Completed W-2s

- Employee Copies
- Federal Copies Original With a Records Copy Watermark
- State Copies Original With a Records Copy Watermark
- Employer Copies

Print Sorted Locality Copies

Note: To avoid duplicate processing, eFiled copies will print with a record copy watermark.

If you select Federal or State Copies the box at the bottom asking if you want to reprint Original or Record copies becomes active. Original Copies can be used to file taxes with the government. Record Copies will have a “Record Copy: Do Not File” watermarked on them.

After selecting the copies you wish to print the Reprint Employee Options Screen Comes up.

NOTE: If you have used the complete filing option reprints will be watermarked record copy. If you have eFiled the Federal Copies will be watermarked.

Reprint Employee Options
 Select which employee copies you want to reprint

All Employees
 Selected Employees
 Employee Instructions Only

Selected Employees Tool

SSN:
 Last Name:
 First Name:

Search Results Sort by:

<input checked="" type="checkbox"/> Reprint	SSN	Last Name	First Name
<input checked="" type="checkbox"/>	325958157	Evening	Sam
<input checked="" type="checkbox"/>	433333333	Jeffries	Dana
<input checked="" type="checkbox"/>	454998765	Martin	Anna Belle
<input checked="" type="checkbox"/>	222526464	Michaels	Scott
<input checked="" type="checkbox"/>	211198787	OToole	Ken
<input checked="" type="checkbox"/>	458217856	Parks	Millie
<input checked="" type="checkbox"/>	221211212	Savage	Natalie

This screen gives you the option to reprint all or a select group of employees. If you choose selected employees, you can filter and sort on employee information and select the employees you need to do the reprints for.

After Clicking “Next” it will take you straight into the form viewer window. You can make your reprints directly from this window.

Reprints will not update your last action but will show up in your View All Completed Actions.

Correcting W2s

If you have already printed and filed your W2’s and need to do a correction you will choose the “Correct Completed W2’s” option.

This will bring up the Correction Options asking if you have distributed any copies. If any copies have been given to the Employee or Filed to the Government (mailed or Efiled) you should check the boxes.

If you have eFiled or used the complete filing option the system may restrict your options based on the status of your eFile in Aatrix®.

Correction Options

Have you distributed any of the following copies?

Form	
<input checked="" type="checkbox"/> Employee W-2	
<input checked="" type="checkbox"/> Federal W-2/W-3	
<input type="checkbox"/> NM State W-2/W-3	

Selecting this option will take you back into the Aatrix® Grid which will show your W2 History. You should make the necessary changes to your W2 Information.

Verify Employee Information **Next Step**

TOTALS:	Employees (6)					\$212042.56	\$40125.64	\$217319
Box a	Box e	Box e	Box e	Box e	Box f	Box 1	Box 2	Box 3
SSN	Last Name	First Name	Middle Name	Name Suffix	Address Line 1	Fed Wages	Fed Withheld	SS Wages
1	325-95-8157	Evening	Sam	J	1256 Blue Horizon Way	4000.00	10.00	697
2	433-33-3333	Jeffries	Dana	R	8522 Louisiana	23455.20	1806.00	23455
3	454-99-8765	Martin	Anna Belle		8768 Mercury Drive	94050.00	22536.48	99000.0
4	222-52-6464	Michaels	Scott	Y	6201 Airplane	51870.00	10158.96	54600
5	211-19-8787	OToole	Ken	Z	2346 Hamilton	21567.36	2250.00	21567
6	221-21-1212	Savage	Natalie	P	5555 Oak Mott Road	17100.00	3364.20	18000

Anytime you make a correction the field corrected will change color and the row number that field is located on will become highlighted as well.

WARNING- Do not delete any employees from this grid unless they were not supposed to be issued a W2. Deleting employees from this grid will result in their W2 record being removed, even if you have already eFiled.

After all the changes have been made and the data has all been verified if there were state corrections required you will be asked to verify that.

W2C

When you go to print your corrected filings you may either get a W2C or a replacement W2. It depends on if your W2's have been sent to the government or eFiled.

After the correction process you will be asked a number of questions. Depending on how you answer the questions will determine if a W2C or replacement W2 is appropriate.

Even if you have eFiled you may still get a replacement W2 because Aatrix® has not submitted your eFile to the Federal Government.

Depending on the forms chosen and the type of corrections made Aatrix® may print some or all employees after you have made a correction. If you do not want to print the entire range of employees that Aatrix® lists you can choose to print specific pages.

Starting Over

If you have significant problems with your W2 you may wish to simply start over. To Start over choose the Start Over action on the W-2 History File Options.

Form	Last Completed Action
Employee W-2	Printed on 12/07/2012
Federal W-2/W-3	Printed on 12/07/2012
State W-2/W-3	
Local W-2/W-3	

View Detailed List of Completed Actions

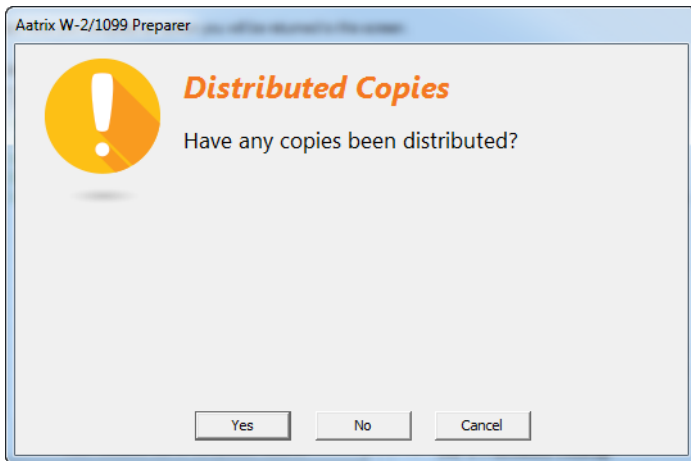
View Instructions on Returning Later

Available Actions

- Reprint Completed W-2s**
Reprint a copy of any W-2 filing that you have already completed.
- eFile or Print Incomplete W-2s**
eFile or print any required W-2 copies you did not process yet.
- Correct Completed W-2s**
Make corrections to W-2 copies that you have processed. Also, add/delete employees in this process.
- Start Over**
Clear your past actions and start the W-2 process over again with new payroll data.

You will first be asked if you have distributed any copies. This means that you have either handed them out or filed them.

If Copies have been distributed, then you cannot Start Over. Instead you must go to Correct Completed.



If you say NO then it will take you back through the W2 Wizard.
The grid will be refreshed and new information will be pulled in.
Any previous edits, deletions or changes that you made in the Aatrix® grid will be lost.

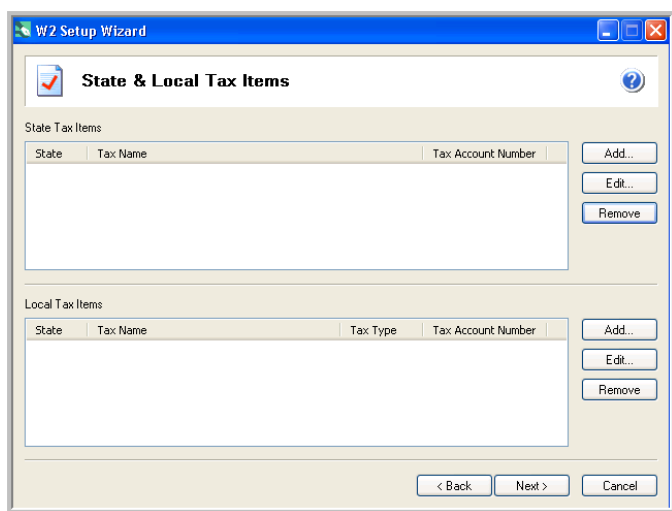
After verifying your data you will proceed through the W2 printing/filing process like before. In the end you will print new copies of your W2's and have the opportunity to eFile the correct information.

If you have eFiled Start Over will not be available. If you wish to start over you will need to log onto the Aatrix® website and delete your filing for start over to be available. If any portion of your filing (Federal or State) has already been submitted, you will not be able to delete it. If you need to start over at this point you will need to contact Aatrix® for assistance.

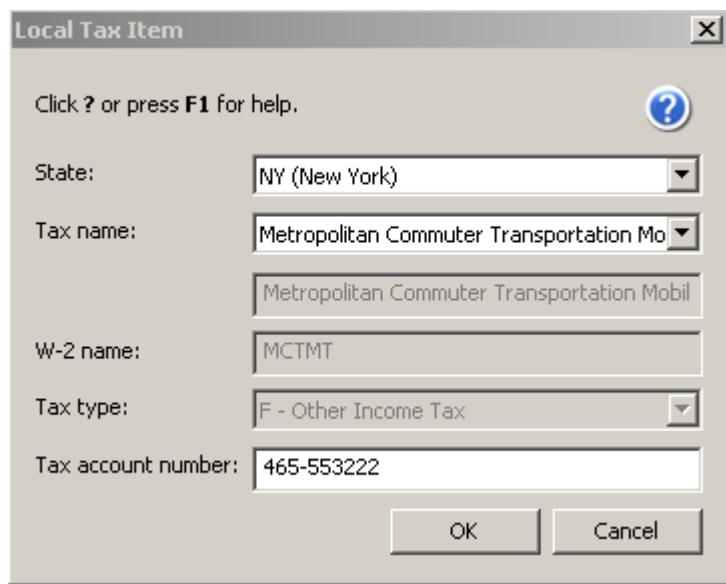
Section 7 - Adding State and Localities to your W2

Aatrix® directly supports printing forms for many states as well as a few select localities. If you have information for an Employee's state withholding already recorded in payroll, it will automatically be pulled into Aatrix® and you will see it identified in the preparer grid. If you don't have that information, or you need to record some type of information that is not recorded in MIP FUND ACCOUNTING, you have the option of manually creating that column in the W2 and then manually adding the values.

In the W2 Setup Wizard there is a screen for adding State and Local Tax Items. If you have already gone past this point you can always go to Edit>Update Company Information to get back to the wizard.

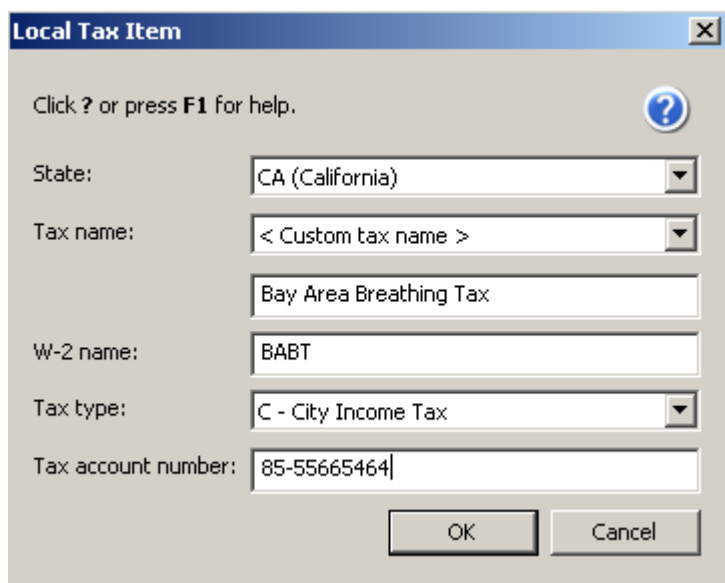


If you click on *add* it will let you create the tax. There are many pre-defined taxes for states and some localities.



If you do not see the tax you are looking for it will need to be created.

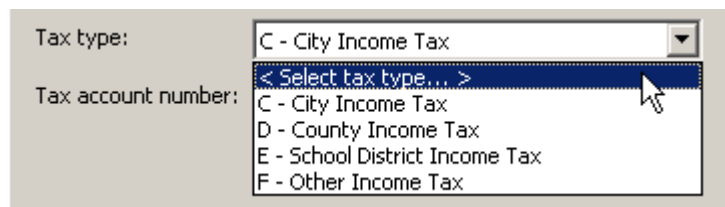
To create a new tax you must first select the **State** that the Tax resides in, even if it is a local tax (what state is the locality in)



A dialog box titled "Local Tax Item" with a close button (X) in the top right corner. It contains the following fields and controls:

- Help text: "Click ? or press F1 for help." with a question mark icon.
- State: A dropdown menu showing "CA (California)".
- Tax name: A dropdown menu showing "< Custom tax name >".
- W-2 name: A text input field containing "BABT".
- Tax type: A dropdown menu showing "C - City Income Tax".
- Tax account number: A text input field containing "85-55665464".
- Buttons: "OK" and "Cancel".

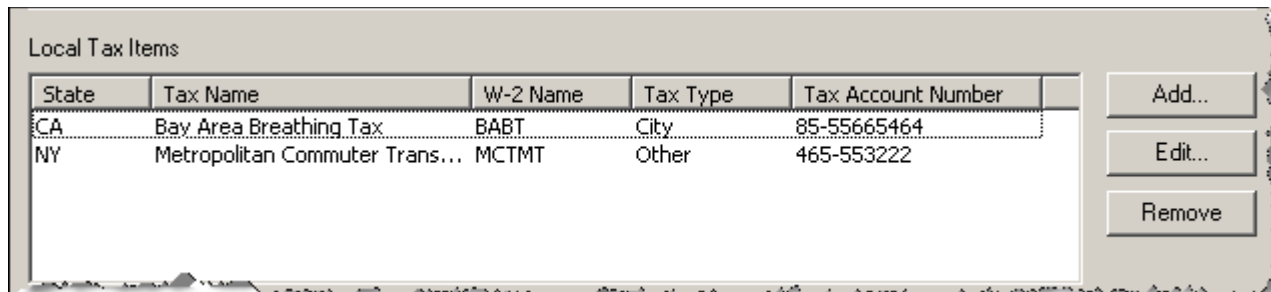
There are different Tax Types that can be designated. They are City, County, School District and Other Income Tax.



A close-up of the "Tax type" dropdown menu. The menu is open, showing the following options:

- < Select tax type... >
- C - City Income Tax
- D - County Income Tax
- E - School District Income Tax
- F - Other Income Tax

After you have added the Tax(es) you should see them in the screen to use.



A screenshot of a "Local Tax Items" window showing a table with the following data:

State	Tax Name	W-2 Name	Tax Type	Tax Account Number
CA	Bay Area Breathing Tax	BABT	City	85-55665464
NY	Metropolitan Commuter Trans...	MCTMT	Other	465-553222

Buttons: "Add...", "Edit...", "Remove".

After the columns have been added continue with the W2 process as normal until you get to the preparer grid. On the preparer grid you see the columns that you have added.

Box 18	Box 19	Box 18	Box 19
BABT Wages	BABT Tax	MCTMT Wa...	MCTMT T...
10000.00	100.00		

If you do not see the column that you added, it is because the value that you gave it in the *Tax Name* portion of your setup is not a field that can show on the W2.

You will notice that there are no values for these taxes in the preparer grid. You will need to manually type the values in. To manually add in values, click on the cell that you wish to type in a value. You may be able to type the value directly into the cell or it may bring up an edit box.

Edit State Detail records

The total that is displayed in the grid is calculated from the detail records. To change the amount in the grid, you must change the detail records.

Rec#	Date	CA Wages
New	20091001	10000
New	20091015	12000
New	20091101	13000
New	20091023	
New	20091023	

Some values that you put in (usually State Wages and Taxes) must have a date associated with them. The edit box allows you to enter the wages in with as much detail as you wish. The Date column is the date that those wages were paid. You can break the wages out into the actual dates they were paid or lump them together at the end of the year depending on your reporting needs. The date format in the date column is YYYYMMDD.

Other values (usually Local wages and taxes) may not require a date. The values can be directly typed into the cell. When you are done the values should appear in the grid.

2 C	Box 16	Box 17	Box 18	Box 19
2BOX...	CA Wages	CA Tax	Metropolitan...	Metropolitan...
310.16	35000.00	35.00	35000.00	350.00
460.00				
957.50				

These values will carry forward to your W2 printouts and filings.

NOTE: Any information entered through this method WILL NOT update the values in MIP FUND ACCOUNTING. It will only show up in Aatrix®.

Section 8 – Electronic Distribution of W2

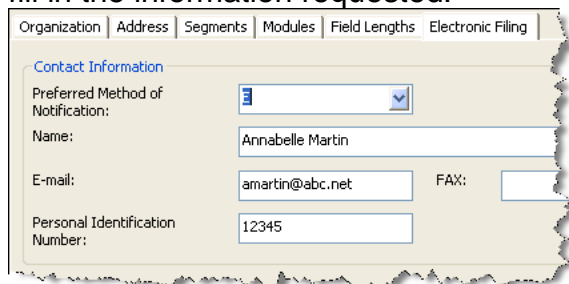
The ability to distribute your W2's electronically is an option as part of the Complete Filing Solution. If you wish to use electronic distribution you have two options.

One is to distribute electronic W2's in addition to the regular complete filing solution. You pay for the complete filing solution and in addition to Aatrix® printing and mailing the Employee copy the information will be available for download off of a website.

The other option is to distribute electronic W2's ONLY. This decision is made on an employee by employee basis. Selected employees will not receive a paper W2 in the mail. Their information will be available for download on a website. Using this option reduces the cost of filing from \$1.95 to \$.99 for each employee selected. This selection process is made in the Aatrix® grid.

For the most efficient processing there are several steps you should take prior to running your W2's.

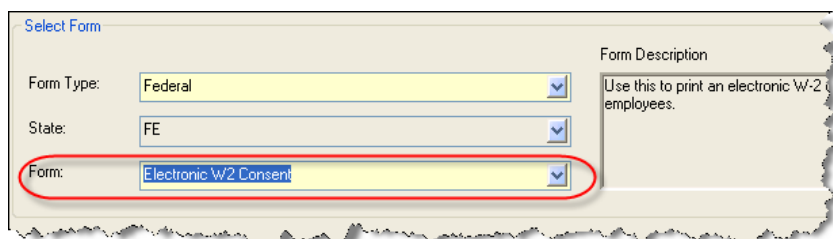
First go to Organization>Organization Information and select the electronic filing tab. You should fill in the information requested.



The screenshot shows a software interface with a tabbed menu at the top: Organization | Address | Segments | Modules | Field Lengths | Electronic Filing. The 'Electronic Filing' tab is active. Below the tabs is a section titled 'Contact Information' with the following fields:

- Preferred Method of Notification: [Dropdown menu]
- Name: Annabelle Martin
- E-mail: amartin@abc.net | FAX: [Empty field]
- Personal Identification Number: 12345

Prior to doing electronic W2's you are supposed to receive a signed consent form for each employee. You can print a copy of this form by going into Activities>Payroll>Tax Forms and E-Filing by Aatrix® and selecting the Electronic W2 Consent form to print.



The screenshot shows a 'Select Form' dialog box with the following fields:

- Form Type: Federal
- State: FE
- Form: Electronic W2 Consent (highlighted with a red circle)

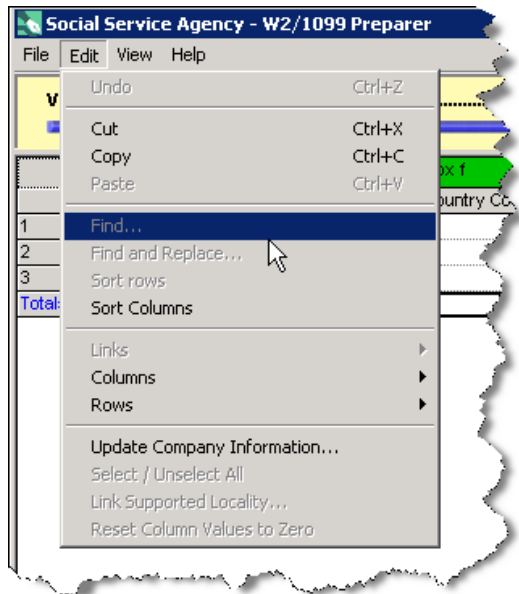
Form Description: Use this to print an electronic W-2 for employees.

After you have received the forms you should go to Maintain>Payroll>Employee Information and pull up each of the employees that have elected to receive an eW2. On the W2 tab there is a place to put in the Electronic Employee W-2 Information. You should fill this information in.

Section 9 - Advanced Grid Operations

The W2 Preparer grid has many data manipulation options built into it. These can be accessed through the various menus or by right clicking on the column headers.

The Edit Menu provides the most functionality. Like an Excel spreadsheet you can sort, cut, copy and paste information to and from the grid.

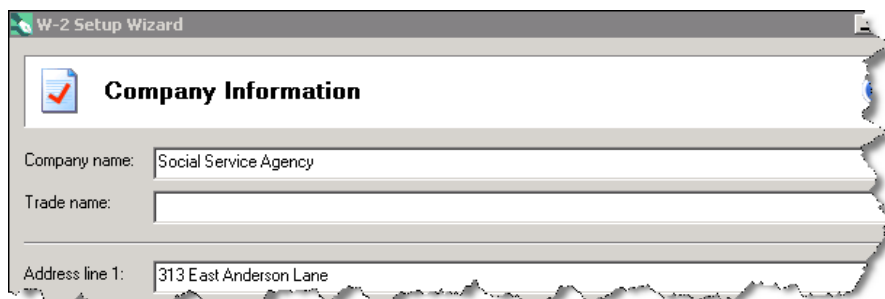


Copy/Paste

The Aatrix® grid has copy and paste functionality built into it. You can select an entire row or an entire column to copy or paste. Select the Row or Column header like you would in a spreadsheet and go to Edit>Copy or CTRL+C. You can then paste this into your spreadsheet. The inverse can be done as well. Copy a range of cells from your spreadsheet and paste them into Aatrix® a column or row at a time. Due to limitations of the Aatrix® program *it is not possible to copy or paste multiple columns at the same time.*

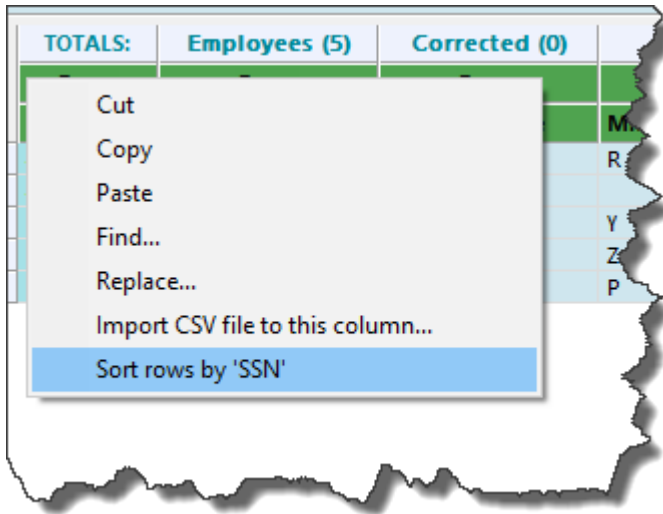
Update Company Information

If you need to make changes to your company information (Address, State and Local Tax Items, 941 information, third party sick pay etc) you can do so in the Aatrix® grid by going to Edit>Company Setup or Click on the Company Setup Button. This will bring up the initial company information Wizard and let you make changes.



Sorting

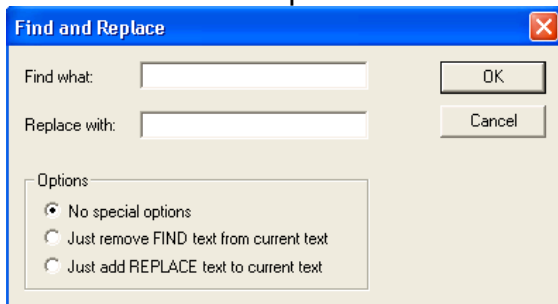
Aatrix® provides the ability to sort on any column in the grid. To sort on a column RIGHT CLICK on the column in question you will see a sorting option on the dropdown menu.



Other Column Functions

In addition to sorting there are many other options you can do with each column as you can see in the menu.

You can move the columns to the left or right. You can Cut or Copy information. You can also Find or Find and Replace.



Inserting a Row

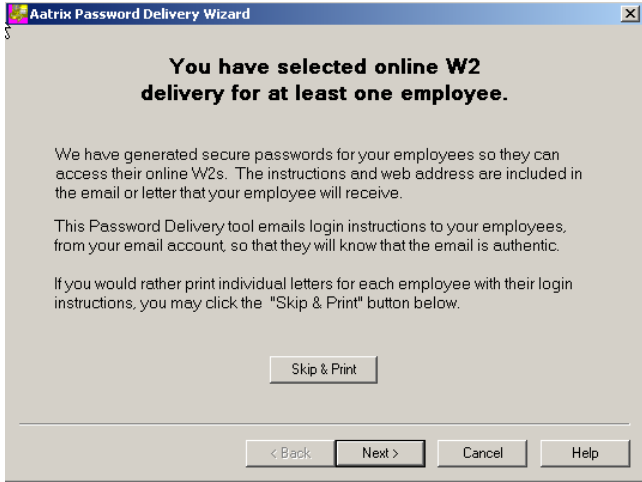
Another useful command in the edit menu is the Rows>Insert. If you need to add a new record to your W2's you can insert a line into the grid and then manually add the record by typing in all the information. You can also insert a row by selecting the Row by *right clicking* and choose *Insert*.

Deleting a Range of Rows

While you cannot copy a range of rows it is possible to delete a range of rows. This can be useful after you have sorted rows for records you do not want. You can use the SHIFT + Click to select a range of contiguous rows or the CTRL + Click to select multiple non-contiguous rows.

Run W2 Notification Wizard

This option on the file menu activates the Aatrix® Password deliver wizard in order to distribute eW2 password notifications. It is the same process as if you were going through the Aatrix® Password Wizard the first time. For detailed instructions see Section 8.



Section 10: Auditing and Correcting Your W2's

If you are uncertain about the origin of the values that have been pulled into the Aatrix® grid you can check those values by running a W2 information report. To do that:

NOTE: You must be in v2019.1 or later for the information on this report to pull correctly

1. Go to Reports>Payroll >Payroll Tax Worksheets>Calculate W-2 Information.
2. Select all employees for this tax year.
3. Click on Start to calculate.
4. Go to Reports>Payroll>Payroll Tax Worksheets>W-2 Information.
5. Select the <W-2 Box Information> Report.
6. Go to the Filter tab and select the W-2 Year = 2018.
7. Go to the Content tab and add "Employee ID" to the Report Body.
8. Choose to "Show Total" for the Employee ID (this will help organize the data).
9. Stay on the Content tab and add all appropriate W2 Box numbers that pertain to YOUR organization.
10. Go back to the Setup tab and hand key a new and unique Report Name.
11. Run the report (to printer or screen).
12. Use the MIP FUND ACCOUNTING W-2 Information report to compare values with the Aatrix® W2 preparer grid.

If you find values in the Aatrix® W2 preparer grid that do not match the values on the MIP FUND ACCOUNTING W-2 Information report then you can manually change the numerical value on the Aatrix® grid to match the report.

NOTE: Any changes made within the Aatrix® W2 preparer grid will not affect the MIP FUND ACCOUNTING database.

If the numbers do match, but you believe the value in the MIP FUND ACCOUNTING W2 information report to be incorrect, you can get a detailed analysis of the contents by running one of the Payroll history reports.

Auditing Boxes 1-6

To get a detailed listing of the values that were pulled into Boxes 1-6, go to Reports>Payroll History>Taxes. There is a default report <W2 Detailed Audit Report> to use as a basis for your research. This will produce a detailed listing of all transactions that have affected your tax amounts. You may wish to go to the filter tab in order to restrict the information to a specific type of tax. The most common cause of incorrect values in these boxes are:

- 1 – Some type of Earnings, Benefit or Deduction code was improperly set up on the Taxes tab of that code. As a result, it improperly affected taxes (making them too much or too little).
- 2- An adjustment was done to the employee information but the Taxes tab of the adjustment was not correct. Usually earnings, benefits and deductions were entered on the adjustment but nothing was done in the taxes. As a result, the taxes are off by the amount of that payroll.

Correcting Amounts in Boxes 1-6

To correct the values in Boxes 1-6, go to Activities>Payroll>Setup Adjust Employee Balances. Select the employee ID, create an adjustment number and give it an adjustment date (usually 12/31 if you are making one adjustment for the whole year). On the Taxes tab you would select and make adjustments to the various taxes that are incorrect.

When making the adjustment, be sure to adjust both Subject and Gross Taxable earnings together. The amount of the adjustment is the difference between the current value and what you want it to be. Therefore, if your current value for a particular tax was \$900 and it needed to be \$1000 you would do a +\$100 adjustment. Alternately you can just adjust the amounts in the Aatrix® grid. This is discussed in Section 2.

Select	Earnings	Benefits	Deductions	Workers' Compensation	Taxes	Leave	
	Tax Type	Jurisdiction	SUTA Weeks	Subject Earnings	Gross Taxable Earnings	Employee Amount	Employer Amount
	FIT		0	1,000.00	1,000.00	100.00	0.00
	SWT	NM	0	1,000.00	1,000.00	10.00	0.00
	SUTA	NM	0	1,000.00	1,000.00	0.00	7.00
*						0.00	

Auditing Boxes 15-20

The same <W2 Detailed Audit Report> also is useful for auditing your boxes 15-20. However, because of the limitations of the MIP FUND ACCOUNTING system and the varied requirements for the contents of Boxes 15-20 it is common to have amounts that are not correct. If this is the case it is best to correct those amounts in the Aatrix® W2 preparer grid mentioned in Section 2. Otherwise correct them in the same fashion as Boxes 1-6.

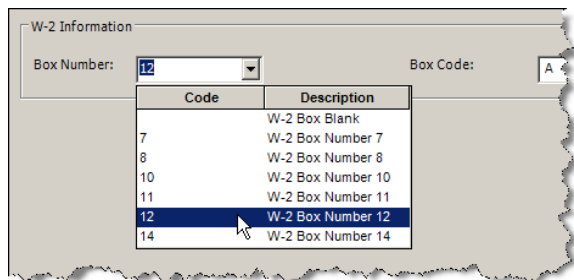
Auditing Boxes 7-14

These boxes are a little more difficult to audit. The reason being is that they often pull from multiple sources and there is no one easy report that is guaranteed to pull them all. Amounts in Box 12 can come from both Benefit codes and Deduction codes. Most of the time discrepancies are because Benefit codes or deduction codes are not set up as being subject to Box 12. In most cases, only Benefit Codes should be flagged as being subject to Box 12.

To investigate those codes you should go to Payroll>Reports>History>(Benefits or Deductions). There is a detailed default report that can be used to start with.

Correcting Amounts in Boxes 7-14

Unlike Boxes 1-6 or 15-20, by adding or removing a W2 box number to a benefit or deduction code, the Aatrix® grid will add or remove all information associated with that code from the W2 box number. So if you discovered your Box 12 information was off by the amount associated with a certain benefit code, go into Maintain>Benefit codes and remove Box 12 (select W2 Box Blank) from the W2 information. Recalculate your W2's. The amounts from this code will no longer contribute to Box 12.



To get a list of which codes affect what W2 box you can go to Reports>Payroll>Lists and see listing of the different types of codes. In the content tab of the report, there are fields called *W2 Box Number* and *W2 Box Code*. Add those to your report body to see what is currently affecting your W2's.

Remember if you make any changes you should recalculate both your W2 Information report and the W2's in Aatrix® or the changes will not take effect.

Alternately you can just adjust the amounts in the Aatrix® grid. This is discussed in Section 2.

Health Insurance Reporting Requirements

The Patient Protection and Affordable Care Act of 2010 (Obamacare) requires that you report the cost of group coverage health care on the employees W2, specifically in box 12 DD. To do this you would mark the Benefit AND Deduction Codes used for health insurance as subject to Box 12DD. This will net the two values in the W2. If box 12 DD is not an option on the dropdown it is because you are on an out of date version.

Extra Medicare Taxes

Tax law states employees earning more than \$200K will see Medicare wages taxed at a higher rate. All earnings under \$200K are taxed at 1.45%. Any earnings above \$200K are taxed at 2.35% regardless of filing status.

Form 1095-C

Some employers will be required to report additional information regarding health insurance. This is not a requirement on the W2's, it will be reported on a separate form (1095-C).

Keywords: W2, print, reprint, 10.1, Aatrix®, processing, W-2, W-2's, W2s, W2's, tax form, forms, form, 2018 W-2, 2018 W2, 2018W-2's, 2018 W2's, 2018 W2s, 2018 W-2s, W2, W3, Aatrix®, eFiling, printing, tax forms, authorization, enrollment, taxes, pricing, tax liability, website, form viewer,