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Temps Plus W2 Help

# Temps Plus W2 Printing

by Bridgeware Systems, Inc.

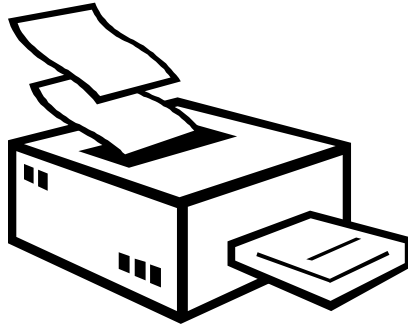
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## Printing W2 Forms



Version 11.27.01

Printing W2's from Temps Plus JKM requires that you have executed the quarterly totals procedure (End of Quarter Payroll Tasks) for the 4<sup>th</sup> quarter of the year you wish to print W2's for before the totals needed for reporting W2's will be available to print.

Your W2 format must match the laser forms you are printing on. Currently, Bridgewater supports printing W2's using an HP compatible laser printer. You may use other printers, but will need to create a W2 format (using Crystal Reports) to match the form and printer you wish to use.

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## Filling in the Criteria Page

At this screen you may select the year and company code(s) to process.

You may also choose to run other reports by selecting from the list of reports shown.

Press the [**Selection F7**] button to bring up the selection criteria screen to limit which W2's will be selected for printing. If you wish to print all W2's for which there are totals, you may ignore this selection.

You may also check the [**Preview**] box to review the W2's on the screen before printing. This also provides a convenient way to print selected W2's, by selecting a range of W2 pages to print after selecting the Print option.

After making your selections, press the [**Begin F5**] command bar to start the program.

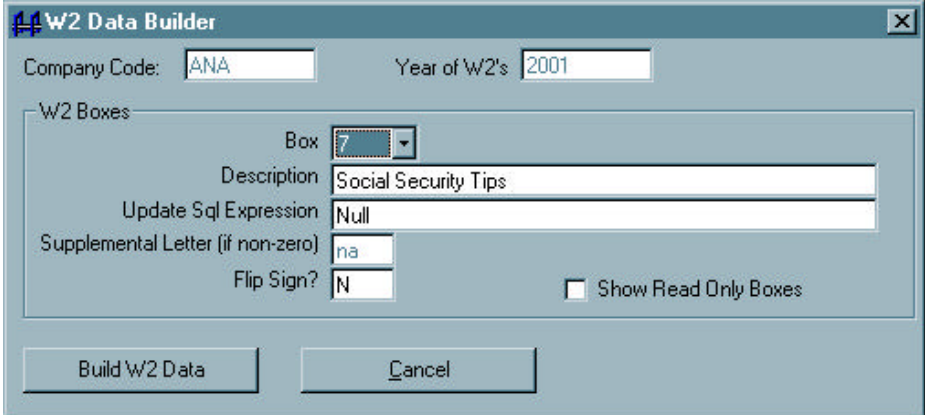
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## Filling in the W2 Data Builder W2 Boxes

While many items that appear on the W2 forms are predetermined in origin, some items need you, the user, to "tell" the program where to find your data. You do this by filling in boxes on the W2 data builder screen.

Although the box numbers on the W2 forms may change from year to year (at the discretion of the federal government), the W2 program (as long as you are using the latest version) will reflect the changes to the forms. For instance, for the tax year 2000, box 17 was used to show State Wages – for the tax year 2001, box 16 was used to show State Wages. The W2 application will automatically show which box numbers are in use depending on the year you entered on the Criteria Page.

For this reason, we will not use box numbers to identify the items in this documentation, but instead refer to the description for each box to identify it.



### Terms

**Sql Expression** – may contain letter(s) referencing the deduction letter(s) to use in supplying the expression for the box. For example, "A + B + C" (without the quotes) would add the totals from deductions A, B, and C for the box.

**Supplemental Letter** – is only available where it would be appropriate. If, by following the IRS W2 instructions, an expression needs to be followed by a letter, you may enter the letter in this field.

**Flip Sign** – reverses the sign of the expression. For example, to make an expression with a negative amount appear as a positive amount on the form.

### Read-Only Boxes

These boxes are "read-only", and cannot be changed, just viewed. The expressions for these boxes are calculated and come directly from the database.

- **Wages, Tips and Other Compensation**
- **Federal Income Tax Withheld**
- **Social Security Wages**

- **Social Security Tax Withheld**
- **Medicare Wages and Tips**
- **Medicare Tax Withheld**
- **Employee's social security number**

## User-Definable Boxes

- **Social Security Tips**
- **Allocated Tips**
- **Advanced EIC Payment**
- **Dependent Care Benefits**
- **Nonqualified Plans**
- **State**
- **Employer identification number**

Enter the identification number, without punctuation. If you must use punctuation, be sure to enclose the ID number in quotes to prevent the program from trying to execute the punctuation literally.

- **Employer's state ID number**

Enter the identification number, without punctuation. If you must use punctuation, be sure to enclose the ID number in quotes to prevent the program from trying to execute the punctuation literally.

- **State wages, tips, etc.**
- **State income tax**
- **Local wages, tips, etc.**
- **Local income tax**
- **Locality name**

If you have local wages and taxes to report, enter an SQL expression to place the correct name in the box. For instance, entering "CASDI" (with the quotes) would be the correct choice for reporting CA SDI.

- **See Instructions for Box**

Follow the instructions for the form you are using to determine how to fill out this type of box.

These boxes work just like the others, but also allow the entry of a letter to associate with the amount in the box. For example, entering "A + B + C" (without the quotes), in the Sql Expression field will add the totals from deductions A, B, and C; entering "D" (without the quotes) in the Supplemental Letter field will additionally place the letter "D" before or after the amount in the box.

Boxes which require an "X" (as a check mark) on the form will place the check mark by entering any SQL statement that results in a "True" result. For example, "P <> 0" in the Sql Expression field for a box would place an "X" in the box if the employee had non-zero amounts in deduction P.

Almost any SQL "WHERE" type statement using field names from the QTDMSTR, YTDW2TOTALS, and YEAR tables can be used. For instance, using "location = "DEAD" in the Sql Expression field for a box requiring a check mark would place an "X" in the box for employees with the letters "DEAD" in the location field in the QTDMSTR table.

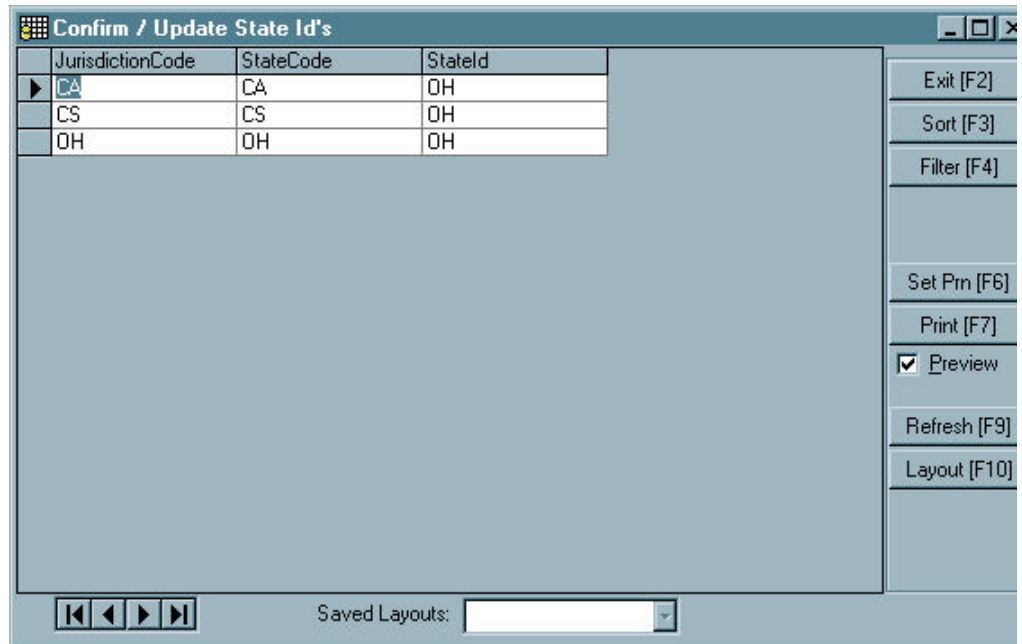
- **Company Name**
- **Company Address1 (Street Address)**
- **Company Address2 (Cityline)**
- **Company Address3 (not used on L87 form)**

Enter the appropriate information for the above four boxes enclosed in quotes. For instance "Contemporary Temporaries, Inc." (including the quotes) would be a correct format for entering a company name.

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## Build W2 Data

After you have completed the process of telling the application how to place the data into each box, choosing the [(Re)Build W2 Data] button continues by bringing up a grid where you can verify the Jurisdiction Code(s), State Code(s) and State ID Code(s).



You may make any necessary changes directly to this screen before continuing.

Press the [Exit F2] command bar to continue.

Next a grid verifying the Key Totals by State appears.

FedIdNumber	State	StateId	Tot Box1
1234567890	OH	OH	1868.6

Note that the state totals here are gross pay totals by state, not state taxable amounts. By using the scroll bar at the bottom of the window to view the expressions for other boxes, you should make sure that all the information on this screen is as you wish it to appear on your W2 forms, including the Federal ID, Company Name, and Company Address information.

Press the **[Exit F2]** command bar to continue.

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## W2 Database Tables

The tables used in the printing of W2's, like Quarterly Report Totals (End of Quarter Payroll Tasks), are in the QTRLY folder under the NPATH folder in the file name 4XXXYMMM where "YYMM" is the year and month of the 4<sup>th</sup> quarter for the company "XXX".

- The QTDMSTR table is built directly from the PR3MSTR table, and contains employee master record information.
- The YEAR table contains employee totals for the year.
- The YTDW2TOTALS table contains W2 totals needed for the successful completion of the W2 form.

These tables could be modified directly to provide even greater control over printing your W2's. Please note that any data entry made directly to these tables is overwritten when Quarterly Reports Totals are executed.

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## W2 Checklist

1. Perform End of Quarter Payroll Tasks for the last quarter of the year you are reporting
2. Start the W2 application (W2.EXE)
3. Fill out the criteria screen
4. Press [Begin F5]
5. Enter any appropriate changes to the data builder screen boxes
6. Press [(Re)Build W2 Data]
7. Confirm the information on the Confirm/Update State ID's grid
8. Press [Exit F2] to continue
9. Confirm the information on the Key totals by state grid
10. Press [Exit F2] to continue

If you choose to preview (at step #3 above), your information is displayed to the screen, at which point you can choose the print icon to print W2's. Otherwise, your W2's will start printing (after you are prompted for your target printer). Make sure you have the forms loaded properly in your printer. **Printing a test page is highly recommended.** You may choose just one W2 for a test run by choosing [Selection F7] at step 3 above and entering a specific employee number in the Employee Numbers Mask field.

11. Perform End of Quarter Payroll Tasks for the current quarter of the year you are in to rebuild your employee totals properly to match the current data in your system. If you forget to do this, the YTD information on your employee reports (and check stubs) may be incorrect.

# Sample Worksheet

You may print and use this worksheet to record the preferences you need to enter for your W2's. You should, of course, makes entries to match the data you wish printed on your W2's.

## Year 2001 Example W2 Box Setup

Box	Function	Sql Expression	Flip?	example
1				
2				
3				
4				
5				
6				
7				
8				
*9	Earned Income Credit	Deduction letter(s) for EIC	No	
10				
11				
*12a	401K Pension	Deduction letter(s) for 401K	Yes	K (supplemental letter = D) also needs K in 1
14				
15	State	"CA"		
15b	State ID #	Your State ID #		'123456789'
18	Local Wages	SQL example as shown ==>		(EStTaxblPay-46327)*((EStTaxblPay-46327)>0)+EStTaxblPay
19	Local Income Tax	Deduction letter(s) for SDI	Yes	
20	Name of Locality	"CASDI"		
b	Federal ID #	Your Federal ID #		'987654321'
C1	Company Name	Your Company Name		"Contemporary Temporaries, Inc."
C2	Company Street Address	Your Street Address		"1234 Paycheck Avenue"
C3	Company Cityline	Your City, State Zip		"Los Angeles, CA 91212"

\* = optional, if you do not have these items, then don't enter anything here

This worksheet demonstrates printing W2's for a company called "Contemporary Temporaries", operating in the state of California.

In this example:

- EIC payments were stored in deductions I and J
- 401K withholdings were stored in deduction K
- The State Code in box 15b was forced to "CA"
- The State ID # was set to 123456789
- CASDI withholdings were stored in deduction S, and the limit for the wages was \$ 46327.00
- The Name of the Locality was forced to "CASDI"
- The Federal ID # was set to 987654321
- The Company Name, Address, and Cityline were entered as shown