

## How to do Year-End W2s

**W2s** can be created by District Finance on blank 8.5 x 11 paper or on a preprinted **W2** form from the IRS or third party (Staples, OfficeMax, etc.).

\*\*\* Please note that prior to creating **W2s** you must first complete the **Year-End Payroll**. To learn how to do this, please refer to our **“How to do Year-End Payroll”** document. \*\*\*

### Accessing W2s:

1. Log onto District Finance.
2. Click on the **Payroll** tab.
3. Click on the **Load Payroll Menu** button.
4. Click on the **General Payroll Reports/Other** button.
5. Click on the **State/Fed** tab.
6. Click on the **W2/W3** radio button.
7. Follow the steps below for creating a **W2** on regular paper or on a pre-printed form:

#### **a. Creating a W2 form on regular paper:**

1. Under **W-2 Print Options** click on the **Create Complete form** radio button.
2. Check the **Issue 4 parts** and **W3 PDF** checkboxes.
3. Under **W-2 Form** click on the **Print 4 parts** radio button (This will produce **W2s** for all individuals grouped by each the individual. There will be four parts on two pages).
4. Click on the **View/Print** button.
5. Print the **W2s**.
6. **Exit** out of the reports.
7. A new button **“Print W3”** should now appear; click on this button to print the **W3**.

#### **b. Creating a W2 on a Preprinted form:**

1. Under **W2 Print Options** select the **Print to Preprinted Form** radio button.
2. Under **W-2 Form** select the **Copy A/W3 – IRS** radio button (This will produce **W2s** grouped by form; print each group separately).
3. Click on the **View/Print** button.
4. Print the **W2s**.
5. **Exit** out of the report.
6. Repeat steps 3-5 for **Copies B, D** and **C**.
7. Under **W-2 Print Options** click on the **W3 PDF** checkbox.
8. Click on the **View/Print** button.
9. **Exit** out of the report.

\*\*\* Please note that before printing on a preprinted form, you should always check the alignment first. To check the alignment:

1. Print one page only on plain paper.
2. Take this page and compare to a preprinted **W2** form to make sure the alignment is exact.
3. If the two pages do not align properly, alignment adjustments can be made under **W2** Form options.
  - a. To move up in space, decrease the number next to the **"Top"** field.
  - b. To move down in space, increase the number next to the **"Top"** field.
  - c. To move left in space, decrease the number next to the **"Left"** field.
  - d. To move right in space, increase the number next to the **"Left"** field.
  - e. To increase the space between the upper and lower portions of the form, increase the number next to the **"Between"** field.
  - f. To decrease the space between the upper and lower portions of the form, decrease the number next to the **"Between"** field.

A difference of 90 pixels equals 1/8 of an inch. To learn more about alignment, please refer to our **"How to align checks and determine pixel coordinates"** document.

4. Complete each adjustment separately to avoid overcompensation.
5. Repeat steps **a-f** until the pages match up.
6. You will also be prompted for **W3** at the end of each part; check the alignment as with the **W2s** and make any necessary adjustments. \*\*\*