



FILEGUARDIAN EOY FEATURES

W2/1099 DELIVERY SETTINGS AND MANAGEMENT TOOLS

COMPONENTS OF EMPLOYEE W2/1099 DELIVERY

Generation

- Creation of the employee specific W2/1099 delivery based on the W2 files received by FileGuardian

Release/ Delivery

- Release/delivery of the W2/1099 download email and link
 - Manual release – your team conducts the release
 - Automatic release – deliveries are ushered into the queue when the source W2/1099 file is received

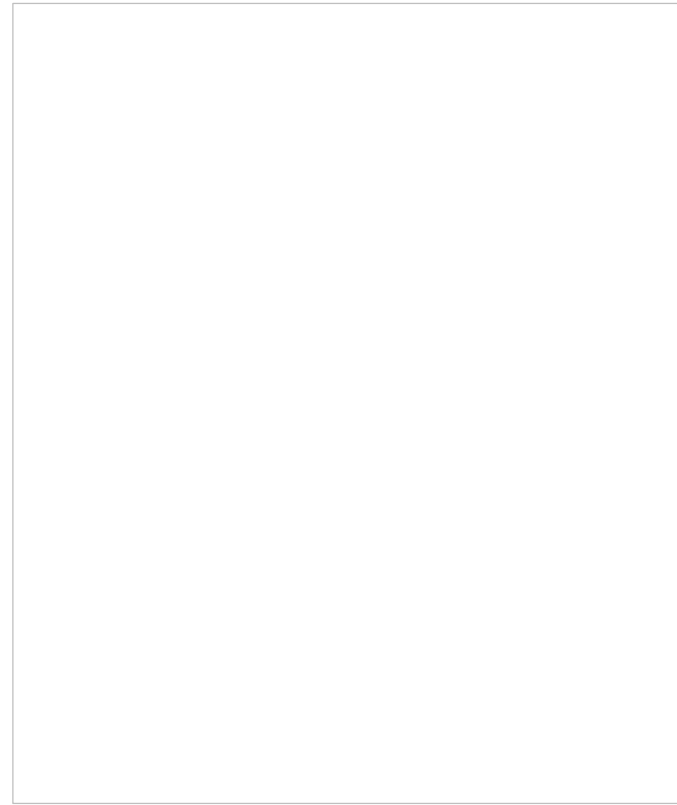
Note: When "released", emails will be scheduled for delivery at approximately 3 am EDT the next day.

RELEASE MODE

MANUAL



AUTOMATIC



STAGES OF EMPLOYEE W2/1099

	W2/1099 file sent to FileGuardian	Release to employees complete
Pending Generation		
Pending Delivery	✓	
Delivery Complete	✓	✓

EOY CHECKLIST

Path: FGX – Express | EOY Checklist

1. Set your default EOY release setting
 - Defaulted to “Manual” for everyone
2. Define your W2/1099 retention policy
 - Default is seven years
3. Select your employee W2 & 1099 email templates
 - Can create new templates under My Account \ Branding
 - Tip: use the `*|Year|*` merge tag in your template
4. Activate the e-stuffer feature (if you want to use it)

E-STUFFERS

Prepend up to a 2 page PDF (500KB max) to employee W2s

E-Stuffer (page 1)

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.

Earned income credit (EIC). You may be able to take the EIC for 2012 if (a) you do not have a qualifying child and you earned less than \$13,980 (\$19,190 if married filing jointly), (b) you have one qualifying child and you earned less than \$36,920 (\$42,130 if married filing jointly), (c) you have two qualifying children and you earned less than \$41,952 (\$47,162 if married filing jointly), or (d) you have three or more qualifying children and you earned less than \$45,060 (\$50,270 if married filing jointly). You and any qualifying children must have valid social security numbers (SSNs). You cannot take the EIC if your investment income is more than \$3,200, or if income is earned for services provided while you were an inmate at a penal institution. **Any EIC that is more than your tax liability is refunded to you, but only if you file a tax return.**

Clergy and religious workers. If you are not subject to social security and Medicare taxes, see Pub. 517, Social Security and Other Information for Members of the Clergy and Religious Workers.

Corrections. If your name, SSN, or address is incorrect, correct Copies B, C, and 2 and ask your employer to correct your employment record. Be sure to ask the employer to file Form W-2c, Corrected Wage and Tax Statement, with the Social Security Administration (SSA) to correct any name, SSN, or money amount error reported to the SSA on Form W-2. If your name and SSN are correct but are not the same as shown on your social security card, you should ask for a new card that displays your correct name at any SSA office or by calling 1-800-772-1213. You also may visit the SSA at www.socialsecurity.gov.

Cost of employer-sponsored health coverage (if such cost is provided by the employer). The reporting in Box 12, using Code DD, of the cost of employer-sponsored health coverage is for your information only. **The amount reported with Code DD is not taxable.**

Credit for excess taxes. If you had more than one employer in 2012 and more than \$4,624.20 in social security and/or Tier I railroad retirement (RTTA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. If you had more than one railroad employer and more than \$3,192.90 in Tier II RTTA tax was withheld, you also may be able to claim a credit. See your Form 1040 or Form 1040A instructions and Pub. 505, Tax Withholding and Estimated Tax.

W2

Copy B--To Be Filed With Employee's FEDERAL Tax Return				38-2009030 OMB No. 1545-0048	
1 Employer's soc. sec. no. 111-22-3333	2 Wages, tips, other comp. 89.55	3 Social security wages 99.50	4 Social security tax withheld 4.18	5 Medicare wages and tips 99.50	6 Medicare tax withheld 1.44
7 Employer's name, address, and ZIP code PARTRIDGE MUSIC CO. 123 MAIN STREET ANYTOWN, PA 19222					
8 Control number PA00031					
9 Employee's name, address, and ZIP code SHIRLEY JONES 555 SECOND AVE ANYTOWN, PA 19222					
7 Social security tax	8 Allocated tax	9			
10 Dependent care benefit	11 Nonqualified plan	12 Code	13 Code See inst. for box 13 D 9.95		
13 Statutory employee	14 Other	15 Code	16 Code PAUD 0.08		
Retirement plan	X	17 Code	18 Code 24 Code		
Third-party sick pay		19 Code	20 Code PA 0012 3456 99.50 3.06		
15 State Employer's state ID no.	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.		
	99.50	1.00	EASTPK		
Form W-2 Wage and Tax Statement 2012 Dept. of the Treasury — IRS					

Copy 2--To Be Filed With Employee's State, City, or Local Income Tax Return.				38-2009030 OMB No. 1545-0048	
1 Employer's soc. sec. no. 111-22-3333	2 Wages, tips, other comp. 89.55	3 Social security wages 99.50	4 Social security tax withheld 4.18	5 Medicare wages and tips 99.50	6 Medicare tax withheld 1.44
7 Employer's name, address, and ZIP code PARTRIDGE MUSIC CO. 123 MAIN STREET ANYTOWN, PA 19222					
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	99.50	1.00	EASTPK		
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EOY STATUS SCREEN

Allows for a “global” view of clients in the following stages:

- Pending generation
- Pending delivery
- Delivery complete

Allows for “batch” release of multiple clients

- What is “fully generated”?

This means the count of W2s & 1099s generated is equal to the number of active employee rules defined.

EOY STATUS SCREEN

W2/1099 Employee Delivery Status

Search by client or #vc file name

Search for clients in a specific EOY status

Default Settings | **EOY Status**

Search by:

PENDING GENERATION

PENDING DELIVERY

DELIVERY COMPLETE

Select All | Select All Full Generated | Deselect All

☐ **DEMx Premier Sample**
3 employee rules
3 documents generated

Green text denotes this client is "fully generated"
(# of ee rules = # of docs generated)

☐ **Dem1 Test Two**
2 employee rules
1 documents generated

Yellow text denotes this client is NOT "fully generated"
(# of ee rules != # of docs generated)

Why?
Were W2s processed but not 1099s?

Release Now

Select clients to "batch" release

THE DILEMMA

Situation

A single employee needs their W2 reprocessed for an address change

Your Hesitation

You've released W2s/1099s to all employees of the client already

What can you do now? Do you have to reprocess all W2s/1099s and disrupt all employees?

NO – you can selectively reprocess employees for reprocessing

REPROCESSING GOLDEN RULES

- If W2s/1099s have NOT been delivered
 - All existing generated employee W2s/1099s will be deleted and replaced with the latest version from the source W2/1099 file
 - W2/1099 deliveries will still be staged
- If W2s/1099s have been delivered
 - Only employees tagged will have their W2/1099 regenerated and delivered
 - Employees added since last W2/1099 generation will have W2s/1099s generated and delivered

STEPS WHEN REPROCESSING

1. Select the employees who require reprocessing
2. Regenerate W2s/1099s out of your payroll system
3. Tagged employees will have their newly generated W2s/1099s delivered the next morning



Remember reprocessing
is only required if
W2s/1099s have been
released to employees

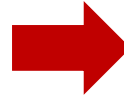
HUB USERS

Path: HUB tab of an existing FGX rule

Acme Made Inc FGX

Summary	PUSH	HUB
Settings: Options/Utils	Client Admins (3)	Access HUB
Admin: Features/Styles	Security	Communication Center
Time: Payroll Lists	Time Entry Rules	Alerts & Reports
EOY: Year End Processing		

PAY PERIODS



Processing

Tag employees for end of year reprocessing

If you need to reproduce and re-release a W2/1099 for employees, select the employees below

[Select All](#) [Deselect All](#)

- ☐ 114 - Graham Brown
- ☐ 126 - Martha Black
- ☐ 146 - Diana Black
- ☐ 207 - Karen Black
- ☐ 1222 - Harry Smith
- ☐ 1023 - Homer Hire
- ☐ 23 - Julia Roberts
- ☐ 0078 - John Shugo
- ☐ 84 - Robert Shugo
- ☐ 111111 - Joe Smith

[Tag Employees for Reprocessing](#)

Reprocess tagging

NON-HUB USERS

Path: Employees tab of an existing FGX rule

W2/1099 Status

- 1 Generation
12/23/2012
- 2 Release [Reprocess Tagging](#)
12/24/2012

Initiates the reprocessing tagging

QUESTIONS

End of Year Knowledge Base Articles

ask@myshugo.com

