Sage HRMS Learning Series

W-2 Forms and Aatrix

Updated: January 9, 2020

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Visit our Web site at www.SageU.com or call (866) 888-6062 to learn about training classes that are added throughout the year.

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Sage HRMS Training Classes

Sage HRMS Learning Series

This learning session uses concepts contained in the following training class on Sage University:

HRMS – Sage HRMS – Payroll Year End

Scheduled Training WebEx 4 hours $274.00 (C$274.00)

Reduce stress by being prepared before year end. During this virtual, instructor led course U.S. customers using Sage HRMS Payroll will learn payroll processing best practices for successfully planning for year end. Topics will include regulatory requirements, year-end forms, pre-close reporting, balancing, and reconciling, and setting up new year payroll processing.

Upon completion of this course, you will be able to:

- Process Year End forms and documentation with Sage Payroll Tax Forms and eFiling by Aatrix
- Follow the Year End processes in the Sage HRMS Payroll module
- Follow the steps for ensuring Sage HRMS is compliant with the Affordable Health Care Act

- **Who Should Attend?**
  Any Sage HRMS Payroll customer who is responsible for Year-End Payroll closing.

  Prerequisites:
  Working knowledge of Sage HRMS Payroll

Sage University

To find training and register for training courses, visit Sage University at https://www.sageu.com/hrms. If you have Gold Support, you are entitled to 50% off Sage HRMS instructor-led training and Sage HRMS Any-time learning (ATLs) are free. If you register for an instructor-led training class be sure to use code HRMSresource to receive 10% off. If you have Gold Support, this is in addition to the 50% discount.

To enroll in a course, go to Sage University and log on. If you do not have a log on, you will need to create one. For registration assistance, call Sage University Help Desk at 1-855-724-3864 or email SageUniversity@sage.com.

Icons

	This is a tip.

	This is a note.

Session Objectives

At the end of this session, you will be able to:
- Review and update employee information that affects the Form W-2
- Verify the W-2 Reporting boxes for deductions, benefits and local/other taxes
- Generate Form W-2s
- Edit W-2s in the Aatrix Preparer
- Print Form W-2s

Introduction

It is important before you begin generating Form W-2's that the information in Sage HRMS is correct. The employee's personal information, earnings, deductions, and tax information will need to be reviewed along with the setup.

Verifying Employee Personal Information

Search for Duplicate SSN's

Path: Payroll > (Tasks) Search for Duplicate SSN's
Run the search for duplicate SSN's and preview the report. This report will display the duplicate SSN, employee number and employee name. You may also want to create a secure query report to search for any employees that have 000-00-0000. Changes to an employee's SSN can be made on their Demographics Page > Personal Tab.

Employee Payroll – General Tab

Path: Employees > (Tasks) View/Edit Employee > Payroll > General Tab
Verify the employee's name, address and SSN are correct. Changes can be made on the employees Demographics page. Once these changes are saved, they are immediately updated on the Employee Payroll page.

Employee Payroll – Class/Schd Tab

Path: Employees > (Tasks) View/Edit Employee > Payroll > Class/Schd Tab
Select whether or not the employee consents to receive only electronic W-2s. The default is not having this box checked.

☐ Employee Consents to Receive Only Electronic W-2s

Employee Payroll – Taxes Tab (USFIT)

Path: Employees > (Tasks) View/Edit Employee > Payroll > Taxes Tab > (USFIT) > Tax Info (F9)
There are several fields inside the USFIT Tax Info button that affect the Form W-2 Box 13.

- Statutory Employee
- Pension Plan
- Third Party Sick Pay

Additional Tax Information

Tax Field	Value	
Filing Status	Single	
Exemptions from W-4	0	
Statutory Employee	Yes	
Deceased	No	
Pension Plan	Yes	
Third Party Sick Pay	Yes	
Hshld. Employee	No	

When the value is set to Yes for any of these three fields, an X will appear on the employee's Form W-2 Box 13 for the appropriate indicator. If you have already generated your W-2's and do not wish to regenerate them to correct this issue, you can edit this field in the W-2 Preparer > Verify Employee Information screen.

W-2/1099 Preparer [52-1755757 DEU]   Sage HRMS 2017 on BCR516846   _ ☐ ×
File   Edit   View   Help

Verify Employee Information   Next Step

		Box e	Box e	Box e	Box f	Box f	Box f	Box f	Box f	Box f	Electronic Delivery	Electronic Only	Box 13	Box 13	Box 13
	First Name	Middle Name	Name Suffix	Address Line 1	Address Line 2	City	State/Province	Zip/Postal Code	Country Code	E-mail Address	Electronic W-2	Statutory Employee	Retirement Plan	Third-Party Sick Pay
1	Hugh	F		12001 Oak Ridge Road	Apt 101	San Jose	CA	95014	US	hallendemo2@deu.com	☐	☒	☒	☒
2	John			784 Goan St.		San Jose	CA	95101	US	john.ament@deu.com	☐	☐	☒	☐
3	Clay			655 Norn St.		Los Gato	IL	95030	US	clay.andrews@deu.com	☐	☐	☒	☐

To change all the items as selected or deselected in a column, right click on the column heading, and select 'Select / Deselect All'.
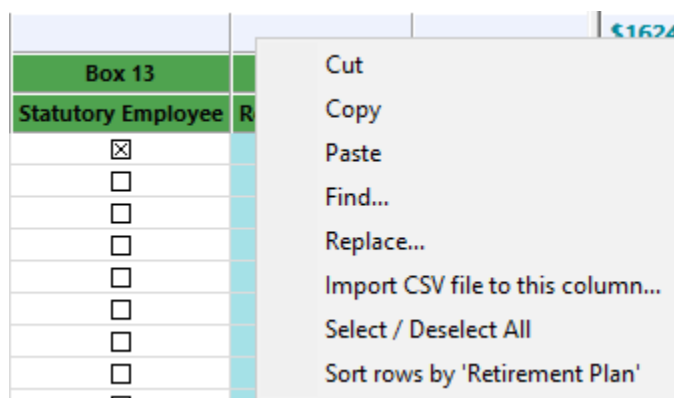
When making changes in the Aatrix Preparer, these changes do not flow back to Sage HRMS. You will need to review and correct the data in Sage HRMS.

Verifying W-2 Reporting Boxes

Verifying W-2 Reporting Boxes for Deductions and Benefits

Path: Setup > (Codes) Payroll > Earnings/Deductions/Taxes > (Earnings/Deductions/Taxes) Earning /Deduction Codes
Category: Deduction - Employee tab has a 'W2 Reporting' field where you can map the deduction for the Form W-2.

When 'Other Information Box' is selected in the W2 Reporting field, you have the option to select Associate W-2 printing and choose the Associated Tax.

Category: Benefit – Employer tab has a 'W2 Reporting' field where you can map the employer portion of the benefit to the Form W-2.

Verifying W-2 Reporting Boxes for Local/Other Taxes

Path: Setup > (Codes) Payroll > Earnings/Deductions/Taxes > (Earnings/Deductions/Taxes) Local/Other Tax Codes

Category: Deduction – When the Employee Calc. Method field has a value other than None, the Employee Tab will display W2 Reporting field. You can map the tax code to any of the following:

- Not Applicable
- Other Information Box
- Combine with Another Tax
- Local Tax Box
- Suppress W2 Reporting

Setup Verification

We recommend you navigate to the Company Profile for the address and Options for Federal Tax Number to ensure both are updated and correct.

To access the Company Profile, go to Setup > Payroll > Payroll Setup > Payroll Company Profile.

Once at the Payroll Company Profile, ensure the Address tab is filled out and is current as this information flows over to the eFiling service.

To navigate to the Options page, go to Setup > Payroll > Payroll Setup > Options.
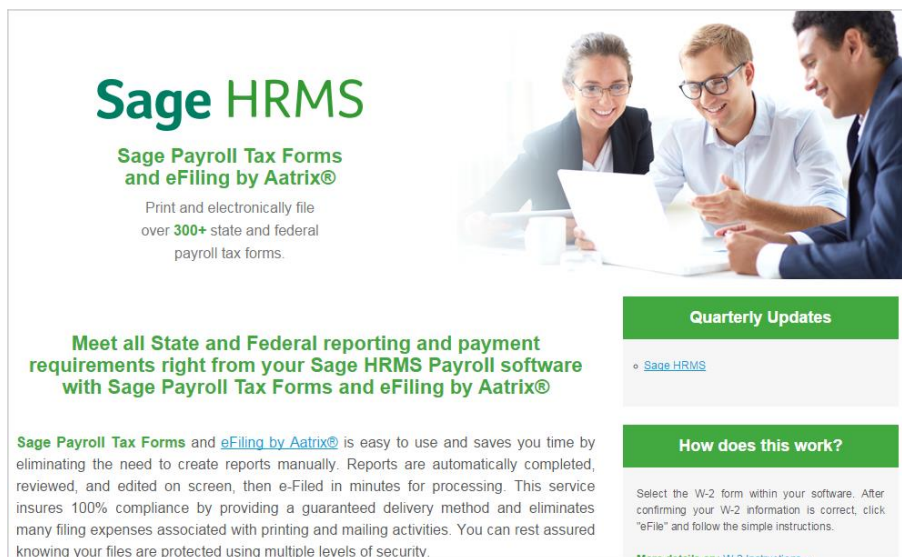
From the Options page, you are interested in the "Tax Number" field and want to ensure it is correct. The tax number entered here will appear in the Aatrix Preparer.

Registering for the eFiling Service

To register for "Year-End Filing with Sage Payroll Tax Forms and eFiling by Aatrix," you will want to navigate to the Help Functionality from Sage HRMS.
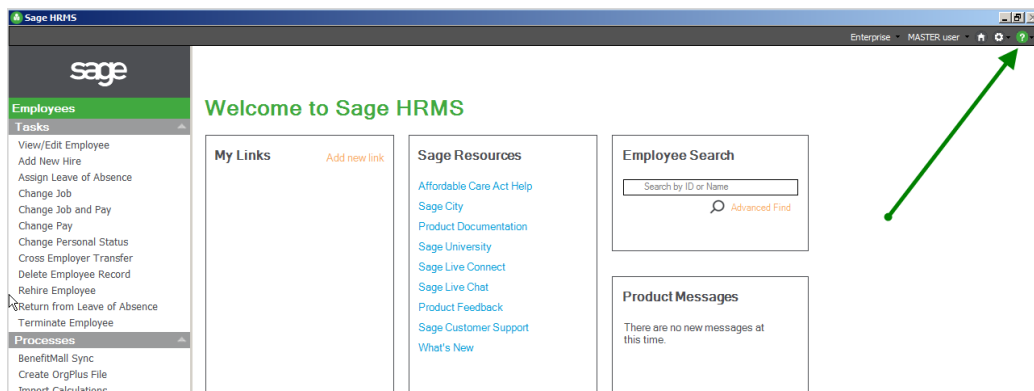
Once you access the Help Functionality, you will see the "Register for eFiling" option. Selecting this option will open the eFiling website. From this website you have access to additional eFiling information, as well as links to access important updates to the "Year-End Filing with Sage Payroll Tax Forms and eFiling by Aatrix" service.

Also, from this landing page, you will see the "Click Here to Enroll" button. Selecting this button will take you to an additional page where you will enter your information to enroll in the service.

After you enter your registration information, you will be taken to your eFiling home page. From here, you can update your profile, look at past filings, view a calendar of when forms are due, and view pricing options.

Once you have registered for the eFiling service, you are now ready to begin generating your forms.

Generating W-2 Forms

Navigation Path: Reports > Payroll > Government Reports. This will take you to your three Government Report options

- Federal Tax Filing: All the required Federal Tax Forms will be available from this option.

- State Tax Filing: You can choose individual states and have access to their forms. You are able to electronically file from this option.

- W-2s Forms: To print or eFile W-2s and W-3s, select this option.

> Companies with greater than 250 employees receiving W-2s must report by eFiling. If you are unsure if you are required to report by eFiling versus paper forms, please contact a tax consultant.

Once you have selected your report, the system will determine if the form needs to be updated. If this is the case, you will receive a choice of options:
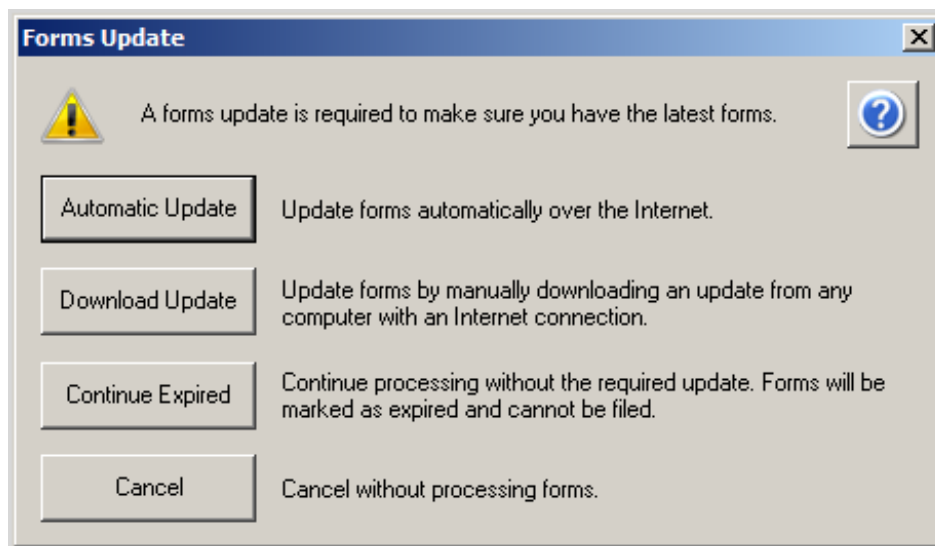
Automatic Update: This option will automatically download and install any forms that are needed. If possible, this is the recommended choice.

Download Update: The "Download Update" option will download any updates but will not install the updates. The user would then need to run the updates manually to install them.

Continue Expired: If you wish to view your Sage HRMS data without installing or updating any updates, you can select this option. Please note that this option only allows you to view the forms; they are unable to be filed until the forms are updated.

Cancel: This option will take you back to the form selection.

If you opt to choose the "Automatic Update" or "Download Update" options, a page will display listing all the forms that require updates.
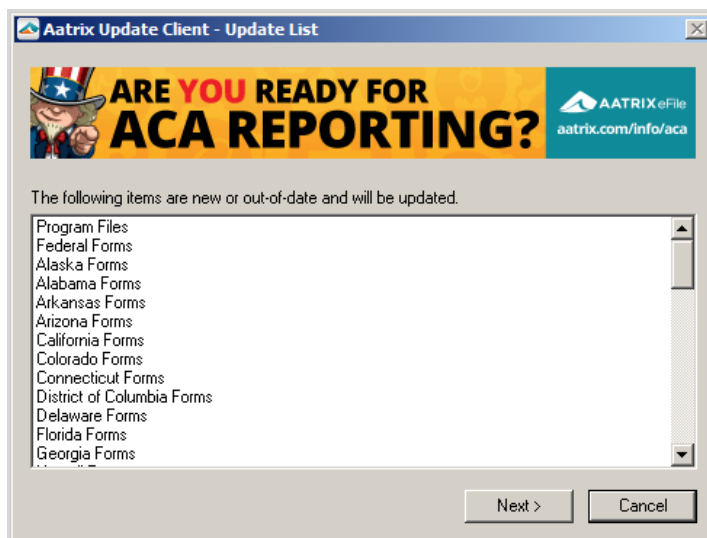
Selecting "Next" will download the needed file and form updates. Once finished, you will be taken back to the form selection page.
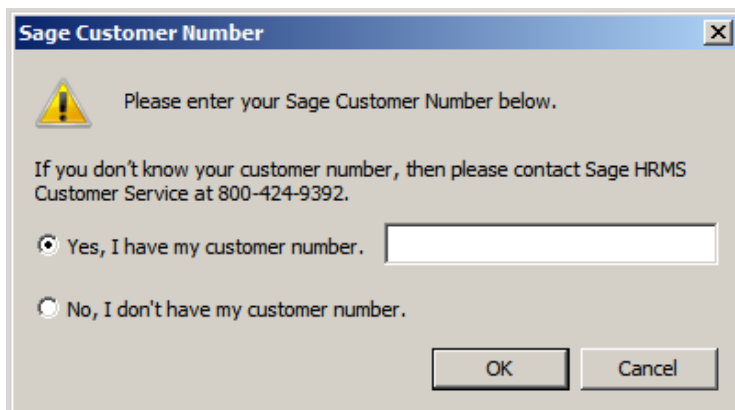
When the forms have been updated, you can continue the process by selecting the form you wish to eFile and selecting the "Display" button. At this point you will be prompted for your Sage Customer Number.

Once you have entered your Sage Customer Number, you will continue to a wizard to walk you through the W-2 process.

The first step of the wizard pertains to processing W-2s for your employees. You can opt to fully process your W-2s or choose to "test drive" the process for your employees.

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.

If you choose any of the "test drive" options, you will walk through the process without saving your information. Select the choice that best pertains to your needs and click the "Next" button to continue.

The following step will display your Company Federal Tax ID for accuracy.

Company Setup Wizard

☑ **Company Setup Wizard**   ❓

Get Started Printing or eFiling Your Federal & State Forms

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

1 9 - 9 8 9 8 9 8 0

[< Back] [Next >] [Cancel]

If the Company Federal Tax ID (FEIN) is correct, click the "Next" button to continue. If the FEIN is incorrect, return to Setup > Payroll > (Payroll Setup) Options > Company tab to enter the correct Tax Number.

Once you have reviewed the form for accuracy, click the "Next Step" button to continue.

The instructor will demonstrate how to edit and print W-2 Forms in the Aatrix Preparer.

Links and contact information

Topic	URL	Additional Information
Aatrix eFile	https://efile.aatrix.com	EFile login or enroll for eFiling
Sage Payroll Tax Forms and eFiling by Aatrix	https://partner.aatrix.com/sagehrms	Aatrix W-2 Demo, FAQs, and more
Aatrix	https://aatrix.com	Form deadlines
Aatrix eFile Help	https://efile.aatrix.com	Click Help from the menu. Call Aatrix at 701-746-6814. Be sure to have your AFID or EIN ready.
Sage City – HRMS Forum	https://www.sagecity.com/support_communities/sage_hrms/f	Sage HRMS Year End Center
Questions and Answers relating to Sage HRMS Learning Series	https://www.sagecity.com/support_communities/sage_hrms/f/sage-hrms---training	This link will take you directly to the Sage HRMS – Training forum on Sage City
Sage University	https://www.sageu.com/hrms	Telephone: 1-855-724-3864 Email: SageUniversity@sage.com
Discount code when registering for Sage HRMS instructor-led training	HRMSresource	10% off
Register or access on demand recording for Sage HRMS Learning Series	https://get.sage.com/HRMSLearningSeries	
Grad Cap icon in Sage HRMS		A link to Sage University to browse for training on the related area in Sage HRMS