TAX DOCUMENTS – CONFIGURE COMPANY

Using the Tax Documents page in Perform, administrators within your organization are able to preview employees' W-2s in order to review all employees' W-2 data in one central report. They can also access their employee's W-2c forms; these are the finalized W-2cs that can be used for tax filing purposes.

Note: If you have a user who is not a Company Admin but you would like to provide them access to the W-2 Preview and W-2c features, you can assign them the "View Company & Employee Tax Documents" sub role and the "View Payroll Settings" sub role. For employee users, the "View Comp & EE Tax Documents" sub role is needed to access these forms.

GENERATE A W-2 PREVIEW

Using the W-2 Preview feature will allow you to validate throughout the year that the employee data in the Perform system is accurate and matches each employee's current information. This will result in higher quality W-2s delivered to your employees at year end and will reduce the amount of W-2s that need corrected, regenerated, and re-delivered.
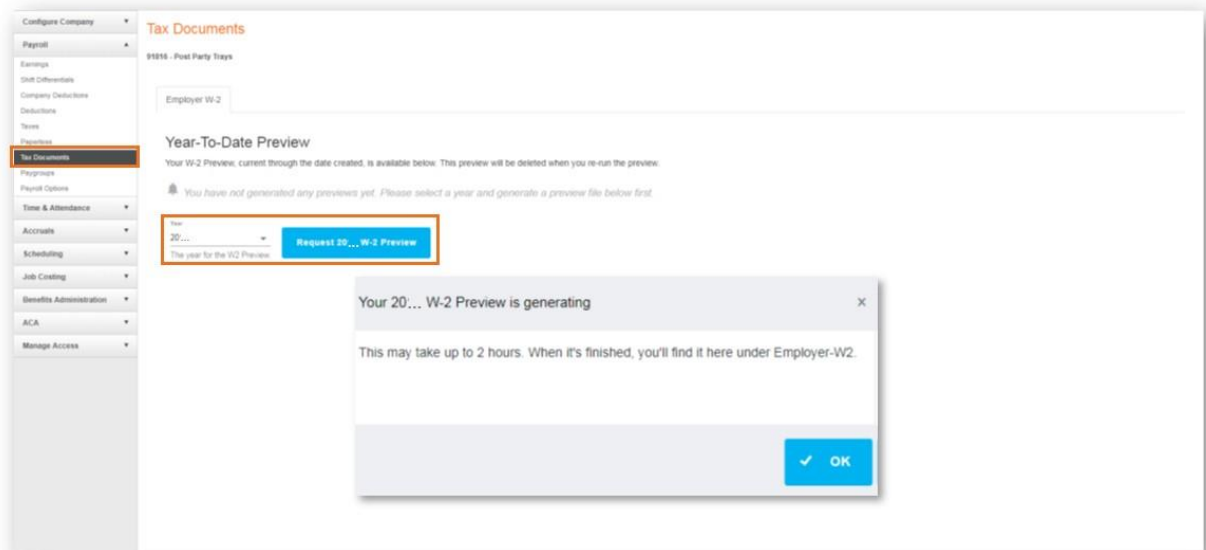
1. In the Configure Company area, click Payroll and then select the Tax Documents option.

2. Select the year for which you want to generate a W-2 preview. (You cannot generate W-2 previews prior to 2018).

3. Click Request **20XX** W-2 Preview.

4. A confirmation message displays letting you know that the preview could possibly take up to two hours to generate. Click **OK** through the message and the report will display on the page when finished generating. *After closing the message, you continue with other work in other areas of the system while the report is generating.*

5. Once the W-2 preview has generated, it will appear on the Tax Documents page.

6. To download the preview for viewing, click . You can then open the preview in a .csv format.

- The column heading descriptions provide the W-2 box number and description.
- The column heading for box 12 lists the earning/deduction code, as well as the box 12 code.
- There may be multiple box 12 columns if you have multiple box 12 earnings/deductions.
- If your organization operates in multiple states or localities, you will see multiple columns for state and local taxes.

- The IRS provides insight to the contents of each box here:

  https://www.irs.gov/pub/irs-pdf/iw2w3.pdf

Notes:

- The system allows for one active W-2 preview downloaded in the system at a time. To retain multiple versions of the W-2 preview, you can save the W-2 files to your computer files and then generate a new w-2 preview in the system.
- In order to ensure that all payrun related changes are reflected in the W-2 Preview, all current payroll reports must be generated before running the W-2 Preview.

ACCESS EMPLOYEE W-2c FORMS

Administrator users can access their employee's W-2c forms on the Tax Documents page. These are the finalized W-2cs that can be used for tax filing purposes.

1. In the **Configure Company** area, click **Payroll** and then select the **Tax Documents** option
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2. Select the **W-2c tab** and then select the **year** of the W-2c you want to view. All available W-2cs will display in a table. (You can also search for the name of the W-2c form by typing into the **search** box.)

3. To download a single W-2c for viewing, click in its table row. You can then open the file in a .pdf format.

4. To download multiple W-2cs at one time, check the boxes next to them and then click **Download**. All the selected W-2cs will be downloaded into a zip file named "W2C_Bundle.zip" from which all the individual W-2cs can be extracted.

Note: For Internet Explorer (IE) browser users: IE has restrictions on the size of the download file. If you select a large number of files for download using IE, you may have multiple zip files. When more than 1 file is generated, the zip files are named as W2C_Bundle-Part1.zip, W2C_Bundle-Part2.zip, etc.