## Payroll Compliance Reporting Learning Portal

## **Print Alignment**

The IRS and Social Security Administration (SSA) use an electronic format to read paper returns. Returns must be printed to meet IRS standards. Forms W-2, W-2c, W-3 and W-3c use a special printing utility to print the multi-copy formats required by the SSA. These forms must be printed on a laser printer using black ink.

Forms 1099, 1098, 5498 and W-2G must be printed on red preprinted forms. You can order these forms from the IRS or NELCO. Many office supply stores also sell these. If you plan to file paper returns with the IRS or the SSA, please read IRS Publications 1141, 1167 and 1179 for specific details about IRS requirements for substitute forms, including print characteristics. The IRS updates these publications as its standards change.

## **Aligning Data**

To align W-2 and 1099 data when printing on substitute forms, do the following:

Open a return and click the **Print Alignment** button above the form. 1.



- 2. Payroll Compliance Reporting displays the **Print Alignment** dialog box. Select the appropriate paper type.
  - **1** If you select **Preprinted forms**, load the paper for the appropriate copy into the printer.
- **3.** Adjust the margins and row spacing and click **Print**.



Print Alignment	x
<ul> <li>Uni-Form</li> <li>Preprinted-2</li> <li>Blank-3</li> <li>Blank-4</li> <li>Preprinted-3</li> <li>Preprinted-4</li> <li>W2c Preprinted</li> </ul>	
Top Margin Left Margin Space Between 1099/W2s All Row Spacing All Column Spacing	0.25 🔹 🔊 0.13 👻 🧿 0.15 👻 🧿 100% 👻 🧿
Print Reset All	Close

**4.** Payroll Compliance Reporting displays the **Print** dialog box.

Print Return for Smalltown					
What do you want to print?					
📀 Filing Client Preparer Custom	Payroll				
Print to Printer:	Print Payroll Forms	^			
225 Toshiba-33117 Ready	Select the form to print: W2/W3	~			
Print to PDF	Paper:				
Print to PaperlessPLUS	<ul> <li>Blank Paper</li> <li>Preprinter</li> <li>(print dat.)</li> </ul>	d Forms a only)			
Copies: 1 ~ Print Preview	<ul> <li>Uni-Form</li> <li>Prepri</li> <li>Instructions</li> <li>Prepri</li> <li>Blank-Copy A</li> <li>Prepri</li> <li>Blank-Copy B</li> <li>Blank-Copy C</li> <li>Blank-Copy 2</li> <li>Blank-Copy D</li> <li>Blank-3</li> <li>Blank-4</li> <li>Blank - W3</li> </ul>	inted-2 inted-3 inted-4 inted - W3			
Remember selections					
Print Preferences  Print Packets	Restore	Print Cancel			

**5.** From the Print Payroll Forms section, select the form to print.

Print Payroll Forms	
Select the form to print:	W2/W3 ×
	W2/W3
Paper:	W2C/W3C
🔘 Blank Paper	<ul> <li>Preprinted Forms (print data only)</li> </ul>

6. Specify your Blank Paper Printing and Preprinted Form preferences.

Print Payroll Forms		
Select the form to print: W2/W3		~
Paper: O Blank Paper	<ul> <li>Preprinted Forms (print data only)</li> </ul>	
<ul> <li>Uni-Form</li> <li>Instructions</li> <li>Blank-Copy A</li> <li>Blank-Copy B</li> <li>Blank-Copy C</li> <li>Blank-Copy D</li> <li>Blank-3</li> <li>Blank-4</li> <li>Blank - W3</li> </ul>	<ul> <li>Preprinted-2</li> <li>Preprinted-3</li> <li>Preprinted-4</li> <li>Preprinted - W3</li> </ul>	

7. Click Print.

		~
Remember selections		
🕐 Help 👹 Print Preferences 🌇 Print Packets	s Prestore	Print Cancel

## Mark/Unmark All

To make it easier to choose which records to print, Payroll Compliance Reporting now includes a Mark All and Unmark All option on Detail worksheets.

W2 Employee Schedule							
Import Export H		1 of 21	H Add I	Record(s) 1 🔦 Del	ete Reco	Apply Sort to For	m
	Individual						
	X to						
Name	print	Soc. Sec. Num.	Control Number	Last Name	Suffix	First Name	M.I.
Megan Caldwell	Х		80001Caldwell			Megan	
Salon Employee	Х		12345Employee			Salon	
Dan Johnson	Х		10001Johnson			Dan	
Kristina M Kelley	Х		6Kelley			Kristina	М
Rachel P Nevels	Х		3Nevels			Rachel	Р
Samuel G Omega	Х		10mega			Samuel	G
Maria Rangel	Х		15Rangel			Maria	
Susan Rangel	Х		21Rangel			Susan	
Rebekah M Schwartz	Х		8Schwartz			Rebekah	
Janet Slaughter	Х		20001Slaughter			Janet	
Peggy Smith	Х		20Smith			Peggy	
					_		_

On the W2 or 1099 detail tab, click **Mark All** or **Unmark All** to choose all records at once.

W2 Employee Schedule							
Import Export	H4 1 of 21 H	Add Record(s)	1 Delete Record	Apply Sort to Form	Find:	Mark All	Unmark All
			Individual				