

# Payroll Compliance Reporting Learning Portal

## Preparing W2 Returns

Employers must file Forms W-2 for every employee to whom they pay wages. Form W-2 also reports any taxes withheld. Submit these forms to the Social Security Administration (SSA) and provide a copy to each employee. Payroll Compliance Reporting helps you prepare Forms W-2, which you can then upload to the SSA.

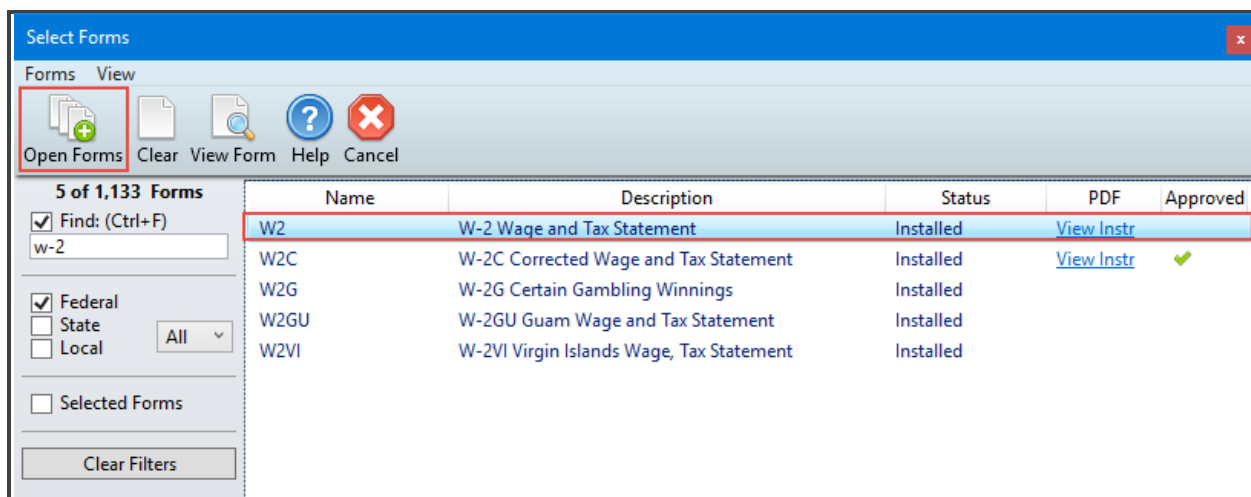
### Starting New W-2 Returns

To start a new W-2 return:

1. In Return Manager, click **New**.



2. Payroll Compliance Reporting displays the Select Forms dialog box. Select the forms you want to add and click **Open Forms**.



**i** You can select as many forms as you need at this time or add more forms later.

3. Payroll Compliance Reporting opens the new return. Use the Main Information Worksheet to begin entering the employer's information.

Return Manager   Rollover Manager   E-file Manager   Unnamed Return x

Returns   Edit   Tools   Navigate   Forms   E-file   Tax Research   Support

Save   Add Forms   Restore   Start Link   Back   Forward   Check Return   Print   Page   E-file   ePayment   Calculator   Preparer/ERO   Form Release

Main Info  
W2  
W-3/W-3C

## Main Information Worksheet

This return is currently for: W2.  
If you would like to change forms, please go to Add Forms and manually choose a Signature Form to replace the W2.

### Demographic Information (W2)

Filing information for the calendar year 2021 or other tax year beginning , and ending

### Name and Identification Number

Business Name (Individual name, if sole proprietor)  Fed ID Number

DBA Name

### Address

In Care Of (if applicable)  
First Name  M.I.  Last Name  Suffix

c/o

Street Address  Apt, Suite or Unit  Unit Type

P.O. Box (if applicable)  Private Mailbox Number


## JumpTo

On all forms, schedules and worksheets, PCR calculates values in white boxes from data typed elsewhere. **JumpTo** enables fast navigation to the forms, schedules or worksheets from which this data originates.

To use JumpTo:

1. Click a calculated box and click the **JumpTo** icon.

For an Individual Payer, enter First Name, Middle Initial

First   M.I.

2. **JumpTo** navigates to the source box.
3. Enter the information in the field. PCR carries the information to the appropriate fields in the return.

## Navigating Forms

Many forms consist of multiple pages and worksheets to allow detailed data entry. Below are multiple ways to navigate and enter data, depending on the situation.

## Navigating Through a Single Page

To navigate through a single page:

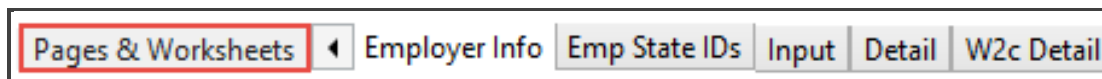
- Press **Enter** or **Tab** to move from the current box to the next box.
- To reverse direction, press **Shift+Tab**.

## Navigation Bar

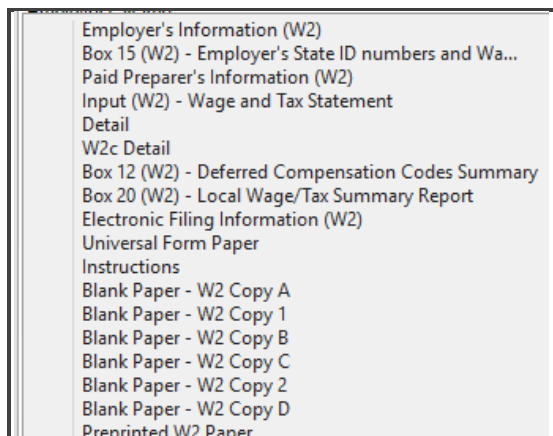
Payroll Compliance Reporting displays a navigation bar below the active form, consisting of the Pages & Worksheets button and a series of tabs. PCR associates each tab with a numbered form page, schedule, worksheet or other page of the active form.

To navigate through the active form:

1. Click **Pages & Worksheets** to display a list of all worksheets for the active form.



2. Click the worksheet to open.



## Employer Information

1. Enter additional employer information for this W-2 return on the Employer Info tab.



2. Select any of the check boxes that are applicable to this employer.

### Employer's Information (W2)

Click the Input or Detail worksheets to enter information for each Employee.  
Be sure to select any of the calculations or printing options below as needed.

☒ Check (X) to truncate EIN/SSN on Employee copies.

Mail or file Copy A of Form(s) W2 and W3 due to SSA:

1/31/2022

Furnish Copies B, C, and 2 to each person who was your Employee:

1/31/2022

Extensions of time to file Form W2 with the SSA:

3/2/2022

☒ Check to automatically calculate all Social Security and Medicare in Boxes 3, 4, 5 and 6.

☐ Check here to always enter employee's state into line 1 of Box 15 and copy wages to Box 16.

☐ Check here if the Employer name, address and EIN are already printed on the "Preprinted" W2 paper.

Select the State to print for W2 Copy 1, or leave blank to print "All":

3. Next, complete the information in the Employer's Information (W3) section. This includes control number, kind of payer, kind of employer, email address, phone number, contact person and title.

### Employer's Information (W3)

a. Control Number

b. Check for Kind of Payer:

(Check one)

☐ 941☐ Military☐ 943☐ 944☐ CT-1☐ Household  
employer☐ Medicare  
govt. emp.

Check Kind of Employer:

(Check one)

☒ None apply☐ 501c non-govt☐ State/local  
non-501c☐ State/local  
501c☐ Federal govt.

Third-party sick pay

☐ (Check if applicable)

d. Establishment number

Assign a unique 1-4 digit Establishment number to each W-3 when filing multiple W-3's for a single EIN.

h. Other EIN used this year

E-mail address

Telephone number

Ext.

Fax number

Contact person

Title

Date

4. In the W2 E-Filing Information section, select and complete the required information for this employer.

### W2 E-Filing Information

☐ Check here if the business has been terminated during this tax year.

☐ Check here if you received a resubmission notice from the Social Security Administration.

Refer to the notice for the wage file identifier (WFID) and enter here:

(If resubmission notice is not for tax year "2018", you may NOT use this year's product to resubmit W-2 wage data).

Agent or Common Paymaster (Enter information here ONLY if agent pays wages on behalf of employer).

Select the appropriate Agent Code (if the situation applies) and enter your Agent Name and EIN:

Agent or Common Paymaster Business Name

Agent's Fed ID No.

5. Next, complete the Submitter's Information section.

Submitter's Information			
<input type="checkbox"/> Check to enter Paid Preparer information as Submitter.			
Firm's Name			
Firm's Address	Street		
	City	State	Zip Code
	Foreign Country	<input type="checkbox"/> Check if foreign submitter	
Submitter's Name			
Submitter's SSN			
Submitter's PTIN		<input type="checkbox"/> Check if self-employed	
Submitter's EIN			
Telephone Number		Ext.	
FAX Number			
E-mail Address			
<p>By entering this User ID under penalties of perjury, I declare that I have examined this file's data and that to the best of my knowledge and belief, it is true, correct, and complete.</p> <p>SSA Assigned User ID* </p> <p><small>* The User ID to be entered here is assigned by the Social Security Administration. This User ID represents the person attesting to the accuracy of the data submitted. Without a proper User ID assigned by the SSA, the transmission will be rejected. To obtain a User ID, register with the SSA by calling 800-772-6270 Monday through Friday 7 AM to 7 PM Eastern Time. Or via the SSA website at: <a href="http://www.socialsecurity.gov/bsowelcome.htm">http://www.socialsecurity.gov/bsowelcome.htm</a></small></p>			
Choose the type of preparer:			
Preparer's Signature Date		8/24/2018	

**i** The SSA Assigned User ID is assigned by the Social Security Administration. Without a proper User ID assigned by the SSA, the transmission will be rejected. For more information on obtaining a User ID, visit the [Social Security Administration](http://www.socialsecurity.gov/bsowelcome.htm) website.

6. To enter the Employer State ID number for each state, go to the **Emp State IDs** tab.

Pages & Worksheets	Employer Info	<b>Emp State IDs</b>	Input	Detail	W2c Detail	Codes Summ?
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7. The information flows from the Employer Info tab to the appropriate places on the return.

## Entering Employee Information

Next, you must enter the information for each employee who will receive a W-2.

**i** If your client's payroll or 1099 data is recorded in Quickbooks™ or Sage 50 Accounting, you can import the data into PCR and create a file. Payroll Compliance Reporting uses an XPS file for this import. For additional information on importing data into PCR, review the *Importing* video in the Education Library.

1. Click the **Input** worksheet.
2. Complete the employee name, address and wage information.

Input (W2) - Wage and Tax Statement									
Void		a Employee's social security number		1 Wages, tips, other compensation		2 Federal income tax withheld			
b Employer identification number (EIN)		12-3045678		3 Social security wages		4 Social security tax withheld			
c Employer's name, address, and ZIP code		Samuel Omega 225 Chastain Meadows Court Kennesaw, GA 30144		5 Medicare wages and tips		6 Medicare tax withheld			
d Control Number				7 Social security tips		8 Allocated tips			
e Employee's first name and initial		Last name		9 Verification code (for e-file)		10 Dependent care benefits			
f Employee's Address				11 Nonqualified plans		12a Code, Year, Amount			
Line 1				13 Stat. Emp. Ret. Plan Sick Pay		12b			
Line 2				14 Other Desc. & Amount		12c			
City		State ZIP				12d			
Foreign Country (foreign address only)									
Province		Postal Code							
15 Set up on the 'Emp State IDs' worksheet		16 State wages, tips, etc.		17 State income tax		18 Local wages, tips, etc.		19 Local income tax	
State Employer's state ID number		0.00						20 Locality name Associated state	
1		0.00							
2									

3. Click **Add New Record** and repeat the process for each employee.

⏮	⏪	Record: 1	⏩	⏭	Add New Record	Delete Record	Print Alignment
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## Completing Returns

Once you enter all the information in the return, check for missing information, and create and send the e-file.

To check the return for missing information or forms the IRS requires for e-filing:

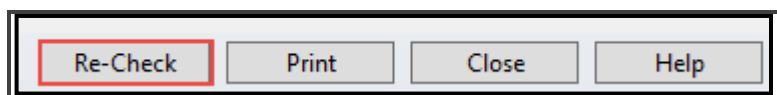
1. Click **Check Return** on the toolbar.

⏮	⏪	Check Return	Print	Page
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2. Payroll Compliance Reporting displays the results at the bottom of the screen with errors in red text. Click the error to navigate to the form and box in question.

Click the items below to locate on the form		
<input checked="" type="checkbox"/> Errors	<input type="checkbox"/> W2 Error	A valid preparer type code must be entered from the list provided.
<input checked="" type="checkbox"/> Warnings	<input type="checkbox"/> W2 Error	A valid Submitter's User ID number must be entered.
<input checked="" type="checkbox"/> Informational	<input type="checkbox"/> W2 Warning	There are multiple state income taxes entered in this Return, select one state at a time to print Copy 1.
<input checked="" type="checkbox"/> Estimates	<input type="checkbox"/> W2 Warning	If Submitter has an EIN, that EIN should be entered.
<input checked="" type="checkbox"/> Overrides	<input type="checkbox"/> W2 Error	Submitter's name is required.
<input checked="" type="checkbox"/> Notes	<input type="checkbox"/> W2 Error	Submitter's address is required.
<input type="checkbox"/> Paper File	<input type="checkbox"/> W2 Error	Submitter's E-mail Address is required.
<input checked="" type="checkbox"/> E-File	<input type="checkbox"/> W2 Error	Submitter's Telephone number must be entered.
<input type="checkbox"/> Hide Marked	<input type="checkbox"/> W2 Error	Employee: 1 - must have a Last Name entered.
<input type="checkbox"/> Clear Filters	<input type="checkbox"/> W2 Error	Employee: 2 - must have a Last Name entered.
	<input type="checkbox"/> W2 Error	Employee: 1 - must have a First Name entered.
	<input type="checkbox"/> W2 Error	Employee: 2 - must have a First Name entered.
	<input type="checkbox"/> W2 Warning	If Maryland State Pickup exists, enter "STPICKUP" in Box 14 description.
	<input type="checkbox"/> W2 Error	There must be at least one entry in one of the following boxes to e-file: Boxes 1 through 7, 8 or 9, or codes A, B, C, D, E, F, G, H, M, N, Q, R, S, T, or V in Box 12(a, b, c, or d.)

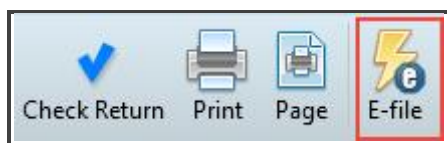
3. Correct the information to remove the error. After you correct errors, click **Re-Check** to clear corrected errors and check for additional errors.



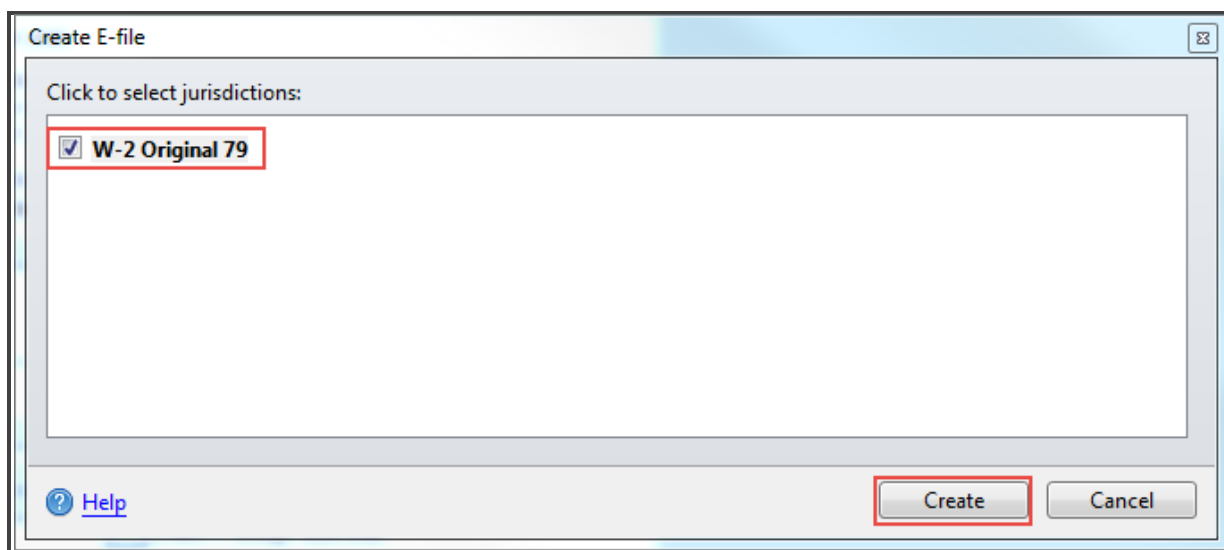
4. Once you have corrected all required information, you can create the federal and state e-files.

## E-Filing W-2 Returns

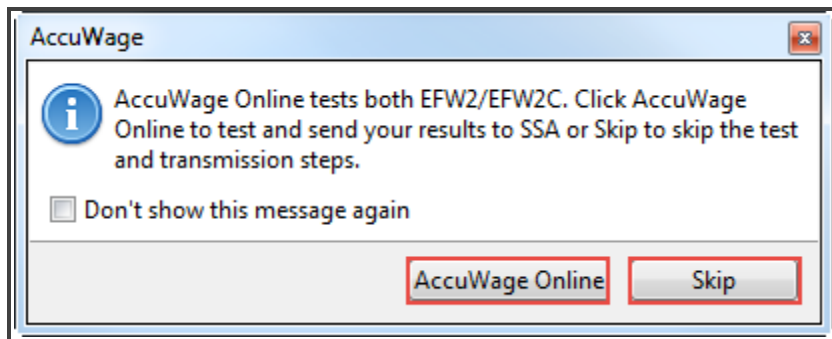
1. Click **E-file** on the toolbar.



2. On the **Create E-file** dialog box, select the check box for the e-files you want to create. You can create both federal and state e-files.
3. Click **Create**.

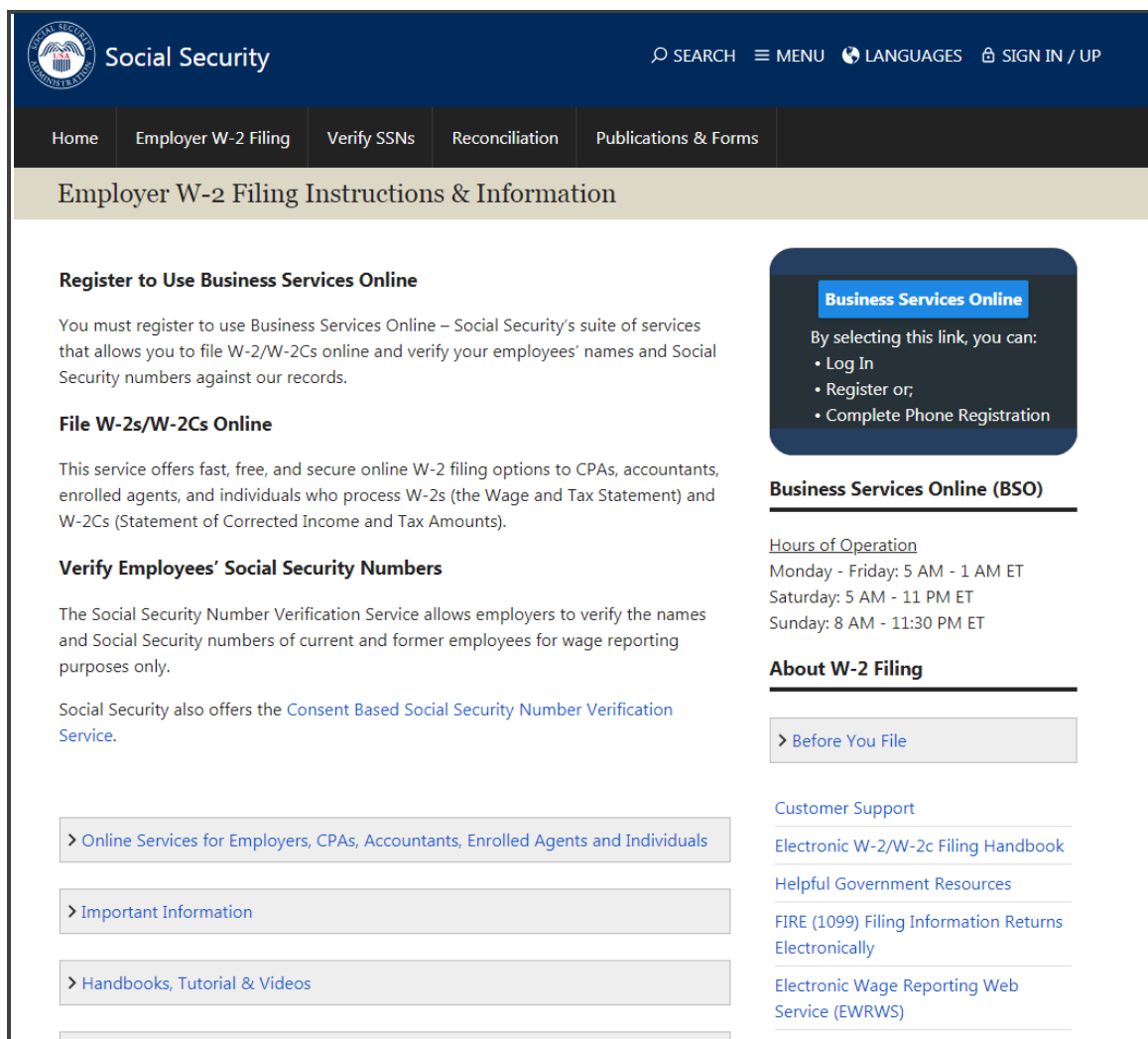


4. PCR displays a message that AccuWage Online tests both W-2 and W-2C files. Click **AccuWage Online** to continue the process, or **Skip** to cancel the testing and transmitting process.



**i** For more information on AccuWage Online, review the [AccuWage Online Help Guide](#).

5. Clicking AccuWage Online launches the Social Services Administration website, where you can log in to the Business Services Online site and upload the W-2 e-files.



6. Once you log in, SSA displays the Welcome screen. Click **Report Wages to Social Security**.



**Social Security**  
The Official Website of the U.S. Social Security Administration

## AccuWage Online

For Testing Tax Year 2017 EFW2/EFW2C Submissions

**DISCLAIMER STATEMENT**

AccuWage Online identifies most of the common format errors in wage submissions. Using this application greatly reduces submission rejections. Please be aware that even if no errors are identified by AccuWage Online, your submission could be returned because of other errors.

**Important:** You still need to upload and submit your Formatted Wage File after testing it through AccuWage Online.

**Information:**

We suggest you always zip your file before running it through AccuWage Online.

### Submission Type

\*Select Submission Type

☒ W-2(Regulars)

☐ W-2c(Corrections)

**Start Testing** [Return to EWR Home](#)

[AccuWage Online Help Guide](#) | [EFW2 - EFW2C](#) | [AccuWage Online FAQ](#)

**i** For information on AccuWage Online, review the [AccuWage Online Help Guide](#).

## Updating the Status of W-2 Files

Because you do not file W-2 returns through PCR, you also do not receive acknowledgments through the program. Instead, you will need to manually update the status in E-file Manager.

To do this:

1. In E-file Manager, click the **Status** field for the return you want to change.
2. Select the appropriate status from the drop-down list.

Status	Status
Created	7/19/20
None	
Created	
Held	
Transmitted to EFC	
Held at EFC	
Transmitted to Agency	
Accepted	