

To find an individual W2 record, click 'Find W2' and enter the employee's Social Security Number you wish to locate. Partial searches are active. For example, you can enter '6' and click Ok to find the first W2 record beginning with a SSN starting with '6'.

- Exclusive Class Range

Use this option to set a range of employee's records to not be skipped. This is especially helpful for processing companies reporting to multiple states. If for example, the company has multiple state reporting and each state is in a separate employee class, you could easily enter the beginning and ending class for a state and click 'Set Range'. All employees **not** included in the selected class range would be marked as skipped.

Electronic Filing

You can file Forms W2 (Copy A) and Form W3 electronically with the SSA. Enter the requested information and click 'Create W2 e-File' to use this filing method.

Note: Electronic filing criteria requires additional W2 verifications. Since e-file W2s should normally always match your paper W2s, electronic filers should use this option before printing paper copy W2s.

Reminder: The following criteria are NOT currently supported by Electronic Filing:

- Foreign Address Formatting
 - Military Employers
 - 3504 Agents
 - 2678 Agents
 - EDI Electronic Government Employer Submissions (BSO Only)
- Requested Information Highlights

Hint: Each requested information field for electronic W2s has a specific purpose as defined by the SSA electronic file guide. To see how specific information will be used in the e-file, place your cursor over any prompt and additional help or information will be displayed. For example, place your cursor over the employer's 'City' prompt and 'Code RE Location 141-162' will be displayed. The SSA guide fully documents what information is

required from location 141 to location 162 of the RE record...

- Employer - RE Record
- Submitter - RA Record
 - Pin Number cannot be blank
 - Contact Name cannot be blank
 - Blank email address includes warning
 - Load/Save Default Submitter information

If you are filing for multiple employers, enter your submitter information on the first company and click 'Save Default'. On the following companies, select 'Load Default'.

- Optional State Data - Record RS

State wages and withholding can be included in the electronic file. The current application formats all state data as specified by the SSA Electronic File Guide (EFW2). If your state does not follow the federal guidelines, you may not be able to submit this e-file to your state without manually editing the file. Please check your state filing criteria carefully before using this option. To include state information:

- Make sure your first active (Not Skipped) W2 record has the state record correctly defined.
- Click 'Include State Wage Records' and the system will define the State and State ID information from the first active W2 record.
- Only one state record is included per employee. The second state line should be blank for all selected W2s. If you file with multiple states, you must manually ensure all active employee W2 records have the correct state information in W2 boxes 15-17 line one only.

- Create W2 e-File

To verify and create a W2 e-file for the selected company based on the current criteria, click 'Verify and Create'.

- **W2 e-File Verification Errors** - if there are critical verification errors

that could cause the e-file to be rejected, an error list will be presented with a list of issues to be corrected. You must correct these issues before a W2 e-file will be created. The most common error message is Invalid 2 digit State ID [xx] in address translation - reformat to {City} {State Abbr.} {Zip Code}. City, state and zip code information for employees in CertiflexDimension is one data field. For electronic filing, this information must be translated into properly formatted separate city, state and zip code fields. The state information must be a valid two-character state abbreviation. If you receive this message, try entering the employee second line address with a space between the city and state abbreviation and a least one space between the state abbreviation and the zip code.

- **W2 e-File Warnings** - if there are verification warnings that could cause the e-file to be incorrect, a warning list will be displayed. To cancel the e-file creation, click 'Abort'. To continue processing with the listed warnings, click 'Continue Anyway'. The most common warning you will receive is an address truncation message. The employee street address on each employee is a single 32-character field. The e-file only supports a 22-character delivery address for each employee. You may wish to manually edit the employee's W2 record and move part of the employee's address into the location field.
- **Save W2 e-File** - After the system has verified and created the electronic file information, you will be prompted for the file name and location to save the e-file information. You should manually select a **safe secure location** as discussed in 'Items to Remember' above. If you attempt to save this information to the current data folder, a reminder warning will be displayed and you must answer **No** to this warning to store the e-file in the current data folder. The default file name for the electronic file is DDZW2Mag.00Y where **DZ** is the Company ID and **Y** is the last digit of the tax year. If you will be combining e-files using the 'Advanced e-File Options', all files to be combined must be located in a common folder using the default file naming conventions.
- **Process Complete** - Once the e-file has been saved to the selected location, the system will display additional verification information. To return to the standard wizard, click 'Done'.

Print W2 Forms

Select your desired W2s and output options. To print selected W2 forms, click 'Print W2s'.

- Ranges and Output Options