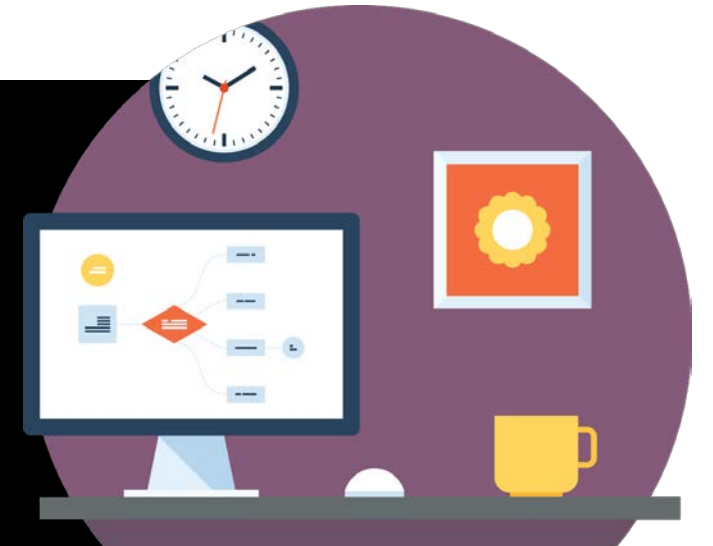


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PREMIER SUPPORT: Prior Year Adjustments

Presented by: Aimée Morgan

2.16.2018

INTRODUCTION

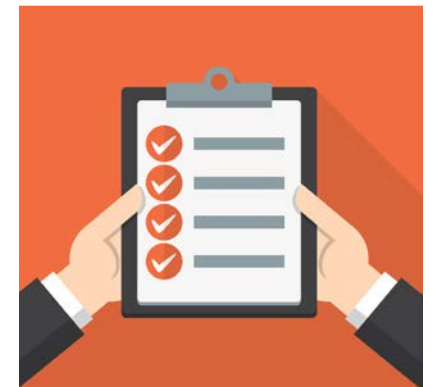
Aimée Morgan

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AGENDA

- What is a W-2C
- What triggers a W-2C
- Issues
- What do I need?
- Next Steps



Chat

Feel free to ask questions during the session or
Use the Chat icon in the bottom of your screen to
submit them

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YOU GOT THIS

We are here to help!

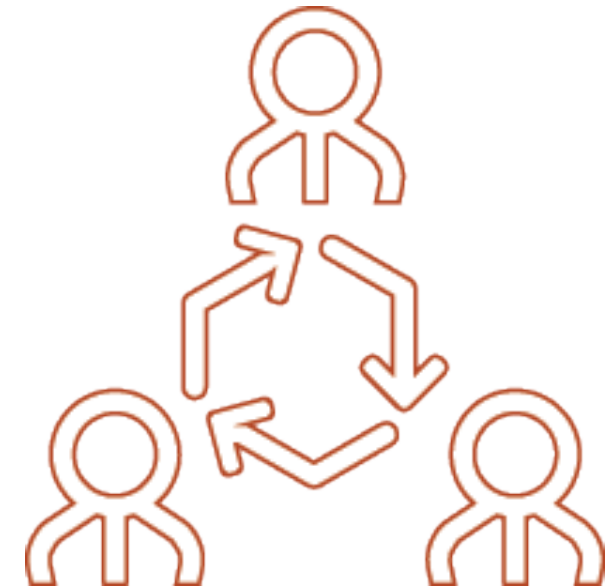
TRIGGERED BY:

- Name Changes
- Address Changes
- SSN Corrections
- Changes to YTD Taxable Wages and/or Taxes Withheld.



WHAT CAN I EXPECT IN THE WAY OF ISSUES?

- Employee moved, but taxes were not updated
- State or Local Taxes were/were not withheld in error
- Withholding on record does not match employee's W-4 form



www.payroll-taxes.com

SO WHAT DO I NEED?

- Date the problem started
- Date the problem was fixed
- Lots of reports, run before you start anything
- Summary Payroll Register for the period in question
- Wage Detail report for the employee
- W-2 Detail
- Print of employee pay statements if you do multi-state taxation



Data Setup



Data Analysis

OKAY, NOW WHAT?

- Reverse Checks
- Enter Adjustments
- Run Tax Recon
- Re-run Summary Payroll Register and Wage Detail
- Generate W-2C forms



IS THAT IT?

- Not quite. You need to send the corrections
 - Process for UltiPro
 - Process for Ceridian
 - Process for In-House taxes
 - Process for W-2 submission

