

Preparing for Payroll Year-End 2019

(Updated 12/17/2019)

Overview

This guide was prepared with the best practice standards in mind, from a user standpoint. Microsoft has their own version of the payroll year-end guide also, which can be downloaded from CustomerSource. This guide is not meant to replace the payroll year-end guide from MBS, but to be used as a supplement to that guide with further detail to verify your W2 wages are correct. Please contact Columbus Support at [us-GPsupport@columbusglobal.com](mailto:US-GPsupport@columbusglobal.com) with any questions you may have. Calendars fill very quickly for this time of year, so we highly recommend you contact Columbus as soon as possible if you would like to reserve a time for consulting assistance with year-end processes for payroll or other GP modules, or assistance installing the year-end service pack.

Note

Some illustrations might show dates for previous tax years. Other than the dates illustrated, information is accurate for the current year-end process.

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IMPORTANT NOTES

- **If you need to install payroll tax tables for the new year prior to creating your year-end wage file,** you will need to be sure the correct rates and limits are in →Setup→System→Payroll Taxes for FICASS at the time the Year-End wage file is created. (See Section 3, page 14)
- **When you are ready to update your tax tables, you may do this yourself. It is a good idea to update your tax tables periodically to be sure you have the latest tax tables on, but do not do this process after 12/15 if you have not completed your last checks for the year or have not created your year-end file yet.** Update the payroll tax tables by logging into GP as the 'sa' user. Then go to →Microsoft Dynamics GP menu→Maintenance→US Payroll Updates→Check for Tax Updates. Choose the Automatic method and follow the instructions on the screen. This only needs to be installed one time for your entire system and may be done from any workstation and any company. Verify it has update the tax tables by looking in →Administration →Setup →System →Payroll Tax, and the Last Tax Update date in the upper right-hand corner will have changed. The release date for the first tax update of the new year is usually a December date.

If you get errors during this update, try doing the update directly on the SQL server, or contact [Columbus Support](#) for assistance. Tax table updates can also be processed manually or with a SQL script if it doesn't work to use the Automatic method.

Important: The first round of tax tables for the new year usually release around 12/15, so if you update tax tables after 12/15 you may get tax tables for the new year. *Do NOT update the tax tables until you are done processing 2019 checks. The payroll year-end close and W2s do not need to be done prior to installing this. It should be installed prior to Building/Calculating and Print checks for your first checks dated in 2020. If you install this in order to have it on for printing your checks for the new year, and still need to create your year-end file for the old year, the FICA-SS maximum can be manually edited back to the previous year maximum temporarily while you create the year-end file.*

- **Verify whether you need to install the Year-End Update.** There is a Year-End update available for GP (18.2)/GP2018, GP2016, and GP2015. For 2019, we recommend installing the year-end update for all clients running GP Payroll, because of W4 changes. **Installing the Year-End update and updating the tax tables are two separate items.**

Important: Please contact Columbus prior to installing any service packs on your system, to be sure all companion products and customizations are compatible.
- **Be sure the GP user date is a date within the new year while building, calculating and printing checks.** Failure to do so may cause FICA tax to be incorrect for employees over the limits, and could update summary tables for the incorrect year.
- Payroll year-end tasks are independent from other GP modules.

SECTION 1: PRE-YEAR END TASKS

1. Purchase W-2 Forms or communicate electronic consent instructions to employees.

If you use Greenshades, Aatrix, or any electronic method of W2 distribution, communicate to employees where they should provide consent for electronic retrieval of forms. It is helpful to complete this task by December so when you complete and publish your W2s, employees will immediately have access to their forms.

If you print and distribute paper forms to employees, the following formats are recommended – these will save you time not having to collate sets for the employee. The item numbers listed are valid at <http://compliantforms.com> (Please note: Columbus does not endorse this website. You may purchase these forms from whichever supplier you like. The items and links posted here show an example of the form.)

- W-2 Employee 4-Square Condensed Laser Employee Copy, and Envelopes. (Get one set, one employee per page.) Item # BW24UP and Envelope # 4UPDWENV05
- W-2 Single-wide, 2 per page, laser format for Employer Federal Copy. (Get one set, each page holds 2 employees. Item # BW2FED.
 - Note: Only need this if NOT filing magnetic media for Federal.
- W-2 Single-wide, 2 per page, laser format for Employer State Copy, and any other jurisdictions that need a copy. (Get however many sets you need, each page holds 2 employees. Item # BW2ER105
 - Note: Only need this if NOT filing magnetic media for State.
- W-2 Single-wide, 2 per page, laser format for Employer Copy to keep (or you could run the Employee set through a copy machine after they are printed on) (Get however many sets you need, each page holds 2 employees. Item # BW2ERD05
 - Note: Only need this if NOT filing magnetic media for State.)
- W-3 – need one form per company, plus an extra for alignment or goofs. Sometimes it comes free with other sets of W-2's. Item # BW305
 - Note: Only need this if NOT filing magnetic media for Federal.

2. Install the year-end update/service pack as soon as it is released by Microsoft Business Solutions, and all of your GP companion products have been verified compatible with the release.

For the US Year-End release, you do not need to wait until the last payroll has been processed to install this, but there should not be any Build Checks or Calculate Checks in process at the time of loading the service pack.

IMPORTANT: PLEASE CONTACT COLUMBUS PRIOR TO INSTALLING THIS IF YOU HAVE CUSTOMIZATIONS TO YOUR GP PRODUCT, OR IF YOU HAVE GP COMPANION PRODUCTS.

- i. Verify the current version of your Great Plains installation under →Help→About Microsoft Dynamics GP. All workstations should be consistent on version numbers.

NOTES:

- All YE updates are all-inclusive of all previous updates.
- Microsoft generally releases the US year-end update around November 15.
- Canadian Payroll year-end update is generally released around December 20.
Timing for installing Canadian Payroll year-end is critical, after the last payroll of the current year and prior to the first payroll of the new year.

IMPORTANT: Please contact [Columbus Support](#) for assistance to upgrade to a supported version of GP if you are on GP2013 or older. GP2015 mainstream support ends April 2020, so please plan your upgrade.

- ii. Plan to have all users out of Great Plains until the year-end update has been installed on all workstations.
- iii. Have the 'sa' user password available. You will need access to the SQL server (and Terminal Server, if applicable), and administrative rights on the machine(s) you are installing on.
- iv. Verify whether the installation has any custom programming or third-party companion software products affecting Dynamics GP. If you are not sure, please email a copy of your Dynamics.set file to us-GPsupport@columbusglobal.com. This file is usually located in c:/Program Files(x86)/Microsoft Dynamics GP/GP/Dynamics.set. **Please contact Columbus Support prior to loading any updates so we can confirm your companion products and customizations are confirmed compatible with the service pack.**
- v. For 2019, after the year-end update has been installed, check to confirm →Tools→Setup→Payroll→Payroll has a Last Year-End Update Date of November 18, 2019.

3. Electronic Filing

If electronically filing for federal or state W2s, unemployment or other electronic files, apply for or renew password on any websites you use.

- i. Apply for or renew your password to submit the file online at <http://www.ssa.gov/bsowelcome.htm>
- ii. **Accuwage** – Verify your EFW2 file online. You must be registered at ssa.gov. <http://www.ssa.gov/employer/accuwage/index.html>.

4. Record non-cash taxable benefits to include on the W-2

Non cash taxable benefits may be recorded throughout the year, or on the final pay check (in the case of an employee terminating), or on the final pay check run of the year. Examples are life insurance premiums >\$50,000, auto allowances, etc.

Confirm that the "Subject to taxes" boxes are marked properly when you set up any new deductions or benefits, prior to assigning the deduction or benefit code to employees. Also verify the Payroll Posting Accounts are correct >Administration >Setup >Posting >Payroll Accounts, in the Type drop-downs for Taxable Benefits Expense (DR) and Taxable Benefits Payable (CR).

5. Verify W-2 box numbers and labels

Verify what box numbers and labels you need to populate with this guide from the IRS website: <http://www.irs.gov/pub/irs-pdf/iw2w3.pdf>

W-2 box numbers and labels may be verified by in the following location in GP:
→Setup→Payroll→Deductions and →Setup→Payroll→Benefits for any special codes (401k, disability benefits, etc.) that need to display on the W-2's.

Do this for each company and be sure to save and roll-down any changes you make to the W-2 Box and Label fields, as long as you have not touched any other fields on the window. Please be sure you have a current backup prior to doing this process. Be aware that there are 4 W2 Box Number and Label fields available. Most codes only require to be populated on the W2 in ONE box. Be sure you are in the left-most or first box, and don't populate the code in more than one box, or it will print incorrectly on the W2.

6. Verify your Federal and State Employer ID numbers

Federal and State Employer ID numbers may be verified in the following location in GP: (Tools→Setup→Payroll→Tax ID). Use TaxCode FED, and States you withhold for. This is the number that will be printed on the W-2 statements.

Unemployment ID number for FUTA and SUTA can be verified in →Tools→Setup→Payroll→Unemployment Tax.

7. Verify boxes are marked properly for Statutory Employees

In GP, go to →Cards→Payroll→Tax Information to verify that the boxes are properly marked for Statutory Employees. Mark this box if the employee is subject to FICA withholding but not federal withholding. **The Retirement Plan box will mark automatically on the W-2 if the Deduction code is marked properly with a W-2 box and label.** If the employee is eligible to participate in a retirement plan but is not participating (has no retirement deduction), mark this box if you need it marked on the W-2.

8. Prep 1095C / Affordable Care Act (ACA) data

You could potentially produce your 1095C forms prior to year-end! If you have all the data of which employees have coverage or are offered in December earlier than year end, these forms could be produced earlier.

If you are using GP to track the 1095C information, Integrity Data has a free window that makes editing the 1095C records MUCH easier than waiting for the year-end file to be created and editing in the Edit W2 window. Contact Columbus for assistance.

9. Set up fiscal periods for the new year

Fiscal periods for the new year are set up in GP by going to: →Tools→Setup→Company→Fiscal Periods.

10. Complete final pay check runs for the year.

11. Plan to have other users out of Great Plains payroll windows while the Year-End file(s) are being created.

12. Verify the normal backup plan has processed successfully, and there is a recent full backup completed.

SECTION 2: STEPS TO CREATE AND RECONCILE YE WAGE FILE TO PAYROLL RECORDS

GP does not alert the user that taxable wages are incorrect. Follow the process outlined here to confirm the numbers are accurate. We recommend you do this process (or a similar process) quarterly, using the 941 report, and at year-end time, using the Year-End Wage report to compare the summarized reports that come from detailed transaction history.

In order for the following documented process to be applicable, it is recommended that paycodes, deductions, and benefits are set up such that the taxable settings for the code are consistent for all employees. If the code is taxable for one employee, the tax setting is true for all employees. If you have employees with special tax considerations (like Clergy, or tribal members), it is recommended that a separate set of codes be set up and assigned to those employees. The key is that all tax settings on a particular code are consistent, so that you can use summary reports and tie out taxable wages at a company level. If taxable wages don't reconcile at a company level, then an employee-by-employee reconciliation will need to be done.

1. Print Paycode Summary, Deduction Summary, Benefit Summary, State and Local Tax Summary Information.

This summary information can be printed by going to →Reports→Payroll→Period End. Use a date range of Jan 1 – Dec 31 for the year-end reconciliation, or for just the period of one quarter for the quarterly reconciliation.

At year-end time, have your 941 report handy for Q1, Q2, and Q3, or reprint the 941 Prep report for each quarter in →Reports→Payroll→Quarter End.

2. Move Payroll Transaction Data into the Year End Wage File

For a year-end or year-to-date reconcile, we need to take payroll transaction data from the calendar year and put it into a Year-End Wage file. This step blocks users from posting any more payroll transactions into that year.

Move payroll transactions into the year end wage file by going to →Tools→Routines→Payroll→YearEnd Closing.

Note: This process does not print a report and does not delete anything. This file can be deleted and recreated multiple times. It is ok to do this process earlier or periodically throughout the year to reconcile and verify your data is clean and ready for W-2's.

In order to process more payroll transactions for the year, go back into →Tools→Routines→Payroll→YearEnd Closing, and click Process. Choose delete to delete the current file. Then choose cancel to not create another year-end file. *Be very cautious about deleting the year-*

end file for a previous year. If changes have been made in the Edit W2s window, the edits will be lost. Be sure you do not delete the file for a previous year that you have already completed W2s for.

Note: You will need the correct FICA rates and maximums in →Setup→System→Payroll Taxes while creating the Year end file.

3. Print the last page of the Year End Wage report

Run the Year End Wage report by going to →Tools→Routines→Payroll→YearEnd Wage report. Print to screen to see the entirety of the report, and print to paper or screenshot just the last page in order to do the reconciliation. This can be a long report with one page per employee. It is also helpful to save this report to a file if you don't print it entirely. The totals on this report will be used to tie out to Summary reports.

4. Print the Validation Report

Print the validation report by going to →Tools→Routines→Payroll→Print W-2's, then choose Validation Report in lower right-hand corner. Fix or verify any addresses, Social Security numbers, or errors that show on this report. It is normal to see some items that are off a few pennies from rounding, but any items that are material should be fixed before printing W-2's or filing your Q4 reports.

5. Reconcile Payroll

Use the Quarter-End or Year-End Wage Reconciliation spreadsheet. Complete the fields as directed on the template, to determine whether the Taxable Wages showing on your 941 and/or Year-End Wage Report are correct.

Possible causes for incorrect taxable wages:

1. The tax boxes at the setup level of a paycode, deduction, or benefit was incorrect. ****Prior to GP2018 R2, If changes are made at the setup level, they will only roll down to codes where there is NO transaction history and the code is Active status on the employee. (As of GP2018 R2 – option to roll down to inactive records!)*
2. The tax boxes at the employee level for one or more paycodes, deductions, or benefits was incorrect. This can happen if the user does not say "yes" to use the default from setup when adding a code. Another common error is that if an employee wants no federal or state taxes withheld, a payroll user will unmark the Subject to tax boxes on that employees paycode. This will cause that employee's taxable wages to be incorrect. Withholding amounts should be adjusted in the Tax Information window instead. Following the guidelines in this document, the Subject to Tax boxes or TSA Sheltered From Tax boxes should never be changed in Employee Paycode, Deduction or Benefit Maintenance windows. They should always be consistent with the Setup level for that code.

3. A payroll transaction didn't have the State or SUTA state filled in appropriately.
4. A payroll adjustment was keyed incorrectly.
5. System issue.

Hints about reconciling:

1. The PAYROLL SUMMARY report in >Reports >Payroll >Period End is not always accurate, and the tables that hold the data for this report are not always updated properly if there have been manual adjustments. Likewise, Federal Wages listed on > Cards > Payroll > Summary are NOT from the same table as the W-2 numbers are pulled from, so fixing this field in Employee Summary does not help correct the W-2's.
 2. It is safer to do the reconciling against either the 941 or the YE Wage report, since those use amounts that actually land on tax reports that are submitted.
 3. FICAM wages should equal Total Paycode Summary less Pre-tax Deductions from Deduction Summary report (other than 401K) plus Taxable Benefits, less any Paycodes that are not regular taxable wages.
 4. FICASS wages may be lower than FICAM wages because of employees who earn above the FICASS Maximum taxable wages. In most cases, if a code is subject to FICAM, it is also subject to FICASS, so the difference between these two totals can be attributed directly to employees over the FICASS Max. A Smartlist Builder object can be used to find those employees over the max, or most times it involves just a handful of people and the payroll user will know who they are to look at those people individually.
 5. Federal Wages should generally be Fica-Med wages less retirement deductions (not Roth)
 6. State and Local Wages usually should equal Federal Wages
 7. Additional steps for Year-End:
 - a. Verify Box 12-xxx totals on the YE Wage Report are correct, by comparing to totals for appropriate codes on the Deduction Summary and Benefit Summary reports. If the totals do not match, verify the W2 box labels are correct for each Deduction and Benefit at the Setup level. Roll these down if necessary. Be aware there could be up to 4 W-2 box numbers and labels that could be populated. Many of the issues with this information are easily remedied by rolling down the codes from the setup level. ***CAUTION – be sure you have a good backup prior to saving and rolling down changes at the setup level. To avoid accidental roll-downs, do not touch fields other than the W-2 boxes.
 - b. Verify appropriate retirement boxes are marked on W-2's
 - c. Verify Employer numbers are properly filled in for federal and state IDs.
- **Note – if any of the above are not correct, remove the YE Wage File, fix the issues, then create the YE Wage File again.

8. Verify TSA settings on paycodes, deductions, benefits. Be aware of any situations where tax boxes were marked differently on employee maintenance level. Generally you want to have a separate paycode, deduction code, or benefit code for any records that need to be taxed differently than the majority, *ie. Do not change the tax settings at the employee level from what is on the setup record of a paycode, deduction, or benefit.* (SQL: Select * from UPR00400, UPR00500, UPR00600 if need to check individual employee records or import the Smartlist Builder objects that show this information).
9. The method to adjust FICA Taxable wages because of pretax deduction marked incorrectly will vary, depending on the situation. It would be best to test out resolutions in a test company before posting adjustments of this sort in the live company. It may be necessary to void check(s) and then put in a manual check, making net wages come out the same. Offset any changes to FICA by adjusting Federal withholding. *Be sure to fill in the "Taxable Wages" box on transactions for federal, state, local, and FICA taxes. Manual Checks keyed in using the Beginning Balance type does not update the General Ledger or Bank Rec, so if any journal entries are necessary they will need to be done manually.*
10. If you need to do an Employee-by-Employee verification comparing Federal Wages to State, modify one of the W-2 one-wide formats in Report Writer so that all the important numbers and employee ID are printed on one line, then print this report to a file in Tools > Routines > Payroll > Print W-2's. You can pull State Wages from > Reports > Payroll > Wage & Hour > State Wage Report, print to a file. Import into Excel, do a VLookup and calculate the difference between the two reports.
11. NOTE: Federal Wages listed on > Cards > Payroll > Summary are NOT from the same table as the W-2 numbers are pulled from, so fixing this field in Employee Summary does not help the W-2's!!!!
12. If both Federal and FICA wages are off, the problem probably lies somewhere in a pre-tax deduction or a paycode having tax boxes marked incorrectly.
13. If only Federal wages are off, the problem is likely because of a 401k deduction.

6. Remove the year-end file and make corrections

Remove the year-end file and make corrections to employees rather than editing on the W-2 window, except in cases where re-creating the year-end file is not possible. Make any corrections necessary to reconcile, then repeat steps 1-6. If there are errors that cannot be fixed by changing an employee maintenance record or voiding and re-keying as manual checks, editing can be done directly on the edit W-2 window. This is not recommended since these edits will not be included in the totals of quarterly reports. *NOTE: Every time you delete the year-end wage file and recreate it, any corrections made in the edit W-2's window will need to be redone.*

7. Create Electronic file (EFW2) if required.

If you are required to create an electronic EFW2 file, go to →Tools→Routines→Payroll→W-2 Electronic Filing. This will create the file required for Federal filing. If you need an electronic file for State(s) that do not accept the same file you submit to Federal, there are additional products we can recommend.

8. Launch Accuwage Online

The next step is to launch Accuwage (this was referenced in section 1, item 3). This program will alert you to whether there are any additional items that need to be corrected. If there are no errors, it gives you the option to submit the file to the IRS. You should remove the year-end file (assuming you haven't edited directly in Edit W-2 window) to correct problems in employee maintenance window or by voiding and re-keying manual checks, then go back and repeat from step 1 of this section.

9. Edit W-2s

Do any final manual edits needed in the →Tools→Routines→Payroll→Edit W-2's window. If you are using GP HR for gathering Affordable Care Act information for the 1095-Cs, the editing of the 1095-C information is also done in the Edit W-2s window. *NOTE: Be sure you will not need to remove the year-end file for further corrections to wages or addresses. Any edits made in the Edit W-2s window will be lost and need to be redone each time you remove and recreate the year-end file.*

10. Print W-2s, or publish electronic W2s to employees

Print all required paper copies of W-2s by going to →Tools→Routines→Payroll→Print W-2. Choose the correct format of W-2's in the lower right-hand corner. Print to the screen so you can reprint easily as many times as necessary. See Section 4 for alignment hints.

If you are using an employee portal where employees can view or download their W2s, complete the process required to upload and publish the W2s in that product.

If using GP2015 Employee Self-Service features or another employee portal, publish the W2s to be displayed in ESS or other employee portal, when ready.

11. Print W-3, if required

If you are not filing Electronic EFW2, you will also need to print the W-3. Do this by going to →Tools→Routines→Payroll→Print W-2. Choose W-3 in lower right-hand corner. See Section 4 for alignment hints.

12. Submit Electronic EFW2 file

Submit the electronic EFW2 file at <http://www.ssa.gov/bs/bsowelcome.htm> (or through external programs like Greenshades or Aatrix) by the deadline, if you didn't already submit it through the Accuwage program.

13. Install the payroll tax tables for the new year

Install the new year payroll tax tables by logging into GP as the 'sa' user. Then go to →Microsoft Dynamics GP menu→Maintenance→US Payroll Updates→Check for Tax Updates. Choose the Automatic method, and follow the instructions on the screen. This only needs to be installed one time for your entire system and may be done from any workstation and any company. Verify it has update the tax tables by looking in →Administration →Setup →System →Payroll Tax, and the Last Tax Update date in the upper right-hand corner will have changed. The release date for the first tax update of the new year is usually a December date.

If you get errors during this update, try doing the update directly on the SQL server, or contact Columbus Support for assistance. Tax table updates can also be processed manually or with a SQL script if it doesn't work to use the Automatic method.

14. Verify FUTA and SUTA Taxable Wages are correct

- a. Print the FUTA and SUTA reports in →HR & Payroll Navigation →Setup →Payroll →Period End reports.
- b. If the total Taxable Wages do not easily reconcile to Federal Taxable Wages, check the settings in →HR & Payroll Navigation →Setup →Payroll →Unemployment Tax. Look at code FED for Federal, and at each state you have employee wages in.
- c. Confirm which tax-sheltered deduction codes are to be included as FUTA/SUTA taxable wages. There may be a newly added Pre-tax deduction code to insert to include as Taxable Wages.
- d. Confirm whether your Paycodes are set up to be included in FUTA/SUTA taxable Wages, in →HR & Payroll Navigation →Setup →Payroll →Paycodes.

- e. If all settings are correct, then it is possible that one or more payroll transactions were posted with a blank or wrong FUTA/SUTA code. Use a Smartlist that examines Payroll Transaction History, and look at the SUTA and FUTA codes on the transactions.
- f. If any posted historical payroll transactions need the FUTA/SUTA code fields adjusted, mark the setting to allow this in →HR & Payroll Navigation →Setup →Payroll →Payroll →Options, mark the checkbox for Edit Financial Fields.
- g. To adjust the SUTA/FUTA code individually on employee historical payroll transactions, →Cards →Payroll →Paycodes→Choose the Employee ID and Paycode. Click the History button. Show details, and the FUTA/SUTA fields are editable.
- h. If Paycode history needs to be updated enmasse, a SQL script can be run against the UPR30300 table. A backup is recommended prior to making table updates.
- i. Re-run the SUTA/FUTA reports in Period End after the changes have been made. The reports will reflect changes made.

15. Print and file 1095-C reports, if required

If you will be producing 1095-C reports from GP, any necessary edits may be done in the Edit W2s window. Reminder – be sure you will not be removing the Year-End Wage file again, or any edits made in the Edit W2s window will be lost, for both 1095C information and W2 information.

Use the Print W2s window to print the 1095-C reports from GP.

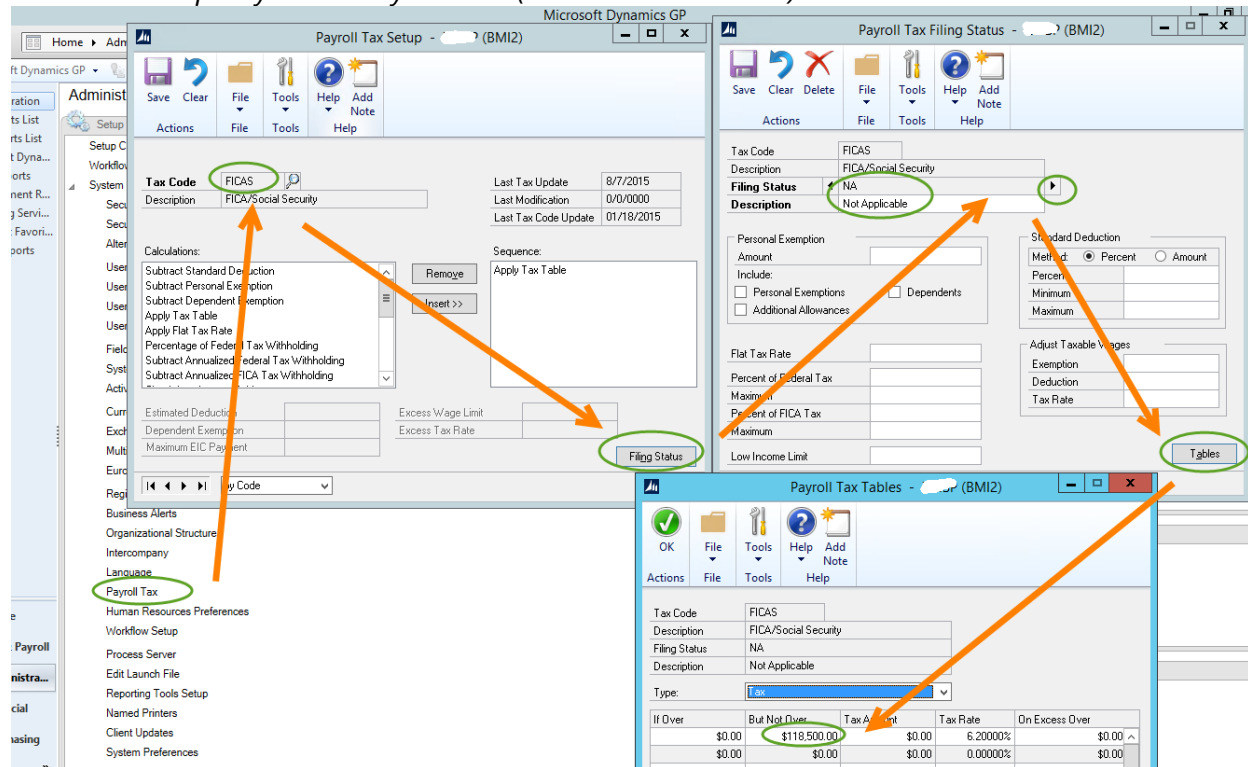
If you are using GP for creating the 1095-C reports and have >250 forms, you must file electronically. GP will not create the electronic file for this, so a companion software product must be used. The most common vendors we see for this are Greenshades, Aatrix, and Integrity Data. All 3 of these vendors use a preformatted template, which can be uploaded to their website, where you can generate an electronic file, for a fee. Please contact Columbus for more information or assistance.

If you are not producing 1095-Cs through GP, verify whether your company is required to file these, and whether you have fulfilled the reporting requirement using a third-party companion software.

SECTION 3: OTHER PAYROLL TIPS

1. If you have already loaded the tax tables for the new year and then need to recreate the YE Wage file, A) You may need to edit the Social Security Wage Limit to last year's limit, if it has changed, B) Recreate the file, C) Change the Social Security Wage Limit back to the current year's limit. See following screen shots.

→Tools →Setup →System →Payroll Tax (see screenshot below)



2. To reprint Quarterly reports after the year is done, change your GP System date to reflect the year for which you need to print the Quarterly reports for. Then →Reports →Payroll →Quarterly Reports, choose the quarter you would like to print for, and mark the boxes for which reports to print.
3. Removing Employees & History (optional): →Utilities →Payroll →Remove Inactive Employees and History. *Note: Most customers do not wish to or need to do this step unless hard drive space is an issue.*
4. If Human Resources Attendance or Employee Self Service or Time Matrix is being used, pay periods or pay schedules for the next year will need to be set up. Some time clock programs, like Time Matrix, also require pay periods to be set up for the new year.
5. If using GP PTO Manager, you may need to do a year-end process to implement auto calendar-year calculations.

SECTION 4: ALIGNMENT ISSUES

If the W-2's (or any other form in GP) needs slight alignment, adjust this with the Print Dialog Box. The Print Dialog Box appears after you press the print button. If it doesn't appear for you, turn it on by changing a command in the dex.ini file.

- a. Look in C:\Program Files\Microsoft Dynamics\GP\dex.ini file and change the line that says "NoPrintDialog=True" to say "NoPrintDialog=False". If the line does not exist, add "NoPrintDialog=False" to the end of the file. Then save the file and relaunch Great Plains.
- b. Print the W-2s to the screen.
- c. Choose the printer icon button on the top left.
- d. A print dialog box with horizontal and vertical alignments will appear on the right. Adjust according to the situations below:
 - i. Form prints too high Enter a positive vertical adjustment (.25 is one line)
 - ii. Form prints too low Enter a negative vertical adjustment (-.25 is one line)
 - iii. Form prints too far right Enter a negative horizontal adjustment
 - iv. Form prints too far left Enter a positive horizontal adjustment.

SECTION 5: RATE CHANGES

Please refer to official sources for this information, but here are a few common items to note.

1. FICA/Social Security wage limit is going up from \$132,900 for 2019 to \$137,700 in 2020. This will be updated by the payroll tax table update.
2. SUTA/FUTA rate or Wage limit changes need to be made manually in →HR & Payroll Navigation →Setup →Payroll →Unemployment Tax. The reports will reflect the rate that is in the Setup window at the time the report is generated.
3. 401K employee contribution limits are moving up to \$19,500 for 2020 (from \$19,000 in 2019). If changes are necessary, update these manually in the Benefit Setup window and roll down the change. The payroll tax update does not maintain them.

The Catch-Up maximum contribution goes to \$6,500 for 2020 (up from \$6,000 in 2019), which makes a total of \$26,000 if age 50 or over for 2020.