



# 2023 W2 Agenda

## Welcome

## W2 Processing Instructions

### Items to Review before Producing W2s

- Balancing
- Box 12 and Box 14 Setup
- Third Party Sick Pay Setup
- Employee Year to Date Adjustments
  - Turn On the Employee YTD Adjustment Option
  - Making Employee YTD Adjustments
  - What Happens When an Employee's YTD is Adjusted?
- W2 Email Setup
  - Enter Server and Return Email Address Information
  - Enter Server Name or IP Address
  - Activate W2 Email Delivery Option
  - Enter Email Information for the Person Sending W2s by Email
  - Set up the Verification to Allow W2s to be Emailed to the Employee

### W2 Production

- How to Print W2s with Pre-printed Forms/Blank Forms
- Sending W2s via Email
- Magnetic Media and Electronic Filing to the Federal Government
- Magnetic Media and Electronic Filing to the State
- Where the W2 Data Originates in SDS
- Quick Recap of Steps

### How to Correct W2s

### Running the First Payroll for 2024