W2 and W3 Printing Process

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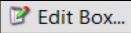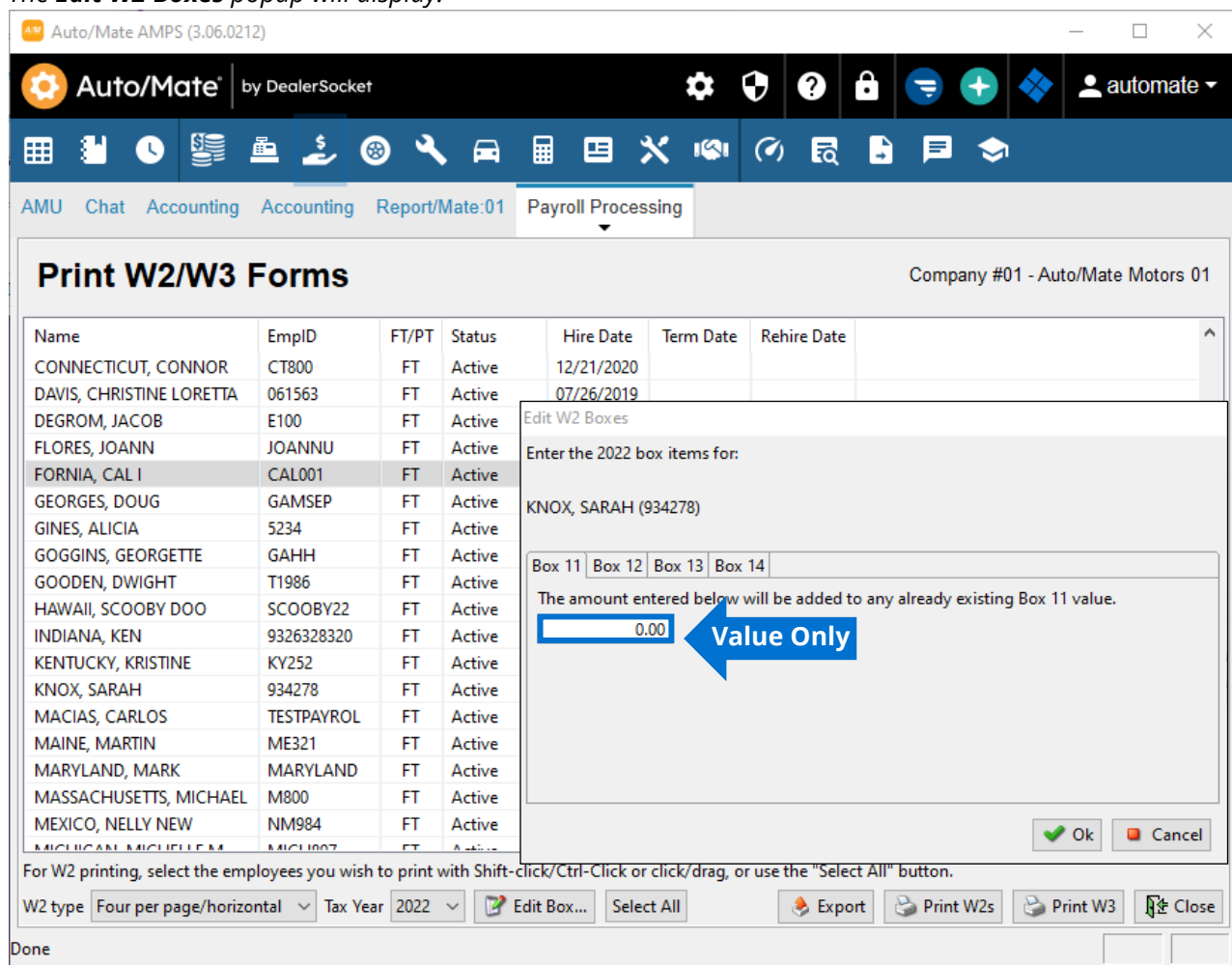
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W2 and W3 Printing Process

Overview
This document will overview how to **Edit** and **Print W2** and **W3 Forms** in the **New Payroll** module.

W2 and W3 Box Entry Screens

1. In the New Payroll module, select **Program 10: Annual IRS-W2/W3 Forms**.
2. Select an **employee**.
3. Data for Box 11, 12, 13, 14 will pull from the Earnings and Deductions or Tax setups. If you need to add a value that doesn't pull from any of these, click [Edit Box...] .

*The **Edit W2 Boxes** popup will display.*

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Box 12
(Two-Character Description & Amount)

Edit W2 Boxes

Enter the 2022 box items for:

KNOX, SARAH (934278)

| Box 11 | Box 12 | Box 13 | Box 14 |

Amount(s) entered will be added to existing Box 12 value(s) for the same code(s).

#	Description	Amount	
1	DD	700.00	✖
2		0.00	✖

✔ Ok   ■ Cancel

Box 13
(Check Box if employee qualifies for employer funding for retirement plan, no employee contribution)

Edit W2 Boxes

Enter the 2022 box items for:

KNOX, SARAH (934278)

| Box 11 | Box 12 | Box 13 | Box 14 |

☐ Employee qualifies for employer funding (No employee contribution)

✔ Ok   ■ Cancel

Box 14
(Eight-Character Description & Amount)

Edit W2 Boxes

Enter the 2022 box items for:

KNOX, SARAH (934278)

| Box 11 | Box 12 | Box 13 | Box 14 |

Items added in this tab will appear after any automatically generated ones.

#	Description	Amount	
1	UNIFORMS	200.00	✖
2		0.00	✖

✔ Ok   ■ Cancel

> ⚠️**Special Note:** *The entered information is for example only. Please refer to your IRS documentation to determine which information is required for these fields.*

Four items will print per W2 form. If additional items are entered, an additional W2 will print.

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Print W2 Forms

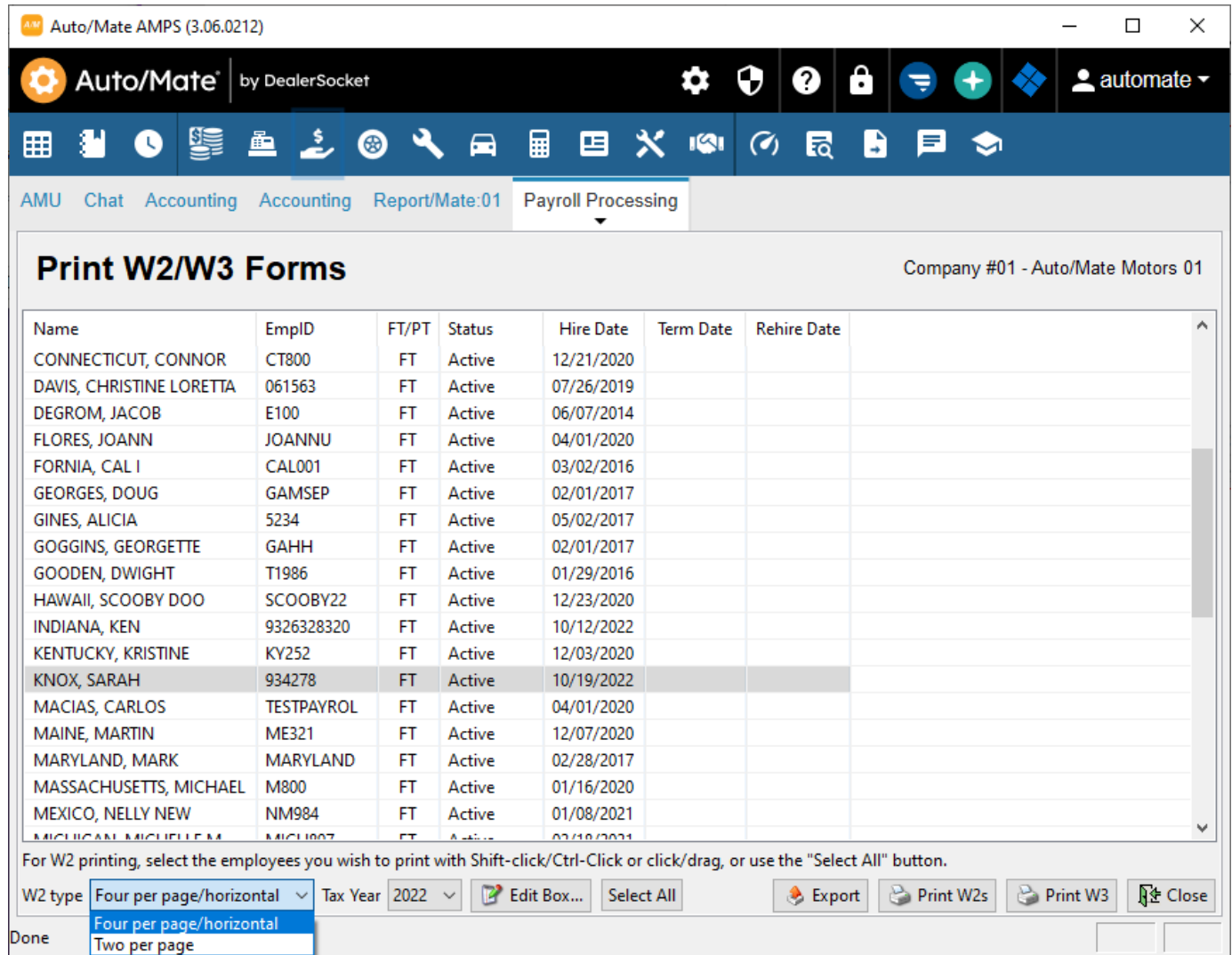The **W2/W3 Print Screen** lists all eligible employees including **Name**, **EmpID**, **FT/PT**, **Status**, **Hire Date**, **Term Date**, and **Rehire Date** (if applicable). **Print W2s** and **Print W3** appear on the same screen. Select one, multiple, or all W2s to print.

1. Click on the dropdown to select the **W2 Type**.

Auto/Mate offers two **W2 Types**: **Four Per Page/Horizontal** or **Two Per Page**.

2. The next screen advises the number of **forms** necessary to load based on the number of employees selected (and any overflow of Box 14).

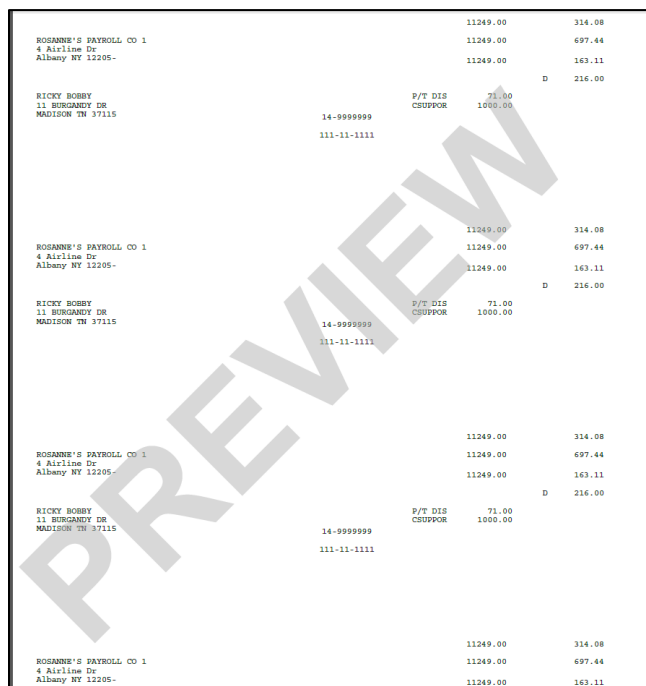There is also a **Print Preview** feature to review and print on plain paper

Use the Print Adjustment section to adjust the forms if they are not aligned correctly.

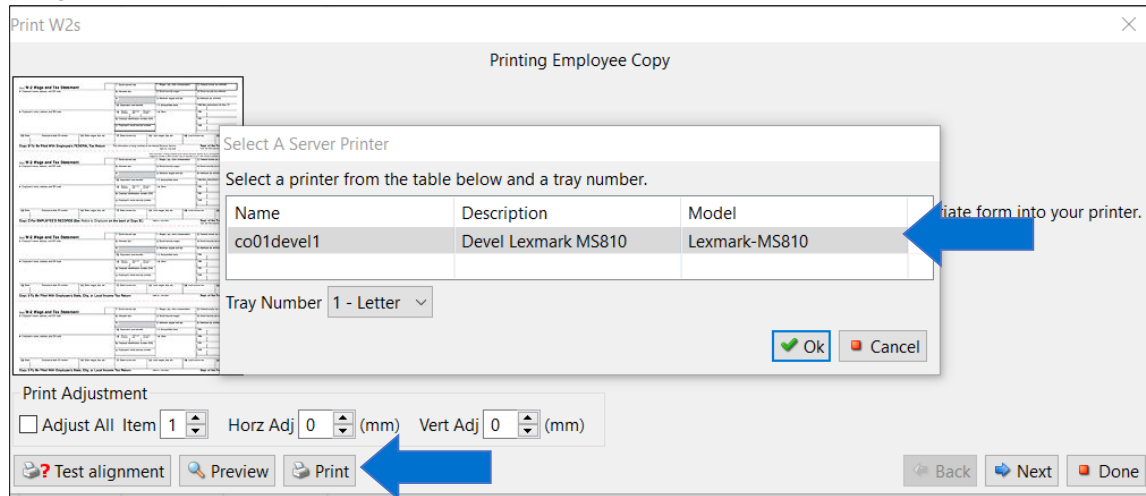- W2 printing alignment
  - o Item - Refers to the parts of the forms.
    - o If 2 parts: Part 1 = the top, Part 2 = the bottom.
    - o If 4 parts: Part 1 = the top, Part 2 = next section down, Part 3 = the following section, Part 4 = the bottom section
  - o Horizontal Negative Value = Left
  - o Horizontal Positive Value= Right
  - o Vertical Negative Value= Up
  - o Vertical Positive Value= Down

3. Click **Print** to print Employee copies.

Make sure to load the appropriate form and the correct number of copies to be printed.
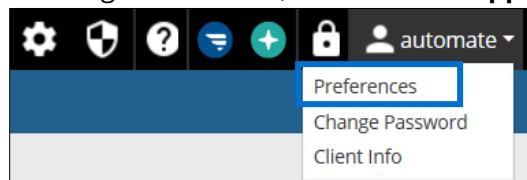
Sample:

Note: *The employee's default Auto/Mate server printer will be used to print W-2 forms.*
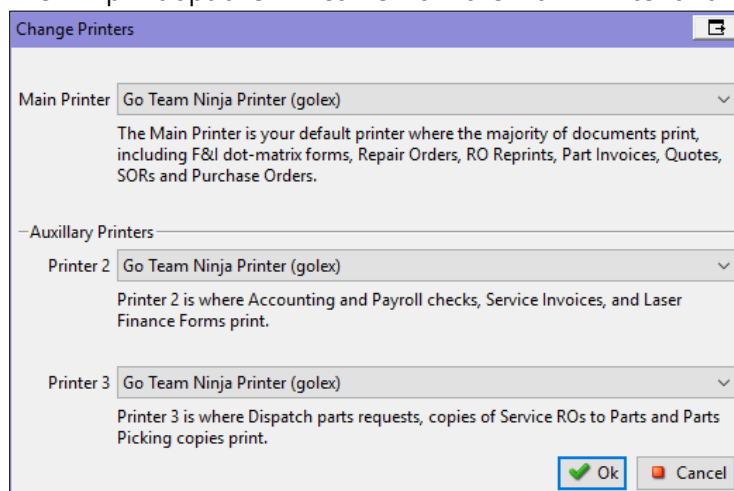
4. Select next and continue to print the other copies of the W2s.

Changing Printers

If changing printer is necessary, it can be done by clicking Auto/Mate in the upper right-hand corner, selecting **Preferences**, then **Console Applications**, and finally **Configure Printers** options.
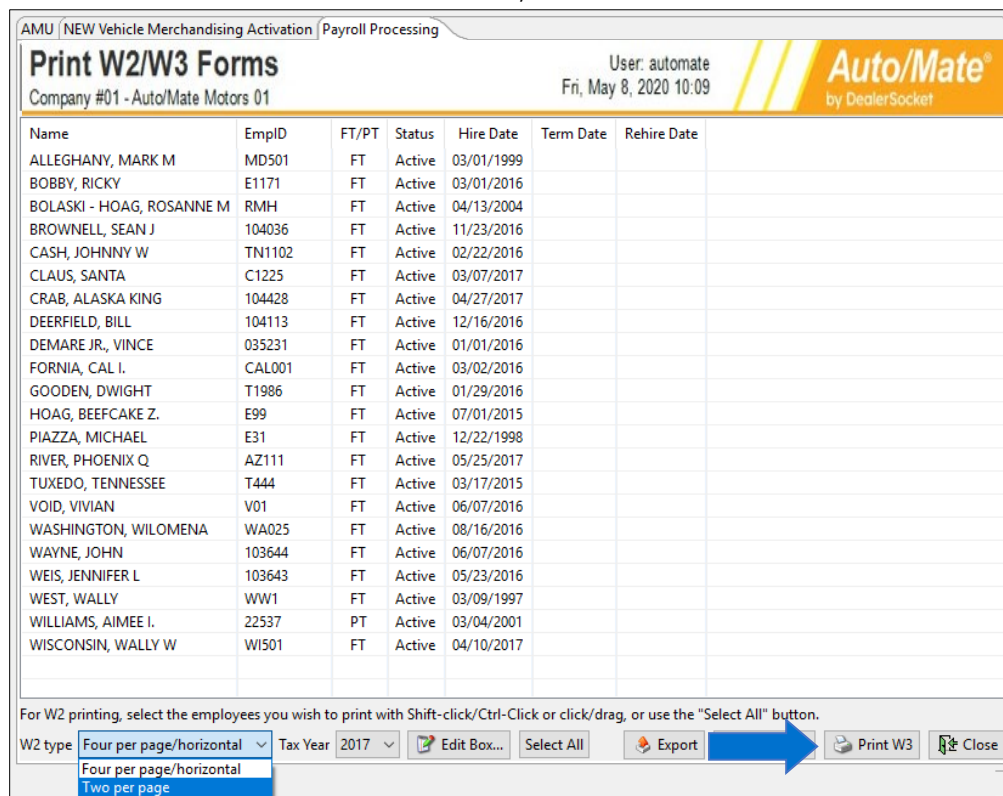

The W2 print options will come from the Main Printer and Printer 2.

Print W3 Forms

1. From the **Print W2/W3 Forms** screen, select **Print W3**.

2. Enter the necessary information and click **Print** or **Preview.**

The Print Preview feature allows you to review and print on plain paper.

Use the Print Adjustment section to adjust the forms if they are not aligned correctly.
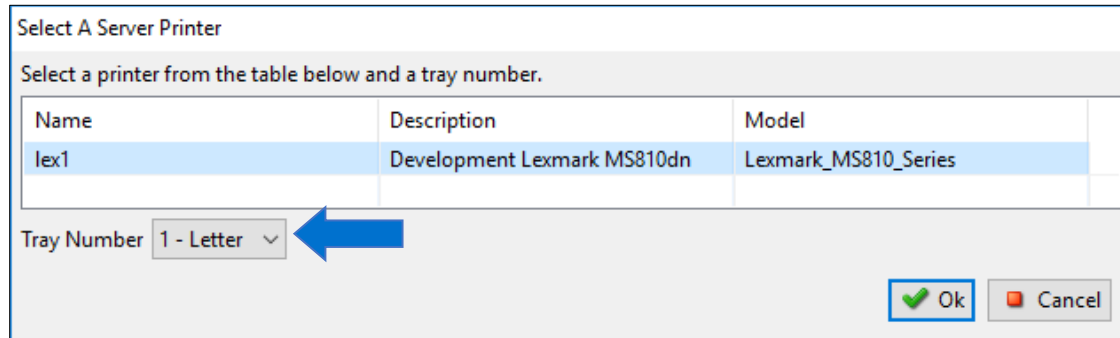
- W2 printing alignment
    - Horizontal Negative Value = Left
    - Horizontal Positive Value= Right
    - Vertical Negative Value= Up
    - Vertical Positive Value= Down

3. To print, select **Print** and then select the Printer and tray assignment, if needed.
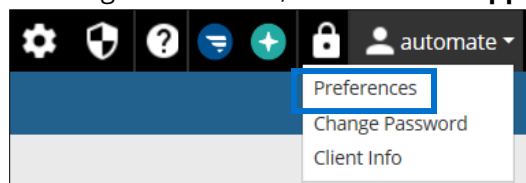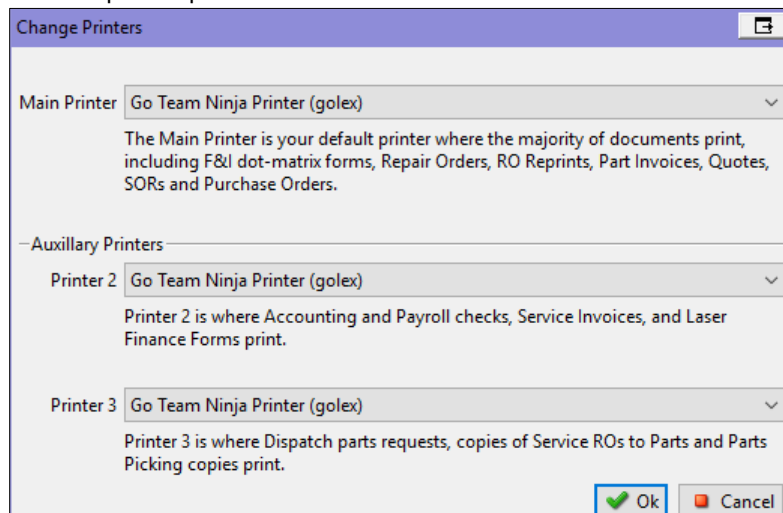
Note: The employee's default Auto/Mate server printer will be used to print W-3 forms.

Changing Printers

If changing printer is necessary, it can be done by clicking Auto/Mate in the upper right-hand corner, selecting **Preferences**, then **Console Applications**, and finally **Configure Printers** options.

The W2 print options will come from the Main Printer and Printer 2.

Note: Four-Part Forms look similar, however, they are two different types.
1. **#5206 Employee Copy** (Prints one employee per page)
2. **#5204 Employer Copy** (Prints four employees per page)

To differentiate between the Employee and Employer copy, click **Next**. The **Form Type** is located at the bottom right-hand side of the form.

Option to Export for Account Ability

The Account Ability software must be purchased. The software must be installed on a PC. If you do not have administrative rights to do this, contact your dealership IT Manager.
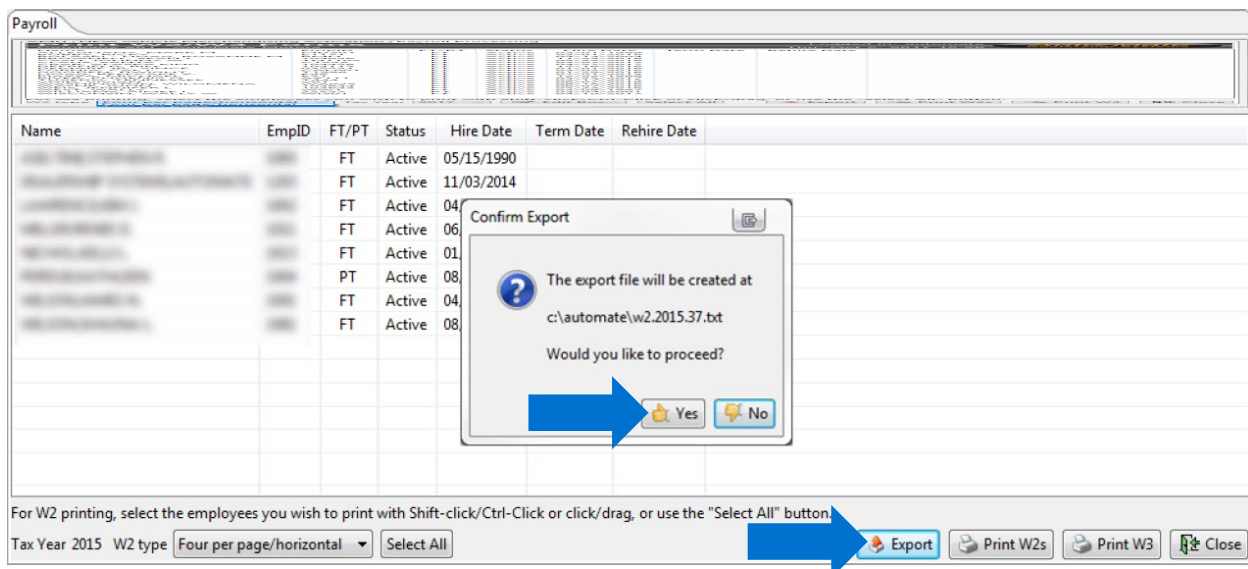**Website Link:** http://www.idmsinc.com

Auto/Mate creates the file used with Account Ability. From there, all subsequent concerns will be managed by Account Ability. The A/M file is already formatted to the Account Ability software.
Toll Free Phone Support: 1-888-IDMSINC (436-7462)

To export the file, click **Export** at the bottom of the screen and **Yes** to confirm the export.

Note: Export file is for Account Ability electronic filling. Only the first three **Box 14** entries are accepted *(see additional documentation if you need to export W2 information).*

Yearli (Nelco) W2 Extract Instructions

This feature will allow you to export W2 information from Auto/Mate and upload it to a third party, Yearli, to produce W2 files. This file will need to be modified based on the dealership's W2 needs (i.e. Box 12/14 Codes, state taxing, etc.)

This information is available in a separate document that can be found in AMU with keyword "**Yearli**". The information will walk you through the process to create the export file to be uploaded on the Yearli Website.

Internal