

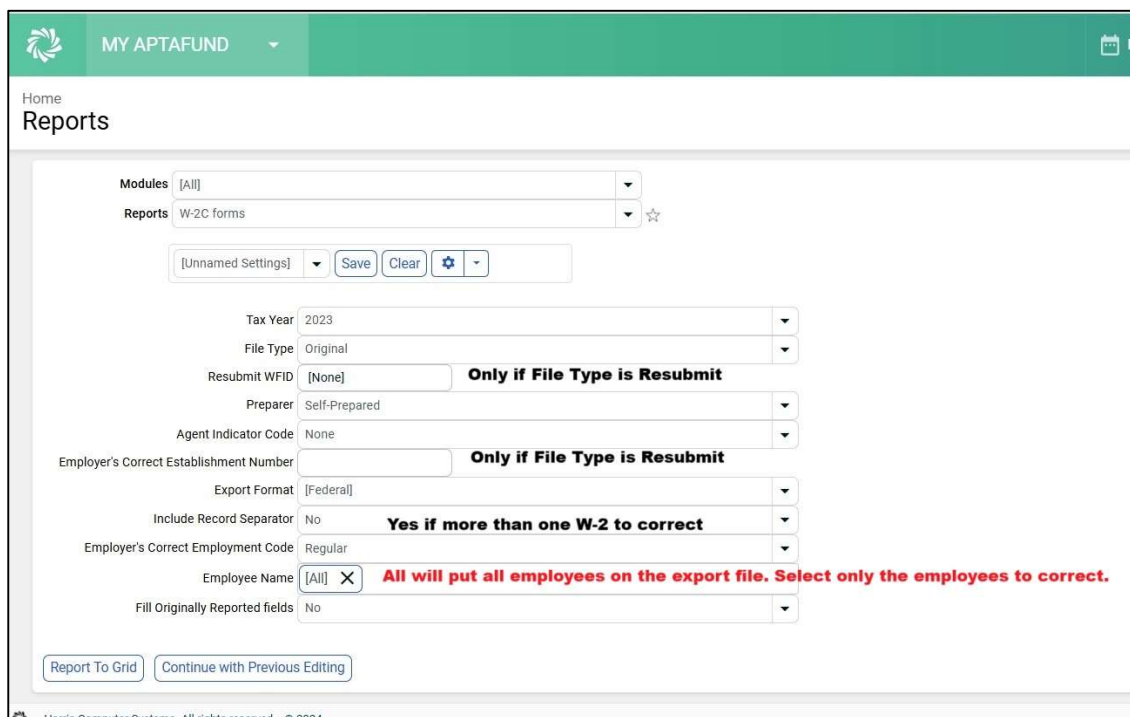
W-2C Forms Report

APTAFUND-3693, APTAFUND-3936, APTAFUND-3951

The W-2C Forms Report (and grid) will create electronic W-2C files when it is necessary to correct employees' W-2s.

Note: The printed W-2C forms will be in the January 3, 2025 quarterly update.

The W-2C Forms report is available at My AptaFund > Reports in the Payroll module. The parameters are as follows:



The screenshot shows the 'Reports' configuration page in the 'MY APTAFUND' system. The 'Modules' dropdown is set to '[All]' and 'Reports' is set to 'W-2C forms'. Below these are buttons for '[Unnamed Settings]', 'Save', 'Clear', and a gear icon. The configuration parameters include: Tax Year (2023), File Type (Original), Resubmit WFID ([None] with note 'Only if File Type is Resubmit'), Preparer (Self-Prepared), Agent Indicator Code (None), Employer's Correct Establishment Number (with note 'Only if File Type is Resubmit'), Export Format (Federal), Include Record Separator (No with note 'Yes if more than one W-2 to correct'), Employer's Correct Employment Code (Regular), Employee Name ([All] X with note 'All will put all employees on the export file. Select only the employees to correct.'), and Fill Originally Reported fields (No). At the bottom are buttons for 'Report To Grid' and 'Continue with Previous Editing'.

Figure 1: Report Parameters

It is important to select only the employees whose W-2s require correction. Entering "All" in the Employee Name parameter will result in all employees being on the export file whether they have corrections or not. Only employees with corrections need to be reported to Social Security Administration.

When reporting to grid, the grid will have a separate tab for the RCA, RCE, and RCW records.



Home -> Reports -> W-2C forms

2023-Original[None][Federal] Save All Modifications Generated: November 07, 2024 3:35 PM by Rickard Tarzwell (rtarzwel@harriscomputer.com)

Tax Year: 2023 File Type: Original Resubmit WFID: [None] Preparer: Self-Prepared Agent Indicator Code: None Employer's Correct Establishment Number: Export Format: [Federal] Include Record Separator: No Employer's Correct Employment Code: Regular Employee Name: [All] Fill Originally Reported fields: No

RCA RCE RCW

Search

Drag a column header and drop it here to group by that column

Record...	Submitter's EIN	User ID	Software Ver...	Sof...	Submitter Name	Location Address	Delivery Address	City	Sta...	Zip	ZIP Co...	Foreign State/Province	Foreign Po...
<input type="checkbox"/>	RCA	999676543	SNQD76W8	1422	99	Apta Software	1776 Washington Ave.	1776 Washington Ave.	Somew...	KS	987...	4321	

Figure 2: RCA Tab

Home -> Reports -> W-2C forms

2023-Original[None][Federal] Save All Modifications Generated: November 07, 2024 3:35 PM by Rickard Tarzwell (rtarzwel@harriscomputer.com)

Tax Year: 2023 File Type: Original Resubmit WFID: [None] Preparer: Self-Prepared Agent Indicator Code: None Employer's Correct Establishment Number: Export Format: [Federal] Include Record Separator: No Employer's Correct Employment Code: Regular Employee Name: [All] Fill Originally Reported fields: No

RCA RCE RCW

Search

Drag a column header and drop it here to group by that column

Record Identifier ?	Tax...	Employer's/Agent's Originally Reported Federal EIN	Employer's/Agent's Federal EIN	Ag...	Agent for...	Employer's Origin...	Employer's Correct ...	Employer Name	Location Address
<input type="checkbox"/>	RCE	2023						Apta Software	1776 Washington Ave.

Figure 3: RCE Tab

Only one employee requires editing for the purposes of this document. Hence in the Employee Name parameter, Robin Lott was the only selected employee, and only her record displays.

MY APTAFUND FY 24/25 test_KS_Hugoton rtarzwel@harriscomputer.com Log Out

Home -> Reports -> W-2C forms

Tax Year: 2023 File Type: Original Resubmit WFID: [None] Preparer: Self-Prepared Agent Indicator Code: None Employer's Correct Establishment Number: Export Format: [Federal] Include Record Separator: No Employer's Correct Employment Code: Regular Employee Name: Lott, Robin Fill Originally Reported fields: No

RCA RCE RCW

Search

Drag a column header and drop it here to group by that column

Validation Error	Record...	Employee's ...	Employee's ...	Employee's Originality ...	Employee's Originality ...	Employee's Originality ...	Employee's Correct Fr...	Employee's Correct ML...	Employee's Correct La...	Location Address	Delivery Address	City
<input type="checkbox"/>	RCW		888881002				Robin	A	Lott	6670 Sunrise		Hugoton

Total records selected: 0 (Unselect All)

1 - 1 of 1 items

Edit Edit All Export to File

Figure 4: RCW Tab

To edit a record, select the record, and click the Edit button in the lower right corner.

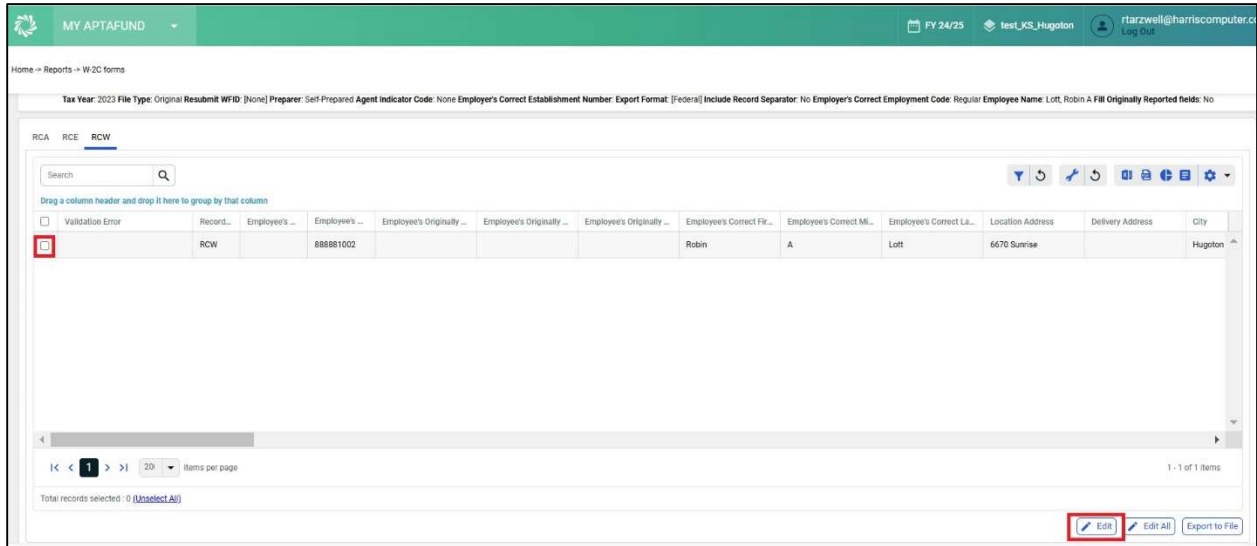


Figure 5: Selecting an RCW row for editing

When editing, a user needs to enter the originally reported amount and the corrected amount for the W-2 fields that need editing. A user does not enter in any field that does not require editing. In this illustration, only the Wages, Tips, and Other Compensation (Box 1) require editing.

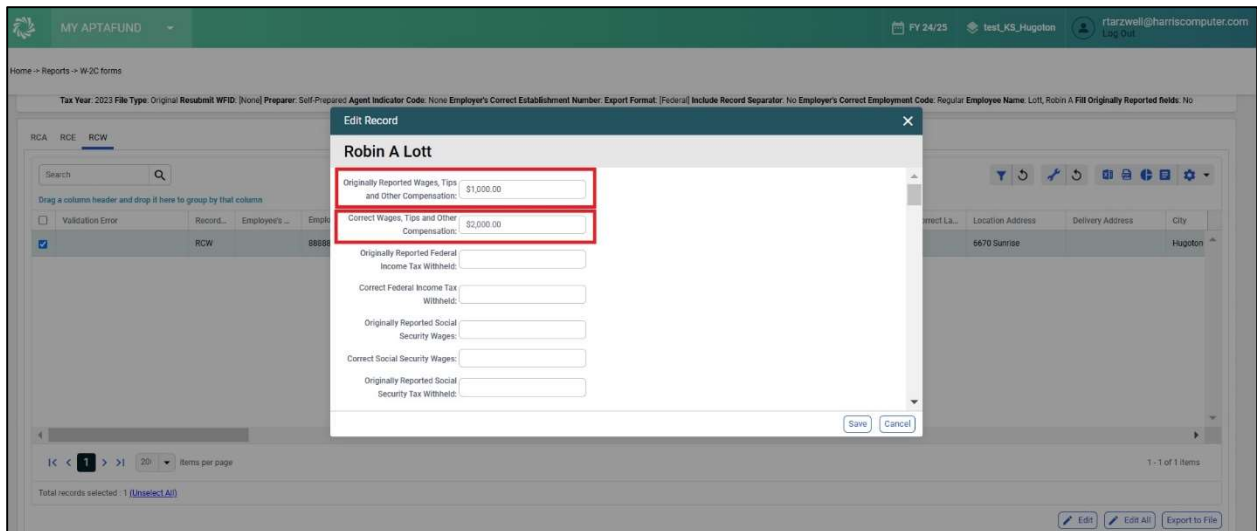


Figure 6: Editing an RCW row

The edited boxes are highlighted on the grid.

Employee's Correct Fir...	Employee's Correct M...	Employee's Correct L.a...	Location Address	Delivery Address	City	Sta...	Zip	ZIP Co...	Foreign State/Province	Foreign Po...	Co...	Originally Reported W...	Correct Wages, Tips a...	Originally Reported Fe...
Robin	A	Lott	6670 Sunrise		Hugoton	KS	679...					\$1,000.00	\$2,000.00	
Carolann	M	Prince	8697 Ridgeview Drive		Hugoton	KS	679...							

Figure 7: RCW row after editing

After completing all edits, click the Export to File button in the lower right corner of the RCW tab to create the export file to send to Social Security Administration.

```

RCA9998765435NQD76W81422      99Apta Software                               1776 Washington Ave. 1776 W
RCE2023      999876543      Apta Software                               1776 Washington A
RCW      888881002      Robin      A      Lott
RCT000000100000000010000000000000200000
RCF00000001
    
```

Figure 8: EFW2C.txt Export File