W-2 Forms - Prepare and Print or eFile

Document #:	3042	**Product:**	CenterPoint® Payroll

This document describes how to print and eFile W-2 forms using CenterPoint Payroll and Federal/State Tax Forms (Aatrix). You can print and eFile forms in any combination. For example, many people choose to eFile the federal and state copies and then print the employee copies. An increasing number of people are using the complete eFile process in which Federal and State copies are eFiled and the employee copy is printed and mailed by Aatrix. The W-2 printing/efiling process includes multiple steps which are detailed below.

Installing the Federal/State Tax Forms (Aatrix) Update:

Please note that this step can be skipped if the process was already completed when printing 1099s.

1. In CenterPoint Payroll, select **Help > Online Updates > Check for Fed/State Tax Forms Updates**. Your system will be updated with the latest Aatrix Federal and State tax forms.
2. If you don't have an internet connection at this PC, you will need to install the **Federal/State Tax Forms (Aatrix)** by downloading it from our website at a computer that does have internet access. If internet access is not available from any computers, you can call the Red Wing Software Sales department at 800-732-9464, and we'll send the updates to you on a CD once a quarter for a minimal annual fee.

Exporting Data from CenterPoint Payroll

1. Begin processing W-2s by selecting **Reports** > **Federal & State Payroll Forms & Reports** > **Federal Tax Forms**. **Note:** If you have not registered Aatrix or your registration has expired, you will be prompted to register. Step-by-step instructions on how to register Aatrix can be found in the Help. From within CenterPoint select **Help** > **CenterPoint Help**. Select **Menu** > **Installation and Registration** from the top of the screen, and then select **Register Federal/State Tax Forms (Aatrix)**.

Forms Update

If you have internet access and the latest version of Federal/State Tax Forms (Aatrix) is not installed, the following **Aatrix Update** screen will display when you select the menu selection above.

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» If you want to immediately install the update, click **Yes** and follow the on screen instructions. A progress bar will display as the update continues.
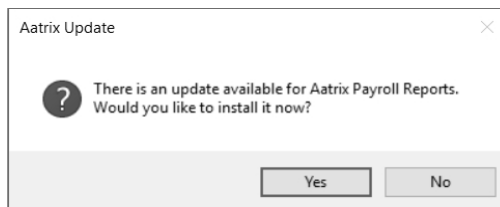
» If you do not want to immediately install the update and continue processing without the required update, click **No**.

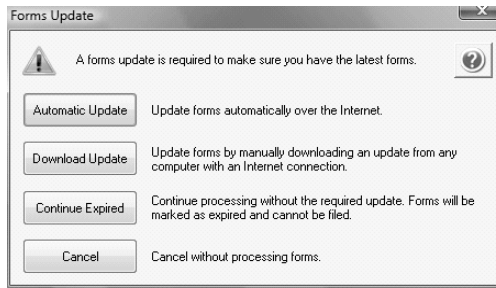2. The Federal Tax Forms screen will display.

3. Select the appropriate **Employer** and **Report Method**. When you are starting the W-2 process you will select **Normal** in the Report Method. Draft would be used if you want to continue working on a copy that was previously started but not finished. History is only used if you'd like to review the information that was processed and already printed or eFiled.
4. In the **Report** box, select **2023 W-2/W-3** and **2023** in the **Year**. Click **OK**. **Note**: If the 2023 W-2/W-3 is not available in the Report box, then the 4th quarter update for Aatrix has not yet been installed. This can be installed by clicking on **Help > Online Updates > Check for Fed/State Tax Forms Update**.
5. Under employees, select whether you want to include **Non-Agricultural Employees**, **Agricultural Employees**, or **Both**
6. Click **OK**.

> Note: If the Federal Id is blank in Setup > Employers > Taxes tab, a message will display and the form/report will not be processed until the Federal Id is entered.

7. It may take several minutes for the payroll data to be transferred to the W-2 printing process. Actual time will depend on the number of employees in your database.
8. To verify that the correct information transferred to Aatrix, you can print the W-2 Summary report from CenterPoint Payroll by selecting **Reports** > **Reports** > **Payroll Tax Data Reports** > **Reports** > **Federal Tax Reports** to verify federal, FICA, and FUTA and **Reports** > **Reports** > **Payroll Tax Data Reports** > **State & Local Tax Reports** to verify state, local withholding, and SUTA.
   » The following **Forms Update** screen will display if you chose not to perform the Aatrix update when you first selected Reports > Federal & State Payroll Forms & Reports > Federal Tax Forms or State Tax Forms. If you want to continue processing your forms without performing the required update, click **Continue Expired**. Note: Expired forms will be marked as expired and **cannot** be filed. This screen will continue to display each time you choose not to perform the required update until you click Yes when first prompted to install the available update or you click **Automatic Update** or **Download Update** to perform the required update from this screen.

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W-2 Setup

If changes have been made in CenterPoint that affect the information used on the selected form, a screen indicating that changes were detected in the company information will display.
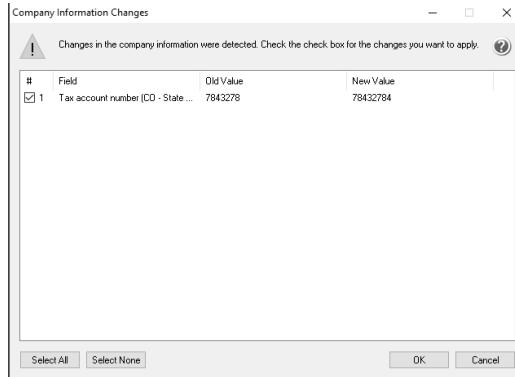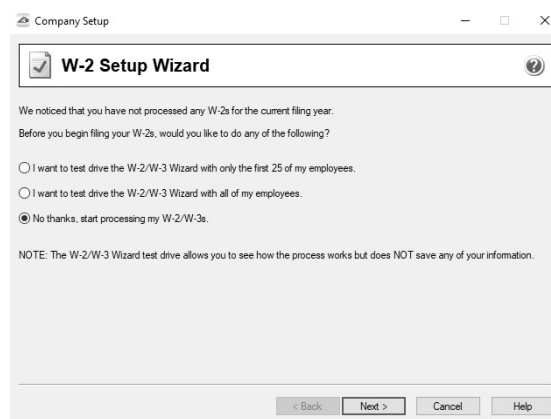

Choose to either accept or reject these changes. To accept only certain changes, use the check box provided to indicate which changes to apply.

> Note: Any changes that are accepted will overwrite the current data stored in the Company Setup Wizard in Aatrix. The Company Setup Wizard will display to allow you to review the new data updates.

> **Note**: Changing company information in Aatrix does not change company information in your Red Wing Software program. If a change is needed, it is suggested to change company information in your Red Wing Software program.

1. If this is the first time W-2s are being processed this year, the W-2 Setup Wizard will automatically be displayed. The wizard will guide you through the process of verifying data and efiling or printing year end forms. To start the actual W-2/W-3 process, select the recommended **No thanks, start processing my W-2/W-3s**, then click **Next**. To test the process prior to processing the W-2/W-3s (none of your selections or forms will be saved), you can select **I want to test drive the W-2/W-3 Wizard with only the first 25 of my employees or all of my employees**.

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> 📎 **Note**: If you started processing W-2s previously, printed, or eFiled at least one form and then exited the process, a history file would have been created. The following W-2 History File Options screen will be displayed instead of the W-2 Wizard. Choose the appropriate **Available Action** on the right and click **Next**.

» If the **Reprint Completed W-2s** or **Process Non-Filed W-2 Copies** is selected, it will automatically bring you to the W-2/1099 Preparer detailed in the next section of this document.

2. The Taxpayer Identification Number for this company is displayed. If it's correct, click **Next**. If it's incorrect, click **Cancel**. You will need to go back into your payroll program and select Setup > Payroll Details > Employers > Taxes tab to correct the number and then start the export process again.

3. The Multiple Payroll Data Files option will be displayed. Select **Yes** if you have multiple payroll databases with the same EIN, see the FAQ section in this document for more information. Otherwise select **No** and click **Next**.

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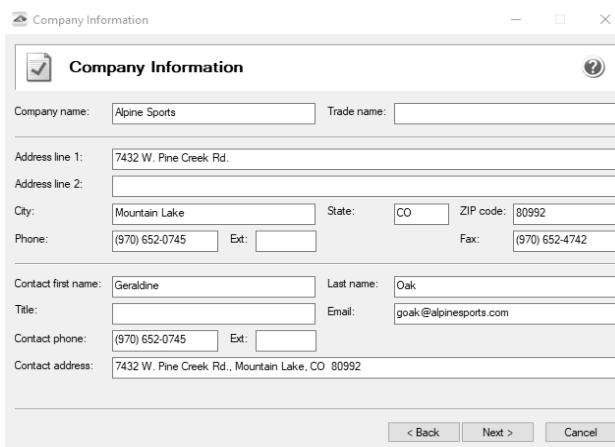
4. Review your **Company Information**. The system will notify you if any required fields have incorrect or missing information. Click **Next** if the screen is correct, if it's incorrect, click **Cancel**. You will need to go back into your program and select **Setup** > **Payroll Details** > **Employers** to correct the information and then start the export process again.
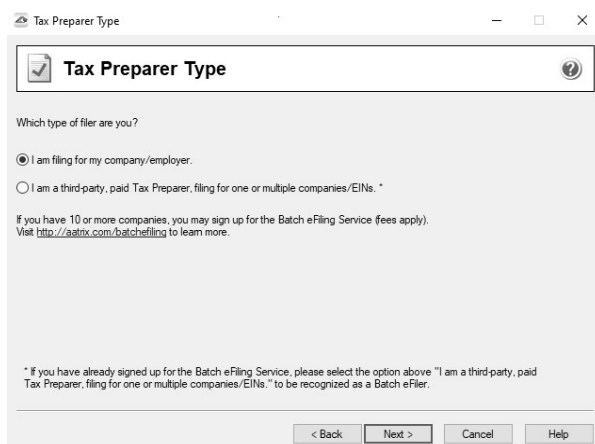
5. Specify the correct **Tax Preparer Type**. If you are processing the W-2s for your company/employer or if you are a paid 3rd party tax preparer. If you are a 3rd party tax preparer, you will then be prompted for your information. After making the selection, click **Next**.

» If you are a 3rd party tax preparer, you will then be prompted for your information. If you have **Preparer Information (Optional)** entered and **Yes** selected in the **Use Preparer information** setting in **File** > **Preferences** > **Reports** >

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Federal Tax Forms, the paid preparer information will automatically display. Otherwise, enter the information and then click **Next**.

6. The **State Items** screen will display. The Setup Wizard will automatically verify that all required information for listed states are complete and conform to the required formats. Click **Next**.

> Note: Most filing errors are due to incorrectly formatted withholding or unemployment account numbers. Verify each state and account number. See the steps listed below to edit or add account numbers.

» Click **Edit** to add any applicable information to each state, for example tax account numbers for state withholding, state unemployment, workers' compensation, etc.
» Click **Add** to add a state and applicable tax account numbers.
» If there is blank or incorrect data on the **State Items** screen, or the tax account number is improperly formatted the line will be highlighted and you will be automatically prompted to correct the data. Enter the correct Tax Account Number (Each state has different requirements, the screen that displays will guide you through the requirements for the state formatted in error.). Some states have more than one account number format, to see all account number formats available, click the "…" button in the Tax Account Number box. You will not be able to continue to the next screen of the wizard until all required fields are correct.

6. The **Local Tax Items** screen will display. The Setup Wizard will automatically verify that all required information for listed local taxes are complete and conform to the required formats. Click **Next**.

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» Click **Edit** to add any applicable information to each local tax, for example tax account numbers local taxes, etc.

» Click **Add** to add a local tax and applicable tax account numbers.

» If there is blank or incorrect data on the **Local Tax Items** screen, or the tax account number is improperly formatted the line will be highlighted and you will be automatically prompted to correct the data. Enter the correct Tax Account Number (Each locality has different requirements, the screen that displays will guide you through the requirements for the local tax formatted in error.). Some local taxes have more than one account number format, to see all account number formats available, click the "…" button in the Tax Account Number box. You will not be able to continue to the next screen of the wizard until all required fields are correct.

7. The **Data Verification** screen will display five questions. Please review and answer each question accurately as they affect how the W-2s are processed. Once all questions are answered, click **Next**.

8. Review the information on the W-3 Information screen. The Wizard will notify you if any required fields are not filled in or if data is formatted incorrectly.

» If you are filing for both Non-agricultural and Agricultural employees, select both the **941** and **943 (Agriculture)** check boxes.

» The **Kind of Employer (Box b)** field will be blank. Please select one of the employer types. Select **None apply** if you are not a 501c non-govt., State/local non-501c, State/local 501c, or Federal govt. employer.

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9. The **Employee Social Security Numbers** screen displays, determine if you want to truncate employee social security numbers and how the truncation should appear, with asterisks or X's and then click **Next**.

10. Click **Next** and the data will begin transferring to the W-2/1099 Preparer.

Prepare W-2s

The W-2/1099 Preparer will walk you through the process of efiling and/or printing your W-2s. Once the displayed data has been reviewed, click the **Next** button to continue to the next screen. The W-2/1099 Preparer will automatically verify that all required fields are filled in and the data is formatted correctly. Anytime the Preparer finds data that is incorrect or missing, it will automatically prompt you to correct it.

This is an example of what the W-2/1099 Preparer will display if it finds incorrect or missing data on a screen. If this message is displayed, simply click on the **Go Back and Correct** button and the data that needs to be corrected will be displayed in red. Click on the red data and correct the information. Once all data has been corrected, click the **Next** button again to continue to the next screen.

Error

1 employee(s) have incorrect social security numbers. Incorrect social security numbers on your W-2 forms will be rejected by the SSA. If the number begins with 9, it is likely an Individual Taxpayer Identification Number (ITIN). ITIN cannot be used for the W-2.

You must correct these errors or delete the employee(s) from your filing and process them through an alternative means; they cannot be processed through the W-2 Preparer. All cells with identified errors will be highlighted in red.

Click Help for tips on how to resolve these errors.

Error / Warning Description:

Social security number cannot be blank and must be formatted as xxx-xx-xxxx [1 errors found]

[Go Back and Correct]   [Print List...] [Help...]

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1. The first screen of the **W-2/1099 Preparer** displays the **Employee Information** (box a - f on the W-2).

W-2/1099 Preparer

Verify Employee Information — Next Step

TOTALS: Employees (12) — $683335.22 $122964.01 $701135.83 $43470.64 $714755.93 $10364.01 $31420.71

	Box a SSN	Box e Last Name	Box e First Name	Box e Middle Name	Box e Name Suffix	Box f Address Line 1	Box f Address Line 2	Box f City	S	Box 1 Fed Wages	Box 2 Fed Withheld	Box 3 SS Wages	Box 4 SS Withheld	Box 5 Medicare Wages	Box 6 Medicare Withheld	Box 7 SS Tips	Box 12D 401k Fixed Amount	Health Sav
1	465-46-5456	Apple	Sam	J		8732 Champion Way		Chicago	IL	32015.00	5620.74	33700.00	2089.40	33700.00	488.65		1685.00	
2	526-46-5465	Aspen	George	T		1632 Sicamore Cr.		Alpine	C	48445.98	12628.76	48445.98	3003.66	48445.98	702.47			
3	521-89-5222	Berry	Jerry	S		7989 S. Dogwood Ln.		Alpine	C	87081.65	14594.90	97500.00	6044.99	102081.65	1480.25		15000.00	
4	526-49-8954	Cedar	Stacey	C		899 W. 14th St.		Alpine	C	88306.05	16081.85	91990.70	5703.40	91990.70	1333.85		3684.65	
5	523-46-5433	Cottonwood	John	Q		98745 Bijou Dr.		Colorado	C	106538.45	21701.00	97500.00	6045.00	106538.45	1544.75			
6	520-46-5456	Douglas	Jeanne	Z		4789 E. 32 Ave.		Hyde Par	IL	52269.30	10688.70	53769.30	3333.75	53769.30	779.70		1500.00	
7	523-65-9811	Maple	Ted	W		1632 Seedmont Dr.		Alpine	C	34295.00	4240.67	36100.00	2238.20	36100.00	523.42		1805.00	
8	525-46-5465	Oak	Geraldine	A		617 Main St.		Rock Cre	N	54096.20	8604.43	55769.30	3457.75	55769.30	808.70		1673.10	
9	524-98-7988	Pinon	Frank	R		1742 Pine Needle Dr.		Alpine	C	31868.00	3743.48	35588.00	2206.58	35588.00	516.07		3720.00	
10	519-46-5465	Redwood	Tim	X		9842 E. California Gr		Alpine	C	60197.15	8717.60	61697.15	3825.25	61697.15	894.65		1500.00	
11	522-65-4654	Sap	Stella	S		7865 W. Grand Ave.		Lochbui	C	46427.64	9360.72	46427.64	2878.50	46427.64	673.10			
12	354-65-4655	Spruce	Joanne	A		2432 W. Grand		Red Win	N	41794.80	6981.16	42647.76	2644.16	42647.76	618.40		852.96	

Ready   CAP NUM SCRL

» If you are filing for multiple Kinds of Payers, the **Filter by** box at the top of the screen can be used to filter for **All**, **941** or **943** payers, and for each employee, in the **Employment Code** box, click the drop-down arrow and then select **943** or **941**.
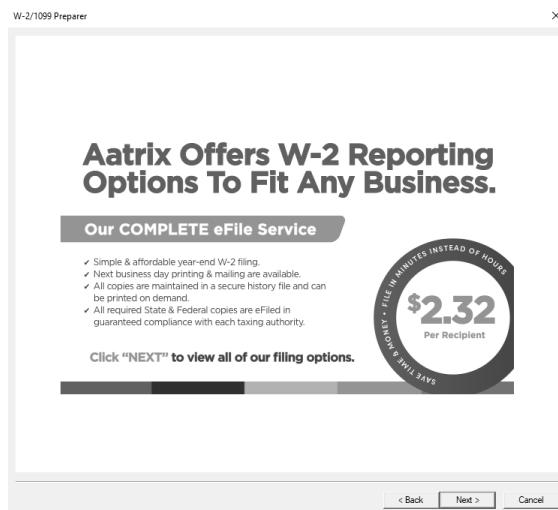
W-2/1099 Preparer

Verify Employee Information — Next Step

Use the Filter by to filter the Preparer by Employment Code

Totals Row

$683335.22 $122964.01 $701135.83 $43470.64 $714755.93 $10364.01 $31420.71

	Box e Name Suffix	Box f Address Line 1	Box f Address Line 2	Box f City	Box f State/Province	Box f Zip/Postal Code	Box f Country Code	Kind Of Payer Employment Code	Box 1 Fed Wages	Box 2 Fed Withheld	Box 3 SS Wages	Box 4 SS Withheld	Box 5 Medicare Wages	Box 6 Medicare Withheld	Box 7 SS Tips	Box 8 Tips	Box 12D 401k Fixed Amount
1		8732 Champion Way		Chicago	IL	60615	US	941	32015.00	5620.74	33700.00	2089.40	33700.00	488.65			1685.00
2		1632 Sicamore Cr.		Alpine	CO	80942	US	941	48445.98	12628.76	48445.98	3003.66	48445.98	702.47			
3		7989 S. Dogwood Ln.		Alpine	CO			941	87081.65	14594.90	97500.00	6044.99	102081.65	1480.25			15000.00
4		899 W. 14th St.		Alpine	CO			941	88306.05	16081.85	91990.70	5703.40	91990.70	1333.85			3684.65
5		98745 Bijou Dr.		Colorado	CO			943	106538.45	21701.00	97500.00	6045.00	106538.45	1544.75			
6		4789 E. 32 Ave.		Hyde Par	IL	60615	US	941	52269.30	10688.70	53769.30	3333.75	53769.30	779.70			1500.00
7		1632 Seedmont Dr.		Alpine	CO	80942	US	941	34295.00	4240.67	36100.00	2238.20	36100.00	523.42			1805.00
8		617 Main St.		Rock Cre	MN	55067	US	941	54096.20	8604.43	55769.30	3457.75	55769.30	808.70			1673.10
9		1742 Pine Needle Dr.		Alpine	CO	80942	US	941	31868.00	3743.48	35588.00	2206.58	35588.00	516.07			3720.00
10		9842 E. California Gr		Alpine	CO	80942	US	941	60197.15	8717.60	61697.15	3825.25	61697.15	894.65			1500.00
11		7865 W. Grand Ave.		Lochbui	CO	80601	US	941	46427.64	9360.72	46427.64	2878.50	46427.64	673.10			
12		2432 W. Grand		Red Win	MN	55066	US	941	41794.80	6981.16	42647.76	2644.16	42647.76	618.40			852.96

Select your Employment Code

Ready   CAP NUM SCRL

» To add a line to the W-2/1099 Preparer grid, right-click over one of the line numbers on the left side of the screen and select **Insert Row**, enter the number of rows you want to add to the end of the list of employees, and then manually enter the new information into the grid.

» To delete a line from the W-2/1099 Preparer grid, right-click over the line you want to remove, and then select **Remove Row**.

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» To copy a line on the W-2/1099 Preparer grid, right-click over the line you want to copy, and then select **Copy**.
» To add a copied line to the W-2/1099 Preparer grid, right-click over the line where the copied row should be inserted, and then click **Paste**.
» To Find information in a column in the W-2/1099 Preparer grid, right-click on the column header name, select **Find**, in the **Find What** box, enter the information you want to locate, and then click **Find Next**.

2. Click **Next Step** or the **Next** button at the top of the screen.

Note: The total for the columns appears above the column in the Totals Row.

3. The **Verify Additional Employee Information** screen will display next. Review/edit the supplied data, and then click **Next Step** or the **Next** button. Note: on all pages of the W-2/1099 Preparer, there is a Filter by option in the top right that allows you to view just 941 employees, 943 employees or both. This box is only available if you have included both 941 and 943 employees in this company.
4. Continue reviewing/editing the supplied data and clicking **Next Step** or the **Next** button on each screen displayed.
5. When a Complete eFile Service informational screen displays, click **Next**.
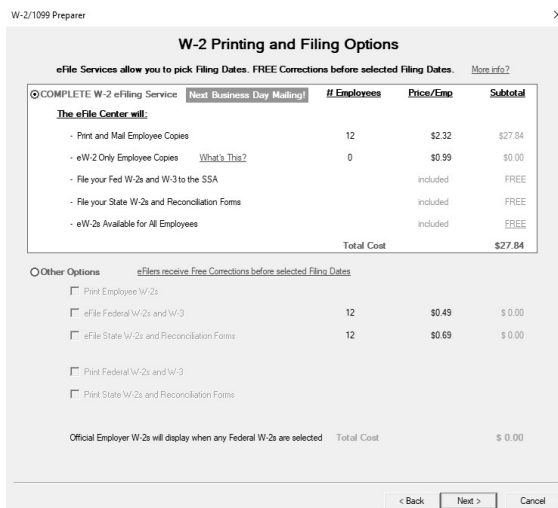
6. The **W-2 Printing and Filing Options** screen will display. eFiling options are displayed with the costs associated, but that service is optional. Printing forms is free of charge. Choose the appropriate options for your company, and then click **Next**.
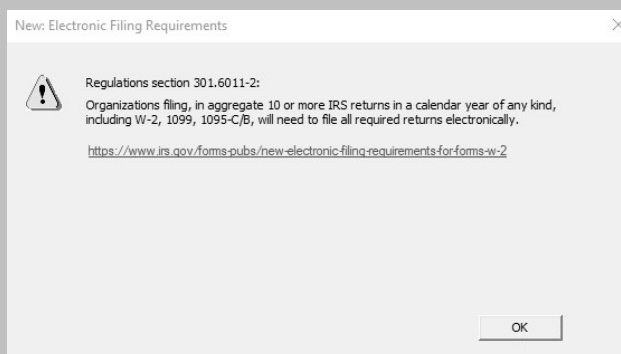
Note: If you chose to print your Federal forms, you will receive a New Electronic Filing Requirements screen. This screen outlines the regulation the IRS and the Department of Treasury changed on February 21, 2023 which changed the Federal eFile threshold for 2023 from 250 to 10. Click here for more information. Click **OK** to return to the filing options screen to continue printing if you are compliant or make eFiling selections to remain compliant.

New: Electronic Filing Requirements
×

⚠ Regulations section 301.6011-2:
Organizations filing, in aggregate 10 or more IRS returns in a calendar year of any kind, including W-2, 1099, 1095-C/B, will need to file all required returns electronically.

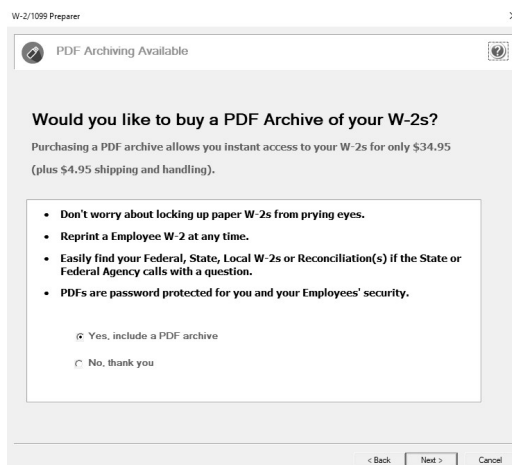https://www.irs.gov/forms-pubs/new-electronic-filing-requirements-for-forms-w-2

OK

Many states have lowered the efiling requirements to align with the new Federal requirement and you will receive a New Electronic Filing Requirements screen when printing state copies. Click **OK** to return to the filing options screen to continue printing if you are compliant or make eFiling selections to remain compliant.
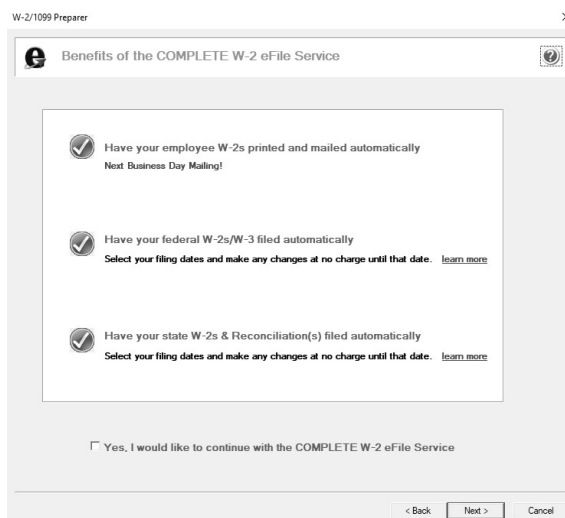
New: Electronic Filing Requirements
×

⚠ Many states have lowered the electronic filing requirements to align with the new federal requirement of electronic filing if more than 10 returns.

OK
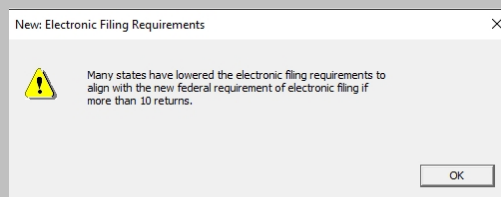
7. If you chose the **W-2 eFiling Service**, you have the option to purchase a PDF archive on a USB drive of your W-2s, select **Yes, include a PDF archive** to purchase an archive or select **No, thank you** to continue without purchasing an archive.

Red Wing Software recommends purchasing a PDF Archive of your W-2s as a backup so you can easily view or reprint a filed W-2 form. If your Aatrix History file becomes corrupt, the file cannot be located, or you get a new computer and the file is not copied to your new computer the PDF Archive can be used instead. See the Frequently Asked Questions section of this document for information about backing up the Aatrix History file.

W-2/1099 Preparer
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PDF Archiving Available

Would you like to buy a PDF Archive of your W-2s?

Purchasing a PDF archive allows you instant access to your W-2s for only $34.95
(plus $4.95 shipping and handling).

• **Don't worry about locking up paper W-2s from prying eyes.**
• **Reprint a Employee W-2 at any time.**
• **Easily find your Federal, State, Local W-2s or Reconciliation(s) if the State or Federal Agency calls with a question.**
• **PDFs are password protected for you and your Employees' security.**

⦿ Yes, include a PDF archive

○ No, thank you

< Back   Next >   Cancel

8. If you have not chosen the Complete W-2 eFiling Service option, you have another chance to select that service instead of printing the W-2s yourself. Click **Next** to continue.

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» If you use the Complete eFiling Service for your W-2 forms, there are applicable discounts for using the complete eFile service for your ACA 1095 forms. To qualify for discounted 1095s:
  a. eFile your W-2s using the Aatrix W-2 Complete eFile Service.
  b. Select a mail date for your employee W-2s that provides you with enough time to complete your ACA filing (the mail date may be adjusted at efile.aatrix.com up to one day prior of the set date).
  c. eFile your ACA forms utilizing the Aatrix Complete eFiling Service and save 50%.

» There may be additional discounts available when you select the UNLIMITED eFile Package which includes Federal & State Unemployment, Wage Withholding Report, New Hire Reports/Payments, and ANY Associated Payment, it does not include additional discounted W-2s, 1099s, or 1095s. Package pricing is based on the number of employees in your company.

9. The states screen will be displayed if you chose to print or eFile any state forms. States can be unselected if you'd like to file them at a later date. Then click **Next**.

10. The **Review Data** screen will be displayed. If you select the Print button, it will create a printed version of exactly what displays on this screen. If any changes are needed, click **Back**. Otherwise click **Next** to continue.
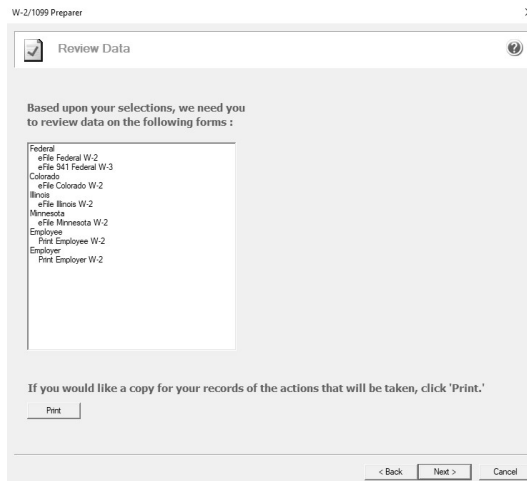
Print/eFile W-2s

11. The first W-2 form will be displayed. The form type is displayed in the yellow bar. Note: If you are using the Complete eFiling Service, you will not be able to view your employee copies while in the Forms Viewer. If you would like to view your employee W-2 forms, please choose to reprint in the W-2 History File Options screen at the end of this process. It also specifies how many different forms were selected to be printed.

   » To print this first form, click **Print Final**. You will be prompted to enter either plain paper or perforated paper. Click **OK**. Once the data is printed, click **Next Step** to continue to the next selected form.

12. The next form will be displayed. Click **Print Copy** or **Print Final** to print the form, then click **Next Step** to continue to the next form. Repeat this process for each selected form.
13. Depending on the form selected to print, the following message may be displayed. Selecting **Double Check** will bring you back to the previous screen so you can verify your data. Selecting **Agree** will bring you to the eFiling login screen.

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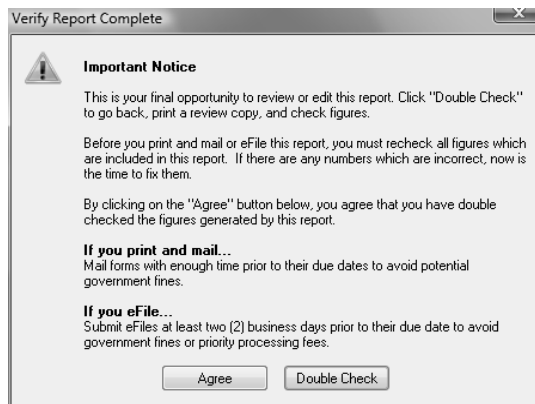
eFile W-2 Forms

> This section will not display if you have not chosen to eFile your W-2 forms.

» If you have chosen to eFile any of your forms, and you have not filed previously, the Aatrix Secure eFile screen will be displayed.
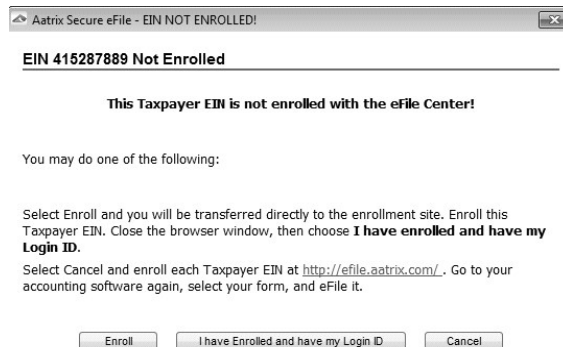
» If you are not enrolled to eFile with Aatrix, you can do one of the following:

> » Click the https://efile.aatrix.com link to be transferred immediately to the to the Aatrix website, then click **Enroll** in the upper-right corner to begin the enrollment process. After you are enrolled, close the Browser window and select **I have enrolled and have my Login Id**. Enter your login information and then follow the onscreen instructions to eFile your forms.

> » Click **Cancel** and enroll each Taxpayer EIN at http://efile.aatrix.com. Go back to CenterPoint, select your forms to eFile, **click I have enrolled and have my Login Id**, enter your login information, and then follow the onscreen instructions to eFile your forms.

» If you are enrolled to eFile with Aatrix, click **I have Enrolled and have my Login ID**, enter your login information, and then follow the onscreen instructions to eFile your forms.
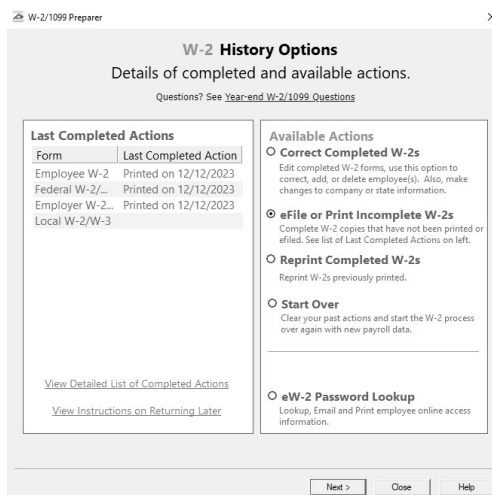
» If you need additional information during the eFile process, [click here](#) or enter https://www.aatrix.com/support/knowledgebase/windows/ to view answers to common questions.

» For additional information about eFiling and to view videos about the eFile process, [click here](#) or enter http://partner.aatrix.com/redwing

» You will have the option to select to allow your employees to securely import their W-2 information into certain tax software products by approving the Aatrix Tax Form Transfer Agreement displayed during the eFiling process.

» When the eFile process is complete, the Complete screen will indicate that your filing was successfully received for processing. A confirmation email will be sent to the email address specified on this screen.

» The AFID (Aatrix Filing Identifier) is a number assigned to your submission for tracking purposes. If you contact Aatrix Support, they will request this number.

> Note: It is important to write this number down. It will be required when contacting the eFile Center with questions about your submission.

» If you eFiled your W-2 forms, and have questions regarding your filing, contact Aatrix by email at helpme@aatrix.com, on their website at https://efile.aatrix.com/ by clicking **Login** and entering your Aatrix username and password, or on their website at https://efile.aatrix.com/ by clicking the **Search our FAQs** button.

14. Upon exiting the W-2 process, the **W-2 History File Options** screen is displayed. If no other actions are needed at this time, select **Close**.

» This screen will also be displayed if the W-2 printing process is started again and you can select to reprint, eFile or print incomplete W-2s, correct, or start the W-2 process again (if you've submitted any of the filing, you'll need to reprint or correct the W-2 forms).

» Use the W-2 Password Lookup selection to see a full list of your employee passwords and you can distribute as you'd like.

Frequently Asked Questions

Q: Are there any important changes to the W-2 filing process for 2023?

A: On February 21, 2023, the IRS and the Department of the Treasury changed the Federal eFile threshold for 2023 from 250 to 10. Click here for more information. For specific W-2 and ACA form information, click here.

Q. Where do I enter the employer identification number (EIN) that is required when running Federal or State tax forms?

A. Select **Setup > Payroll Details > Employers**. Select your **Employer** and click **Edit**. Click on the **Taxes** tab. Under the **Taxes** in the upper left, select **Federal** to display the **Tax Details** on the right. Enter your **Federal Tax Id**.

Each state you calculate payroll taxes with is also listed under the Taxes in the upper left side of the Taxes tab. Under the State, select the **State tax** such as the State withholding or State unemployment to display the **Tax Details** on the right. Enter your **State Id #**. Click **Save** after completing each required State tax number.

Q. How can I verify taxable wages and tax amounts for this year prior to printing W-2s?

A: To verify those amounts, you can print the W-2 Summary report from **Reports** > **Reports** > **Payroll Tax Data Reports** > **Reports** > **Federal Tax Reports** to verify Federal, FICA, and FUTA and **Reports** > **Reports** > **Payroll Tax Data Reports** > **State & Local Tax Reports** to verify state, local withholding, and SUTA.

Q. When is the 2023 filing deadline for W-2 forms?

A: The Internal Revenue Service filing deadline for W-2 forms submitted to the Social Security Administration can be located by using the Search feature on the Internal Revenue Service website at www.irs.gov.

Q. What are the 2023 eFiling deadlines for W-2 Forms?

A. eFiling deadlines can be located from this link: https://efile.aatrix.com/pages/public/FilingDeadlinesPublic.aspx?v=ATX000

Q: I have deductions/benefits that have a code that must appear in Box 8,10, 11, 12, or 14, where do I set that code up?

A: The **Employee** or **Employer** Box 8, 10, 11, 12, or 14 options can be selected in **Setup** > **Deductions & Benefits** > **Detail** tab > **General** tab from the **W-2 - Box Options** box.

Q: How can I determine how many employee W-2 forms I printed last year?

A: The Federal Tax Withheld by Employee report can be used to determine the number of W-2 forms printed last year by selecting **Reports** > **Reports** > **Payroll Tax Data Reports** > **Federal Tax Reports** > **Federal Tax Withheld by Employee** report and using a **Pay Date of Last Year**. The Records included in total will be the number of employee W-2 forms that were printed last year.

Q. I want to send my employee's W-2 forms electronically to be viewed online with Aatrix. How do I set up my employees to receive electronic copies?

1. Select **Reports** > **Federal & State Payroll Forms & Reports** > **Federal Tax Forms**.
2. In the **Report** box, select **Electronic W2 Consent**. In the **Year** box, enter **2023**, and in the **Time Period** box, select **One Year**.
3. Follow the on-screen instructions until the form displays, then edit, print, and distribute to your employees. Have your employees sign and return for your records.
4. Make sure each employee (**Setup** > **Employees**) has an email address on file on the **General** tab and the **Consent to Electronic W-2** on the **Payroll** tab selected if they consented to receiving their W-2 electronically.
5. Process your W-2s from **Reports** > **Federal & State Payroll Forms & Reports** > **Federal Tax Forms** by selecting **2023 W-2/W-3**.
6. After the grid of employees displays and is verfied/edited, the W-2 Printing and Filing Options screen will display, select **Complete W-2 eFiling Service** and follow the on-screen instructions to eFile.

Q. Do I need to order W-2/W-3 forms or can I print them on plain paper?

A. You are able to print all of your W-2 copies on plain paper; you no longer need to print any on preprinted forms. Even the W-3 Social Security Copy A (often called the "red copy") can be printed on plain paper. Note: There is special perforated blank paper available that is recommended for use when printing employee copies of the W-2s. This paper comes with employee W-2 information printed on the back of the paper (for the employee copy) and blank for the State / Local copies. This paper is

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available from Computer Forms, Inc. at https://redwing.computerforms.biz/c/tax_forms or by calling 800-458-0158. All orders are 25% off until December 31, 2023 (use promotion code RWCFITD when ordering).

Q. Do I need to print my W-2 forms before I close the 2023 year and print January checks?

A. There is no closing process in CenterPoint Payroll, so W-2 forms can be printed anytime.

Q. Why is the 2023 W-2 not available in the list when I select Reports > Federal & State Payroll Tax Forms & Reports?

A. You need to install the latest update of Aatrix Federal and State Tax Forms. Select **Help > Online Updates > Check for Fed/State Tax Forms Updates**. Your system will be updated with the latest Aatrix Federal and State tax forms.

Q. I'm trying to process my Federal forms (W-2, 1099, etc.), but I keep getting the message "Would you like to register now, or evaluate?"

A. You will need to manually register your Federal/State Tax Forms (Aatrix) software.

1. Call Red Wing Software at 1-800-732-9464 and request an Aatrix Registration code.
2. Open **CenterPoint**
3. Select **Help > Product Registration > Federal/State Tax Forms Registration**.
4. In the **Aatrix Registration Key** box, enter the key you were given by Red Wing Software (do not enter the dashes).
5. Click **Submit**.
6. At the **Registration Successful** message, click **OK**.
7. Click **Close**.
8. Your Aatrix software is registered through the last day of the month of your Customer Care Plan anniversary date.

Q. Why am I getting a "forms update" or "mandatory update" message when I try to process my Federal forms (W-2, 1099, etc.) and what do I need to do?

A. At least once a quarter, including at year end, updates are created for the Federal/State Tax Forms (Aatrix) software. When you receive either of those messages, it means that Aatrix has an update available that you should install prior to continuing. If you have internet access at this computer, you can simply select **Automatic Update** and follow the prompts to do the update through the program.

> If you have signed up for the service that automatically sends an Aatrix flash drive at the end of each quarter, please follow the instructions that will be included with the flash drive. Those flash drives will begin shipping before January 1, 2024.

If you don't have internet access at the computer that has CenterPoint Payroll installed, but you do have it available at another workstation, follow the instructions below. This process does require the use of a removable drive (CD, thumb, zip or flash drive, USB Drive, etc.).

1. Log into the Red Wing Software website at **www.redwingsoftware.com**, from the **Welcome, (Your Name)** menu, select **My Account Home**, select the **Downloads** tab, under **CenterPoint Payroll** select **Downloads**, and then select **Federal/State Tax Forms (Aatrix)**. Click the download file and then follow the on-screen instructions.
2. When the download is complete, exit the website. Copy the **RedWingForms.exe** file from your desktop to the removable drive (CD, thumb drive, etc.) you'll be using to move the downloaded file.
3. Take the removable media source to the computer with CenterPoint Payroll and install by double-clicking on the **RedWingForms.exe**.

If you don't have an internet connection at any of the computers, you can call the Red Wing Software Sales department at 800-732-9464, and we'll send the Federal/State tax forms (Aatrix) updates to you on a flash drive once a quarter for a minimal annual fee.

Q. Can I change the figures on my Federal reports if they are incorrect?

A. Yes, once the data is in Aatrix Federal/State Tax Forms, you can change any figure on the reports that are highlighted blue. Any figure that is highlighted red must be changed before you can print the report. Any figure that is white cannot be changed, but it is a calculated number, so it can be changed by adjusting the fields around the white field.

> Changing the figures on this screen will only change the printed Federal reports, it will not change the data in your payroll program. If you make changes, you need to make sure your 941/943 report amounts match your W-2 report amounts for federal wages, social security, medicare wages, and withholding amounts.

Q. How can I ensure I have a copy of my Federal & State Reporting tax forms to review for historical purposes or when moving to a different computer?

A: The Aatrix History File contains your historical Federal/State Tax Forms and it is necessary to back this file up on a regular basis so that if you purchase a new computer the history can easily be transferred to the new computer by restoring the backup. Red Wing Software suggests backing up your Aatrix History File on a quarterly basis.

1. Select **File > Backup > Backup Aatrix History**.
2. Select the employers to back up history files for.
3. Click **OK**.
4. Select a location to save the AatrixHistoryBackup.zip file to, and then click **Save**.
5. At the Back Up Created message, click **OK**.

> The Aatrix History File folder will have one or more sub-folders, each sub-folder contains files for a specific EIN number.

If networked, the default location of the Aatrix history files can be changed by following these steps:

1. Select **File** > **Preferences** > **Reports** > **Federal/State Tax Forms**.
2. Click the **Application** tab.
3. In the **Use Non-Default File Location** box, select **Yes**.
4. In the **Non-Default File Location** box, the default Red Wing Software suggested file location displays: <ProgramData>\Red Wing Software\CenterPoint\Aatrix\. Change this location to the network location you want to save the Aatrix History file to.
5. Click **Save**.

> You can still perform a manual back up of the Aatrix history files by following the local computer steps above.

Q. I'm attempting to log in to the Red Wing Software website, but it does not recognize my Email and/or Password? What should I do?

A. Follow the instructions below for information about the Red Wing Software website.

To log in to the Red Wing Software website:

1. In your web browser, enter **www.redwingsoftware.com**, and press Enter.
2. In the upper-right of the Red Wing Software home page, click **Log in**.
3. Enter your **Email Address** and your **Password**.
4. Click **Log in**.

To register on the Red Wing Software website:

If you have not previously registered or logged in on the Red Wing Software website, please follow the steps below:

1. In your web browser, enter **www.redwingsoftware.com**, and press Enter.
2. In the upper-right of the Red Wing Software home page, click **Log in**.
3. Click **Register**.
4. In the **Account Number** box, enter your company **Account Number**. Your Account Number can be located in a few different places:
   a. From within CenterPoint by selecting **Help** > **About**.
   b. On the Support Certificate that you receive upon renewing Customer Care Membership.
   c. Red Wing Software sends customers a renewal form for Customer Care Membership. This renewal form contains your account number.
   d. Invoices you've received from Red Wing Software contain your account number.
   e. If others at your company have already registered, they can sign into their account and find your company's account number at www.redwingsoftware.com/home/myaccount.

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5. Continue entering your **Title**, **First and Last Name**, **Email Address** (which is your login) and a **Password**.
6. Enter the displayed **Security Verification** code, and then click **Submit**.

To retrieve a forgotten password:

1. In your web browser, enter **www.redwingsoftware.com**, and press Enter.
2. In the upper-right of the Red Wing Software home page, click **Log in**.
3. Click the ✉ **Forgot** link.
4. Enter/verify your **Email Address**, click **Send**, and then click **Close**.
5. Wait until you receive an email that includes instructions to reset your password.
6. Click the link in the email that you received from Red Wing Software.
7. Enter the **Validation Code** which was included in the email. If you enter the code and it is not recognized, copy and paste the code from the email. The Validation Code expires in 24 hours.
8. Enter a **New Password** and then **Re-enter the New Password**.
9. Click **Submit**.
10. Click **OK**.

To log out of the Red Wing Software website:

1. At the top of the Red Wing Software home page, click **Welcome, (Your Name)**.
2. In the displayed menu, select **Log out**.

Q: I'm trying to eFile my W-2s and I can't remember my Aatrix eFile username and/or password, how can I get it?

A: We recommend you contact Aatrix by calling 800-426-0854 or by clicking on the Forgot Login button.

Q: I eFiled my W-2 forms, and I have questions regarding my filing, how do I contact Aatrix ?

A: For specific questions regarding your filing, you can contact Aatrix by email at helpme@aatrix.com, on their website at https://efile.aatrix.com/ by clicking **Login** and entering your Aatrix username and password, or on their website at https://efile.aatrix.com/ by clicking the **Search our FAQs** button.

Q: If I use the Complete eFiling Service for my W-2 forms, are there any applicable discounts for using the complete eFile service for my ACA 1095 forms?

A: Yes, the Aatrix ACA Complete eFile Service can print and mail employee copies and eFile the required reports to the IRS at a discounted rate. To qualify for discounted 1095s, follow the steps below:

1. eFile your W-2s using the Aatrix W-2 Complete eFile Service.
2. Select a mail date for your employee W-2s that provides you with enough time to complete your ACA filing (the mail date may be adjusted at efile.aatrix.com up to one day prior of the set date).
3. eFile your ACA forms utilizing the Aatrix Complete eFiling Service and save 50%.

» There may be additional discounts available when you select the UNLIMITED eFile Package which includes Federal & State Unemployment, Wage Withholding Report, New Hire Reports/Payments, and ANY Associated Payment, it does not include additional discounted W-2s, 1099s, or 1095s. Package pricing is based on the number of employees in your company.

Q: After exporting my data, I was asked to register Federal/State Tax Forms Aatrix. How do I register?

A. You will need to manually register your Federal/State Tax Forms (Aatrix) software.

1. Call Red Wing Software at 1-800-732-9464 and request an Aatrix Registration code.
2. Open **CenterPoint**
3. Select **Help > Product Registration > Federal/State Tax Forms Registration**.
4. In the **Aatrix Registration Key** box, enter the key you were given by Red Wing Software (do not enter the dashes).
5. Click **Submit**.
6. At the **Registration Successful** message, click **OK**.
7. Click **Close**.
8. Your Aatrix software is registered through the last day of the month of your Customer Care Plan anniversary date.

Q: I have multiple payroll databases for one EIN; how do I merge the databases so I get one set of W-2s?

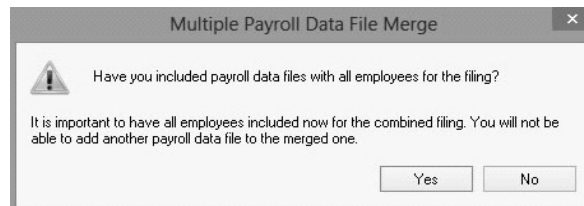**A:** Follow the steps below to merge multiple databases into one set of W-2s:

1. Start the W-2 process and continue until the Multiple Payroll Data Files screen displays. On the **Multiple Payroll Data Files** screen, select **Yes**, I use multiple payroll data files for the EIN and click **Next** to continue.
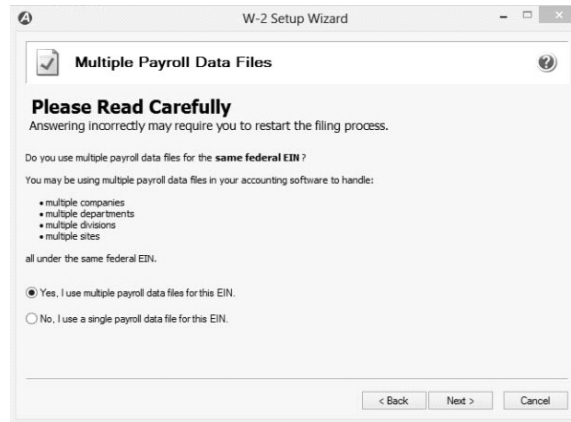
2. The next **Multiple Payroll Data Files** screen displays, click **Save,** enter a name for the payroll data file, and click **Close**.
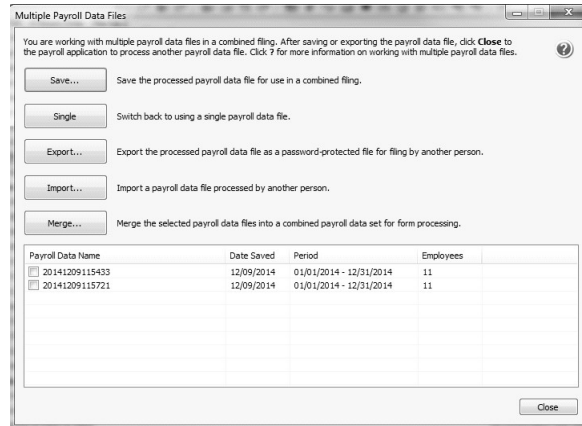
3. Open the other database(s) and repeat steps 1-2 above for all databases you want to merge. When all data files are saved, continue to step 4.
4. At the bottom of the **Multiple Payroll Data Files** screen, select each database to be merged and then click **Merge.**
5. On the **Multiple Payroll Data File Merge** screen, click **Yes**.

6. On the **Multiple Payroll Data Files** screen, click **Continue** to continue processing W-2s.

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