



W2 Edit List Instruction Sheet

A W2 edit list was included with your payroll closest to November 1st, 2023. Please read the below instructions, make any changes, and send them back to us no later than Friday, December 1st, 2023.

If you do not send them back we will assume that all of the information on the W2 edit list is correct. If you later notify us that W2 corrections are necessary, you will incur fees.

Company/ Address and ID #'s –

This is what will print on the W2. Make sure that this is your legal company name and valid ID #.

Employee Name –

Please verify the employee name per the social security card; do not use nicknames. Confirm that individuals with recent marital status changes have updated the Social Security Administration, in addition to updating the W2 Edit List. **(Please REMOVE ANY (or @ * ‘ symbols in your Employee Names)**

W2 or 1099 –

Individuals with an Annual Form Type of 'W2' or 'W2 &1099', will receive a W2. Please confirm that all employees are classified as W2 if applicable. Individuals with an Annual Form Type of '1099' or 'W2 & 1099', will receive a 1099M, 1099NEC or 1099R as applicable. Unless specifically requested PayData will only generate a 1099M or 1099NEC if it is over the \$600.00 Federal minimum. **(if you are reporting any Deceased Employee Wages, be sure to notify your CSR)**

Pension / Deferred Comp –

If you are reporting these through payroll, the W2 boxes will automatically be checked. Only notify us if your employees have a pension or deferred compensation that is not reported through payroll. **(if you have 2 Employee setups for one EE, be sure these setups are identical)**

Statutory Employee –

Special groups of employees identified by law (e.g., fulltime life insurance agents, certain home workers) whose wages are not subject to federal income tax withholdings but are subject to Social Security, Medicare and FUTA taxes.

Social Security Numbers –

Confirm that social security numbers are valid. Valid social security numbers can not start with 000. Also current SSA documents indicate that no numbers above 799 have been issued. Example: 799-XX-XXXX

- **Remote users:** Please make all changes in Evolution and fax or email the last page signed to your Client Service Representative. If the change was made to a Social Security Number, please send an email to your Client Service Representative detailing the change.
- **Fax, esheet, email, evoClock, phone clients:** Please indicate all necessary changes and fax or email the report to your Client Service Representative. If you are emailing, please make sure to password protect the document. If no changes are necessary, please indicate no changes, sign and return the last page.

Please contact your Client Service Representative with any questions.