



I4: W-2 REPORTING

Effective Date: 10/22/02

Prior Date: 11/21/00

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Purpose and Scope	Authority and Responsibility	References
Definitions	Questions	Sample
Deadline	Reporting Periods	Process
Multiple W-2's		Inaccurate, Missing or Lost W-2's

Purpose and Scope

W-2's are prepared to report employee earnings to the State of Illinois and the Internal Revenue Service and to provide copies to employees for submission with their tax returns.

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[Loretta K. Pienta](#)

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Authority and Responsibility

1. The Payroll Office is responsible for having the W-2 forms generated, reviewing them, distributing them to employees and generating replacement forms.
2. ADP is responsible for submitting the W-2 data to the Social Security Administration, the State of Illinois and the Internal Revenue Service.

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References

<http://www.irs.gov/> (use W-2 as a key word)

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Definitions

W-2: The wage and tax information form distributed by employers to employees for filing with their federal and state tax returns.

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Deadline

The deadline for mailing W-2's to employees is January 31 of each year.

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Reporting Periods

1. W-2's include all earnings through December 15 for status employees paid on an anticipated basis. Earnings from December 16 through December 31 are included in the following year's W-2 form for these employees.
2. The W-2's include all earnings through November 30 for students, temporary and extra help employees paid on a delayed basis. Earnings from December 1 through December 31 are included in the following year's W-2 form for these employees.

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Process

Payroll Office staff will:

1. request ADP generate sample W-2 forms,
2. review and verify the sample W-2 forms,
3. request the actual W-2 forms be generated,
4. mail the W-2's to the employees one week before the deadline,
5. attempt to correct W-2's that are returned with incorrect addresses, and
6. generate replacement W-2C's, whenever necessary.

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Multiple W-2's

1. Students or temporary extra help who become Civil Service employees, Civil Service who become A & P employees, retirees who return as visiting lecturers or part time faculty within the same calendar year will receive more than one W-2 for the year.
2. Employees who change their taxing status during the year; i.e., students or temporary civil service who change their Medicare deductions will receive more than one W-2 for the year.

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Inaccurate, Missing or Lost W-2's

Supervisors should direct employees that report inaccurate, missing or lost W-2's to contact the Payroll Office, E-225, extension 5195. Payroll staff will generate a replacement.

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Sample

W-2 Form

1 Wages, tips, other comp. 1440.00		2 Federal income tax withheld 105.64	
3 Social security wages 1440.00		4 Social security tax withheld 89.28	
5 Medicare wages and tips 1440.00		6 Medicare tax withheld 20.88	
a Control Number	Dept. 131446	Corp.	Employer use only T 1
c Employer's name, address, and ZIP code NORTHEASTERN ILLINOIS UNIVERSITY 5500 N ST LOUIS AVE CHICAGO IL 60625			
Batch #02240			
b Employer's FEIN number	d Employee's SSA number		
7 Social security tips	8 Allocated tips		
9 Advance EIC payment	10 Dependent care benefits		
11 Nonqualified plans	12a See instructions for box 12		
14 Other	12b		
	12c		
	12d		
	13 Stat emp.	Ret. plan	3rd party sick pay
e/f Employee's name, address and ZIP code			
15 State Employer's state ID no. IL	16 State wages, tips, etc. 1440.00		
17 State inc tax 33.20	18 Local wages, tips, etc.		
19 Local income tax	20 Locality name		
Safe, accurate, FAST! Use IRS e-file Visit the IRS Web Site at www.irs.gov .			
Employee Reference Copy W-2 Wage and Tax Statement 2001 Copy C for employee's records. OMB No. 1545-0008			

This blue Earnings Summary section is included with your W-2 to help describe portions in more detail. The reverse side includes general information that you may also find helpful.

1. The following information reflects your final 2001 pay stub plus any adjustments submitted by your employer.

Gross Pay	1440.00	Social Security Tax Withheld Box 4 of W-2	89.28	IL State Income Tax Box 17 of W-2 SUI/SDI Box 14 of W-2	33.20
Fed. Income Tax Withheld Box 2 of W-2	105.64	Medicare Tax Withheld Box 6 of W-2	20.88		

2. Your Gross Pay Was Adjusted as follows to produce your W-2 Statement.

	Wages, Tips, other Wages Box 1 of W-2	Social Security Wages Box 3 of W-2	Medicare Wages Box 5 of W-2	IL State Wages, Tips, Etc. Box 16 of W-2
Gross Pay	1,440.00	1,440.00	1,440.00	1,440.00
Reported W-2 Wages	1,440.00	1,440.00	1,440.00	1,440.00

3. Employee W-4 Profile. To change your Employee W-4 Profile Information, file a new W-4 with your payroll dept.

Social Security Number: _____
Taxable Marital Status: MARRIED
Exemptions/Allowances:
FEDERAL: 4
STATE: 4

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Questions

Questions about W-2's should be directed to the Payroll Office, E-225, extension 5195.

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