Payroll Checklist

These items can be done as soon as your 2025 software is set up

- o Update leave balances and rate of pay
    - o Click File Maintenance
    - o Click Amend Rates of Pay
    - o Make appropriate updates to: wages, leave, duties, county tax rate
- o Run 2025 payroll (as needed)

Creating W2s for Employees

Create W2s

- o Open W2 Program
- o Confirm Federal ID, State ID, Library name and address
- o Click on Fix W2 Info
    - o Check for any two-line addresses and update to one line
    - o Check that there are no commas in duties
- o Build W2 file
- o Print W2s on paper and CHECK FOR ACCURACY
- o Print two on official W2 form and check for alignment (call AVC if they are not aligned)
- o Print all copies of W2 for all employees
- o Print W-3

Create 100R

- o Build 100R Information File
- o View 100R Information
    - o Check to make sure first line shows headings (call AVC if the first line is not headings)
- o Build Gateway 100R csv file
- o Connect to Gateway Website and upload file

If you are uploading W2s to the state:

- o Click Required information to Upload W2s to Indiana Department of Revenue
- o Confirm information
- o Click Build W2 for transfer
- o Print filing guidelines
- o Connect to IN.GOV and follow guidelines

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