

Keystone Payroll Year End Update Instructions December 31, 2007

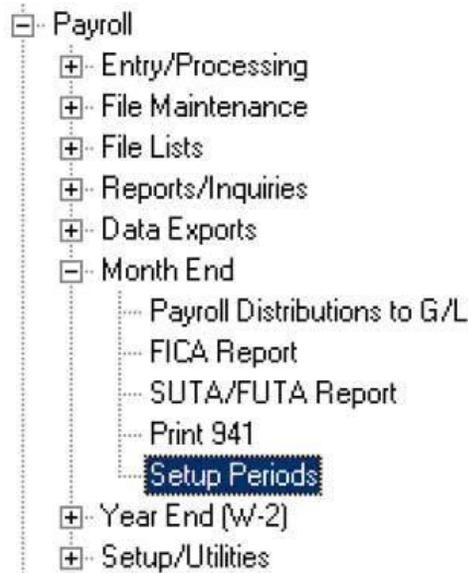
After your last 2007 payroll and before your first 2008 payroll:

1. Make two (2) CD (or similarly permanent media) backups. Label these “2007 Payroll Year End.”
2. Install the 2008 W-2/Tax Table Update (see “Performing a Web Update” below.)
Important: After installing the update, please verify that the Build number listed at the bottom of the Keystone menu is 2.0.24.0 or higher.
3. Set up periods for 2008 (see “Setting up Payroll Periods” below.)

Setting up Payroll Periods

Note: Perform this procedure for each company that has payroll

1. Select “Setup Periods” from the Payroll Month End menu.



Setup Payroll Periods

File Edit Help

Year: 2008

Period	Begin Date	End Date	Status
1	1/1/2008	1/31/2008	O
2	2/1/2008	2/29/2008	O
3	3/1/2008	3/31/2008	O
4	4/1/2008	4/30/2008	O
5	5/1/2008	5/31/2008	O
6	6/1/2008	6/30/2008	O
7	7/1/2008	7/31/2008	O
8	8/1/2008	8/31/2008	O
9	9/1/2008	9/30/2008	O
10	10/1/2008	10/31/2008	O
11	11/1/2008	11/30/2008	O

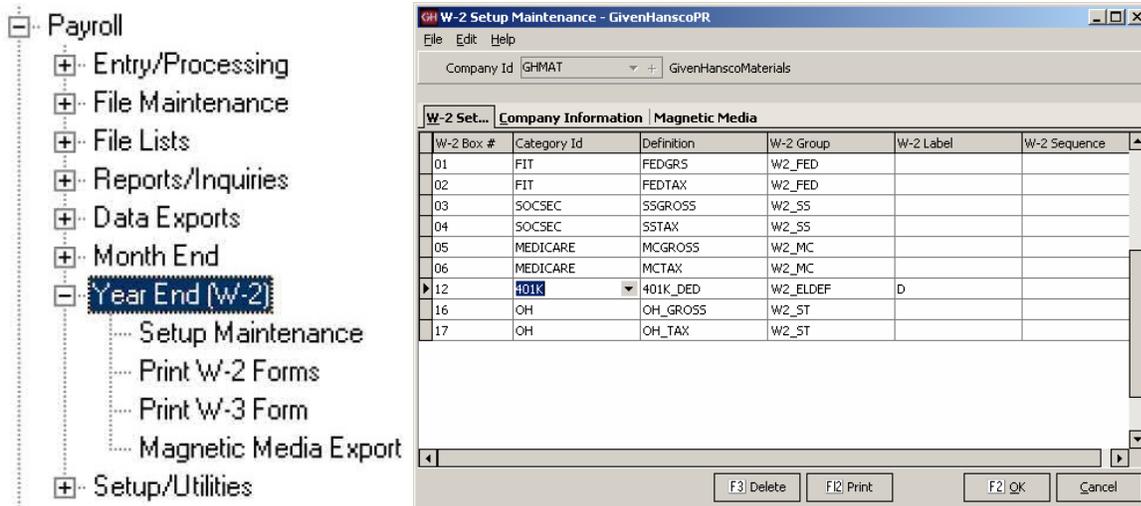
F2 OK Cancel

2. Enter “2008” in the Year box.
3. Follow the prompts to fill in the 12 calendar months automatically.
4. Click OK or press F2 when done.

Printing W2s

Note: Perform this procedure for each company that has payroll.

1. Select "Setup Maintenance" from the Payroll Year End (W-2) menu.



2. Define the appropriate value for each W-2 box:
 - a. Select the appropriate box # from the drop-down list.
 - b. Select the appropriate Category Id from the drop-down list.
 - c. Select the appropriate Definition from the drop-down list.
 - d. The W-2 Group will be filled in automatically.
 - e. Leave the W-2 Sequence blank, except in the following cases:
 - i. for multiple states, number each state beginning at 1
 - ii. for multiple local taxes, number each locality beginning at 1
 - f. Fill in the W-2 Label with the Locality Name for local taxes only.

3. Click on the Company Information tab:
 - a. Fill in the W-2 EIN field with the appropriate number
 - b. Fill in the Contact information.
 - c. List each state in the grid at the bottom of the window:
 - i. Select the Tax Code from the drop-down list.
 - ii. Fill in the 2 letter state code in the Description box.
 - iii. Fill in the State EIN box with the appropriate value.
 - iv. Select "Other Tax" for Tax Type.
 - v. The remaining fields are required **only for Magnetic Media filing**.
4. **For Magnetic Media filing only**, fill in the information on the Magnetic Media tab.

GH W-2 Setup Maintenance - GivenHanscoPR

File Edit Help

Company Id GHMAT GivenHanscoMaterials

W-2 Setup Company Information **Magnetic Media**

Other E.I.N.

Pin # 99999999

Notify Method Postal Mail

Terminated?

3rd Party Sick?

Resubmitting?

Resub File Id

F3 Delete F2 Print F2 OK Cancel

5. Click OK or press F2 to save the W-2 Setup information.

6. Select the "Print W-2 Forms" option from the Payroll Year End (W-2) menu.
7. Verify that the Year is correct (this should be the Tax Year that you are printing W-2s for --e.g. 2007).
8. To print an audit list to verify W-2 accuracy, click the Print button (or click Preview to view on the screen.)

GH Print W-2 Forms - GivenHansco PR

File Edit Help

Printer Name: Dell [Properties...]

Report Sequence: Social Security No.

Selection Criteria	Field	Beginning	Ending
	Control No.		

Options **Advanced**

Year (e.g. 2004): 2007

W-2 Form Type: W-2 Audit List

[F12] Print [F11] Preview Cancel

9. When W-2 accuracy has been verified, select the appropriate W-2 Form Type for your type of printer, then click the Print button.

GH Print W-2 Forms - GivenHansco PR

File Edit Help

Printer Name: Dell [Properties...]

Report Sequence: Social Security No.

Selection Criteria	Field	Beginning	Ending
	Control No.		

Options **Advanced**

Year (e.g. 2004): 2007

W-2 Form Type: W-2 (2-up) Laser/Inkjet

[F12] Print [F11] Preview Cancel

10. You may need to use the Advanced tab to adjust the Top and/or Left Margin settings for your particular printer.

Print W-2 Forms - GivenHansco PR

File Edit Help

Printer Name: Dell [Properties...]

Report Sequence: Social Security No.

Field	Beginning	Ending
Control No.		

Optio... **Advanced**

Top Margin: .5 (in.)

Left Margin: .5 (in.)

[F12] Print [F11] Preview Cancel

11. When all W-2 forms have been printed and verified, select the “Print W-3 Form” option from the Payroll Year End (W-2) menu.

12. Select the appropriate form type for your printer, then click the Print button.

Print W-3 Form - GivenHansco PR

File Edit Help

Printer Name: Dell [Properties...]

Report Sequence: W-3 Sequence

Selection Criteria: No selection fields are available for this report.

Optio... **Advanced**

Year (e.g. 2004): 2007

W-3 Form Type: W-3 Laser/Inkjet

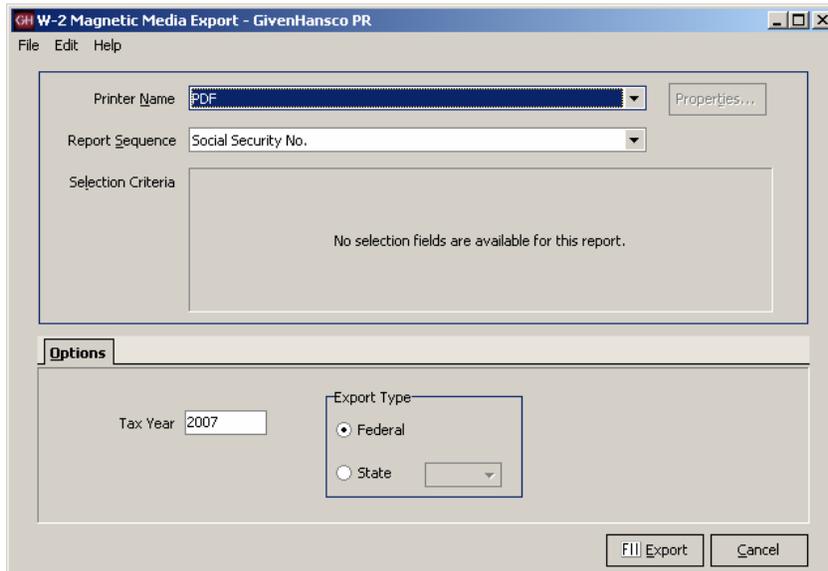
[F12] Print [F11] Preview Cancel

Note: If you are not filing Magnetic Media W-2s, skip the remaining steps (13-21.)

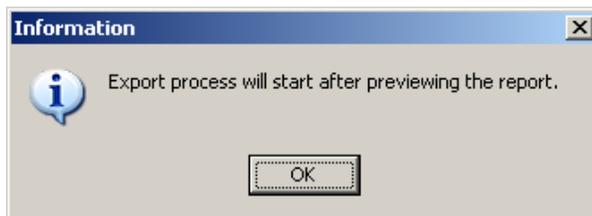
13. For Magnetic Media filing only, select the “Magnetic Media Export” option from the Payroll Year End (W-2) menu.

14. Verify that the Tax Year is correct (this should be the Tax Year that you just printed W-2s for --e.g. 2006.)

15. Click the Export button.



16. The following message appears:

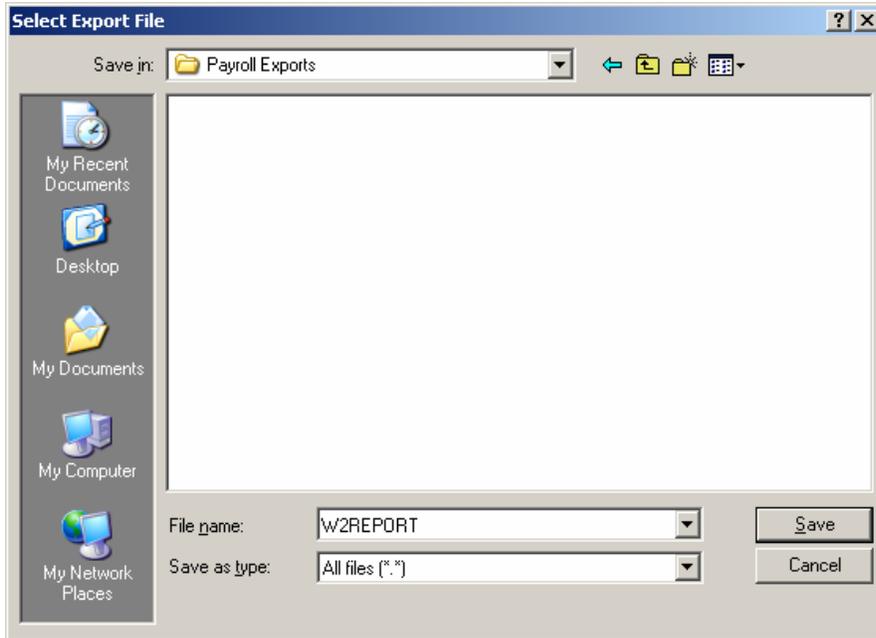


17. Click the OK button to preview the export. Verify accuracy and close the window.

18. The following message will appear:



19. Click Yes to proceed with the export. You will be asked to select the location to save the Magnetic Media export file to. The file name must be left as "W2REPORT."



20. Once the file has been exported, the following message appears:



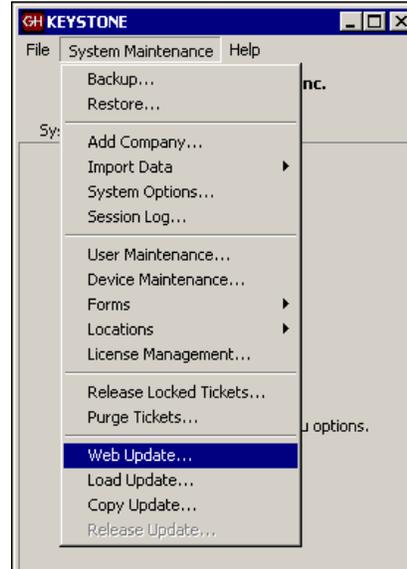
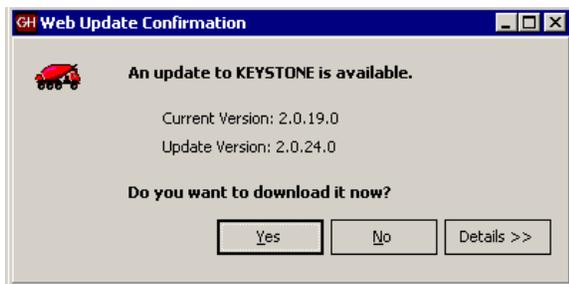
21. GivenHansco strongly recommends that Magnetic Media export files be verified with the SSA's AccuWage program before filing. You can obtain this program on the Internet at: <http://www.ssa.gov/employer/accuwage>.

Performing a Web Update

1. Connect to the internet

Note: Some internet services disconnect after 10 or 15 minutes without activity from a web browser. If you are getting disconnected frequently while downloading a web update, open Internet Explorer and do a "Refresh / Reload" of your home page.

2. Login to Keystone as ADMIN.
3. Click on System Maintenance
4. Click on Web
5. When the next box appears, click OK to continue.
6. After a few moments, the computer will determine if a new update is available.



7. Click Yes to download the update.



8. Downloads vary depending on internet connection speed. (If you are disconnected, you must start from the beginning – this ensures the integrity of the downloaded data)
9. When the download is complete, you will be asked if you wish to release the update. This is the process by which programs and data are updated. **WARNING: YOU CANNOT RELEASE AN UPDATE WHILE ANYBODY IS LOGGED INTO KEYSTONE! MAKE SURE ALL USERS ARE COMPLETELY LOGGED OUT**
10. Release the update on the server.
11. When the update is installed on the server, Login to each company. This will start the Database upgrade. It is important that all users stay out of a company until the upgrade is complete.
12. Go to each workstation and login to Keystone. It must be released **ONE WORKSTATION AT A TIME!**

NOTE: Terminal Server Computers: Keystone update must be released from the console of Terminal Server computers before any of the remote sites can regain access.