



2013 W-2/1099R CD-ROM User's Guide

For Customer Support please call:

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Please retain this manual for future use of the W-2 CD ROM.

Encryption

For additional security your 2013 W-2 CD-ROM has been encrypted using SecureDisc Client 2.4.2 software. **You will need to install the SecureDisc Client software upgrade on your PC.** Once you insert your CD into the disc drive, the disc will show up in your CD drive as "SD_Encrypted." Double click on the CD. Once the CD is open, double click on "SCD Client242.exe." This will start the process to uninstall the older version of SecureDisc and install SecureDisc Client 2.4.2. For step by step instruction see attachment "Installing SecureDisc Resident Client 2.4.2."

System Requirements

- Microsoft Operating System
- Microsoft .NET Framework 2.0 Service Pack 2
- Microsoft Excel version 2003 or newer

Opening Your W-2 CD

Insert the CD into your CD reader. You will be prompted to enter your SecureDisc passphrase for drive D: **This should be the same as your W-2 password.** Once the password has been entered, select Log in... "Login OK" will appear in green if successful.

- An installation wizard should start running shortly after logging in thru SecureDisc.
 - Click on Next; Select the location that this will be saved/installed
 - Select Everyone, click on next, click on next again, click on close/finish
- If the installation wizard does not auto run, you can open the W-2 database manually by double clicking on the **W2Viewer2012.exe** application located on the root of the CD ROM. The W2 Viewer window will open and you will see a blank W-2 Form in red.
- The installation wizard installs the viewer on your desktop. Double click on the desktop icon "Shortcut to W2Viewer2012.exe" to open the viewer

FOR FUTURE USE: You can simply access the W2 Viewer from your desktop, you do not need to insert the CD ROM. If you do insert the CD, simply select cancel on the installation wizard and work from the desktop icon.

Logging into Your W-2 CD

Replace with the assigned W-2 password and click on the "Login" button. If the correct password was entered the message, "Loading data please wait" will appear. If password was incorrect, the user will be prompted to re-enter the password.

Navigating Throughout the W-2 CD ROM

- After a successful login, all available W-2 PSIDs will be listed on the left hand side of the screen.
- Click on the plus (to the left of the PSID) to reveal all W-2s within each PSID.
- To View the W-2 form for a specific employee click on the employee's name and the W-2 will appear on the right hand side of the screen.
- You can navigate through the different W-2 Copies (Copy A – D, 1 & 2) by clicking on the specific copy you wish to view in the top right corner of the screen.

Searching for W-2s

You can search for a specific W-2 form in three ways. Select the specific search criteria and then enter in the value:

Searching by Last Name

- Click on "Last Name" under the Search criteria section of the screen
- Click in the "Value:" box and type in the last name of the employee's W-2 form you wish to see. Select Search
- Click on the plus sign to the left of the PSID to reveal results
- Wild Card searches are permitted (i.e. If searching for Smith you can type in Sm*)
- To return to view ALL W-2 forms, click on the "ALL" button



Searching by SSN

- Click on “SS Number” under the Search criteria section of the screen
- Click on the Values box and populate box with numbers from SSN
- Enter in the entire or partial SS Number and then select Search

Searching by State

- This will search on the “Local Wages” state/Box 15.
- Click on “State” under the Search criteria section of the screen
- Using the drop down function, select the state of your choosing. Select Search

Printing W-2 forms

You have the option to print several different ways. Printing options are available after selecting “Print”

1. Current – means you wish to print the highlighted form (or the form you are viewing in the PSID list)
 - a. Selected copy (the copy that you are viewing)
 - b. All Copies (Copies A, B, C, D, 1, 2)
2. Checked – means you wish to print all forms that are checked in the PSID List
 - c. Selected copy (the copy that you are viewing)
 - d. All Copies (Copies A, B, C, D, 1, 2)

Exporting W-2 Records into Excel


You can export one or multiple PSIDs to excel. This will place the information from each box on the W-2 into a separate column in the spreadsheet. *If you do not see the option to export data, your company has opted out of the Export to Excel Feature.

- Place a check in the box to the left of the PSID(s) you would like to export
- Select Export W2 Data
- A second window will open; select the specific boxes you wish to export, or choose the Select All option.
- Select Export and then choose the proper location to save the spreadsheet.

W-2C Form

- For your convenience a W-2C form has been added to the CD ROM.
- While viewing a W-2, select W2C
- Choose either With Values or Blank (with values will populate the W2C with all of the current information from the W2 you are viewing)
- You will be prompted to choose a location to save the file; you will also need to name the form (ex. John Smith), select save.
- If you have Adobe Reader, after saving this PDF in step 4, please browse to the document and open in Adobe Pro if you wish to save. If you do not have Adobe Pro, you will not be able to save; you must print to retain this record.
- On page two you will find the form for Copy A in Red. Update the boxes on the RED form and all other pages will populate accordingly.
- Save all changes – this will not change anything on the W-2 CD ROM itself. This will only save as a PDF.

1099R Forms

- To View the 1099R forms, click on the  button on the tool bar.
- Searching and printing is exactly the same as the W2 options (see above for details)
- You can not export 1099R data into excel

Protect Yourself with a Backup Copy

We encourage you to order an additional copy of your W-2 CD for back up and disaster recovery before we purge your data!!! Additional copies are \$68.00 + S/H. To order a duplicate copy, please contact the D2X Customer Service Team.