2015 W-2/1099R CD-ROM User's Guide

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

Encryption

Your CD-ROM has been encrypted using SecureDisc Client. To verify whether you have the SecureDisc program, go to Start→ Programs→ look for SecureDisc from the list of programs. If you do not have SecureDisc installed, you will need to download from www.ceridian.com/securedisc. Scroll to the bottom of the web page and select SecureDisc Client Installation File (EXE version). **You will need to reboot after this program is installed.**

System Requirements

- Microsoft Operating System
- Microsoft .NET Framework 4.5
- Microsoft Excel version 2003 or newer

Opening Your W-2 CD

- Insert the CD in the CD/DVD Drive. You will be prompted to enter your SecureDisc passphrase. **This is the same as your W-2 password unless you have a custom password**. Once the password has been entered, select Login… "**Login OK**" will appear.
- Navigate to the CD/DVD drive on your Computer.
- Double click on the W2_Viewer_2015.exe. The W2 Viewer window will open and you will see a blank W-2 Form in red.
- Replace Access Code `Access Code` `Login` 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.
- Optional: To install the W2 Viewer Shortcut to your desktop, follow the instructions at the end of this document.

Navigating Through the W-2 CD Viewer

- 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.
- 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 W2 recipient by last name, social security number or state.

- Enter the desired search criteria in the "Value:" box
- Select Search
- Click on 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 W2 forms, click on the "ALL" button

Printing W-2 forms

- Select "Print" from the top of the viewer
  - Current - will print the highlighted form (or the form you are currently viewing)
  - Checked - will print all forms that are checked
  - Selected copy-will print only the copy that you are viewing
  - All Copies- will print Copies A, B, C, D, 1, 2
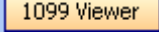
Exporting W-2 Records to Excel

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
- Select the specific boxes you wish to export, or choose the Select All option → Select Export
- Choose the desired location to save the spreadsheet.

W-2C Form

- 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)
- Choose a file name and location → select save.
- 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 [1099 Viewer] button on the tool bar.
- Searching and printing is exactly the same as the W2 options (see above for details)
- You cannot export 1099R data into excel

Installing the W2 Viewer

1. Create a new folder and name it 2015 W2 Viewer.
2. Navigate to the CD/DVD drive and open the W2 CD.
3. Copy ALL files from the CD to the new W2 folder that was created in step 1.
4. Right click on the W2_Viewer_2015.exe and select Create Shortcut from the dropdown menu.
5. Copy the W2 Viewer Shortcut to your desktop.

For Customer Support please call:
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