



PeopleSoft Payroll Year-End Processing Training Agenda

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AGENDA

- **PROCESS STEPS FOR ELECTRONIC SELF SERVICE FORMS W-2 IN PEOPLESOFT 9.2**
- **YEAR END SET UP STEPS**
- **STEPS TO PREPARING TAX DATA TO PRODUCE YEAR-END FORMS**

PeopleSoft delivers the majority of the year end changes with Tax Update 18D. Along with the normal Tax Update documentation a year end document is also delivered. Review the year end document before applying tax update 18D. There are instructions if this is the first time for creating W-2s using PeopleSoft. Also, there are instructions on which tables have to be updated before applying the Tax Update 18D.

The process steps for Electronic Self Service Forms W-2 in PeopleSoft 9.2

If W-2s were produced using PeopleSoft for 2017 there are several queries are needed to determine if deductions or earnings are new for the calendar year and if they need to be mapped to the W-2 tables.

- Query the Earnings Balance table for the current year and the previous year and determine if new earnings codes are used for the current year. Determine if the new earnings codes impact the W-2. If yes, it will need to be added to the W-2 table and possibly to the Print Form Parameter table
- Query the Deduction Balance table for the current year and the previous year and determine if new earnings codes are used for the current year. Determine if the new earnings codes impact the W-2. If yes, it will need to be added to the W-2 table and possibly to the Print Form Parameter table.
- Query the W-2 table to review the Earnings mapping to the W-2 table.
- Query the W-2 table to review the Deduction mapping to the W-2 table.
- Query the W-2 table to review the Tax mapping to the W-2.
- Query the W-2 Company Table and Compare the Tax Balance table pulling company and Tax Class E. This will identify any new companies for the current year.

Before applying Tax Update 18D Step one must be completed. The step will be in the year end documentation delivered with Tax Update 18D.