

LET'S HAVE A PICTURE  
PERFECT YEAR END

picture perfect  
*year end 2014*

# Seminar Courtesies

- Silence cell phone
- Ask questions at any time
- Parking lot for items to research
- Participate and Enjoy!!



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# Agenda

- Introductions
- Year End Processing Dates
- What's New with Forms and Legislation?
- Year Round Checklist
- System Enhancements



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# Goals and Objectives

- ✓ Identify year end best practices
- ✓ Prepare for a successful year end
- ✓ Hear legislative updates
- ✓ Determine services, products or enhancements that add value to your organization



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holidays  
&  
important  
dates



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# ADP WNSC Bank Holidays

Date	Holiday	ADP	Bank
November 27th Thursday	Thanksgiving	Holiday	Holiday
November 28th Friday	Day After Thanksgiving	Open	Open
December 25 <sup>th</sup> Thursday	Christmas Day	Holiday	Holiday
January 1st Thursday	New Year's Day	Holiday	Holiday
January 19th Monday	Martin Luther King Day	Open	Holiday



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# W2 and Tax Processing Dates

Date	Processing Information
November 20, Thursday	Deadline for Qtr 1-3, 2014 adjustments to be included as amendments and reflected on returns
December 26, Friday	Begin processing Forms W-2 and 1099
January 8, Thursday	Quarter and year end close by 12:00 noon local time. Last day to release W-2s (entire company)
January 14, Wednesday	Last day to process and release partial W-2 and 1099 adjustments by 5pm PST. Blackout period begins
January 19, Monday	W2s loaded to PRWC by end of day (Puerto Rico W2's will be loaded at a later date)
January 26, Monday	W-2s and 1099s to leave ADP facility for distribution by this date at the latest
February 2, Monday	Begin producing Forms W-2Cs
February 2, Monday	Begin distribution of fourth quarter SODs
March 30, Monday	Begin distribution of annual SODs



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# Federal Tax Deposit Dates

Date	Federal Tax Deposits > \$100,000
December 31, 2014 Wednesday	Last day to process payrolls over \$100,000 in liabilities with a check date of December 31, 2014
January 2, 2015 Friday	Deposit due for liabilities greater than \$100,000 with a check date of December 31, 2014

Date	Federal Tax Deposits < \$100,000
January 6, 2015 Tuesday	Last day to process payrolls under \$100,000 in liabilities with a check date of December 31, 2014
January 7, 2015 Wednesday	Deposit due for liabilities under \$100,000 with a check date of December 31, 2014



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What's New for 2014

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# W2 Changes

- Box 12Z
  - Description Change
  - Income under a nonqualified deferred compensation plan that fails to satisfy section 409A. This amount is also included in Box 1.



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# W2 Changes

- Box 18
  - KY Locals
  - Full subject wages to print in Box 18 regardless if those wages are greater than the taxable wages.
  - Impacted Locals:
    - BAR – Bardstown License Fee
    - CO1 – Covington EIT
    - COV – Covington EIT
    - CRH – Crestview Hills License Fee
    - FCI – Franklin City License Fee
    - FWR – Fort Wright
    - OHI – Ohio County License Fee
    - PAH – Park Hills License Fee



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# Wage Base Limits and Percentages

Limits and Rates	2014	2015
Social Security Base Limit	\$117,000	\$118,500
Social Security Tax Rate	6.2%	
Medicare Wage Limit	None	
Medicare Tax Rate (FMed and FSUR)	1.45% plus .9% over \$200,000	
FUTA Wage Limit	\$7,000	
FUTA Effective Tax Rate	.06%	



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# Deferred Compensation Limits

Description	Limit Code	2014	2015
401(k), 403(b), and 457 Plan Limit	4KP, 43B, 45G	\$17,500	\$18,000
Eligible YTD Gross Compensation	4KQ	\$260,000	\$265,000
Combined limit for all contributions	4KT	\$52,000	\$53,000
401(k), 403(b), and 457 Catch-up Limit	CU1, CU2	\$5,500	\$6,000
401(k) Puerto Rico Plan Limit	4PT	\$15,000	
401(k) Puerto Rico Catch-up Limit	4PC	\$1,500	



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# HSA Limits

Description	2014	2015
Contribution Limit Self-only HDHP coverage	\$3,300	\$3,350
Contribution Limit Family HDHP coverage	\$6,550	\$6,650
Minimum Deductible Self-only coverage	\$1,250	\$1,300
Minimum Deductible Family coverage	\$2,500	\$2,600
Maximum out of pocket Self-only coverage	\$6,350	\$6,450
Maximum out of pocket Family coverage	\$12,700	\$12,900



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# 2015 Tax Tables

- Downloads available to clients on Thursday, November 20th for pick up
- 2014 or 2015 CheckPro checks can then be created – Use Caution!



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# Pop Quiz

Question:

When is the last day to release 2014 W2 for your entire company?



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# Answer

January 8, 2015 (Thursday) at 12 noon local time



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# REMINDERS

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# Mergers and Acquisitions

- November 3 - Last day to submit Company Addition request and FEIN or Legal Name changes effective 1-1-2015



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# Affordable Care Act (ACA)- Reminders

- Required IRS reporting begins January 2016 for 2015
  - Form 1095-C (Employee statements):  
January 31, 2016 (in conjunction with W-2 distribution)
  - Form 1094-C (Employer Transmittal):  
February 28, 2016 (or March 31, 2016 if filed electronically)
- The IRS forms are to be completed by the client
- Review Eye on Washington for details



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# Additional sources for ACA

- Governmental sites:

<http://www.healthcare.gov>

[www.dol.gov/ebsa/healthreform](http://www.dol.gov/ebsa/healthreform)

- ADP websites:

<http://www.adp.com/tools-and-resources/adp-research-institute/insights.aspx> (Eye on Washington)

<http://www.adp.com/health-care-reform/>



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# Year End Reports

Year Round Checklist

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# Year Round Checklist

- Use proactively to eliminate Year End stress
  - Year Round Checklist
    - Use this each quarter end
    - Everything you needed to know about Year End
    - Tailor it to your department needs

Located in the VIP room under YE Resource Book



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# Calendar Level

- Review the remaining 2014 payroll processing dates
- Identify the West NSC and bank holidays
- Review the 2015 payroll process calendar
- Send calendar changes to your Client Service Consultant



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# Annual Payroll Calendar Report

## Meeting of the Minds

## Annual Payroll Calendar Report

\*\* Callin or Delivery falls on Sat. or \$ Check Date falls on Bank Holiday  
 # Callin falls on Pro or Bank Holiday ! Delivery falls on National Holiday  
 @ Delivery falls on or before Callin ?H Indicates a bank holiday impacting  
 ? Federal Law dictates 48 business the 48 hour lead time needed for direct  
 hours lead time for direct deposit deposit.

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COMPID: MOTM

PAYGROUP: 1

Pay Num	Callin	Delivery	Start	End	Check	G/L Per	Days Accr	Accr %	Holiday Pay	Hrs	Tax Cyc	Exception	Frequency Codes
14	Wed 07/26/0X	Thu 07/27/0X	Sun 07/16/0X	Mon 07/31/0X	Mon 07/31/0X	7	0	0	0	0	-	DWL/RPS/FXE/	M2,A2,ML,ME
15	Thu 08/10/0X	Fri 08/11/0X	Tue 08/01/0X	Tue 08/15/0X	Tue 08/15/0X	8	0	0	0	0	-	DWL/RPS/FXE/	M1,A1,MF,MB
16	Mon 08/28/0X	Tue 08/29/0X	Wed 08/16/0X	Thu 08/31/0X	Thu 08/31/0X	8	0	0	0	0	-	DWL/RPS/FXE/	M2,A2,ML,ME
17	Tue 09/12/0X	Wed 09/13/0X	Fri 09/01/0X	Fri 09/15/0X	Fri 09/15/0X	9	0	0	0	0	-	DWL/RPS/FXE/	M1,A1,MF,MB
18	Tue 09/26/0X	Wed 09/27/0X	Sat 09/16/0X	Sat 09/30/0X	Fri 09/29/0X	9	0	0	0	0	-	DWL/RPS/FXE/	M2,A2,ML,ME,QL,QE
19	Tue 10/10/0X	Wed 10/11/0X	Sun 10/01/0X	Sun 10/15/0X	Fri 10/13/0X	10	0	0	0	0	-	DWL/RPS/FXE/	M1,A1,MF,MB,QF,QB
20	Thu 10/26/0X	Fri 10/27/0X	Mon 10/16/0X	Tue 10/31/0X	Tue 10/31/0X	10	0	0	0	0	-	DWL/RPS/FXE/	M2,A2,ML,ME
21	Fri 11/10/0X ?H	Mon 11/13/0X	Wed 11/01/0X	Wed 11/15/0X	Wed 11/15/0X	11	0	0	0	0	-	DWL/RPS/FXE/	M1,A1,MF,MB
22	Mon 11/27/0X	Tue 11/28/0X	Thu 11/16/0X	Thu 11/30/0X	Thu 11/30/0X	11	0	0	0	0	-	DWL/RPS/FXE/	M2,A2,ML,ME
23	Tue 12/12/0X	Wed 12/13/0X	Fri 12/01/0X	Fri 12/15/0X	Fri 12/15/0X	12	0	0	0	0	-	DWL/RPS/FXE/	M1,A1,MF,MB
24	Tue 12/19/0X	Wed 12/20/0X	Sat 12/16/0X	Sun 12/31/0X	Fri 12/22/0X	12	0	0	0	0	-	DWL/RPS/FXE/	M2,A2,ML,ME,QL,QE,YL,YE

\*\*\*\*\* TRANSMISSION DUE BY

10:00 AM

PST \*\*\*\*\*



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# Company Level

- Update company-level deductions
- Processing 2015 calendars in 2014
- Review PTO plan roll logic



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# PTO Roll Logic Report

SIC	SICK	Sick Plan	PTO ROLL DATE	YTD ROLL DATE
	ROLL WHEN	Anniversary	LIMIT CARRYOVER	No
	ROLL ON		ROLL LIMIT TO	n/a
	ROLL DATE	n/a		
	ROLL TO	n/a		
	ZERO NEGATIVES	No	ROLL YTD BASED ON	Period End Date
			ROLL YTD ORDER	Process Rolls First
			YTD ROLL DATE	01/01
VAC	VACATION	Vacation Plan		
	ROLL WHEN	Anniversary	LIMIT CARRYOVER	Yes
	ROLL ON		ROLL LIMIT TO	n/a
	ROLL DATE	n/a		
	ROLL TO	n/a		
	ZERO NEGATIVES	No	ROLL YTD BASED ON	Period End Date
			ROLL YTD ORDER	Process Taken First
			YTD ROLL DATE	01/01
VPT	PT VAC	Part Time Vacation		
	ROLL WHEN	Anniversary	LIMIT CARRYOVER	No
	ROLL ON		ROLL LIMIT TO	n/a
	ROLL DATE	n/a		
	ROLL TO	n/a		
	ZERO NEGATIVES	No	ROLL YTD BASED ON	Period End Date
			ROLL YTD ORDER	Process Rolls First
			YTD ROLL DATE	01/01



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# Company Level

- Review to verify information is set up accurately:  
Company legal name and address



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# Legal Name

Company Master

Related Cmps   BCC List   Options

Legal Name: Meeting of the Minds Company

Contact1: Bob Black

Title: Payroll Manager

Address: 1234 Broadway Ave

Phone: (925) 555-1212 X 101

City: Anytown

State: CA   Zip: 95555-

Phone: (925) 555-5555   Ext:

FAX: ( ) -

Start Dt: 07/01/2001   Transid: 999

Hub Loc:   Stand Alone:

Consldt: 12/11/2003

Page 1 of 3

Company Master

Related Cmps   BCC List   Options

Directions to Client

Common Pay Agent

Name: Name of Common Pay Agent

"As Agent For" Meeting of the Minds

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# Company Level

- Company Level
  - Review Tax ID's
  - Submit tax ID's and rate changes



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# Tax Jurisdiction Report

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## Tax Jurisdictions and Rates

Report # 1182.01

Tax Year

Tax Area	Tax Group	Tax Code	ADP Code	Tax Description	Employee-Employer	Active	Memo	Tax Id/Other Id	Tax Rate	Supplemental Rate	Update Rate	Limit/Period	YTD Hist	Activity During Year
US	FED	FICA		Social Security (FICA)	EE	YES	NO	99-9999999	6.20000	0.00000	YES	113700.00 YEARLY	YES	YES
US	FED	FICA		Social Security - Employer	ER	YES	NO	99-9999999	6.20000	0.00000	YES	113700.00 YEARLY	YES	YES
US	FED	FIT		Federal Income Tax	EE	YES	NO	99-9999999	TABLE	25.00000	YES	0.00 YEARLY	YES	YES
US	FED	FMED		Federal Medicare	EE	YES	NO	99-9999999	1.45000	0.00000	YES	0.00 YEARLY	YES	YES
US	FED	FMED		Federal Medicare - Employer	ER	YES	NO	99-9999999	1.45000	0.00000	YES	0.00 YEARLY	YES	YES
US	FED	FSUR		Federal Medicare Surcharge	EE	YES	NO	99-9999999	0.90000	0.00000	YES	0.00 YEARLY	YES	YES
US	FED	FUTA		Federal Unemployment	ER	YES	NO	99-9999999	0.60000	0.00000	YES	7000.00 YEARLY	YES	YES
AL	SIT	SIT		Alabama Income Tax	EE	NO	NO	APPLIED FOR	TABLE	5.00000	YES	0.00 YEARLY	NO	NO
AL	SUI	SUTA		Alabama Unemployment	ER	YES	NO	*APPLIED FOR	2.50000	0.00000	NO	8000.00 YEARLY	NO	NO
AZ	SIT	SIT		Arizona Income Tax	EE	YES	NO	99-9999999	TABLE	0.00000	YES	0.00 YEARLY	NO	NO
AZ	SUI	SUTA		Arizona Unemployment	ER	YES	NO	APPLIED FOR	2.70000	0.00000	NO	7000.00 YEARLY	NO	NO

ERROR: The following agencies do not accept returns with 'APPLIED FOR' SUI Tax IDs  
Agencies found: AL-SUTA ER



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# Special Considerations

Sample listing of State jurisdictions that do not allow "Applied For" IDs for filing:



AL SIT/SUI



HI SUI



NM SIT/SUI



AR SUI



LA SIT



IA SIT



CO SUI



IN SIT



PR SUI



DE SUI



MA SUI



UT SIT



DC SUI



MN SIT/SUI



WA SUI



FL SUI



GA SIT



WI SUI



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# Special Considerations

- Sample listing of Local jurisdictions which do not allow “Applied For” IDs for filing:



Denver, CO/Aurora, CO



Jefferson, AL



Wilmington, DE



Springboro, OH



Kenton County, KY



Scranton, OH



Kettering, OH



IN locals

- Contact ADP for information on a specific local



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# 940 Filing & FUTA Credit Reduction

## 940 Filing Impacts:

- Avoid possible 940 drops by obtaining and providing tax identification numbers
- Eliminate “Applied For” status
- Registration Services – an ADP Service available to assist clients with State Registration

## FUTA Credit Reduction:

- Department of Labor determines the credit reduction each year and announces the update after November 10<sup>th</sup>
- ADP Tax Service will communicate details regarding possible FUTA Credit Reduction and Credit Reduction Status during the last half of 4<sup>th</sup> Quarter



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# Company Level

- Taxation of earning/deduction codes
- Earning/deduction codes are set up to print correctly in W-2 summary
- Verify that Roll up earning/deduction codes are correct
- Box 12 and 14 are marked accurately
- W-2 retirement box conditions



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# Earnings & Deduction Taxation Analysis Reports

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## EARNINGS TAXATION ANALYSIS

				Check Date	N/A	Period	N/A					
TYPE	CODE	NAME	DESCRIPTION	CALC GROUP CODE	FEDERAL WAGES BOX 1	FICA WAGES BOXES 3.5	STATE WAGES BOX 16	LOCAL WAGES BOX 18	OTHER W-2 BOX/DESCRIPTION	INCL/EXCL/ROLL	Memo	ROLL CODE
** Active Earnings												
EARNING	399	DECEASE	Deceased Wage Payment	OCN	TAX, NOT W/H	N/A	TAX, NOT W/H	TABLE				
EARNING	3PP	3PARTY	3rd Party Payee	REG	ADDS	ADDS	ADDS	ADDS				
EARNING	3SP	3RD SICK	Third Party Sick Pay	S3P	TAX, NOT W/H	ADDS	TABLE	TABLE				
EARNING	3ST	3SPNONTX	Third Party Sick Pay Non-tax	NTX	N/A	N/A	N/A	TABLE	Box 12/CODE J			
EARNING	400	BONUS	Bonus	SUP	SUPP	ADDS	SUPP	TABLE				
EARNING	555	RENT	Housing/Rental Subsidies	SUP	SUPP	ADDS	SUPP	TABLE				
EARNING	570	3RDSTD<6	3rd Party STD < 6 Months	S3P	TAX, NOT W/H	ADDS	TABLE	TABLE				
EARNING	571	3RDLTD>6	3rd Party LTD > 6 Months	S6M	ADDS	N/A	ADDS	TABLE				
EARNING	573	3SC EXCL	Excludable 3rd Party Sick Pay	NTX	N/A	N/A	N/A	TABLE	Box 12/CODE J			
EARNING	AFB	AUTOFRNG	Auto Fringe Benefit	REG	ADDS	ADDS	ADDS	ADDS	Box 14/AUTO			
EARNING	AUT	AUTOALOW	Auto Allowance	REG	ADDS	ADDS	ADDS	ADDS	Box 14/AUTO			
EARNING	AWD	AWARD	Award	SUP	SUPP	ADDS	SUPP	TABLE				
EARNING	BNS	BONUS	Bonus Pay	REG	ADDS	ADDS	ADDS	ADDS				
EARNING	COM	COMMISSN	Commission	SUP	SUPP	ADDS	SUPP	TABLE				
EARNING	DBL	DOUBLE	Double Time	REG	ADDS	ADDS	ADDS	ADDS		R		OVT

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## DEDUCTION TAXATION ANALYSIS

				Check Date	N/A	Period	N/A						
TYPE	CODE	NAME	DESCRIPTION	DED TYPE	CALC GROUP CODE	FEDERAL WAGES BOX 1	FICA WAGES BOXES 3.5	STATE WAGES BOX 16	LOCAL WAGES BOX 18	OTHER W-2 BOX/DESCRIPTION	INCL/EXCL/ROLL	Pays	ROLL CODE
** Active Deductions													
DEDUCTION	3SP	3RD SICK	3rd Party Sick Pay Offset	N	NET	N/A	N/A	N/A	N/A		E		
DEDUCTION	650	MEDICAL	After Tax Medical Plan	N	MED	N/A	N/A	N/A	N/A				
DEDUCTION	ADV	ADVANCE	Advance	N	NET	N/A	N/A	N/A	N/A				
DEDUCTION	AFO	AUTOFRNG	Auto Fringe Benefit Offset	N	NET	N/A	N/A	N/A	N/A		E		
DEDUCTION	DUE	DUES	Union Dues	N	NET	N/A	N/A	N/A	N/A				
DEDUCTION	GTL	GRP LIFE	Group Term Life > \$50,000	N	NET	N/A	N/A	N/A	N/A		E		
DEDUCTION	K01	LCGP	Large Capital Growth Portfolio	N	NET	N/A	N/A	N/A	N/A			A	





# Employee Level

- Confirm employees have correct employee type
- Examples:
  - "E" (Employee)
  - "C" (Contractor)
  - "R" (Retiree)
- Review tax-exempt associates



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# Employee Type

Employee Master SCOOPY DOO

Emp ID 2018 Emp Type **E** EMPLOYEE

First SCOOBY  
Last DOO  
Addr 12345 PLEANTAN HILL ROAD  
City DISNEY St  
Zip 94551 Country USA

Cycle **B** Hour/Salary **S** Rate 1000.0000 Div 5 PayGrp/Sub 1  
OTExmpt **N** PayByExcept **Y** Std Hours 80.00 Dept 5100 Check Dist HDQ

FEDERAL		STATE		Res Wrk		LOCALS	ADDITIONAL WITHHOLDING				
Status	<b>M</b>	Res	<b>CA</b>	Status	<b>M</b>	<b>M</b>		Federal	Res	State	
Exmpts	<b>2</b>	Work	<b>CA</b>	Exmpts	<b>2</b>	<b>2</b>		Amt	<b>0.00</b>	Amt	<b>0.00</b>
XtraEx	<b>0</b>	Rule	<b>R</b>	XtraEx	<b>0</b>	<b>0</b>		\$/%	<b>\$</b>	Freq	<b>F</b>

Exempt from: FIT **N** Res SIT **N** FICA **N** F/MED **N** FUTA **N** SUI **N** SDI **N**

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Select Employee Type

Code	Description
<b>E</b>	Employee
C	Contractor
X	Expatriate
R	1099 - R Employee
K	Backup Withholding



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# Tax Exempt Flags

Employee Master SCOOPY DOO

TaxInfo Rates Options

Emp ID 2018 Emp Type E EMPLOYEE ID Type A APPLD FOR  
First SCOOPY ID Number APPLIED FOR  
Last DOO Status A RFT  
Addr 12345 PLEANTAN HILL ROAD Hire Date 03/09/2010  
City DISNEY State CA Term Date / /  
Zip 94551 Country USA Rehire Date / /

Cycle B Hour/Salary  
OTExmpt N PayByExcept

FEDERAL STATE  
Status M Res CA S  
Exmpts 2 Work CA E  
XtraEx 0 Rule R X

Sub 1 /  
Dist HDQ  
WITHHOLDING  
Res State  
nt 0.00  
% \$ Freq F

**Federal Exempt**

Code	Description
N	Not Exempt
Y	Yes - Exempt from Withholding
A	Additional Only
X	Exempt from Tax

Exempt from: FIT  Res SIT  FICA  F/MED  FUTA  SUI  SDI

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# Employee Level

- Verify employees are set up in the correct state and locality
- Verify Boxes 12, 13, & 14



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# Employee Level

- Exemption from Federal Income Tax Withholding:
  - IRS Form W-4 provides employees with the option (if certain criteria are met) of claiming that they are exempt from federal income tax withholding. This exemption remains in effect only for a limited period of time. For employees who claimed exempt in 2014, the exemption expires as of February 17, 2015. ADP recommends that as part of your year-end process, you review any employees who claimed exempt from federal income tax withholding in 2014, request that those employees submit a Form W-4 for 2015 if they continue to qualify for this exemption, and make any necessary withholding adjustments for employees who do not file a Form W-4 for 2015 by the February 17, 2015 deadline.



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# W-2 Preview Report – cover page

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W2 Preview Report

Report # 6001,01

Company Information

FEIN.....: 99999999

Legal Name.: Meeting of the Minds Company 2013

Address.....: 4125 Hopyard Road  
Pleasanton, CA 94588



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# W-2 Preview Report

MOTM

## W2 Preview Report

Report # 6001,01

Tax year

R T S  
e P t  
t S a

Employee Data, Box 1 - Box 11

<----- State Totals -----> <----- Local Totals -----> <--- Box 12 ---> <--- Box 14 ----->  
State Wages Taxes Code Wages Taxes

Employee Name	EmpID	State	Wages	Taxes	Code	Box 12	Box 14
ALWAYS, JERRY L	4244	NJ	302200.00	0.00			3.40 NY-SDI
Div/Dept:4 /4000 Res:NJ Paygp:1 Outpt:B		NY	302200.00	28976.74			
FIT Wages: 302200.00 FIT W/H: 75155.29							
FICA Wages: 113700.00 FICA W/H: 7049.40							
FMED Wages: 302200.00 FMED W/H: 5301.70							
AMATO, SUBBAT	4644	CA	500.00	33.00			
Div/Dept:4 /4000 Res:CA Paygp:1 Outpt:B							
FIT Wages: 500.00 FIT W/H: 125.00							
FICA Wages: 500.00 FICA W/H: 31.00							
FMED Wages: 500.00 FMED W/H: 7.25							
BAKER, NORMAN	4630	CA	500.00	33.00			5.00 CA-SDI
Div/Dept:6 /6200 Res:CA Paygp:1 Outpt:B							
FIT Wages: 500.00 FIT W/H: 125.00							
FICA Wages: 500.00 FICA W/H: 31.00							
FMED Wages: 500.00 FMED W/H: 7.25							
INGLIS, STEWART	4157	CA	11000.00	804.27			110.00 CA-SDI
Div/Dept:5 /5310 Res:CA Paygp:1 Outpt:B							
FIT Wages: 11000.00 FIT W/H: 1617.79							
FICA Wages: 11000.00 FICA W/H: 682.00							
FMED Wages: 11000.00 FMED W/H: 159.50							
OHMAN, KRIS	4103	CA	2148.57	31.98		3.00 C	21.46 CA-SDI
Div/Dept:5 /5300 Res:CA Paygp:1 Outpt:B							
FIT Wages: 2148.57 FIT W/H: 172.12							
FICA Wages: 2148.57 FICA W/H: 133.21							
FMED Wages: 2148.57 FMED W/H: 31.15							
X SOLECTRON, JOE	4605	CA	45000.00	0.00		5000.00 D	
Div/Dept:5 /5200 Res:CA Paygp:1 Outpt:B							
FIT Wages: 45000.00 FIT W/H: 0.00							
FICA Wages: 0.00 FICA W/H: 0.00							
FMED Wages: 0.00 FMED W/H: 0.00							
X ZEPPORONI, MAX	4100	CA	11463.19	1061.33		3.00 C 1011.77 D	124.72 CA-SDI
Div/Dept:7 /7400 Res:CA Paygp:1 Outpt:B							
FIT Wages: 11463.19 FIT W/H: 2621.67							
FICA Wages: 12474.96 FICA W/H: 773.45							
FMED Wages: 12474.96 FMED W/H: 180.89							

picture perfect  
year end 2014



# Qualified Pension

- The IRS requires each employer to notify every employee who was an active participant in a qualified pension, profit sharing or stock bonus plan for a particular tax year. This requirement is met by checking the “Retirement” plan box (Box 13) of the employee’s Form W-2.
- ADP will automatically mark the W-2 Retirement plan box if the employee has a 401(k) year-to-date deduction.
- Client needs to determine if an employee is eligible as an active participant in a qualified profit sharing and/or stock bonus plan for a particular tax year. If YES, client needs to place a “Y” in the “Retirement” box of all employees who received a Profit Sharing and/or Stock Bonus Plan contribution in 2014.



INVEST

W-2/W-4 ADDITIONAL INFORMATION			
Statutory	<input type="checkbox"/>	Deceased	<input type="checkbox"/>
Legal Rep	<input type="checkbox"/>	Retirement	<input checked="" type="checkbox"/>



picture perfect  
*year end 2014*





# Example W-2

Safe, accurate, FAST! Use **efile** Visit the IRS Web Site at [www.irs.gov/efile](http://www.irs.gov/efile)

Employee Reference Copy  
**W-2** Wage and Tax Statement **2013**  
Copy C for employer's records OMB No. 1545-0047

d Control number	Dept.	Corp.	Employer use only
216543 ROSE/ABC	100	AABB	A 223

c Employer's name, address, and ZIP code  
**ACME SUPPLIES CORPORATION**  
**15 CENTER STREET**  
**ANYTOWN, USA 12345**

Batch# 00001

e1 Employee's name, address, and ZIP code  
**JANE HARPER**  
**101 MAIN STREET**  
**ANYTOWN, USA 12345**

b Employer's FED ID number	a Employee's SSA number
12-1233338	999-99-9999
1 Wages, tips, other comp.	2 Federal income tax withheld
23526.80	2093.00
3 Social security wages	4 Social security tax withheld
25027.00	1051.13
5 Medicare wages and tips	6 Medicare tax withheld
25027.00	362.89
7 Social security tips	8 Allocated tips
9	10 Dependent care benefits
11 Nonqualified plans	12a For contractors for box 12
	C 27.00
14 Other	12b D
31.20 SGL	1500.20
500.00 AUTO	
	12c
	12d
	13 <input checked="" type="checkbox"/> (not applicable) partly sick pay
15 State Employer's state ID no	16 State wages, tips, etc.
NY 12-1233338	23526.80
17 State income tax	18 Local wages, tips, etc.
621.92	23526.80
19 Local income tax	20 Locality name
404.04	NYC RES

## W-2 and EARNINGS SUMMARY



This blue Earnings Summary section is included with your W-2 to help describe portions in more detail. The reverse side includes general information that you may also find helpful.

1. The following information reflects your final 2012 pay stub plus any adjustments submitted by your employer.

Gross Pay	25,000.00	Social Security Tax Withheld Box 4 of W-2	1,051.13	NY State Income Tax Box 17 of W-2	621.92
Fed. Income Tax Withheld Box 2 of W-2	2,093.00	Medicare Tax Withheld Box 6 of W-2	362.89	Local Income Tax Box 19 of W-2	404.04
				SUB/SDI Box 14 of W-2	31.20

2. Your Gross Pay was adjusted as follows to produce your W-2 Statement.

	Wages, Tips, Other Compensation Box 1 of W-2	Social Security Wages Box 3 of W-2	Medicare Wages Box 5 of W-2	NY State Wages, Tips, Etc. Box 16 of W-2	NYC RES Local Wages, Tips, Etc. Box 18 of W-2
Gross Pay	25,000.00	25,000.00	25,000.00	25,000.00	25,000.00
Plus GTL (C-Box 12)	27.00	27.00	27.00	27.00	27.00
Less 401(k) (D-Box 12)	1,500.20	N/A	N/A	1,500.20	1,500.20
<b>Reported W-2 Wages</b>	<b>23,526.80</b>	<b>25,027.00</b>	<b>25,027.00</b>	<b>23,526.80</b>	<b>23,526.80</b>

Note - Fringe benefits include : TUITION REIMBURSEMENT: \$500.00, CAR ALLOWANCE: \$500.00

3. Employee W-4 Profile. To change your Employee W-4 Profile Information, file a new W-4 with your payroll dept.

**JANE HARPER**  
**101 MAIN STREET**  
**ANYTOWN, USA 12345**

Social Security Number: 999-99-9999  
 Taxable Marital Status: Married

Exemptions/Allowances:

Federal: 3 \$25 additional tax  
 State: 2  
 Local: 2

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picture perfect  
*year end 2014*

# Employee Level

- Correct W-2/1099 report errors
- Verify social security numbers and resolve issues



picture perfect  
*year end 2014*



# W-2/1099 Error Report

MOTM

W2 / 1099 Error Report

Report # 6003,01

PeriodTax year

Form	Emp ID	Employee Name	Error Messages
1099M	4633	DOE, JOHN	Invalid Social Security Number replaced with 000-00-0000: 4644
1099R	4644	SEQUEIRA, JESSE	1099R Distribution is blank
1099R	4369	SMITH, DAVID	Invalid 1099R Distribution Code: 07
1099R	4630	SMYTE, JOHN	1099R Distribution is blank
1099R	4646	VASCO, RAMON	1099R Distribution is blank
W2	4650	BAPTISTA, JOHN	SSN is Applied for: BAPTISTA, JOHN
W2	4610	BRADFORD, GREG	Invalid Social Security Number replaced with 000-00-0000: 4610
W2	12342	LIND, CHARLES	SSN is Applied for: LIND, CHARLES
W2	5488	ZEPPORONI, MAX	Invalid Employee Address: zip code does not conform to postal standards:5488



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year end 2014



# Enumeration Verification System

- To verify Social Security Numbers, use the following guidelines to contact the SSA:
  - Direct keying up to 10 names/ SSN's with immediate results
  - Upload file. You can upload up to 250 SSN's per file with next business day results.
- SSA EVS details available at <http://www.ssa.gov/employer/ssnv.htm>



picture perfect  
*year end 2014*



# Employee Level

- Verify Form 1099 information
  - Earnings are accurately distributed to Box 7 of Form 1099R



picture perfect  
*year end 2014*







# 1099-R Distribution Code

The screenshot displays two overlapping windows from the ADP software. The primary window is titled 'Employee Master SCOOBY D00' and contains various fields for employee information, including 'Home Phone', 'Birth Date', 'Service Date', 'Emer. Contact', 'Emer. Phone', 'Relationship', 'Empl. Title', 'Job', 'Project', 'WComp Code', 'Default Batch', 'Clock Number', 'Shift Codes', 'Depend Life', 'GTL Amount', 'Corp Offcr', 'WC Stat', 'Adv EIC', 'GL Group', '#Depends', 'GTL Fact', 'Dsp Rate', 'FUTURE CHANGES', 'Stat', 'S/H', 'Cycle', 'Reason', 'Date', 'Rate', 'Cmnt', 'W-2 ADDITIONAL INFORMATION', 'Statutory', 'Deceased', 'Legal Rep', 'Retirement', 'Defd Comp', '942', 'W-2 Output', 'Total Dist', 'Dist Code', and 'LOCATION INFORMATION', 'Region', 'Location', 'Building', 'Floor', 'Mail', and 'Wrk Site'. A red arrow points from the 'Dist Code' field to a secondary window titled '1099 Distribution Codes'. This window lists the following codes and descriptions:

Code	Description
	Blank, no distribution
1	Early Distribution, no known exception
2	Early Distribution, exception applies
3	Disability
4	Death
5	Prohibited transaction
6	Section 1035 exchange
7	Normal Distribution
8	Excess contributions taxable in current year
9	Cost of current life insurance protection



picture perfect  
year end 2014



# Employee Level

- Correct negative wages



picture perfect  
*year end 2014*





# Negative Wage Report

Meeting of the Minds Company

## Negative Wages Report

Report # 0395,01

Page 1

Check Date

Period

-

\*\* Account Manager:

Name ID	SSNUM	Status	Quarter 1			Quarter 2			Quarter 3			Quarter 4			YTD		
			Gross	Taxable	Tax	Gross	Taxable	Tax	Gross	Taxable	Tax	Gross	Taxable	Tax	Gross	Taxable	Tax
RALSTON, JORDAN																	
5763		A															
	US FICA-EE				-3400.00			-3400.00									-3400.00
	US FICA-ER				-3400.00			-3400.00									-3400.00
	US FIT				-3400.00			-3400.00			-834.49						-834.49
	US FMED-EE				-3400.00			-3400.00									-3400.00
	US FMED-ER				-3400.00			-3400.00									-3400.00
	US FUTA				-3400.00			-3400.00									-3400.00
	CA CA-ETF				-3400.00			-3400.00									-3400.00
	CA CA-SDI				-3400.00			-3400.00									-3400.00
	CA CA-SII				-3400.00			-3400.00			-241.32						-241.32
	CA CA-SUTA				-3400.00			-3400.00									-3400.00
SHATTUCK, RAYMOND																	
4485		A															
	US FICA-EE				-10778.36			-10778.36									-10778.36
	US FICA-ER				-10778.36			-10778.36									-10778.36
	US FIT				-9916.82			-9916.82			-2396.73						-2396.73
	US FMED-EE				-10778.36			-10778.36									-10778.36
	US FMED-ER				-10778.36			-10778.36									-10778.36
	US FUTA				-10769.22			-10769.22									-10769.22
	CA CA-ETF				-10769.22			-10769.22									-10769.22
	CA CA-SDI				-10769.22			-10769.22									-10769.22
	CA CA-SIT				-9916.82			-9916.82			-749.36						-749.36
	CA CA-SUTA				-10769.22			-10769.22									-10769.22
THOMPSON, LISA																	
888		A															
	US FICA-EE										-2941.61			-2941.61			-182.38
	US FICA-ER										-2941.61			-2941.61			-182.38
	US FMED-EE										-2941.61			-2941.61			-42.65
	US FMED-ER										-2941.61			-2941.61			-42.65
TREDWELL, MIKE																	
4351		A															
	CA CA-ETF										-1603.20			-1603.20			-1.60
	CA CA-SDI										-1603.20			-1603.20			-14.43
	CA CA-SIT										-1603.20			-1603.20			-18.39
	CA CA-SUTA										-1603.20			-1603.20			-54.51
TYLER, BILL																	
4204		A															
	US FICA-EE							-764.60			-764.60			-47.41			
	US FICA-ER							-764.60			-764.60			-47.41			
	US FIT							-714.60			-714.60			-46.90			
	US FMED-EE							-764.60			-764.60			-11.09			
	US FMED-ER							-764.60			-764.60			-11.09			
	US FUTA							-764.60			-764.60			-6.12			
	CA CA-ETF							-764.60			-764.60			-0.76			

# Employee Level

- Review supplemental pay
- Review deduction code limit and limit periods for the upcoming year



picture perfect  
*year end 2014*



# Deduction & Supp Pay Limit Reports

Meeting of the Minds Company  
2

## Deduction Limit Report

Report # 0937,01

PAY GROUP	EMP ID	EMPLOYEE NAME	DED CODE	STATUS	DEDUCTION NAME	LIMIT	PERIOD	TAKEN
** Employee Status: Active								
2	123419	DUCK, DAFFY	3SP	A	3rd Party Sick Pay Offset	1000.00	Y	0.00
1	4103	OHMAN, KRIS	3SP	A	3rd Party Sick Pay Offset	2000.00	Y	0.00
1	123421	GATES, BILL	4K	A	401(k) Savings Plan	2000.00	Y	0.00
1	4507	HOUSTON, DEBORAH	4K	A	401(k) Savings Plan	9000.00	Y	0.00
1	4498	IBRAHIM, KHALID	4K	A	401(k) Savings Plan	5100.00	Y	0.00
1	4417	JOHNSON, RUSTY	4K	A	401(k) Savings Plan	8700.00	Y	0.00
1	4103	OHMAN, KRIS	4K	A	401(k) Savings Plan	7938.00	Y	0.00
1	4438	VASCO, RAMON	4K	A	401(k) Savings Plan	3354.00	Y	0.00
1	4608	QUAN, RALPH	600	A	Pretax Medical Plan	10000.00	Y	0.00
1	123420	MOUSE, MICKEY	601	A	Pretax Medical Plan	2000.00	Y	0.00
1	4644	AMATO, SUBBAT	ADV	A	Advance	1000.00	A	1000.00
1	123421	GATES, BILL	GR1	A	Garnishment # 1	2000.00	A	900.00
1	123420	MOUSE, MICKEY	GR1	A	Garnishment # 1	5000.00	A	108.71
1	4578	ROBERTSON, JULIA	GR1	A	Garnishment # 1	3510.25	A	3539.39
1	4639	ANDERSONVILLE, JAMES	GR2	A	Garnishment # 2	5000.00	A	524.22
1	4608	QUAN, RALPH	GR2	A	Garnishment # 2	1000.00	A	1000.00
1	4244	ALWAYS, JERRY	REP	A	Advance Repayment	100.00	A	100.00
1	4477	AZIZA, KEITH	UWY	A	United Way	20.00	Y	0.00

Y - Taken amounts will clear at the end of the calendar year  
 A - Taken amounts will accumulate until the limit is reached  
 P - Indicates limit per pay period  
 M - Indicates limit per month

Meeting of the Minds Company  
2

## Supp Pay Limit Report

Report # 1289,01

PAY GROUP	EMP ID	EMPLOYEE NAME	SUP CODE	STATUS	SUPP PAY NAME	SUPPAY FREQUENCY	LIMIT	PERIOD	EARNED
** Employee Status: Active									
1	4100	ZEPPORONI, MAX	AUT	A	Auto Allowance	P	5000.00	Y	
1	4244	ALWAYS, JERRY SOMETIMES	COM	A	Commission	P	5000.00	Y	
1	123417	DOE, JOHN	COM	A	Commission	P	1000000.00	Y	500000.00

\*\* If YTD Earned is blank, it is zero.

Y - Earned amounts will clear at the end of the calendar year  
 A - Earned amounts will accumulate until the limit is reached  
 P - Indicates limit per pay period  
 M - Indicates limit per month



picture perfect  
year end 2014



# Employee Level

- Notify employees to update W-4 information



picture perfect  
*year end 2014*



# Miscellaneous Items

- Post fringe benefits prior to the last payroll of the year
- Post third-party sick pay payments
- Client Toolbox



picture perfect  
*year end 2014*



# Processing Third Party Sick Pay

Processing Third Party Sick Pay depends on the following:

- ✓ Who issues the W-2?
- ✓ Who remits the employee taxes?
- ✓ Who remits the employer taxes?



picture perfect  
*year end 2014*



# Third Party Sick Pay Scenarios

Issues W-2	Remits Employer Taxes	Remits Employee Taxes	What needs to happen:
ADP/ West NSC	ADP/ West NSC	Third Party	<ol style="list-style-type: none"> <li>1. Manual check posted to the employee to update employee and pay employer taxes</li> <li>2. EE taxes will be recorded, but not withheld</li> <li>3. "T" type earnings code with offset deduction</li> </ol>
Third Party	Third Party	Third Party	Nothing additional – Employee will receive W-2 from Third Party
Third Party	ADP/ West NSC	Third Party	<ol style="list-style-type: none"> <li>1. Manual check posted to Recap employee recording ER wages and taxes</li> <li>2. "T" type earnings code with offset deduction</li> <li>3. Notify AM of Recap EE to mark TPSP flag to "Y"</li> </ol>





# Client Toolkit – VIP Room



## Payroll Processing

[About Social Security Numbers](#)

[About Uncollected Deductions](#)

[Adjusting Wages for EEs with More than One Employee Type](#)

[Calculation Base Setup Form](#)

[Correcting Negative Wages Using Manual Check Management](#)

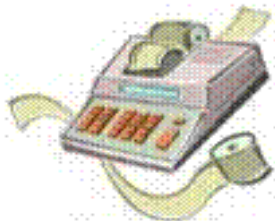
[Creating LIVE Check ProManually](#)

[Deduction Code Request Form](#)

[Deleting Employees from the Employee Master](#)

[Earnings Code Request Form](#)

More.....



## Tax Processing

[Authorization To Add Tax Jurisdiction Form](#)

[Authorization To Change Tax ID Form](#)

[Authorization to Term or Finalize A Tax Jurisdiction Form](#)

[Calculating FIT Tax Withholding](#)

[How Massachusetts Income Tax Withholding is Calculated](#)

[SOD on CD ROM](#)

[Tax Invoice Comment Codes](#)



## Year End

[1099-R Distribution Codes](#)

[Balancing W-2s to the Tax Returns](#)

[Processing Futa and Suta for Third Party Sick Pay](#)

[Processing Third Party Sick Pay - Vendor Issues W-2](#)

[Processing Third Party Sick Pay - W-2 Issued by ADP](#)

[Year End Notebook 2008](#)

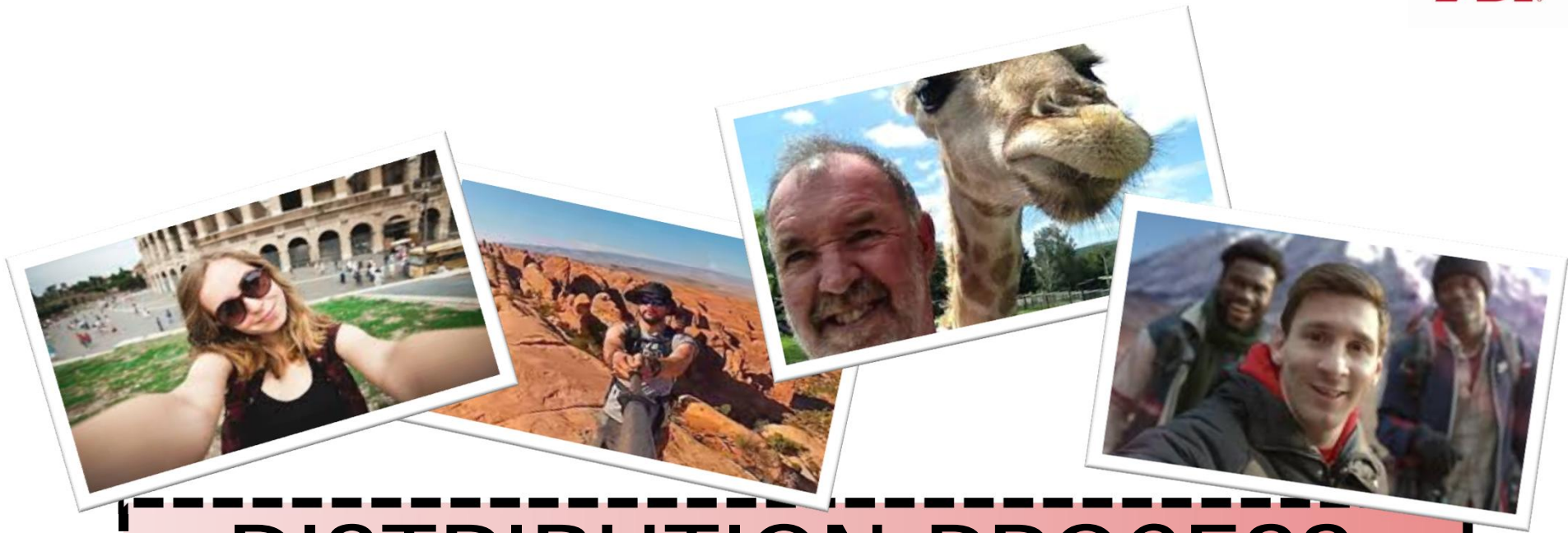
[Year Round Guide 2008 - 2009](#)



picture perfect  
year end 2014







# DISTRIBUTION PROCESS W2 AND 1099

picture perfect  
*year end 2014*

# Forms Distribution

- Split wrap distribution of W-2s
- Paperless W-2 Option
- Determine sort preference
- Verify delivery method
- Verify delivery location
- Determine how you will distribute forms and advise mail room staff



picture perfect  
*year end 2014*



# Forms Distribution

- Schedule date to release W-2 and 1099s
- Request sample W-2s from Client Service Consultant
- Sign the W-2 and 1099 release forms
- Complete and fax the W-2 and 1099 Delivery Verification form



picture perfect  
*year end 2014*

# Pop Quiz

For employees who claimed exemption for FIT Withholding in 2014, when does this exemption expire?



picture perfect  
*year end 2014*



# Answer

Answer: February 17, 2015



picture perfect  
*year end 2014*





# SYSTEM ENHANCEMENTS

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*year end 2014*

# Payroll Enhancements

- Worksheet Audit Report Modification
- Inactive Local Codes Validation
- TDF (Transfer Data Files)
  - Quarterly Audit Reports
  - Report Sort Modification
  - Saving Reports
- Default Employee



picture perfect  
*year end 2014*





# Payroll Enhancements

- Quarterly Audit Reports New Indicator
- Payroll Audit Report Enhancement
- Security Reports Modification
- Special Worksheet Enhancement
- New Check Pro Interface
- Deduction Report – ability to pull all records with history.
- Consolidated Company data in a download



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*year end 2014*



# Upcoming Enhancements

- TPP, View Checks Screen
- Import Manager template
- Garn Info Screen
- All/Active Button on send/receive data screen
- Direct Deposit distribution flag for special payroll



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*year end 2014*



# PRWC Enhancements

- Current
  - Paperless W2s with the use of Netsecure/iSI
  - Mobile
  - Contractor Provisioning
- Future
  - Administrative Service
  - Employee Service
  - Data Transfer enhancement



Payroll		
\$2,340.00	Year To Date 01/15/2012	>
\$41,451.67	Year To Date 09/13/2011	>
\$40,338.70	Year To Date 09/06/2011	>
\$39,225.73	Year To Date 08/30/2011	>
\$37,973.64	Year To Date 08/23/2011	>



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*year end 2014*

# Tax Updates

- Tax Center of Excellence (T CoE)
- Continued enhancements of the tax and banking portal for tracers and amendments

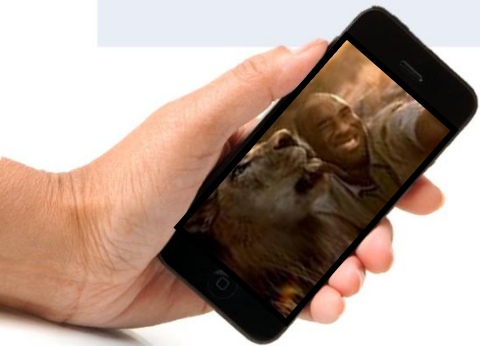


picture perfect  
*year end 2014*



# What's Changing for Clients

What's Changing?	From	To
How I'm being serviced	<ul style="list-style-type: none"><li>• Multiple handoffs</li></ul>	<ul style="list-style-type: none"><li>• Single point of contact</li></ul>
Who services my tax needs	<ul style="list-style-type: none"><li>• A large pool of ADP people</li></ul>	<ul style="list-style-type: none"><li>• A small connected team of tax experts</li></ul>
How I feel	<ul style="list-style-type: none"><li>• Anonymous</li></ul>	<ul style="list-style-type: none"><li>• Connected to ADP</li><li>• Supported by ADP</li></ul>
What I say	<ul style="list-style-type: none"><li>• "Why can't I speak to the tax expert?"</li><li>• "I want to speak to Sam Dimas!"</li></ul>	<ul style="list-style-type: none"><li>• "I sleep better knowing you take care of my taxes."</li><li>• "You've made taxes a 'no-brainer'."</li><li>• "ADP is on top of legislative tax changes."</li><li>• "I can speak directly to a tax expert, if I need to."</li></ul>



bi c t u r e p e r f e c t  
*year end 2014*



# Tax Center of Excellence Strategy Summary



Simplify • Innovate • Grow



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year end 2014



# ADP Tax & Banking Portal

<https://facs.adp.com>

- Statement of Deposits (SOD)
- Agency Notices and Responses
- Amendment / Exception Packages
- Tax Invoices
- State Unemployment Verification (SUI rates)

Tax Direct line: 1 (866) 667-9502



picture perfect  
*year end 2014*





# Statements of Deposits and Filings

- SODs may be used by most agencies in place of the actual 940
- Statement of Deposits and Filings (SODs) – verify the following:
  - Federal, State and Local tax identification numbers
  - SUI Rates
  - Filing Responsibilities
- The following packages are available exclusively on the ADP Tax & Banking Portal <https://facs.adp.com>
  - Statements of Deposit (SODs)
  - Agency Notices and Responses
  - Amendment / Exception Packages



picture perfect  
*year end 2014*

# SOD Example

## ANNUAL STATEMENT OF DEPOSITS & FILINGS



## TAX FILING SERVICE

\*\* TAX YEAR 20XX \*\*

YOUR COMPANY  
123 MAIN STREET  
ANYTOWN, USA 99999

STATEMENT DATE 09/30/XX  
BR/COMPANY 03/XYZ  
AGENT 005  
COMBO YES  
SHORT NAME

FEDERAL ID: 99-9999999

### ANNUAL FUTA INFORMATION

TOTAL PAYMENTS PLUS EXEMPT	44,676,913.57		FUTA TAX LIABILITY	
EXEMPT PAYMENTS:				FUTA TAX DEPOSITED
EXEMPT WAGES .....	2,966.98	QTR 1	.00	.00
*SEE DETAIL RIGHT SIDE		QTR 2	1,816.45	1,816.45
EXCESS WAGES .....	29,142,082.44	QTR 3	16,363.95	16,363.95
TOTAL EXEMPT PAYMENTS ..	29,145,049.42	QTR 4	21,097.89	21,097.89
FUTA TAXABLE WAGES .....	15,531,864.15	TOTAL	39,278.29	39,278.29
GROSS FUTA TAX .....	124,254.91			
TENTATIVE CREDIT ALLOWED..	.00	EXEMPT WAGES DETAIL:		
CREDIT REDUCTION .....	4,519.30	FRINGE BENEFITS		.00
TOTAL FUTA TAX .....	.00	GROUP TERM LIFE INS		2.08
		RETIREMENT/PENSION		.00
		DEPENDENT CARE		2,964.90
		OTHER		.00

ANNUAL FILING RESPONSIBILITY: ADP

### STATE WAGE RECAP

### QBU BATCH NBR

STATE	SUI WAGES SUI ID	EXPERIENCE RATE/QTR	CONTRIBUTIONS ACTUALLY PAID
AL	435,195.03	2.8400% 2-4	12,359.54
AK	44,982.81	1.9700% 2-4 4	886.16
AZ	263,592.57	2.3500% 2-4 4	6,194.43
AR	404,408.44	1.7000% 2-4	6,874.94



picture perfect  
year end 2014

# Pop Quiz

What is the toll free number that you can use to call TCoE or tax direct?

picture perfect  
*year end 2014*



# Answer

1 (866) 667-9502

picture perfect  
*year end 2014*



# ADP Tax Partner Program

## Excellent Employee Benefit at No Cost to You

- The ADP Tax Partner Program provides your employees with the ability to download ADP W2 information into select tax preparation services and software.
- Download W2 data directly to:
  - Intuit, H&R Block, Complete Tax, Liberty Tax, Instant Tax, and Jackson Hewitt
- Clients can still opt out of the ADP Tax Partner Program



picture perfect  
*year end 2014*







# ADP MEETING *of the* MINDS

## Join us on March 22–25, 2015

Gaylord Opryland Resort & Convention Center  
Nashville, TN

More than 1200 NAS clients attend annually

Over 170 education, training and roundtable sessions



### POWER YOUR PERFORMANCE

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IN THE BUSINESS OF YOUR SUCCESS™

HEALTH CARE REFORM

Eye on Washington



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*year end 2014*







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# Regulatory Resources for ADP Clients.

Join discussions and get insights from subject-matter experts in the ADP Research Institute LinkedIn Group:  
<http://www.linkedin.com/groups/ADP-Research-Institute-4314930>



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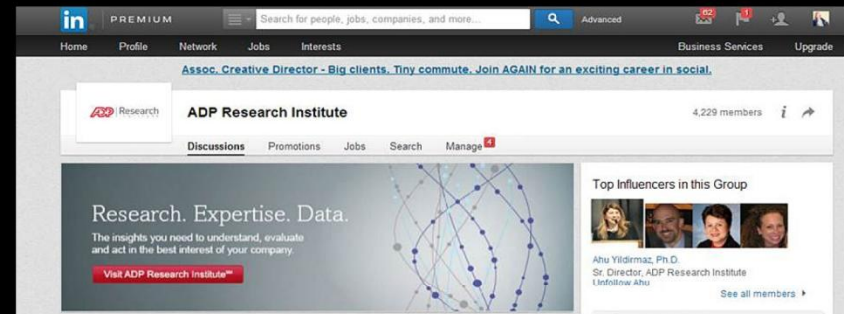
LEGISLATIVE UPDATE

## Eye on Washington

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*For client support, please contact your client support representative. ADP social media channels are not designed to address support needs.*

# Get Connected

The Bridge is the new social networking community for ADP clients. It provides a unique peer-to-peer online forum for sharing experience and knowledge on a wide range of human capital management (HCM) topics and is a secure space for ADP clients to interact, collaborate, and communicate.



Access The Bridge 24/7!



**Join** community spaces or topics of interest including Tax, Payroll, HR & Benefits and Time and Labor Management (TLM).

**Connect** with other payroll practitioners, HR professionals, featured industry representatives and ADP subject matter experts.



**Follow** community spaces or other members to receive the latest activities, interactions and regulatory updates.

**Share** your experiences and thoughts with others. Looking for answers? Check the Frequently Asked Questions (FAQ) or ask the community!



## Join The Bridge Today!

The registration process is simple:

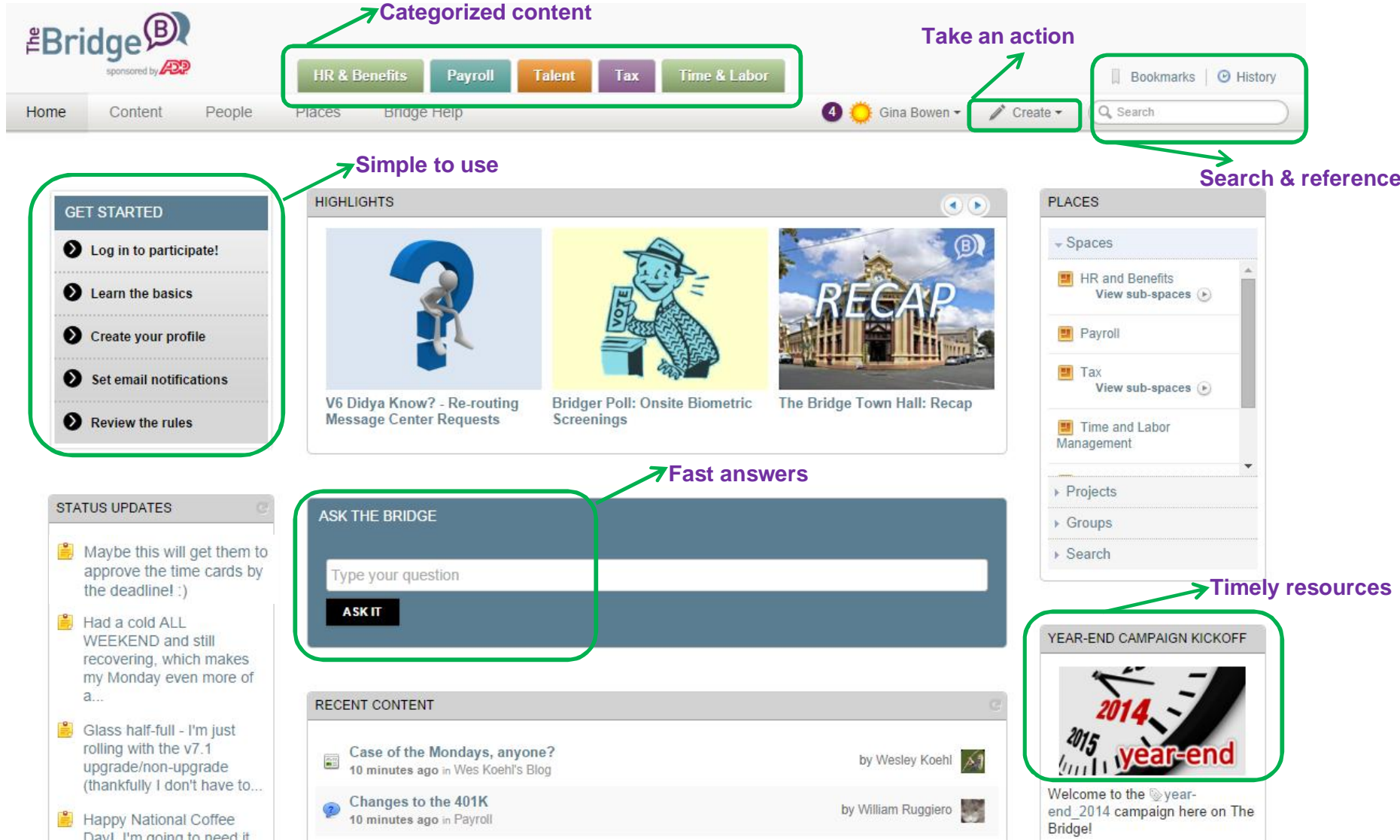
- Access The Bridge one of three ways:
  - Click [here](#) to access The Bridge
  - Click on the link from ADP Support Center (for ADP Major Account clients)
  - Type [thebridge.adp.com](http://thebridge.adp.com) in the browser address bar
- Bookmark The Bridge as a "Favorite"
- Log in using your ADP credentials (NetSecure ID)
- Create a user name and edit your profile in the online community

Please contact the Community Manager for The Bridge at [community@adp.com](mailto:community@adp.com) if you experience any difficulties logging in.

For other helpful tips and training resources, please refer to the "Get Started" section on The Bridge.

# The Bridge: ADP's Client Community

"The Bridge sponsored by ADP is an environment where clients can collaborate on topics related to ADP solutions and related HCM topics. Content is categorized by HR & Benefits, Payroll, Talent, Tax, and Time & Labor, and the structure allows members to quickly find the answers to their questions and network with others." Visit <http://thebridge.adp.com> and log in Today!



The screenshot displays the user interface of 'The Bridge' ADP Client Community. The top navigation bar includes the logo, sponsored by ADP, and a menu with 'Home', 'Content', 'People', 'Places', and 'Bridge Help'. A user profile for 'Gina Bowen' is visible, along with a 'Create' button and a search bar. The main content area is divided into several sections:

- GET STARTED:** A sidebar with a green border containing links for 'Log in to participate!', 'Learn the basics', 'Create your profile', 'Set email notifications', and 'Review the rules'.
- HIGHLIGHTS:** A row of three featured articles: 'V6 Didya Know? - Re-routing Message Center Requests', 'Bridger Poll: Onsite Biometric Screenings', and 'The Bridge Town Hall: Recap'.
- ASK THE BRIDGE:** A section with a text input field 'Type your question' and an 'ASK IT' button, highlighted with a green border and labeled 'Fast answers'.
- RECENT CONTENT:** A list of recent posts, including 'Case of the Mondays, anyone?' and 'Changes to the 401K'.
- PLACES:** A sidebar on the right with a green border listing various categories like 'HR and Benefits', 'Payroll', 'Tax', and 'Time and Labor Management', labeled 'Search & reference'.
- YEAR-END CAMPAIGN KICKOFF:** A section at the bottom right with a green border featuring a '2014 year-end' graphic and the text 'Welcome to the year-end\_2014 campaign here on The Bridge!', labeled 'Timely resources'.

Annotations with green arrows point to various features: 'Categorized content' points to the top category buttons; 'Take an action' points to the 'Create' button; 'Simple to use' points to the 'GET STARTED' sidebar; 'Fast answers' points to the 'ASK THE BRIDGE' section; 'Search & reference' points to the 'PLACES' sidebar; and 'Timely resources' points to the 'YEAR-END CAMPAIGN KICKOFF' section.



# Questions

picture perfect  
*year end 2014*



Here's to a picture perfect Year End!



picture perfect  
year end 2014



THANK YOU FOR PARTICIPATING TODAY

picture perfect  
*year end 2014*