

HOW TO RUN A W-2/1099 EDIT REPORT OR W-2 PREVIEW REPORT:

- In Evolution Payroll, go to Reports > Defined Reports using the left-side menu bar.
- Search for W-2 in the search field.
 - You should see W-2 1099 Edit and W-2 Preview.
 - Click on applicable report then select Configure Report

The screenshot shows the 'Reports' interface. On the left, there are tabs for 'DEFINED REPORTS', 'PUBLISHED REPORTS', and 'AD HOC REPORTS'. A search bar contains 'W-2'. To the right, there is a table with the following data:

Report Name	Report #
W-2 1099 Edit (S162)	162
W-2 Preview (S2594)	2594

Below the table, it says 'Page 1 of 1' and '1 - 2 of 2 items'. To the right of the table, there is a 'W-2 1099 Edit' section with the text 'Choose options for this report' and a 'CONFIGURE REPORT' button.

- For W-2 Preview report:
 - On Misc Options tab, check the box for Always Current Year

The screenshot shows the 'Options for W-2 Preview' configuration page. The 'Misc Options' tab is selected. The page title is 'Options for W-2 Preview'. There are two tabs: 'Misc Options' and 'Run Report'. Below the tabs, it says 'Additional options available for this report:'. The 'Parameters' section contains the following options:

- Page break by Employee
- Display list of 1099 Subcontractors
- Mask Sensitive Information
- Report Year: 2023
- Sorting: Name
- Show Only EEs with Negative Wages/Tips
- Always Current Year

- On Run Report tab, select Run This Report. The finished report can be found in the task queue:

Reports

DEFINED REPORTS ← REPORTS LIST Options for W-2 Preview

PUBLISHED REPORTS

AD HOC REPORTS Misc Options Run Report

Depending on your filters and options, this report may take a long time to generate. If you run this report a task will be placed in the queue to generate it.

You will find an entry in the **task queue** for your generated report. You can then view the report from the queue entry.

Your current report definition is set as follows:

With options set:

Display list of 1099 Subcontractors

S Year: 2023

Data Sort: Name

RUN THIS REPORT

- When the report has finished running, you can select “download” to download the entire file

My Task Queue

xzeta

Run Report XZeta 1 - W-2 Preview #2594 ID: 493983

Finished Successfully - Today 3:49 PM

CO# XZeta 1 - W-2 Preview #2594

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#XZeta 1 Sample Client

CO# XZeta 1 - W-2 Preview #2594

Period Range : 01/01/2023 TO 12/31/2023

Employer Name: Sample Client EIN: 123456789 Address: 532 Sample St., Sample, VT 09999

Employee	Federal	Federal	12. Codes	10. Dep. care benefits
Hourly Employee 3001 Medlin Dr Suite 125 3001, 3001 Medlin Dr Ste 125, Arlington, TX 78015 EE Code: 9876 SSN: 455-55-9876	1. Wages, tips, other comp. 2400.00 3. Social security wages 2400.00 5. Medicare wages and tips 2400.00 7. Social security tips 0.00	2. Fed income tax withheld 143.24 4. Soc. Sec. tax withheld 148.80 6. Medicare tax withheld 34.80 8. Allocated tips 0.00		11. Nonqualified plans 13. Statutory Employee Retirement plan 3rd party sick pay
State and Local				
15. State Employer's state ID no.	16. State wages, tips, etc.	17. State income tax	14. Other	
18. Local wages, tips, etc.	19. Local income tax	20. Locality name		
Employee	Federal			

- For the W-2/1099 Edit Report, select all payrolls in the current year payrolls by clicking the box just to the left of the words “Check Date”

Reports

DEFINED REPORTS ← REPORTS LIST Options for W-2 1099 Edit

PUBLISHED REPORTS

AD HOC REPORTS Payroll Filter Misc Options Run Report

Select the date range to use for your report. All payrolls within your range will be selected. You can fine tune your selection by checking only the payrolls you want to include.

Starting Date: 01/01/2023 Ending Date: 11/15/2023 Include: All Payrolls

Check Date

Check Date	Run #	Processed Date	Status	Type
<input checked="" type="checkbox"/> 09/22/2023	1	08/31/2023 12:24:07 PM	Processed	Regular
<input checked="" type="checkbox"/> 09/08/2023	1	08/31/2023 10:17:02 AM	Processed	Regular
<input checked="" type="checkbox"/> 06/02/2023	1		Past Due	Regular
<input checked="" type="checkbox"/> 04/21/2023	1		Past Due	Regular
<input checked="" type="checkbox"/> 02/10/2023	1	02/17/2023 11:13:55 AM	Past Due	Regular

Page 1 of 1 1 - 5 of 5 items

- There is nothing to check on the Misc Options Tab – skip this tab

- On Run Report Tab, select Run This Report, then go to the task queue to retrieve the report.

Reports

DEFINED REPORTS ← REPORTS LIST Options for W-2 1099 Edit

PUBLISHED REPORTS

AD HOC REPORTS

Payroll Filter Misc Options Run Report

Depending on your filters and options, this report may take a long time to generate. If you run this report a task will be placed in the queue to generate it.

You will find an entry in the **task queue** for your generated report. You can then view the report from the queue entry.

Your current report definition is set as follows: With options set:

Date Range: 02/10/2023-09/22/2023

Payrolls: 5 Payroll(s) Selected.

RUN THIS REPORT

- When the report has finished running, you can select “download” to download the entire file

My Task Queue

Results Log

CO# XZeta 1 . W-2 1099 Edit #162

Run Report XZeta 1 - W-2 1099 Edit #162 ID: 593989
 Finished Successfully - Today 3:54 PM

Run Report XZeta 1 - W-2 Preview #2594 ID: 593983
 Finished Successfully - Today 3:49 PM

DOWNLOAD

page 1 of 3

#XZeta 1 Sample Client

CO# XZeta 1 . W-2 1099 Edit #162	
Check Date :	02/10/2023-1 TO 09/22/2023-1
Period Range :	01/26/2023 TO 09/20/2023
Week Number :	Week #38

Please Verify all company and employee W2 information. Return this entire report with corrections, as soon as possible, before the end of the year.

Note:
 If you are doing a pension plan through payroll, the Pension box and Deferred Comp box does not need to be marked as yes.

Company #	State	State EIN #	Name on Tax Return	SUI EIN's
XZeta 1	VT	09999	Primary	Exempt
Sally Sue's S:			Primary	Test
Sample Client			Primary	Test
532 Sample St.			Primary	987654
Sample	VT	09999	Primary	None
Name on Tax Return:		Primary	Primary	123456
Federal EIN:		123456789	Primary	
AR		000000000	Primary	
CO		Test	Primary	
NV		Test	Primary	
NY		987654	Primary	
TX		None	Primary	
VT		123456	Primary	