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# W2 SUBMISSION TO SSA (PAY-W092)

Sacramento City Unified School District

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## 1.0 SCOPE:

- 1.1 This work instruction is applied to the annual submission of the W2 file to the Social Security Administration.

## 2.0 RESPONSIBILITY:

- 2.1 Supervisor IV, Payroll Services

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

## 3.0 APPROVAL AUTHORITY:

- 3.1 Supervisor IV, Payroll Services

Authorized Signature on File

## 4.0 DEFINITIONS:

- 4.1 The Payroll Services and Information Services departments coordinate to submit the District's annual W2 file electronically to the Social Security Administration.
- 4.2 ISET – Information Services and Educational Technology Department
- 4.3 Accuwage – Preliminary report submitted to the Social Security Administration

## 5.0 WORK INSTRUCTION:

- 5.1 ISET orders the W2 forms and loads the software update for the W2 printing.
- 5.2 Payroll confirms with ISET that the company set-up information has been verified: ID numbers, contact name, and District information.
- 5.3 Payroll loads the W2 file and error listing to verify accuracy.
- 5.4 ISET provides Payroll with the following reports to verify accuracy of W2 file:
  - Accuwage report
  - Federal and State transmittal reports
  - Employee Annual tax deferral contribution report
- 5.5 Following completion of necessary corrections; ISET prints employee copies of W2s
- 5.6 Accounting Department seals W2s; and Purchasing picks up and delivers W2s to the post office for mailing not later than January 31<sup>st</sup>.

## 6.0 ASSOCIATED DOCUMENTS:

- 6.1 Escape W2 error report.
- 6.2 Federal and State transmittal reports
- 6.3 Employee Annual Tax Deferral Contribution report
- 6.4 Accuwage report

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### 7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Escape W-2 error report, Federal and State transmittal reports, Employee Annual Tax Deferral Contribution report, Accuwage report	File cabinet in office	Keep in files on-sight.	None. Must keep all payroll records per Internal Audit Department.	Access with approval of Payroll Services Department.

### 8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/03/04	A	Initial Release
07/16/07	B	Corrected Identification in Record Retention Table

**\*\*\* End of procedure \*\*\***