



My Records
Year-End Forms Print Services
Employer User Guide

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Overview

Welcome to the My Records Employer User Guide for Dayforce's Year-End Forms Print Service. My Records, a feature of Dayforce's Data as a Service (DaaS), provides a secure web-based solution to manage and process the printing of W-2s and 1095-Cs. You can allow your employees online access to view and print their W-2 and 1095-C forms.

My Records creates employee W2 and 1095-C documents from an export file created in your company's payroll product and uploaded to My Records. Dayforce then provides printing and distribution of those forms.

My Records enables you and your employees to manage tax forms using the My Records site:

- Form W-2 Wage and Tax Statement (W-2)
 - This includes forms for the territories of Guam, Puerto Rico, the Virgin Islands.
- Form W-2C Corrected Wage and Tax Statement (W-2C)
- Form 1095-C Employer Provided Health Insurance Offer and Coverage (1095-C)


Employees granted access to My Records can:


- Review electronically and reprint their W-2 or 1095-C (if you are subscribed to Dayforce's ACA service).
- File their federal and state tax returns by uploading their individual W-2 information to supported third-party tax preparation websites.

Audience

This guide is for clients who are users of Dayforce's My Records – Year-End Forms Print Service and have been assigned the My Records Customer Admin or Customer User security roles.

Available Resources

Data as a Service (DaaS) has extensive online Help available specific to each role (Customer Admin or Customer User). On any page, click the Help icon () to open detailed Help for that specific page. In addition, the Help Table of Contents opens, which you can use to access any available Help topic. To search for specific information, the Help offers an extensive Index and a Search feature.

Many of the My Records pages also include help for specific fields, as indicated by the  icon. Hover your mouse over the icon to see the additional information.

Training guides are available for you to provide to your employees to help with functions such as self-registration, logging in, and viewing their documents. Access the [My Records Information website](#) to view links to additional guides and release notes.

User Roles and Access in My Records

Your access in My Records will either be as a Customer Administrator or a Customer User. Those with the Customer Administrator role will have access to all the features, including the ability to create other administrative users at their company. Access for Customer Users may be restricted by FEIN or the service such as W-2 or 1095-C forms. New users are set up and maintained in Dayforce's Identity and Access Management system.



For more information about setting up new administrative users, and user roles and attributes in IAM, see the handouts available on the [IAM Information page](#) on MyDayforce.

The following sections are included in this user guide:

Section	Description
Introduction to My Records	Introduction to the features available in My Records, the initial setup steps, an overview of the print process, plus certain terms used in My Records.
Get Started with My Records	How to log in and navigate in My Records.
Verify Company and Subsidiary Information	Verify company and subsidiary information set up for you in My Records. At the company-level, restrict or allow your employees to access the My Records Employee Portal.
Year-End Form Print Processing	How to complete the Setup Kit. Step through the tasks of uploading and verifying a test file, uploading and submitting live files for processing, as well as audit the Summary report. How to customize the sort and shipping options for a live file. Verify the live file was sent to the Print Center.
Administrative Settings	Learn how to customize My Records for your employees by updating the Home page message and the text used in emails such as the Welcome letter. Indicate which tax preparation partner links will be available. Control employee access to their online forms at the FEIN level.
Client Users & Groups	Create User Groups to simplify assigning notifications to multiple employees.
Employee Users	Run the Employee Registration report. Upload and verify the status of the Employee Feed data file to create employee records, allowing them to self-register to use My Records
View Employee Documents	Use the Search Employee Documents page to review W-2s and 1095-Cs for employees. Filter by Registered status, FEINs, employee name and SSN.

Section	Description
Generate W-2 Corrections (W-2Cs)	Learn how to use the W-2C form to enter corrections to wage or tax amounts on an employee's W-2. Use the W-2C Batch Update to upload a file of corrections for multiple employees.

Introduction to My Records

My Records provides a web-based solution for accurate, fast, and reliable review and management of W-2s, W2-Cs, and 1095-Cs. You have access to this information through a secure website, and the approach gives you ultimate control over when, where, and how you and your employees can review their W-2 and 1095-C information.



Forms 1095-C are only available when using Dayforce's ACA (Affordable Care Act) services.

Features

My Records contains the following features:

- As the employer, you can easily reprint W-2s and 1095-Cs from My Records. W-2 information is in PDF® format and viewable with Adobe® Reader®.
- You can greatly reduce the time needed to generate W-2Cs through My Records.
 - These W-2Cs are available for employees to view if they have access to My Records.
- Employees can import their W-2 information from the Dayforce secure server into a supported group of commercial tax preparation products.
- The employer's legal archive copy of My Records information is produced on CD-ROM. My Records is an online electronic alternative to the provided CD-ROM copy of employee's W-2 information. My Records does not replace the employer copy or the employee copy of the W-2.

Initial Setup Steps

Before you upload your W-2 and 1095-C files, there are implementation steps for you to complete with the Dayforce Implementation team.

Step 1: Dayforce creates the customer account.

Dayforce uses the information you provided in your W-2 Print Services contract. You will receive a welcome letter that includes:

- A UserID for the person at your company assigned the Customer Admin role, plus a link to the DaaS portal to access My Records.
- Key dates for deadlines for processing and printing your year-end forms.
- Information about the Employee W-2 Forms print process.

Step 2: Customer completes the W-2 and 1095-C (if applicable) Setup Kit in My Records.

The W2 print setup kit specifies the format of the forms W2 data, general processing information, sorting and distribution information, paper reporting requirements, and customer contacts. It also includes an estimated number of forms for US and US territories.

The 1095-C setup kit allows you to select the sorting and shipping options, as well as to indicate the estimated number of forms to be printed.

Step 3: Customer submits test files.

Once your W-2 setup kit is complete, you are ready to submit a print file for testing. Sample W-2 forms will be available for your review when the test file is processed. In addition, a Summary Report is available to balance totals to your payroll system.

- If you only use Dayforce’s Print Services, use the My Records website to upload your test file.
- If you use Dayforce’s Tax Filing Services (Source Data Manager), follow the instructions provided in the year-end tax filing guidelines. Typically, the test file is released from Source Tax Online and the file is automatically sent to My Records.

Initial W-2 print file testing is based on the preliminary W-2 specifications Dayforce receives from the IRS. The test process is designed to help identify and resolve any issues in advance of printing the final live W-2 documents.

Legislative changes may impact the final W-2 print file requirements as late as November. At that time, we will provide additional updates as necessary.

Step 4: Customer sends production (final) files.

- **W-2s:** You may delete and resubmit test files until all issues have been resolved with balances or missing/duplicated items on your employee W-2s.
 - Your approval of the final file is required to release the forms for printing.
 - W-2 Print only customers will upload their files to My Records.
 - Tax Filing customers will release their live files from Source Tax Online.



All issues must be resolved prior to sending your live production file to Dayforce for processing to avoid time consuming procedures to delete the incorrect live data from the system.

- **1095-Cs:** Files are automatically sent to My Records.
 - The 1094-C Company Transmittal is available for your review once the file is loaded. Review the ALE Member information, the employee counts, and the Other ALE Members list, if applicable.
 - Your approval of the file is required to release the forms for printing.

Step 5: Forms W-2 and 1095-C are printed.

After Dayforce receives the formal approval of your final production file, the W-2s and 1095-Cs are printed, distributed, and shipped as specified in your print setup kits.

Year-End Form Print Process Overview

Here's an overview of the process for using My Records for uploading and printing Forms W-2 and 1095-C. Additional details and steps are provided later in this guide.

- **Complete the My Records W-2 and 1095-C (if applicable) Setup Kits.**
 - Path: My Actions > Year End Forms > Setup Kit
 - W-2 Setup and 1095-C Setup pages

- **Upload test files.**
 - Path: Processing Schedules > Test Schedule > Details
 - When the W-2 Setup Kit is completed, the Processing Schedules > Test Schedule page will have a record available for uploading your files.
- **Submit W-2 test files for processing.**
 - Path: Processing Schedules > Test Schedule > Details > Submit
 - Review details of your test file results using the Processing Log.
 - Audit the Summary Report to confirm the company totals by W-2 box number balance to the numbers in your payroll system.
 - Resolve all formatting issues before uploading your live file.

Once you have tested and confirmed the file format for your upload, follow these steps to upload and validate your live year-end files:

- **Confirm the Processing Schedule record is available.**
 - Path: My Records > Processing Schedules > Live Schedule
 - When the Setup Kit is completed, the Processing Schedules > Live Schedule page will have a record available for uploading your files.
- **Process all feed file changes.**
 - Upload any Employee Feed File changes to be sure the employee records are correct prior to uploading your files for processing.
- **Upload files for the specific year-end forms for your company.**
 - Path: My Records > Processing Schedules > Live Schedule > Details > Upload
 - Upload W-2 files.
 - 1095-C files will automatically be loaded to My Records.
- **Confirm the Employee Count in the uploaded W-2 and 1095-C files.**
 - Path: My Records > Processing Schedules > Live Schedule > Details
 - Verify the employee count is correct for each file uploaded.
- **Submit W-2 files for processing.**
 - Path: Processing Schedules > Live Schedule > Details > Submit
 - Once the upload file status is Validated, submit the file(s) for processing.
- **Review the processing details.**
 - Path: Processing Schedules > Live Schedule > Processing Log
 - Confirm the status is Complete.
- **Audit the Summary Report for W-2 files.**
 - Path: Processing Schedules > Live Schedule > Details > Summary PDF® or Summary CSV
 - Review the company totals by box number on the W-2.
 - Download an Adobe PDF® or CSV file for your records.
- **Audit the 1094-C: Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns.**
 - Path: Processing Schedules > Live Schedule > Details > 1094-C
 - Review Parts I through IV to confirm company address, Certifications of Eligibility, employee counts, and any Aggregated ALE Group member information.

- **Confirm the document counts for US and US territories W-2s, and 1095-Cs.**
 - Path: Processing Schedules > Live Schedule > Details
 - Review the Details page to confirm the number of US W-2s and 1095-Cs, as well as Guam, Puerto Rico, or Virgin Island forms, if applicable for your company.
- **Preview employee W-2 documents.**
 - Path: Processing Schedules > Live Schedule > Details > View Document or My Records > Search Employee Documents
 - View or download an Adobe PDF® image of a year-end form for an employee.
- **Approve W-2 and 1095-C live files for printing.**
 - W-2 Path: Processing Schedules > Live Schedule > Details > Approve/Reject Live Data
 - 1095-C Path: Processing Schedules > Live Schedule > Details > Approve Data or Reject Data
- **Verify that the live file was sent to the Dayforce Print Center.**
 - Path: Processing Schedules > Live Schedule > Details > Bundles

Terms Used in My Records

My Records uses some terms that have a specific meaning within the product.

Term	Definition
Company	The largest unit of your organization.
Employee Feed File	A file containing user information which can be uploaded to My Records to send registration emails to employees.
Employee Registration Report	A report that includes the employee's registration status. If registered, the report will include the employee email address that is set up, paper/electronic document selection, and dates of registration, etc.
Live File	The file that contains valid data for production processing and printing.
Self-Registration	Action completed by the employee to activate their account on the My Records Employee Portal website.
Subsidiaries	Often a company is made up of one or more sub-companies called subsidiaries. Each subsidiary has its own Federal Employer Identification Number (FEIN). It is very important that the correct FEIN is associated with each subsidiary when you set up your company information in the W-2 Setup Kit.
Test File	A file that contains test data to submit through a process for validating and verifying the desired results.

Get Started with My Records

Access to DaaS and My Records is through the single sign-on IAM (Identity and Access Management) portal. Dayforce creates your company account in IAM, then the user at your company designated as the DaaS Customer Administrator sets up and maintains any additional users who should have access to My Records in DaaS. User access to view specific subsidiaries (FEINs) or types of year-end forms is set up and maintained in IAM.



For more information about setting up new users, and user roles and attributes in IAM, see the handouts available on the [IAM Information page](#) on MyDayforce.

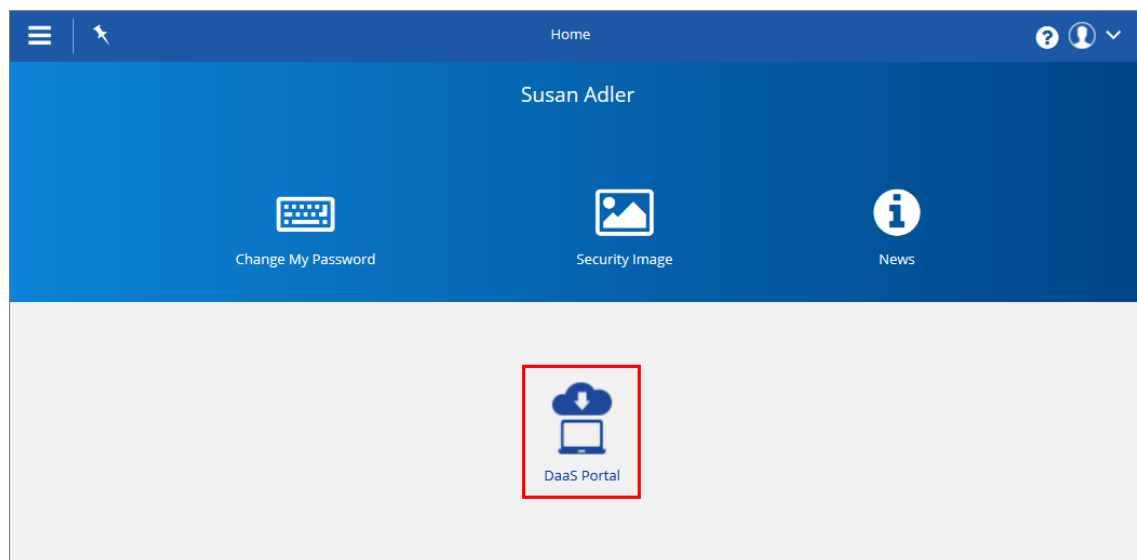
Log in to IAM to Access DaaS and My Records


Log in to IAM using the URL and login information in your welcome email. First-time users will be required to establish a permanent password and create their personal security verification questions. Some clients use a multi-factor authentication process that also requires the user to select a security image or key word as part of the login process.

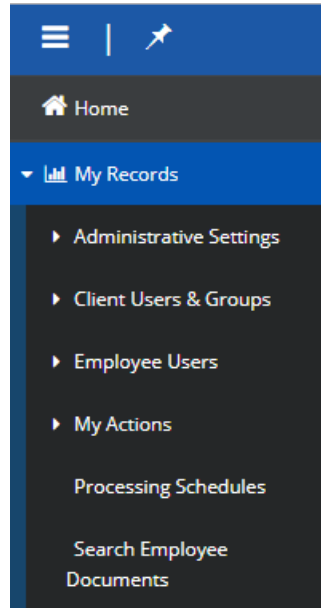


See the *IAM Getting Started* guide on the [IAM Information page](#) on MyDayforce for more information about logging in the first time, changing passwords, and setting up the personal verification questions and answers to be used for validation when the user selects to change or reset their password.

1. Navigate to the IAM login page URL: <https://iam.dayforce.com>.
2. Enter your **User ID** in the format `UserName_Organization`.
3. Enter your **Password** and complete the remaining login steps as established by your company.
4. On the IAM Home page, select **DaaS Portal**. The DaaS Home page will open in a new browser tab.



5. Click the **Navigation** menu icon (). Select **My Records**.



Administrative Settings

- **Employer Details:** View address information for your company and control overall employee access to the My Records Employee Portal.
- **Customization:** Customize the employee's My Records Home page and notification emails. Indicate the supported third-party tax preparation partners available for employees.
- **Email Notification:** Set up My Records administrative users to receive notifications based on events and tasks such as the W-2 or 1095-C files were approved or rejected.
- **Electronic Presentment:** Select the default option for your employees to receive paper or electronic copies of their W-2, W-2C, and 1095-C.
 - Indicate if an employee is allowed to override the default distribution.
- **Document Access:** Allow or restrict employee access to the My Records Employee Portal at the FEIN level. Allow or restrict employees in an FEIN from downloading their W-2 information into a third-party tax preparation partner.

Client Users & Groups:

- **Manage Subsidiaries:** Maintain subsidiary address information and view administrative users granted access to subsidiary information in My Records.
 - Administrative users are set up and maintained in IAM.
- **User Groups:** Combine multiple administrative users who should receive the email notifications about events and tasks.

Employee Users

- **Employee Registration Report:** Run the Employee Registration report to audit their registration status, such as those who received the Welcome email (invited) but haven't completed the self-registration.
- **Employee Feed:** Upload the Employee Feed data file to create the initial employee records in My Records, and to generate the Welcome emails so they can self-register to use the My Records Employee Portal.

My Actions > Year End Forms

- **Setup Kit:** Indicate the anticipated number of W-2s (US and US territories), and 1095-Cs to print as well as your shipping and sorting selection.
- **W-2C Batch Update:** Upload a file with information to correct the W-2s for a number of employees at one time.

Processing Schedules

- Upload and verify data in test and live files.
- Approve W-2 and 1095-C forms for printing.

Search Employee Documents

- View or download an Adobe PDF® of employee W-2s, W-2Cs, and 1095-Cs.
- Enter a W-2C (correction to the W-2) for an individual employee.

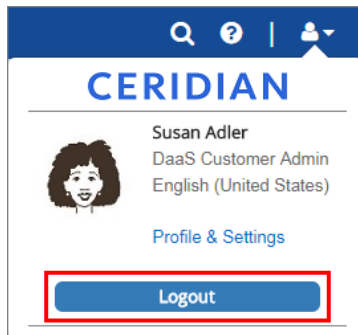



The available feature icons and menu options that display depend on your security access and the other Dayforce products used by your company. Your options may be different.

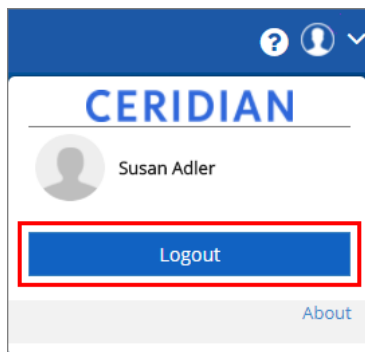
Log Out

Because logging in to DaaS is a 2-step process (first IAM, then DaaS to access My Records), users will also need to log out of both DaaS and IAM when they are through with their session.

1. Select the System Details icon () on the DaaS tool bar, then click **Logout**.



2. Close the browser tab then log out of IAM.
3. Select the Log out icon () on the IAM tool bar, then click **Logout**.

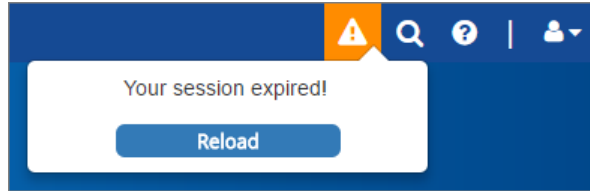




For security purposes, Dayforce recommends that you log out when you are through with your DaaS session. Although there is an automatic inactive session timeout, the browser window for DaaS remains open, potentially displaying sensitive data.

Inactive Session Timeout

Both IAM and DaaS have a minimum 15-minute timeout period. Customer Admins can extend this setting in IAM to a maximum of 30 minutes. If your session is inactive for the timeout period, the IAM session expires and the IAM Home page closes. In DaaS, the Reload message appears on the tool bar. Click Reload to extend your session.



If you do not respond to the Reload message in a timely manner, you may be prompted with the Log In page when you click on Reload.

Enter your credentials and password to be returned to the DaaS Home page.

Verify Company and Subsidiary Information

Dayforce creates the initial record for your company, including Company Name and all associated Federal Tax IDs (FEINs). Verify this information is accurate the first time you log into My Records. You can also update address information as needed in the future.

Verify Company Address and Settings

Path: My Records > Administrative Settings > Employer Details

You can add address information for the company, plus control overall employee access to My Records on the Employer Details page.

The screenshot shows the 'Employer Details' form for 'General Products'. The form contains the following fields and values:

- Company Name:** General Products
- Address-1:** 345 W. State St.
- Address-2:** (Empty)
- City:** Dunwoody
- State:** Georgia (GA)
- Zip:** 99004-5645
- Phone:** 770-829-5253
- Restrict Employee Portal Access for all Employees:**

Restrict Employee Portal Access for all Employees

You have the option of allowing or restricting all your employees' access to their online year-end documents in the My Records Employee Portal.

- **Restrict Employee Portal Access for all Employees:** By default, access is denied for all employees in the company when this box is checked. Clear the checkbox to allow your employees to use the My Records Employee Portal.



The Restrict Employee Portal Access for all Employees is checked by default when you first start to use My Records. That way, you control when to check the box and allow your employees to begin to use the My Records Employee Portal.



See the *Document Access* topic in the Administrative Settings module for information on allowing or restricting access to the My Records Employee Portal at the FEIN level.

Manage Subsidiary Information

Path: My Records > Client Users and Groups > Manage Subsidiaries

You can enter and maintain address information for your subsidiaries if it is different than the main parent company. The page will display the administrative users who have been set up in IAM and granted access to the subsidiary information in My Records. Be sure to click Save after you make any changes.



The FEINs and FEIN Names are established for you in IAM by Dayforce. Contact your Dayforce Representative if the FEIN or FEIN Name is incorrect. If you need to add a new FEIN, contact Dayforce.



For more information about setting up new administrative users, see the handouts available on the [IAM Information page](#) on MyDayforce.

FEIN	FEIN Name
96-██████	FEIN 3
96-██████	FEIN2
71-██████	FEIN 1

FEIN 3
Last modified by ██████ on 02/13/2019 04:49 AM PST.

Properties

FEIN Name* FEIN* PSID Contract Number

Address-1 Address-2 City State

Zip Code Phone Number Enabled

Users

Refresh

Name	Email
██████████	██████████@██████████.com
Customer Admin	██████████@██████████.com
Customer User	██████████@██████████.com

Year-End Form Print Processing

Form W-2, and Form 1095-C if applicable, print processing consists of the following tasks:

- Complete the W-2 and 1095-C Setup Kits.
- Upload test files and audit results.
 - Upload test files.
 - Submit test files for processing.
 - Review processing details and reports to confirm file formatting and totals.
- Process all Employee Feed File changes.
- Upload your print-ready files.
 - Review employee counts in the uploaded files.
 - Customize sort and shipping options, if necessary.
- Submit the files for processing.
- Review the Summary Report to balance the W-2 totals to your payroll system.
 - You can also view and audit individual documents for employees.
- Review the 1094-C Company Transmittal.
- Approve files for printing.
- Confirm the year-end form live files have been received by the Dayforce Print Center.

Complete the W-2 and 1095-C Setup Kits

Path: My Records > My Actions > Year End Forms > Setup Kit > W-2 Setup or 1095-C Setup

Dayforce will communicate when My Records is ready for you to enter the current year Setup Kit information. You'll also be notified of the deadline for completing the kits in My Records.



If the W-2 Setup or 1095-C Setup pages are not available for data entry, contact your Dayforce support representative to enable the pages.

You'll be asked to provide the total number of forms to be printed, plus your shipping and sorting preferences. If you are not using Dayforce's Tax Service, you will be able to select to receive a CD-ROM/DVD of the employee W-2s or 1095-Cs, as well as printed state and local agency reports for your filing needs. Dayforce's Tax Service files the state and local agency reports for customers using the service.



You cannot make any changes once you have submitted your entries for the W-2 and 1095-C Setup Kits. Contact your Dayforce support representative if you need to make changes.

Complete the W-2 Setup Kit:

1. On the Navigation menu select **My Records > My Actions > Year End Forms**.
2. Select **Setup Kit > W-2 Setup**.
3. In the **General Information** section, enter the total number of W-2s to print. This includes US plus any US territories for your company.
4. If applicable, enter the estimated number of W-2s for the US Virgin Islands, Guam, and Puerto Rico forms to be printed.

Test Account - Setup Kit

Year: 2018

W-2 Setup | 1095-C Setup

Your 1095-C setup kit is not complete. Submit and Approve your 1095-C Print Live File before 3/8/2019 12:00:00 AM

Your W-2 setup kit is not complete. Submit and Approve your W-2 Print Live File before 3/8/2019 12:00:00 AM

General Information

Total W-2 (US & Territories Combined) Estimated W-2 VI Estimated W-2 GU Estimated W-2 PR

W-2s: Shipping and Sorting

Select Shipping

Mail directly to employees Ship back to us

Employer Reports

Contacts W-2 Print Services

CD-ROM/DVD copy of Employee W-2 Printed reports for State filing Printed reports for Local filing

--None-- Yes No Yes No

Contacts

Refresh Add Delete

Name	Email	Phone Number
No data available in table		

5. Additional fields appear when you enter a number for Puerto Rico W-2s.

Total W-2 (US & Territories Combined)	Estimated W-2 VI	Estimated W-2 GU	Estimated W-2 PR ⓘ
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="15"/>

Additional Information for Puerto Rico

Control Number ⓘ

From Data File
 Enter a value

Employer Copies of Puerto Rico W-2 Shipment Information

Company Name	Address-1	Address-2	City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	--Select-- ▼	<input type="text"/>
Recipient Name	Recipient Phone	Courier	Courier Account Number		
<input type="text"/>	<input type="text"/>	--Select-- ▼	<input type="text"/>		



Contact your Dayforce support representative for assistance with Puerto Rico control numbers. You can select **From Data File** to have the control numbers assigned as part of the tax filing process.

6. In the **W-2s: Shipping and Sorting** section you have the following options:

- **Mail directly to employees:** Dayforce will mail the employee forms to your employees.
- **Ship back to us:** Select this option if you prefer to distribute the forms. Additional tabs are enabled when you select this option.
 - **Shipping Address:** Enter an address, attention, and delivery instructions.

<u>Shipping Address</u>	Courier	Sort Criteria	Postal Indicia	
Address-1	Address-2	City	State	Zip
<input type="text"/>	<input type="text"/>	<input type="text"/>	--Select-- ▼	<input type="text"/>
Attention	Delivery Instruction			
<input type="text"/>	<input type="text"/>			

- **Courier:** Select FedEx or UPS from the list and enter a valid courier account number. An invalid account number will delay the shipment of your W-2s.

Shipping Address	<u>Courier</u>	Sort Criteria	Postal Indicia
Courier	Courier Number		
--Select-- ▼	<input type="text"/>		

- o **Sort Criteria:** Select up to five levels of sorting.

Shipping Address	Courier	Sort Criteria	Postal Indicia
Sort Key #1	Sort Key #2	Sort Key #3	Sort Key #4
--Select--	--Select--	--Select--	--Select--

- Choose from the following list. Contact your Dayforce support representative for assistance with the custom sort fields. There are assigned positions in the W-2 print file for the sort data.

--Select--

- Select--
- CONTROL NUMBER
- FEIN
- SSN
- EMPLOYEE FIRST NAME
- EMPLOYEE MIDDLE NAME
- EMPLOYEE LAST NAME
- EMPLOYEE ADDRESS LINE 1
- EMPLOYEE ADDRESS LINE 2
- EMPLOYEE CITY
- EMPLOYEE STATE
- EMPLOYEE ZIPCODE
- Custom Field 1
- Custom Field 2
- Custom Field 3
- Custom Field 4
- Custom Field 5



If parts of your organization need different ship or sort instructions than in the W-2 Setup Kit, you will be able to customize the sort and shipping information on a per file basis when you upload your live files. Separate files will need to be uploaded to indicate each different sort or shipping option required.

- o **Postal Indicia:** If you will be mailing your own W-2s, you may have your company's postal permit information for bulk mailing printed on the documents.
 - No postal indicia: Will display the Dayforce Print Center that ships the W-2s. Allows you to distribute the forms in another manner.
 - Use your company postal indicia: Enter the information and provide the indicia graphic to Dayforce.

Shipping Address	Courier	Sort Criteria	Postal Indicia
<input checked="" type="radio"/> No postal indicia		<input type="radio"/> Use your company's postal indicia	
Postal indicia number:	<input type="text"/>	City, State of origin:	<input type="text"/>



You must provide the indicia graphic at least 10 days prior to submitting your live file to allow time for setup.

7. Entries in the **Employer Reports** section may be enabled or disabled, depending on your contract with Dayforce and whether you use Dayforce's Tax Filing Service.
 - For non-Tax Filing customers, printed reports for your state and local filing needs are available for an additional fee.
 - For Tax Service customers, state and local agency reports are provided as part of the tax filing service.

Employer Reports

W-2 Print Services ⓘ

CD-ROM/DVD copy of Employee W-2 ⓘ

--None-- ▾

Printed reports for State filing

Yes No

Printed reports for Local filing

Yes No



Contact your Dayforce support representative for more information about the CD-ROM or DVD (depending on the volume of records) copy of the employee W-2s.

8. In the **Contacts** section, any administrative users selected will receive a notification of various events via email, such as when W-2s are ready for viewing.
 - Click **Add** to view a list of the administrative users set up for your company.
 - Click **Delete** to remove any user who should no longer receive the notifications.

Contacts

↻ Refresh |
 + Add |
 ✕ Delete

Name	Email	Phone Number
No data available in table		

9. To save your entries but keep the page open for changes, click **Save**.
10. Click **Submit** when your data entry is complete, accurate, and you are ready for Dayforce to enable the My Records pages for uploading your test files.



You cannot make any changes once you have submitted your entries for the W-2 Setup Kit. Contact your Dayforce support representative if you need to make changes.

Complete the 1095-C Setup Kit:

1. On the Navigation menu select **My Records > My Actions > Year End Forms**.
2. Select **Setup Kit > 1095-C Setup**.

3. In the **General Information** section, enter the estimated number of Form 1095-Cs to be printed.

4. In the **1095-Cs: Shipping and Sorting** section you have the following options:

- **Mail directly to employees:** Dayforce will mail the employee forms to your employees.
- **Ship back to us:** Select this option if you prefer to distribute the forms. Additional tabs are enabled when you select this option.
 - **Shipping Address:** Enter an address, attention, and delivery instructions.

- **Courier:** Select FedEx or UPS from the list and enter a valid courier account number. An invalid account number will delay the shipment of your 1095-Cs.

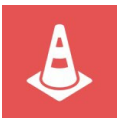
- **Sort Criteria:** Select up to five levels of sorting.

- Choose from the following list. There are assigned positions in the 1095-C print file for the sort data.



If parts of your organization need different ship or sort instructions than in the 1095-C Setup Kit, you will be able to customize the sort and shipping information on a per file basis when the live files are uploaded. Separate files will need to be created and uploaded to indicate each different sort or shipping option required.

- **Postal Indicia:** If you will be mailing your own 1095-Cs, you may have your company's postal permit information for bulk mailing printed on the documents.
 - No postal indicia: Will display the Dayforce Print Center that ships the 1095-Cs. This allows you to distribute the forms in another manner.
 - Use your company postal indicia: Enter the information and provide the indicia graphic to Dayforce.



You must provide the indicia graphic at least 10 days prior to submitting your live file to allow time for setup.

5. Entry in the **Employer Reports** section may be enabled or disabled, depending on your contract with Dayforce and whether you use Dayforce's Tax Filing Service.



Contact your Dayforce support representative for more information about the CD-ROM or DVD (depending on the volume of records) copy of the employee 1095-Cs.

6. In the **Contacts** section, any administrative users selected will receive a notification of various events via email, such as when 1095-Cs are ready for viewing.
 - Click **Add** to view a list of the administrative users set up for your company.
 - Click **Delete** to remove any user who should no longer receive the notifications.

Contacts		
Refresh	+ Add	x Delete
Name	Email	Phone Number
No data available in table		

7. To save your entries but keep the page open for changes, click **Save**.
8. Click **Submit** when your data entry is complete, accurate, and you are ready for Dayforce to enable the My Records pages for uploading your test files.



You cannot make any changes once you have submitted your entries for the 1095-C Setup Kit. Contact your Dayforce support representative if you need to make changes.

Upload W-2 Test Files and Audit Results

When the Setup Kits are completed and reviewed by Dayforce, there will be a record available on the Processing Schedules Test Schedule page for uploading your files. Sample W-2s will be available for your review when the test file is processed. In addition, a Summary Report is available to balance totals by W-2 Box number to your payroll system.

Test Account - Processing Schedules								
Live Schedule		Test Schedule						
Refresh	Filter	★ Favorites	Edit	Processing Log	Details	Delete		
ID	Subsidiary	Type	Year	Period	Submit By	Pay Date	Active	Status
22		1095-C	2017	1		12/31/2017	N	File received
23		W-2	2017	1		12/31/2017	N	File received
993		1095-C	2018	1		12/31/2018	Y	Waiting for files
994		W-2	2018	1		12/31/2018	Y	Waiting for files

Showing 1 to 4 of 4 entries

The process to upload and submit test files is different based on whether you are a Tax Filing Customer or a Year-End Forms Print Only customer. This guide contains the steps for Print Only customers to upload files.



Tax Filing customers release their files in Source Tax Online. Be sure all FEINs are set up and display on the Manage Subsidiary page. FEINs that are not set up will not be included in the file sent from Source Tax Online to My Records until all FEINs in the file are set up. Contact your Dayforce support representative if you need to add a new FEIN.

Upload W-2 Test Files

1. On the navigation panel select **My Records > Processing Schedules > Test Schedule**.
2. Select the W-2 line for the correct year and click **Details**.
3. In the **Processing Files** section, click **Upload File**.

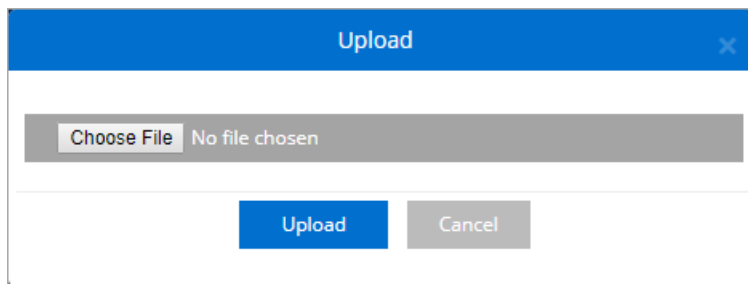
The screenshot shows the 'Test Account - W-2 Schedule Details - Test' page. It includes a 'W-2' section with a table of schedule details and a 'Processing Files' section with an 'Upload File' button highlighted in red.

ID	Description	Status	Number of Documents
994	Test Schedule	Waiting for files	0

Number of W-2 US	Number of W-2 PR	Number of W-2 GU	Number of W-2 VI
0	0	0	0

File ID	File Name	Uploaded By	Uploaded On	Status	Employee Count
No data available in table					

4. Click **Choose File** to locate your file, then click **Upload**.



5. If you have multiple files, for example a separate file for Puerto Rico or Guam W-2s, you can upload additional files once the page refreshes.
6. Click the **Refresh** button in the Processing Files section to update the status of your files. You'll see statuses such as Waiting to be validated, Validation error, and Validated.
7. Confirm the **Employee Count** for each file.

- If the number is not correct, select the line for the file and click **View Log** to see if there are any validation errors. Review your file for missing information.

You can delete the file, make changes to the data, then upload the new file.

View Log X		
Date/Time	Status	Description
11/13/2018 06:32 AM PST	SYSTEM	Validation in progress
11/13/2018 06:32 AM PST	SYSTEM	Validated

Showing 1 to 2 of 2 entries

[Close](#)



Depending on the number of records in your file, this may take several minutes to upload and process the records. Do not close your browser or navigate to another page during this time.



Repeat the steps to upload the files until all the files you will be processing are uploaded. All files must show the file status Validated before the Submit button will be active.

- When the file status shows Validated, and you are satisfied with the document counts click **Submit**. This will submit the files for processing, generate the Summary Report, and create the sample W-2 Adobe PDF® images for employees.

Review the Status of a Processed Test File

The Processing Log displays all the stages of the processing of your uploaded file, along with the Date/Time stamp, and the user who initiated the process such as uploading the file or who submitted the file for processing. Additional system generated statuses display.

Processing Log X		
Date/Time	User Name	Description
10/29/2018 02:03 AM PST		File uploaded W2EF7074100.txt
10/29/2018 02:04 AM PST		Submitted and Ready for process
10/29/2018 02:05 AM PST	SYSTEM	Validation in progress
10/29/2018 02:05 AM PST	SYSTEM	Validated
10/29/2018 02:05 AM PST	SYSTEM	Business rule execution in progress
10/29/2018 02:05 AM PST	SYSTEM	Business rule executed
10/29/2018 02:05 AM PST	SYSTEM	Data processing in progress
10/29/2018 02:23 AM PST	SYSTEM	Data processed
10/29/2018 02:23 AM PST	SYSTEM	Document generation in progress
10/29/2018 02:48 AM PST	SYSTEM	Documents generated

Showing 1 to 10 of 19 entries

[Previous](#)
1
2
[Next](#)

[Close](#)

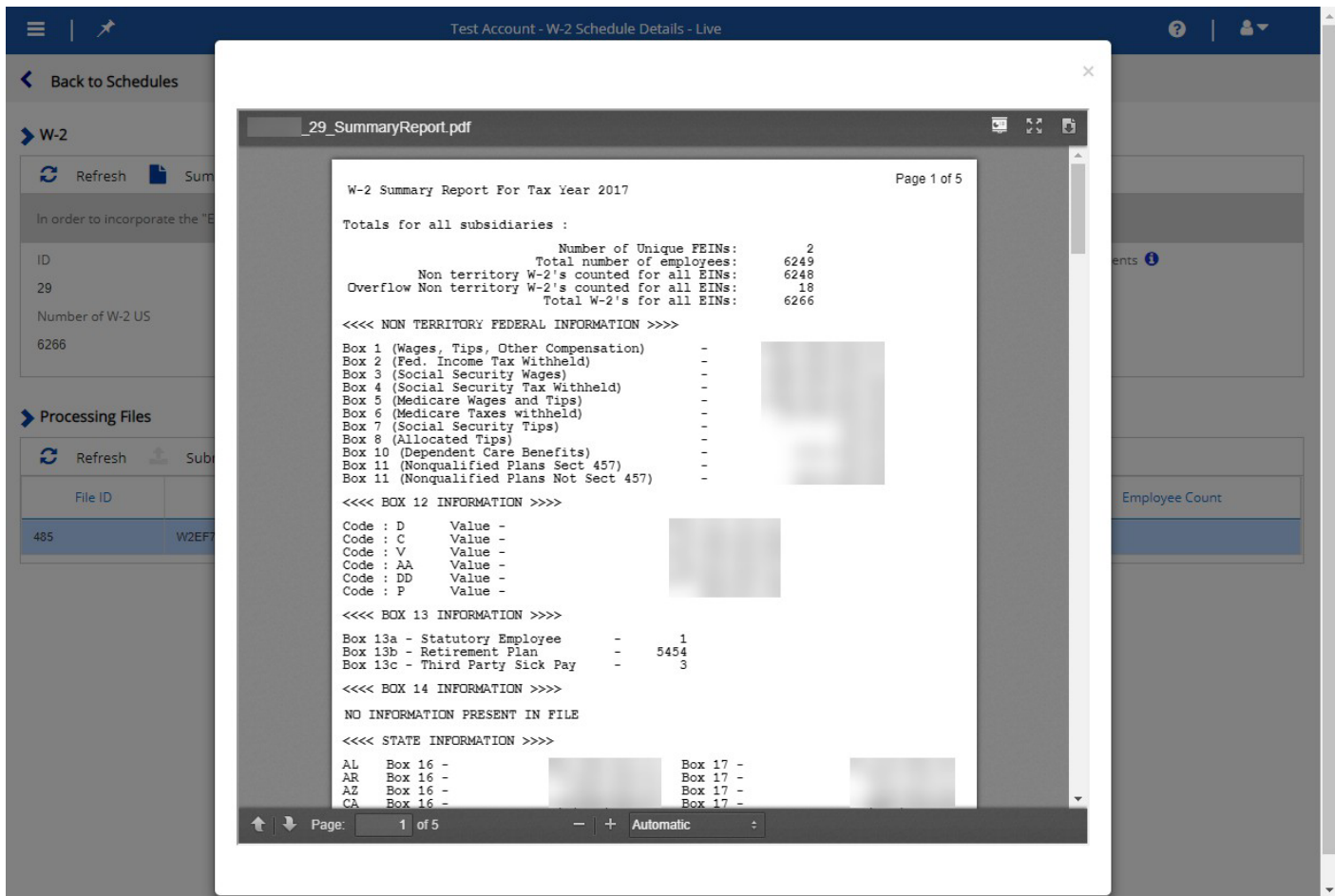
Review the Processing Log for important formatting information about your file.



- **Warnings** in the log will not stop your W-2 print file from processing but may result in problems on the employee W-2.
- **Errors** found in the log will result in a processing error that will prevent the creation of the Summary report and the sample W-2s.
 - Print Only customers need to delete the file, fix the errors, and upload a new file.
 - Tax Filing customers need to correct the errors and release a new file from Source Tax Online.

Audit the Summary Report of W-2 Totals

My Records provides a Summary report in Adobe PDF® or CSV file format for you to review and audit. The report includes company totals for all boxes on the W-2. The Summary PDF® opens in an online viewer. You can select to print or download the file to a local or network drive.

Sample Summary PDF® report with multiple FEINs and overflow documents.



Select the Full Screen button  to expand your view. You can scroll through or page through the document using the buttons at the bottom of the viewer. Use the Download button  to save the file to a local or network drive.

Select **Download** to open and save the document as a PDF file. Depending on your browser:

- The file will open in a separate tab.
- You may be prompted to open or save the file.
- You may need to locate the file in the system tray on your monitor.
- You may need to locate the file in your Downloads folder in Microsoft Windows Explorer ®.

To insure the employee W-2s are correct, it is very important to thoroughly review the Summary Report prior to releasing or submitting a live file. You must balance all taxable wages, tax amounts, and insure all box information is included without duplication and validating that all codes, such as for Box 12, are present. Balance the amounts against reports from your payroll system.



It is extremely important to work with the test files until you have balanced your Summary report. You can delete and upload new files until you are satisfied with the results.

Sections of the Summary Report

Totals for all subsidies

This section contains the number of unique FEINs plus the number of forms to be printed. Separate lines will display the counts if you have forms for Guam, Puerto Rico, or the Virgin Islands.

Totals for all subsidiaries :	
Number of Unique FEINs:	2
Total number of employees:	6249
Non territory W-2's counted for all EINs:	6248
Overflow Non territory W-2's counted for all EINs:	18
Total W-2's for all EINs:	6266

- If there are multiple FEINs, the first Summary Report will be for all FEINs combined, followed by pages with the individual FEIN counts and totals.
 - If your combined counts are incorrect, review each individual FEIN’s total contained in the report to assist with identifying the discrepancy.
- **Overflow documents:** If employees will receive more than one W-2 due to wages and taxes to be reported to multiple state and local agencies, those additional forms are counted as overflow documents. This allows you to balance the number of employees, rather than the number of printed documents.

- o Employees with overflow documents will be listed at the end of the grand totals report and for each FEIN.

```

W-2 Summary Report For Tax Year 2017

TOTAL OVERFLOW W-2s: 18
000-00-0002 LASTNAME0002, FIRSTNAME0002
000-00-0003 LASTNAME0003, FIRSTNAME0003
000-00-0005 LASTNAME0005, FIRSTNAME0005
000-00-0012 LASTNAME0012, FIRSTNAME0012
000-00-0013 LASTNAME0013, FIRSTNAME0013
000-00-0022 LASTNAME0022, FIRSTNAME0022
000-00-0023 LASTNAME0023, FIRSTNAME0023
000-00-0025 LASTNAME0025, FIRSTNAME0025
000-00-0033 LASTNAME0033, FIRSTNAME0033
000-00-0044 LASTNAME0044, FIRSTNAME0044
000-00-0192 LASTNAME0192, FIRSTNAME0192
000-00-0228 LASTNAME0228, FIRSTNAME0228
000-00-0235 LASTNAME0235, FIRSTNAME0235
000-00-0263 LASTNAME0263, FIRSTNAME0263
000-00-0325 LASTNAME0325, FIRSTNAME0325
000-00-0334 LASTNAME0334, FIRSTNAME0334
000-00-0386 LASTNAME0386, FIRSTNAME0386
000-00-0424 LASTNAME0424, FIRSTNAME0424

```

Federal Information

The Federal Information section displays totals for boxes 1 through 11. If you cannot balance to the combined report for all FEINs, you should use the individual FEIN reports to locate the out of balance items.

```

<<<< NON TERRITORY FEDERAL INFORMATION >>>>

Box 1 (Wages, Tips, Other Compensation)      -      $497,868,362.81
Box 2 (Fed. Income Tax Withheld)            -      $87,283,246.47
Box 3 (Social Security Wages)               -      $442,542,190.31
Box 4 (Social Security Tax Withheld)        -      $27,437,615.89
Box 5 (Medicare Wages and Tips)             -      $524,594,583.66
Box 6 (Medicare Taxes withheld)            -      $8,065,255.18
Box 7 (Social Security Tips)                -      $0.00
Box 8 (Allocated Tips)                      -      $0.00
Box 10 (Dependent Care Benefits)            -      $310,643.14
Box 11 (Nonqualified Plans Sect 457)        -      $0.00
Box 11 (Nonqualified Plans Not Sect 457)    -      $576,063.30

```

Box 12 Information

Verify all Box 12 codes and total amounts. If you do not see the code listed on the Summary Report, they will not be included on the employee's W-2.

```

<<<< BOX 12 INFORMATION >>>>

Code : D      Value -      $29,741,761.21
Code : C      Value -      $1,288,969.24
Code : V      Value -      $27,398,629.82
Code : AA     Value -      $2,191,363.27
Code : DD     Value -      $63,080,060.54
Code : P      Value -      $48,021.18

```



Do not upload or process your live files until all codes and amounts balance to your payroll system.

Box 13 Information

Verify that all the counts are correct. If you do not see the count on the reports, the employee's W-2s will not display these boxes as checked.

<<<< BOX 13 INFORMATION >>>>		
Box 13a - Statutory Employee	-	1
Box 13b - Retirement Plan	-	5454
Box 13c - Third Party Sick Pay	-	3

Box 14 Information:

Depending on the states where you do business, you may or may not have any information displayed in Box 14. Information includes state disability or unemployment insurance withholding, as well deductions you want to highlight for your employees such as union dues or nontaxable income. Pay close attention to totals for employees in NJ, NY, and PA as there are many different local taxes that are reported in Box 14. In the following example, the codes "NJ DI" and "New Jersey Disabilit" will result in 2 entries on the employee's W-2. In this example, the result will be an overflow document.

<<<< BOX 14 INFORMATION >>>>		
Code : HSA	Value -	\$12.33
Code : UDUES	Value -	\$33.33
Code : UW	Value -	\$33.33
Code : UI/WF/SWF	Value -	\$252.44
Code : NJ DI	Value -	\$297.00
Code : FLI	Value -	\$71.34
Code : NEW JERSEY WORKFORCE	Value -	\$25.26
Code : NEW JERSEY DISABILIT	Value -	\$297.00
Code : NEW JERSEY UNEMPLOYM	Value -	\$227.18
Code : MEPERS	Value -	\$1,111.11
Code : STPICKUP	Value -	\$1,111.11
Code : WEIC	Value -	\$1,111.11
Code : PA SUI	Value -	\$8.80
Code : CHAR CONT	Value -	\$32.00

Duplicate Entries for the same item will appear on the W2

Review the W-2s for a few of your NJ employees to see how those two NJ codes display.

For this employee, the NJ state document shows the correct Box 14 information using the code UI/WF/SWF for \$126.22, DI for \$148.50, and the FLI for \$35.67.

REISSUED STATEMENT		OMB NO. 1545-0008	
1. CONTROL NUMBER	This information is being furnished to the Internal Revenue Service	1. WAGES, TIPS, OTHER COMPENSATION	2. FEDERAL INCOME TAX WITHHELD
77-		2423.07	234.38
3. EMPLOYER IDENTIFICATION NUMBER	A. EMPLOYEE'S SOCIAL SECURITY NUMBER	3. SOCIAL SECURITY WAGES	4. SOCIAL SECURITY TAX WITHHELD
		2423.07	150.23
5. EMPLOYER'S NAME, ADDRESS AND ZIP CODE		5. MEDICARE WAGES AND TIPS	6. MEDICARE TAX WITHHELD
		2423.07	35.13
7. EMPLOYEE'S FIRST NAME AND INITIAL	LAST NAME	7. SOCIAL SECURITY TIPS	8. ALLOCATED TIPS
FIRSTNAME			
	NJ	9. ADVANCE DC PAYMENT	10. DEPENDENT CARE BENEFITS
11. EMPLOYEE'S ADDRESS AND ZIP CODE		11. NONQUALIFIED PLANS	12. 401K
		14. OTHER	
		UI/WF/SWF 126.22	
		DI 148.50	
		FLI 35.67	
13. STATE	EMPLOYER'S STATE ID NO.	14. STATE WAGES, TIPS, ETC.	15. STATE INCOME TAX
NJ		2423.07	44.46

The overflow document has the duplicate entries for "NEW JERSEY DISABILIT" which is already printed on the NJ state form. Another issue is the combined "NEW JERSEY WORKFORCE" and "NEW JERSEY UNEMPLOYM" amounts (12.63 + 113.59 = 126.22) which are also already included on the NJ

state form with the code “UI/WF/SWF” for 126.22. The overflow document is incorrect and should not be printed.

REISSUED STATEMENT		OMB NO. 1545-0008	
D. CONTROL NUMBER This information is being furnished to the Internal Revenue Service		1. WAGES, TIPS, OTHER COMPENSATION	
B. EMPLOYER IDENTIFICATION NUMBER 77-		3. SOCIAL SECURITY WAGES	
A. EMPLOYEE'S SOCIAL SECURITY NUMBER		4. SOCIAL SECURITY TAX WITHHELD	
C. EMPLOYER'S NAME, ADDRESS AND ZIP CODE		5. MEDICARE WAGES AND TIPS	
HI		6. MEDICARE TAX WITHHELD	
13. Statutory Employee <input type="checkbox"/> Retirement Plan <input type="checkbox"/> Time/Partly Sick Pay <input type="checkbox"/>		7. SOCIAL SECURITY TIPS	
E. EMPLOYEE'S FIRST NAME AND INITIAL LAST NAME FIRSTNAME		8. ADVANCE EIC PAYMENT	
NJ		9. ALLOCATED TIPS	
F. EMPLOYEE'S ADDRESS AND ZIP CODE		10. DEPENDENT CARE BENEFITS	
19. STATE EMPLOYER'S STATE ID NO.		11. NONQUALIFIED PLANS	
16. STATE WAGES, TIPS, ETC.		14. OTHER NEW JERSEY WORKFORCE 12.63 NEW JERSEY DISABILIT 148.50 NEW JERSEY UNEMPLOYM 113.59	
17. STATE INCOME TAX		12. ee	
18. LOCAL WAGES, TIPS, ETC.		15. LOCAL INCOME TAX	
19. LOCAL INCOME TAX		20. LOCALITY NAME	



Review the information included in your W-2 file to locate the incorrect or duplicate information. You can delete and upload a new W-2 file as many times as necessary to insure a clean live file.

State and Local Information

It is a good practice to review documents that contain each of the states, and codes that are to be printed for your employees. By checking at least one W2 document for each item, you can reveal problems prior to printing and distributing the documents. Allow enough time to complete the review. You can greatly reduce or eliminate the need for W2-Cs.

Totals for Box 16, 17, 18, and 19 are included for you to verify all state and local taxes are accounted for and accurate. If a state or local jurisdiction is not listed, it will not print on the employee's W-2.

<<<< STATE INFORMATION >>>>			
CA	Box 16 -	\$556.76	Box 17 - \$16.36
KY	Box 16 -	\$68,746.66	Box 17 - \$3,689.30
MD	Box 16 -	\$11,770.22	Box 17 - \$329.58
ME	Box 16 -	\$11,770.22	Box 17 - \$329.58
NJ	Box 16 -	\$4,846.14	Box 17 - \$66.47
PA	Box 16 -	\$12,021.22	Box 17 - \$329.58
WI	Box 16 -	\$11,770.22	Box 17 - \$329.58
<<<< LOCAL INFORMATION >>>>			
3920 WILKES BARRE CIT	Box 18 -	\$251.00	Box 19 - \$58.00
65CL MONTGOMERY TWP	Box 18 -	\$12,480.22	Box 19 - \$8.74

Puerto Rico, Guam, and Virgin Islands Information

If applicable, totals for each of the territories are listed after the state and local totals.

Upload Your W-2 Print Ready Files

After you upload, submit, and review the W-2 test files, you can upload, submit, and review the W-2 live files using the same steps on pages 26 to 32. The only difference is that you will be using the Live Schedule page instead of the Test Schedule page.



Upload any employee feed file changes before you upload your live files for processing. Otherwise those changes will not be incorporated in the processed and printed files.

Customize Ship and Sort Options for Live Files

Once your live files are uploaded either manually or through Source Tax Online for W-2s, or the 1095-C files show the status of Ready to Print, you can make changes to the default sorting and method of distribution indicated in your W-2 and 1095-C Setup Kits. This step must be completed before you click Submit for your W-2 files, or approve your 1095-C files for printing.

To customize the shipping and sort options:

1. Upload your W-2 files on the **Processing Schedules > Live Schedule > Details** page or release the W-2 file from Source Tax Online.



You must have a separate file for each custom ship and sort group. Tax Filing Service customers may need to ask for assistance from Dayforce in order to split the information into separate files, or to add the custom sort fields to their file.

2. On the **Live Schedules > Details** page, select the file you would like to customize, then click **Custom Shipping**.
3. Select either:
 - a. **Mail directly to employees:** Dayforce will mail the employee forms to your employees.
 - b. **Ship back to us:** Select this option if you prefer to distribute the forms. Additional windows are enabled when you select this option.

Custom Shipping

Select Shipping

Mail directly to employees Ship back to us

Save Cancel

- 4. When you select Ship back to us, complete the following:
 - a. **Shipping Address:** Enter an address, attention, and delivery instructions.

The screenshot shows a 'Custom Shipping' dialog box with a blue header and a close button. Under 'Select Shipping', the 'Ship back to us' radio button is selected. The 'Shipping Address' tab is active, showing fields for Address-1, Address-2, City, State (a dropdown menu with '--Select--'), Zip, Attention, and a Delivery Instruction text area. 'Save' and 'Cancel' buttons are at the bottom.

- b. **Courier:** Select FedEx or UPS from the list and enter a valid courier account number. An invalid account number will delay the shipment of your W-2s and 1095-Cs.

The screenshot shows the same 'Custom Shipping' dialog box, but with the 'Courier' tab selected. The 'City', 'State', 'Zip', and 'Attention' fields are now disabled. The 'Courier' dropdown menu is active, and the 'Courier Number' text field is visible. 'Save' and 'Cancel' buttons are at the bottom.

c. Sort Criteria: Select up to five levels of sorting.

The screenshot shows a 'Custom Shipping' dialog box with a blue header and a close button. Below the header, there are two radio buttons: 'Mail directly to employees' (unselected) and 'Ship back to us' (selected). Below this are four tabs: 'Shipping Address', 'Courier', 'Sort Criteria' (which is selected and highlighted with a dashed border), and 'Postal Indicia'. Under the 'Sort Criteria' tab, there are five dropdown menus labeled 'Sort Key #1' through 'Sort Key #5'. Each dropdown menu currently displays '--Select--'. At the bottom of the dialog box, there are two buttons: a blue 'Save' button and a grey 'Cancel' button.

- Choose from the following list. Contact your Dayforce support representative for assistance with the custom sort fields. There are assigned positions in the W-2 print file for the sort data.

The dropdown menu is open, showing a list of options. The first two options are '--Select--'. The remaining options are: CONTROL NUMBER, FEIN, SSN, EMPLOYEE FIRST NAME, EMPLOYEE MIDDLE NAME, EMPLOYEE LAST NAME, EMPLOYEE ADDRESS LINE 1, EMPLOYEE ADDRESS LINE 2, EMPLOYEE CITY, EMPLOYEE STATE, EMPLOYEE ZIPCODE, Custom Field 1, Custom Field 2, Custom Field 3, Custom Field 4, and Custom Field 5.



The Custom Fields 1 through 5 only apply to the W-2 files.

- d. **Postal Indicia:** If you will be mailing your own W-2s, you may have your company's postal permit information for bulk mailing printed on the documents.
- No postal indicia: Will display the Dayforce Print Center that ships the W-2s. Allows you to distribute the forms in another manner.
 - Use your company postal indicia: Enter the information and provide the indicia graphic to Dayforce.

The screenshot shows a 'Custom Shipping' dialog box with the following elements:

- Select Shipping:**
 - Mail directly to employees
 - Ship back to us
- Shipping Address | Courier | Sort Criteria | Postal Indicia** (The 'Postal Indicia' tab is active and highlighted with a dashed border.)
- Postal Indicia Section:**
 - No postal indicia
 - Use your company's postal indicia
 - Postal indicia number:
 - City, State of origin:
- Buttons:** 'Save' (blue) and 'Cancel' (grey).



You must provide the indicia graphic at least 10 days prior to submitting your live file to allow time for setup.

5. Click **Save**. Repeat steps 1 through 5 for each file that should have a different sort or shipping information than the default in your W-2 or 1095-C Setup Kits.

Before You Approve the W-2 Files for Printing

If your W-2 files have been submitted in My Records but you have not approved your files for printing you must do the following:

- **Confirm** the document counts are correct.
- **Review your Summary Report** and balance all totals to your payroll software reports. Be aware that duplications on the Summary Report will also be duplicated on the employee's W-2.
 - Review and balance each FEIN in the Summary Report. The first page of the Summary Report will include the totals for all FEINs followed by individual totals for each FEIN.
- **Review individual W-2s** to verify a good representation of your employees' documents.
- If discrepancies are found, you would need to contact Print Support to remove the file to allow a new set of live files to be imported/uploaded.

Tax Filing Service Customers

After releasing a live file from Source Tax Online, there is data sent to our Tax Filing subsystem as well as to My Records. If you discover a discrepancy after releasing a live file from Source Tax Online and your file needs to be resubmitted, you must work with your Dayforce Tax Service Representative to complete a Batch Delete. A Batch Delete will remove the file from the Tax Subsystem.



If you are a Tax Filing Service customer, a Batch Delete must be completed for you by your Tax Service representative in addition to removing the file from the Live Schedule page.

Before You Approve the 1095-C Files for Printing

If your 1095-C files have been loaded in My Records but you have not approved your files for printing you must do the following:

- **Confirm** the document counts are correct.
- **Review your 1094-C Company Transmittal** for correct company settings and employee counts.

Approve W-2 Live Files for Printing

You are ready to approve your live files when you:

- Have reviewed and balanced the Summary Report to your payroll system reports.
- Have reviewed a number of individual employee W-2s.
- Are satisfied that the results are accurate and complete.



It is highly recommended that you utilize the Test Schedule process to thoroughly test and audit your files prior to uploading your live files. It is easy to delete a test file and upload a corrected file. Additional steps are required to remove the live files from My Records and the tax subsystem which can cause unnecessary delays.

Path: Processing Schedules > Live Schedule > Details > Approve/Reject Live Data

When you select the file on the Details page, then select the Approve/Reject Live Data button, you will be presented with a checklist. You will be asked to confirm that you have reviewed, balanced, and verified employee data and totals for all boxes on the W-2.

Approve/Reject - Results of Live Data ✕

Please fill out the following form to report the results of your live data.

Checklist	Yes	No	Comment
Did the live employee data for each box match your system's data? (VERIFY employer ID number, employer & employee name & address, SSN, wages, and taxes.)	<input type="radio"/>	<input checked="" type="radio"/>	<input style="width: 100%; height: 20px;" type="text"/>
Did you balance your totals against the Agency Report on eReports & Ceridian Source Tax On Line (if appropriate)?	<input type="radio"/>	<input checked="" type="radio"/>	<input style="width: 100%; height: 20px;" type="text"/>
Did you verify that the correct data is printing in Box 9-11?	<input type="radio"/>	<input checked="" type="radio"/>	<input style="width: 100%; height: 20px;" type="text"/>
Did all Box 12 items print?	<input type="radio"/>	<input checked="" type="radio"/>	<input style="width: 100%; height: 20px;" type="text"/>
Did all Box 14 items print?	<input type="radio"/>	<input checked="" type="radio"/>	<input style="width: 100%; height: 20px;" type="text"/>
Did you check Box 15 thru Box 20 where employees may require printing multiple states and/or localities?	<input type="radio"/>	<input checked="" type="radio"/>	<input style="width: 100%; height: 20px;" type="text"/>
Are you satisfied with all other aspects of the W-2s?	<input type="radio"/>	<input checked="" type="radio"/>	<input style="width: 100%; height: 20px;" type="text"/>

Do you approve this live data to proceed to the Print Center?

Note: If you approve this live data, then the files will be released to the print center for printing. Once printed they will be shipped, so it is important to make sure that you have all files that you will be submitting for listed in the Files tab for the live file set. Extra charges may occur if you need to make any changes after submitting the files for printing.

Yes. I approve this live data.

No. There is a mistake in the data files that we sent. Please clear all the live files I uploaded so far so that I can upload a new set of live files.

No. I have checked and re-checked my data and there is still a discrepancy. I need to talk with my representative.

Approve 1095-C Live Files for Printing

You are ready to approve your live files when you:



- Have reviewed and balanced the 1094-C Company Transmittal to your payroll system reports.
- Are satisfied that the results are accurate and complete.

Path: Processing Schedules > Live Schedule > Details > Approve Data or Reject Data


On the **Live Schedules** page, select the file you would like to approve, then click **Details**. Select Approve Data to release the forms for printing.

Verify the Live File was Sent to the Print Center

You can verify that the live file was sent to the Print Center on the Live Schedules > Details page. Once you have approved the file(s) for printing, the Bundles section appears at the bottom of the page.

Batches							
ID	Sequence	Print Center	Pages	Status	Product	Courier	Tracking #
1376	1	CHG	10000	Sent To Printer	W-2		
1377	1	CHG	3	Sent To Printer	W-2		

The Status column will display Ready, In Progress, Print File Generated, Sent to Printer, Printed, and Shipped.

Once the Status updates to Shipped, courier type and tracking numbers will be available. The hover help () icon will indicate if you selected to have the year-end forms mailed directly to the employees.

Administrative Settings

The Administrative Settings menu contains the following pages:

- Employer Details
- Customization
- Email Notification
- Electronic Presentment
- Document Access

My Records allows you to customize what the employee sees when they log into My Records, such as a contact phone number or email if they need assistance. You can also customize the text in the emails an employee receives, such as the Welcome letter when they register. You can allow or restrict access to the My Records Employee Portal at the FEIN level. You can control which tax preparation partner links display, allowing the employee to upload their W-2 data to file their income tax returns.

Employer Details

Path: My Records > Administrative Settings > Employer Details

You can add address information for the company, plus control overall employee access to My Records on the Employer Details page.

The screenshot shows the 'Employer Details' form. At the top, there is a blue header with a search icon, a help icon, and a user profile icon. Below the header, there are 'Save' and 'Refresh' buttons. The form is titled 'Employer Details' and contains several input fields: 'Company Name' (General Products), 'Address-1' (345 W. State St.), 'Address-2', 'City' (Dunwoody), 'State' (Georgia (GA)), 'Zip' (99004-5645), and 'Phone' (770-829-5253). There is also a checkbox labeled 'Restrict Employee Portal Access for all Employees' which is checked. An information icon is next to this checkbox.

Restrict Employee Portal Access for all Employees

You have the option of allowing or restricting all your employees' access to their online year-end documents in the My Records Employee Portal.

- **Restrict Employee Portal Access for all Employees:** By default, access is denied for all employees in the company when this box is checked. Clear the checkbox to allow your employees to use the My Records Employee Portal.



The Restrict Employee Portal Access for All Employees box is checked by default when you first start to use My Records. That way, you control when to allow your employees to begin to use the My Records Employee Portal.



See the Document Access topic later in this module for information on allowing or restricting access to the My Records Employee Portal at the FEIN level.

Customization

The Employee Message and Email Support Settings pages allow you to customize information that displays for your employees who use the My Records Employee Portal. You can also override the default text in emails your employees receive when they register for the Employee Portal as well as notifications they receive when they have documents ready to view.

Employee Message Page

Path: My Records > Administrative Settings > Customization > Employee Message tab

Use the Employee Message tab to customize what the employee sees when they log into My Records.

The screenshot shows the 'Employee Message' customization page. At the top, there's a navigation bar with a hamburger menu, a search icon, and the text 'Test Account - Customization'. Below the navigation bar are two tabs: 'Employee Message' (active) and 'Email Support Settings'. The main content area has a 'Save' and 'Refresh' button. A notice states: 'You are able to customize various aspects of your employees' web site. If no changes are made in these areas, then your employees' web site will default to the preset global settings.' Below this is a 'Welcome Message' section with a text area containing: 'Welcome to the My Records employee portal. You'll use My Records to view, print, or download your check statements, direct deposit advice, as well your year-end forms such as your W-2 and 1095-C forms.' Underneath are three input fields: 'Contact Person and/or Contact Department' (Payroll Department), 'Phone' (202-555-1212), and 'Email' (Payroll@MyCompany.com). At the bottom, there's a section for 'Third-Party Tax Preparation Partners' with two checked checkboxes: 'Turbo Tax' and 'H&R Block'.

- **Welcome Message:** Displays on the What's New tab of the Employee Portal Home page. Enter up to 8,000 characters.
- **Contact Person and/or Contact Department, Phone, and Email address:** Displays on the Contact Us tab on the Employee Portal Home page. Enter information employees should use to contact someone at your company for assistance.
- **Third-Party Tax Preparation Partners:** Check the box to indicate which, if any, third-party tax preparation partners employees can use to view and download their W-2s when they complete their tax return. Checking the box here also controls which partner icons will display on the Home page of the My Records Employee Portal, allowing the employee to go directly to the tax partner of their choice right from the My Records Employee Portal.



All Third-Party Tax Preparation Partner checkboxes are checked by default when you first start to use My Records. See the Document Access topic later in this module for information about allowing or restricting access for specific FEINs.

Email Support Settings Page

Path: My Records > Administrative Settings > Customization > Email Support tab

Dayforce provides default text for email notifications to employees such as the Welcome email to start the self-registration process, as well as when their year-end forms are ready for viewing. If you choose, you can override the subject line and the body text for the emails, as well as indicate a different "From" email address if you prefer your company email rather than the default from Dayforce.



Refer to the hover Help (i) for a section, or the online Help (?) for the Email Support Settings page for specifics about using the variables, the placeholders where the system will automatically insert the employee's first and last name.


Check the **Change Override Settings** box to enable updates to the page. As you type in a box, the number of characters used updates automatically. Be sure to click **Save** to save your changes.



The types of employee notifications that display depend on the other Dayforce products used by your company. Your options may be different.

Ready to View Notifications

W-2C Ready to View (employee notification)

Enter the "Subject" of the email 

Your W-2C is Ready to View

(41/500)

Enter the "Body Text" of the email 

Dear {FName} {LName},
Your W-2C is now ready for viewing. Please log in to your employee account to access your document. The Employee Portal login page can be found HERE.
Thank you.

(506/8000)

1095-C Ready to View (employee notification)

Enter the "Subject" of the email 

Your 1095-C is Ready to View

(41/500)

Enter the "Body Text" of the email 

Dear {FName} {LName},
Your 1095-C is now ready for viewing. Please log in to your employee account to access your document. The Employee Portal login page can be found HERE.
Thank You

(506/8000)

Earnings Statement/Pay Check Stub Ready to View (employee notification)

Enter the "Subject" of the email 

Earnings Statement is Ready to View

(41/500)

Enter the "Body Text" of the email 

Dear {FName} {LName},
Your earnings statement is now ready for viewing. Please log in to your employee account to access your document. The Employee Portal login page can be found HERE.
Thank you.

(506/8000)

Direct Deposit Advice (DDA) Ready to View (employee notification)

Enter the "Subject" of the email 

Your Direct Deposit Advice (DDA) is Ready to V

(41/500)

Enter the "Body Text" of the email 

Dear {FName} {LName},
Your direct deposit advice is now ready for viewing. Please log in to your employee account to access your document. The Employee Portal login page can be found HERE.
Thank you.

(506/8000)

Electronic Delivery Consent Notifications

Due to laws and regulations in several states regarding receiving electronic-only versions of documents, employees will need to provide their consent when they change the delivery method for a document. For example, if they choose to receive their direct deposit advice as an electronic document online only.

When a change is made by the employee on the My Records Employee Portal, or by an administrative user on the Search Employee Documents page, a pop-up message displays, explaining about approving

the delivery method change. When the change is submitted, an acknowledgment is sent to the email address on record for the employee.

Dayforce provides email templates for notifications when an employee changes to electronic-only delivery, and for changes to paper-only delivery. Templates are provided for W-2s, 1095-Cs, and DDA (direct deposit advices). You can customize the notifications, such as adding a contact name and address at your company if the employee needs to provide a written authorization of the change.

Templates for changes to Electronic-only delivery notifications:

W-2 Electronic Presentment Option - Electronic (employee notification)

Enter the "Subject" of the email ⓘ

Change to W-2 Advice Delivery Preference. (41/500)

Enter the "Body Text" of the email ⓘ

Dear {FName} {LName},

The following changes were made effective immediately:

W-2: Electronic-only
[...]

(506/8000)

1095-C Electronic Presentment Option - Electronic (employee notification)

Enter the "Subject" of the email ⓘ

Change to 1095-C Advice Delivery Preference. (41/500)

Enter the "Body Text" of the email ⓘ

Dear {FName} {LName},

The following changes were made effective immediately:

1095-C: Electronic-only
[...]

(506/8000)

Direct Deposit Advice Electronic Presentment Option - Electronic (employee notification)

Enter the "Subject" of the email ⓘ

Change to Direct Deposit Advice Delivery Pref (41/500)

Enter the "Body Text" of the email ⓘ

Dear {FName} {LName},

The following changes were made effective immediately:

Direct Deposit Advice: Electronic-only
[...]

(506/8000)

Templates for Paper-only delivery notifications:

W-2 Electronic Presentment Option - Paper (employee notification)

Enter the "Subject" of the email ⓘ

Change to W-2 Statement Delivery Preference (41/500)

Enter the "Body Text" of the email ⓘ

Dear {FName} {LName},

The following changes were made effective immediately:

W-2: Paper-only
... ..

(506/8000)

Direct Deposit Advice Electronic Presentment Option - Paper (employee notification)

Enter the "Subject" of the email ⓘ

Change to Direct Deposit Advice Statement De (41/500)

Enter the "Body Text" of the email ⓘ

Dear {FName} {LName},

The following changes were made effective immediately:

Direct Deposit Advice: Paper-only
... ..

(506/8000)

1095-C Electronic Presentment Option - Paper (employee notification)

Enter the "Subject" of the email ⓘ

Change to 1095-C Statement Delivery Preferer (41/500)

Enter the "Body Text" of the email ⓘ

Dear {FName} {LName},

The following changes were made effective immediately:

1095-C: Paper-only
... ..

(506/8000)



The types of employee notifications that display depend on the other Dayforce products used by your company. Your options may be different.

Email Notifications

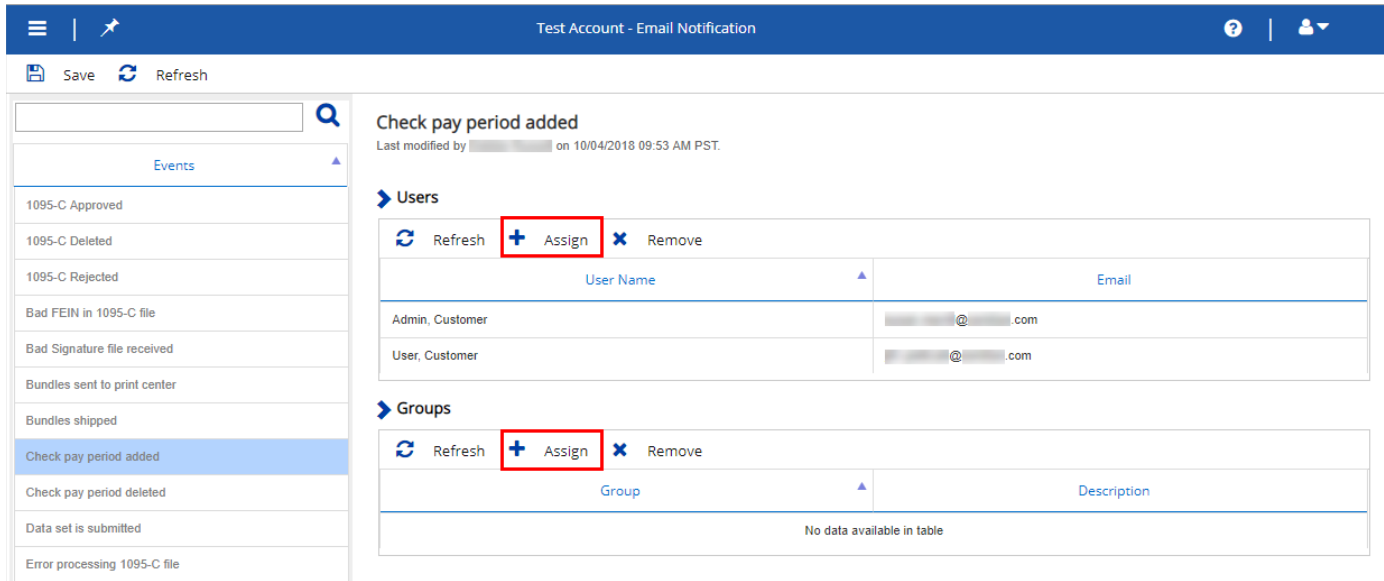
Path: My Records > Administrative Settings > Email Notification

My Records allows you to assign individual administrative users or a defined group of users to receive notifications for events such as when an error occurred when sending files for printing, or a file was approved or rejected.



For more information about setting up new administrative users, and user roles and attributes in IAM, see the handouts available on the [IAM Information page](#) on MyDayforce.

To assign a user or group, first select the type of event on the left side of the page, then click **Assign** under Users or Groups. The available administrative users will display.



More information about setting up groups and assigning users to groups is covered later in this guide.

Types of events that trigger email notifications:

1095-C Approved	1095-C Deleted
1095-C Rejected	Bad FEIN in 1095-C file
Bad Signature file received	Bundles sent to print center
Bundles shipped	Check File Error
Check pay period added	Check pay period deleted
Data set is submitted	Error processing 1095-C file
Error sending files to Payment Solutions	Error sending file to print center
Files sent to Payment Solutions	Pay period is late
Pay period will probably be late	Setup submitted
Shipping address added	Shipping address changed
Shipping address deleted	W-2 Approved
W-2 Rejected	



The types of events and notifications shown may not apply to your company, depending on the other Dayforce services you use.

Electronic Presentment Options

You can establish a default distribution, either paper or electronic, for 1095-Cs and W-2s.

If you allow your employees to use the My Records Employee Portal, you can also use the Electronic Presentment page to grant or deny the employee the option to change if they would prefer a printed document, or to view the document online.



Dayforce has established the initial defaults for all customers for the documents on this page. These settings may not match your previous settings. Verify and update any necessary changes before you allow your employees to access the My Records Employee Portal.

If you allow your employees to use the Employee Portal, you can also use the Electronic Presentment page to grant or deny the employee the option to change if they would prefer a printed document, or to view the electronic copy of the document online. If an employee elects to receive a paper copy, they will still be able to view the information online in the Employee Portal.

Path: My Records > Administrative Settings > Electronic Presentment

☰ | ✈
? | 👤
Test Account - Electronic Presentment

💾 Save 🔄 Refresh

▶ Electronic Presentment

Use this screen to select how you want to distribute documents to your employees. For each product, there are three settings that you may use to tailor the distribution to fit your needs.

Default distribution
This can either be paper or electronic only. If you select paper, then employees will, by default, receive a paper document. If you select electronic only, then employees will, by default, receive their documents electronically.

Allow employees to change?
You may allow your employees to override the default distribution and select paper or electronic only. If you do not allow the employees to change, then they will receive their documents by the default method.

Product	Default Distribution	Employee Actions
1095-C	<input type="radio"/> Paper Copy <input checked="" type="radio"/> Electronic Copy	<input checked="" type="radio"/> Yes <input type="radio"/> No
W-2	<input checked="" type="radio"/> Paper Copy <input type="radio"/> Electronic Copy	<input checked="" type="radio"/> Yes <input type="radio"/> No
W-2C	<input checked="" type="radio"/> Electronic Copy	<input type="radio"/> Yes <input checked="" type="radio"/> No
Check	<input checked="" type="radio"/> Paper Copy	<input type="radio"/> Yes <input checked="" type="radio"/> No
DDA	<input checked="" type="radio"/> Paper Copy <input type="radio"/> Electronic Copy	<input checked="" type="radio"/> Yes <input type="radio"/> No

Remember to click Save if you make any changes to the page. Any changes made here impact the actions an employee can take in the My Records Employee Portal.

The Stop Paper Statements page in the Employee Portal displays comments based on the Employee Actions settings on the Electronic Presentment page.

A sample of the Stop Paper Statements page in the Employee Portal:

Product	Default distribution	Comment
W-2	<input checked="" type="radio"/> Paper Copy <input type="radio"/> Electronic Copy	Your employer has allowed you to select the method by which you will receive this form. By selecting an option, you will be required to approve your selection.
W-2C	<input checked="" type="radio"/> Electronic Copy	Your employer has disabled access to W-2C delivery settings.
1095-C	<input checked="" type="radio"/> Paper Copy <input type="radio"/> Electronic Copy	Your employer has allowed you to select the method by which you will receive this form. By selecting an option, you will be required to approve your selection.
Check	<input checked="" type="radio"/> Paper Copy	Your employer has disabled access to Check delivery settings.
DDA	<input type="radio"/> Paper Copy <input checked="" type="radio"/> Electronic Copy	Your employer has allowed you to select the method by which you will receive this form. By selecting an option, you will be required to approve your selection.



See the *Electronic Delivery Consent Notifications* topic earlier in this module for more information about the email notifications that will be sent to an employee when they change the distribution method for their DDAs, W-2, or 1095-C.



If you use the Employee Feed File process to do a mass upload of employees, your file can include information for the electronic presentment options for each employee. See the *Employee Feed Page* topic in the Employee Users module for more information about the options you can include in the file.

Document Access

Path: My Records > Administrative Settings > Document Access



Depending on your security access, you may not have clearance to view or change all FEINs for the company. Access to FEINs is set up and maintained in IAM by the Customer Admin at your company.

You can allow or restrict access to the My Records Employee Portal for all employees on the Employer Details page. If you prefer, you can also allow or restrict access at the FEIN level on the Document Access page.

FEIN	Restrict Employee Portal Access	Allow Third-Party Tax Preparation Partner Request
03-██████	<input type="checkbox"/>	<input type="checkbox"/> All <input checked="" type="checkbox"/> H&R Block <input checked="" type="checkbox"/> Turbo Tax
04-██████	<input type="checkbox"/>	<input type="checkbox"/> All <input checked="" type="checkbox"/> H&R Block <input checked="" type="checkbox"/> Turbo Tax
43-██████	<input type="checkbox"/>	<input type="checkbox"/> All <input checked="" type="checkbox"/> H&R Block <input checked="" type="checkbox"/> Turbo Tax

Check the Restrict Document Access box to select or deselect all FEINs, or you can scroll through and select only certain FEINs where employees should be allowed to see their documents online.



The Restrict Employee Portal Access box is checked by default when you first start to use My Records. That way, you control when to allow your employees to begin to use the My Records Employee Portal and for which specific FEINs.

Check the Allow Third-Party Tax Preparation Partner Request box to select or deselect all FEINs, or you can select one or more FEINs individually. Checking this box will allow a download, initiated by your employees, of their W-2 information from My Records into the indicated third party tax preparation partner website, allowing them to complete their tax return online. All boxes are checked by default when you start to use My Records.



Dayforce provides your company name and FEIN to our supported tax preparation partners as part of your year-end service. To opt out of this service and remove your company name from the listing provided to our tax preparation partners, do not check the box for that FEIN in the Allow Third-Party Tax Preparation Partner Request section of the Document Access page.

Client Users & Groups

Your company may have several administrative users who access My Records to view and audit only employee W-2s, or only 1095-Cs. They may need to be notified when a file is rejected or the files were approved for printing. Creating groups can simplify the process when several users should receive only certain types of email notifications. First create the group, then assign the specific users to the group. You can create as many groups as needed by your company.



Administrators must first set up new users in IAM so they are able to access My Records in DaaS. For more information about setting up new users, and user roles and attributes in IAM, see the handouts available on the [IAM Information page](#) on MyDayforce.

Path: My Records > Client Users & Groups > User Groups

Add a New User Group and Assign Users

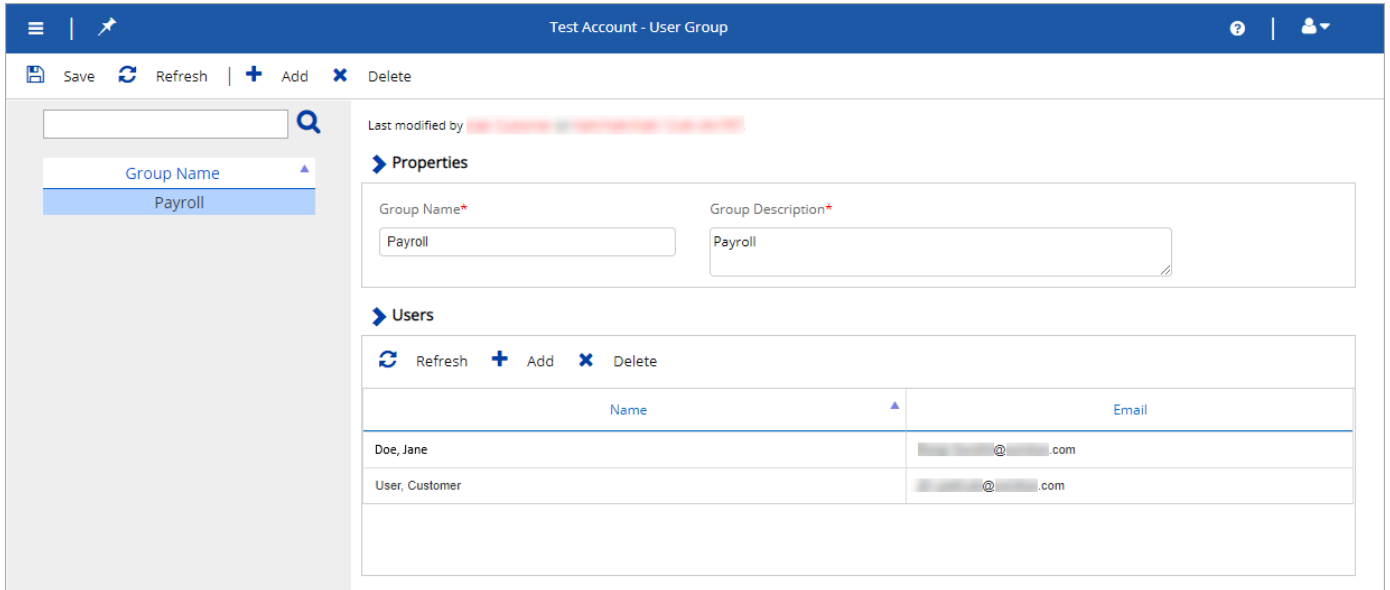
1. Click **Add** on the User Group page.
2. Enter the **Group Name** and **Group Description** in the Group Details window.

3. Click **Save**.
4. Click **Add** in the Users section.
5. In the Contacts Group window, check the box(es) for the users to be assigned to the group.



If the administrative user does not display in the list, they must be added in IAM by the user at your company with the Customer Admin security role.

- 6. Click **Add** to save the users and close the window.
- 7. Click **Save** in the upper left corner of the page to save the group and assigned users.



Delete a User or a Group

You can delete a user from a group. First select the group under Group Name, then select the User in the Users section and click Delete. Be sure to click Save after making any changes.

You can delete a group by selecting the group under Group Name, then clicking Delete in the upper left of the page. Be sure to click Save after making any changes.



See the *Email Notifications for System Events* topic in the Administrative Settings module for information on assigning a user or a group to receive emails when certain events occur.

Employee Users

If your company allows their employees to use the My Records Employee Portal to view their documents, you can use the Employee Users pages to audit their registration status as well as do a mass upload of employee information to create their initial accounts for My Records. Once the account is created, a Welcome email is sent to invite them to complete the self-registration process to set up their password and security validation questions and answers.



A Quick Reference Guide for the employee self-registration process, plus a complete Employee User Guide that reviews all the features of the My Records Employee Portal are available on the [My Records page on MyDayforce](#).

Employee Registration Report Page

Path: My Records > Employee Users > Employee Registration Report

From the Employee Registration Report page, you can generate a report that displays all employees, based on the filter options you select, and information such as their name, the email on file, whether the invitation email has been sent, if they have registered and as of what date.

- **Employee filter options:**
 - **All Employees:** View the status for employees who have not yet registered to use My Records as well as those who have been sent the Welcome email to complete the self-registration process.
 - **Employees Invited:** View the status for those employees who have been sent the Welcome email to complete the self-registration process, but have not yet registered.
 - **Employees Registered:** View the status only for those employees who have completed the self-registration process.
- **Subsidiary filter options:** Select All or select a specific FEIN.
- Enter a **From Date** and **To Date** to audit a group of employees based on when the self-registration Welcome letter was generated or when they completed the registration.

☰ | ↗
🔍 | ⚙️ | 👤
General Products - Employee Registration Report

Filter

All Employees ▾

Subsidiary

All ▾

From Date

mm/dd/yyyy 📅

To Date

mm/dd/yyyy 📅

Generate Report

Reset

Usage notes:

Depending on the number of employees, this report may take several minutes.

If you are looking for recently added employees to ensure they have been invited to register, select Employees Invited from the filter drop-down and select a date range. Based on the filter option and dates selected, the report will only return employees meeting those criteria.



You can find additional information about adding employees individually later in this guide in the *View Employee Documents* topic. Doing a mass upload to add employees using the Employee Feed File is covered later in this topic.

Generate the Employee Registration Report

After selecting your filter options and entering a date range, click **Generate Report** to see the results online. Once the results display, you can download the data as a CSV file.

Test Account - Employee Registration Report
?
👤

Filter

All Employees ▼

Subsidiary

All ▼

From Date

01/01/2019 📅

To Date

02/15/2019 📅

Generate Report
Reset

Usage notes:

Depending on the number of employees, this report may take several minutes.

If you are looking for recently added employees to ensure they have been invited to register, select Employees Invited from the filter drop-down and select a date range. Based on the filter option and dates selected, the report will only return employees meeting those criteria.

Download as CSV

Name	SSN	Employee Number	Customer ID	Business Email	Subsidiary Name	Invited Date	Registered	Registered Date	Last Access Date	Ele
██████████	██████████	██████████	██████████	██████████	FEIN 3	Feb 14 2019 12:53AM	N		Feb 21 2019 5:52PM	N
██████████	██████████	██████████	██████████	██████████	FEIN 3	Feb 1 2019 2:52PM	N		Feb 1 2019 2:53PM	N

Showing 1 to 2 of 2 entries
Previous 1 Next

If you use the Employee Feed File process to do a mass upload of employees, your file may include information for the electronic presentment options. Those items can also be viewed in the Employee Registration report.

Download as CSV

id	Last Access Date	Electronic DDA	DDA Date	Electronic W-2	W-2 Date	Electronic 1095C	1095C Date	Check Email	DDA Email	W-2 Email	1095C Email
	Feb 15 2019 5:08PM	N	Feb 15 2019 5:08PM	N	Feb 15 2019 5:08PM	Y	Feb 15 2019 5:08PM	N	N	N	N
	Feb 1 2019 2:53PM	N	Feb 1 2019 2:53PM	N	Feb 1 2019 2:53PM	Y	Feb 1 2019 2:53PM	N	N	N	N

Showing 1 to 2 of 2 entries
Previous 1 Next

Download as CSV

Name	SSN	EEID	UserID	BusinessEmail	SubsidiaryName	Registered	RegisteredDate	LastAccessDate	ElectronicDDA
No data found									

Showing 0 to 0 of 0 entries
Previous Next

Employee Feed Page

My Records allows employees to view their W-2 and 1095-C forms online. Employees create their own account by completing a self-registration process. For employees to self-register, you will need to populate My Records with data such as the employee's name, Social Security Number, and an email address. You can add the records individually, such as when you have a new hire, or by uploading a data file on the Employee Feed page.

My Records uses the employee's email address and Social Security Number to validate the employee's identity during self-registration. The email address is also used to communicate with employees to complete the registration process, when they forget their password, or when their forms are available for viewing.



Welcome emails are sent to the employees as soon as the upload processing is complete. Employees can click on the link in the email to complete the registration, which includes setting up security questions and creating a password. A Quick Reference Guide for the self-registration process, plus a complete Employee User Guide are available on the [My Records page on MyDayforce](#).

Create the Employee Feed File

Path: My Records > Employee Users > Employee Feed

To easily upload multiple employee records in one step, use the Microsoft Excel® template to create the Employee Feed file. Use the following table as a guide for the formatting needed for each field. Each field listed in the table represents a column in the file.



You must use the template provided on the Employee Users > Employee Feed page or the upload will fail. In addition:

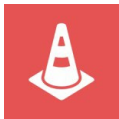
- Red column headings indicate required fields.
- Do not remove the instruction sheet.
- Leave the column headings and the columns in the exact order in the template.
- Do not remove columns. Leave the column blank if the field does
- My Records will only accept an XLS or XLSX file. The upload will fail if you try to upload any other file format, such as a CSV file.

	A	B	C	D	E	F	G	H
1	Action	EmployeeNumber	FName	MName	LName	SSN	FEIN	BusinessEmail
2	Add	N1632F5	Jane		Doe	223-██████	71-██████	jane.doe@mycompany.com

	I	J	K	L	M	N	O
	Electronic W-2	Electronic 1095-C	Electronic DDA	W-2 Notification	1095-C Notification	Check Notification	DDA Notification
	N	N	Y	Y	Y	Y	Y

Field Name	Required	Possible Values	Notes
Action	Yes	'A'dd 'D'elete 'M'odify	Use the Add action for the initial feed to set up your employees. Use Modify if you need to update incorrect information in a subsequent upload file, such as a different email address.
Employee Number	No	Alphanumeric characters accepted	Leave the column blank if not used.
FName	Yes		Employee's first name.
MName	No		Employee's middle name. Leave the column blank if not used.
LName	Yes		Employee's last name.
SSN	Yes	9-digit full SSN	Format the column so leading zeros are not dropped. Dashes are allowed but not necessary.
FEIN	No	9-digit FEIN	Your Federal Employer Identification Number. If your corporation has multiple FEINs, enter the FEIN used to report this employee's wages on their W-2. You may also leave the column blank. Dashes are allowed but not necessary.
Business Email	Yes		The employee's email on record with their employer. If the employee is not assigned a business email, use a personal email address. The email address the employee enters to log in and to self-register must match this email address.
Electronic W-2s	No	Y or N	Indicate if an employee should receive an electronic copy of their W-2 instead of a paper copy. Defaults to N when blank.
Electronic 1095-Cs	No	Y or N	Indicate if an employee should receive an electronic copy of their 1095-C instead of a paper copy. Defaults to N when blank.
Electronic DDAs	No	Y or N	Indicate if an employee should receive an electronic copy of their direct deposit advice instead of a paper copy. Defaults to N when blank.
W-2 Notification	No	Y or N	Indicate if the employee should receive an email when their W-2 is available for viewing in the My Records Employee Portal. Defaults to N when blank.

Field Name	Required	Possible Values	Notes
1095-C Notification	No	Y or N	Indicate if the employee should receive an email when their 1095-C is available for viewing in the My Records Employee Portal. Defaults to N when blank.
Check Notification	No	Y or N	Indicate if the employee should receive an email when their check stub is available for viewing in the My Records Employee Portal. Defaults to N when blank.
DDA Notification	No	Y or N	Indicate if the employee should receive an email when their direct deposit advice is available for viewing in the My Records Employee Portal. Defaults to N when blank.



The upload will fail if you do not follow the file formatting tips. The system is expecting two worksheets and the column headings. The data will not be mapped correctly if you reorder or leave out a column.

File Formatting Tips:

- Use only the template available on the Employee Feed page.
 - This ensures your data is in the correct order.
 - Do not create your own file based on the template. You may leave out key fields or data expected by the system and the upload will fail.
 - Do not reorder the columns. The system maps the data for each employee based on the expected position (column) in the file.
- Leave the column headings in your file.
- Do not remove a column if it is not applicable for your employees.
 - The system maps the data for each employee based on the position (column) in the file. If you leave out a column, the remaining data will not be mapped correctly.
 - Leave the column blank if the information does not apply for your employees.
- Do not remove or rename either of the worksheets in the template.
- My Records accepts Excel® XLS and XLSX file types only. The upload will fail if you use any other file format, such as a CSV file.
- Format the SSN column to include leading zeros.
- Do not leave empty rows between rows containing data.



By default, Microsoft Excel® drops any zeros on the left side of a number. To easily format the SSN data, select the SSN column in your file, then right-click to select Format Cells. In the Category list, select Special, then select Social Security Number. All the rows will display the dashes and any leading zeros will be maintained.

Upload the Employee Feed File

Once you have created the Feed File, upload the file on the Employee Feed page to create the initial employee records in My Records.

Path: My Records > Employee Users > Employee Feed

To upload the data file to populate the employee information in My Records:

1. On the **Employee Feed** page, click **Browse**, then locate and select your Excel® file.
2. Check the boxes for **Generate Report**, **Show Duplicate Records**, **Show Added Records**, and **Show Deleted Records**.

3. Click **Upload**.



Depending on the number of records in your file, this may take several minutes to upload and process the records.



The Welcome emails are sent to the employees as soon as the feed file is processed.

Verify the Status of the Upload

Use the **Status** tab on the **Employee Feed** page to view the status of the upload and the number of records added, deleted, or that may have failed to upload. You can download a report of the results for the file that includes details per employee so you can verify any validation error messages.

The columns on the page include:

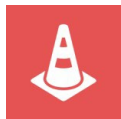
- **File Name:** The name of the file you selected for the upload.
- **User Name:** The name of the user who uploaded the file.
- **Date/Time:** The time stamp for the file.
- **Status:** Statuses include Uploaded, Validated, and Complete.
- **Counts:** The number of records with the action Add, Modify, and Delete in your file.
- **Duplicate:** The number of duplicate records in the uploaded file.
- **Fail:** The number of records in your file that failed to upload, broken out by the action indicated in the file.

Sample Status Page Results

Depending on the size of your monitor, you may need to scroll to the right to see all the columns. In the example below, two records were included in the file (Count of Add) but 1 failed to upload (Fail Add).

File Name	User Name	Date/Time	Status	Count of Add	Count of Modify	Count of Delete	Duplicate	Fail Add	Fail Modify	Fail Delete
EmployeeFeed1.xlsx	Darryl Adler	12/27/2018 05:50 PM PST	Completed	2	0	0	0	1	0	0

Showing 1 to 1 of 1 entries



If the Status page displays any counts in the Fail Add or Fail Modify columns, use the report results to review the specific messages. Fix the data in the file then repeat the upload process for only those rows that had errors. Use a new file name so it's easy to audit those specific rows.

Download Status Results

Highlight the line for your file, then click **Download Report** to export the results of your file to Excel®.

A row will display for each employee record. Any errors will display in the Validation Error column.

	A	B	C	D	E	F	G	H	I
1	Action	EmployeeNumber	Fname	Mname	Lname	SSN	FEIN	BusinessEmail	ValidationError
2	Add		Sally		Smith	111	49	Sally.Smith@Palmetto.com	Action:Add failed. Employee with Email Already Exists
3	Add		Susan		Adler	223	71	susan.adler@gmail.com	
4									
5									

Possible validation errors include:

- Add failed. Employee with Email already exists.
- Add failed. Employee with SSN already exists.
- Invalid FEIN. FEIN does not belong the selected Client.
- Invalid action type. Valid action is Add, Modify, and Delete.

View Employee Documents

Use the Search Employee Documents page to search for and review W-2s or 1095-Cs for a single employee, or for a group of employees based on the filter options you select for the page.

You can update the Document Delivery method, paper copy or electronic copy, for an employee. You can also update the Email Notification settings for an employee to indicate if they should or should not receive an email when a form is ready for viewing.

Search Employees Document Page

Path: My Records > Search Employee Documents

The Search Employee Documents page includes a listing of employees in your company on the left side of the page. This includes all employees added manually or uploaded through the Employee Feed file. Select an employee to see the properties such as their name, employee number, and SSN, as well as the available documents on record for this employee.

The screenshot displays the 'General Products - Search Employee Documents' page. On the left, there is a table with columns: Admin, SSN, Employee #, and Employee Name. The 'Employee #' column is sorted in ascending order, indicated by an upward-pointing triangle. The first row is highlighted, showing an employee with ID 89 named 'Doe John'. On the right, the 'Doe John' profile is shown, including a 'Properties' section with input fields for First Name (John), Middle Name, Last Name (Doe), Employee Number (89), FEIN (66-...), and SSN. There are also checkboxes for 'Employee Invited', 'Enabled', and 'Employee Registered'. Below the properties is a 'Documents' section with tabs for 'W-2', '1095-C', and 'Check/DDA'. The 'Check/DDA' tab is active, showing a table with columns: Year, Type, Subsidiary, Dist Method, Period, PP ID, EffDate, and CheckNumber. The table contains one entry for the year 2018, Type DDA, Subsidiary Test Account, Dist Method Paper, Period 444, PP ID 388, EffDate 11/23/2018, and CheckNumber 117107.



Click on the column headings to sort the list by SSN, Employee #, or Employee Name in ascending order. Click the column heading again to sort in descending order.

Click **Add** to enter the information for an individual employee to allow them to self-register. At a minimum, fill in the required fields since these are the key fields to allow an employee to complete the self-registration process.



A Welcome email is sent to the employee as soon as the record is saved. Employees can click on the link in the email to complete the registration, which includes setting up their security questions and creating a password.

You can also select an existing employee and click **Delete** to permanently remove them and their access to their documents from My Records. Click **History** to view the events and actions for the employee such as when the Welcome letter was sent or the last time they logged in.

Employees marked with the blue asterisk are administrative users with access to My Records in DaaS. These users are set up and maintained in IAM. The Properties fields are read-only. The Save and Delete buttons are disabled since any changes would need to be made in IAM.

These users will also have a record as an employee (without the blue asterisk). Available documents and the email notification settings will display under their employee record. The History button will be active, allowing you to view the events and actions if the administrative user registers for and uses the My Records Employee Portal.

Filter Options

Click **Filter** on the Search Employee Documents page to display only certain employees.

The screenshot shows the 'Test Account - Search Employee Documents' interface. At the top, there is a navigation bar with a menu icon, a search icon, and the title 'Test Account - Search Employee Documents'. Below the navigation bar is a toolbar with buttons for 'Save', 'Refresh', 'Filter', 'Favorites', 'Add', 'Delete', and 'History'. The main area contains a series of filter fields:

- Filter Type:** A dropdown menu set to 'All'.
- Employee Type:** A dropdown menu set to 'All Employees'.
- FEIN:** A dropdown menu set to 'All FEIN'.
- Employee Number:** A text input field.
- Employee Name:** A text input field.
- Employee SSN:** A text input field.
- Year:** A dropdown menu set to 'All Year'.
- Employee Email:** A text input field.
- Check Number:** A text input field.
- Check Date:** Two text input fields labeled 'From' and 'To', both with a placeholder 'mm/dd/yyyy'.

At the bottom right of the filter section, there are three buttons: 'Apply Filter' (blue), 'Clear Filter' (blue), and 'Cancel' (grey).

You can filter by:

- **Filter Type:** All document types, W2/W-2C, 1095-C, PR W-2, or Check/DDA.
- **Employee Type:**
 - **All Employees:** Includes all employees, not matter their registration status.
 - **Registered Employees Only:** Includes only those employees who have completed the self-registration process.
 - **Unregistered Employees Only:** Includes only those employees who have not been sent the Welcome letter.
 - **Invited Employees Only:** Includes only those employees who have been sent the Welcome Letter but who have not completed the self-registration process.
- **FEIN:** Select All FEINs or a specific FEIN from the list for your company.
- **Employee Number:** Search for a specific employee by their employee number.
- **Employee Name:** Search for a specific employee by their name.
 - The field is not case sensitive. My Records will find any entries that start with or contain the letters you enter. For example, entering Br will return employee Bruce Adams and employee Susan Brown.
- **Employee SSN:** Search for a specific employee by their Social Security Number.
 - Do not enter the dashes. If you enter a partial number, My Records will find any entries that start with or contain the numbers you enter. For example, entering 112 will return SSN 112345678 and 789451123.

- **Year:** Select a specific year from the list of history stored for your company.
- **Employee Email:** Enter any portion of the email address.
- **Check Number:** Enter a specific check number.
- **Check Date: From and Check Date To:** Enter a range of dates.
 - If you select a range of check dates, the Year filter will be disabled until you clear the filter.



The available feature icons, filter and menu options that display depend on your security access and the other Dayforce products used by your company. Your options may be different.



If you select a date range that spans multiple years, the listing of employees will take longer to generate.

Click **Apply Filter** to refresh the page with the employees who meet your selection criteria.

To return the page to the complete list of employees, click **Clear Filter**, then click **Apply Filter**.

Properties

Information in the Properties section comes from the data uploaded in the Employee Feed File or when you click Add at the top of the page to add a specific employee. You can update information for existing employees such as a change to their name or email address.

Properties

<p>First Name*</p> <input type="text" value="John"/>	<p>Middle Name</p> <input type="text"/>	<p>Last Name*</p> <input type="text" value="Doe"/>
<p>Employee Number</p> <input type="text" value="89"/>	<p>FEIN</p> <input type="text" value="66-"/>	<p>SSN*</p> <input type="text" value=""/>
<p>Email*</p> <input type="text" value="John.Doe@gmail.com"/>	<p>Employee Invited</p> <input checked="" type="checkbox"/>	<p>Employee Registered</p> <input type="checkbox"/>
<p>Resend Welcome Email</p> <input type="checkbox"/>	<p>Enabled </p> <input checked="" type="checkbox"/>	<p></p>

- Employee First Name, Middle Name (optional), and Last Name
- Employee Number (optional)
- FEIN - Select an FEIN from the list of subsidiaries for your company, if applicable.
- SSN
- Email – the business or personal email address for the employee. This is the email the employee enters to self-register and is their user name when they log into My Records.
- Employee Invited - Indicates the Welcome email has been sent to the employee, inviting them to complete the self-registration process.



- Enabled - Indicates the Welcome email has been sent to the employee, and enabling them to use the My Records Employee Portal. You can clear the check box to restrict this one employee from accessing the Employee Portal.
- Employee Registered – Indicates if the employee has completed the self-registration.
- Resend Welcome Email – Check this box to resend the Welcome email to an employee who has been invited but has not yet completed the self-registration process.



The Resend Welcome Email process only applies to employees who have not completed the registration process. If the employee already shows as registered on the Search Employee Documents page, checking the box does not generate a new Welcome email.




Documents

A listing of documents available for the employee by year will display on the W-2 tab or the 1095-C tab (if you are contracted for Dayforce's ACA services). You can review the document or save the document as a printable PDF file.

Select a line for a document, then click **View as PDF** to open the online viewer. Select the Full Screen button  to expand your view. You can scroll through or page through the document using the buttons in the viewer. You can use the Download button  to save the file to a local or network drive.

Select **Download** to open and save the document as a PDF file. Depending on your browser:

- The file will open in a separate tab.
- You may be prompted to open or save the file.
- You may need to locate the file in the system tray on your monitor.
- You may need to locate the file in your Downloads folder in Microsoft Windows Explorer®.

Documents							
W2		1095-C					
 View as PDF		 Download					
Year	Type	State	FEIN	Dist Method	Other	Actions	
2017	W-2	GA		Paper			
2017						[Correction]	

Use the Correction link to create a W-2C for the employee. See the *Generate W-2C* topic later in this guide for more information.

Document Delivery

The Search Employee Documents page includes the Document Delivery Settings that feed from the Electronic Presentment page. As an administrative user, you cannot log into the employee's record on the My Records Employee Portal. Use the Document Delivery section to view or modify the settings for a specific employee.

If the Employee Action on the Electronic Presentment page is No, you will not be able to change the delivery settings in the Document Delivery section.

Document Delivery

Report	Document Delivery Settings
1095-C	<input type="radio"/> Paper Copy <input checked="" type="radio"/> Electronic Copy
Check	<input checked="" type="radio"/> Paper Copy
DDA	<input checked="" type="radio"/> Paper Copy <input type="radio"/> Electronic Copy
W-2	<input checked="" type="radio"/> Paper Copy <input type="radio"/> Electronic Copy
W-2C	<input type="radio"/> Electronic Copy

Email Notifications

The Email Notifications section indicates if My Records should send an email to an employee, notifying them when a new document is available for viewing. The document types that show depend on the Dayforce services used by your company.

Email Notifications

Report	Notification Settings
1095-C	<input type="radio"/> Send an Email <input checked="" type="radio"/> Do Not Send an Email
Check	<input type="radio"/> Send an Email <input checked="" type="radio"/> Do Not Send an Email
DDA	<input type="radio"/> Send an Email <input checked="" type="radio"/> Do Not Send an Email
W-2	<input type="radio"/> Send an Email <input checked="" type="radio"/> Do Not Send an Email
W-2C	<input type="radio"/> Send an Email <input checked="" type="radio"/> Do Not Send an Email

By default, no email notifications will be sent to employees. When the Welcome Email is sent, My Records passes these settings to the Employee Portal for this employee.

If an administrative user changes the setting on the Search Employee Documents page for an employee, a record will display in the Activity History for the employee, indicating the date and time, plus the administrative user's name as having made the change.



Employees who use the My Records Employee Portal can also update their email notification preferences on the Notification Settings page on the portal.

View an Employee's W-2

When you view a W-2, the Summary and the employee’s copy appear at the top of the page. State, local, and federal copies appear at the bottom of the page. The employee’s W-2 will print “Reissued Statement” on all copies since this is not the original W-2. Whether you use the View as PDF or Download methods, the file will include the front and the back of the form.



My Records will display the US, Puerto Rico, Virgin Islands, and Guam versions of the W-2.

Path: My Records > Search Employee Documents

Search for and select the employee. On the W-2 tab, select the line for the document, then click **View as PDF** to open the online viewer.

The screenshot shows a web application interface for viewing employee documents. The main content area displays a PDF of a 2017 Form W-2 Wage and Tax Statement. The form is titled 'FORM W-2 Wage and Tax Statement' and includes a summary table at the top. The summary table has columns for 'Federal', 'Social Secu', 'Medicare', 'State', and 'Local'. The 'Gross' row shows values of 12000.00, 14000.00, 10000.00, and 20000.00. The 'W-2 Wages' row shows 10000.00, 23466.00, 10000.00, and 10000.00. Below the summary table is a 'REISSUED STATEMENT' section with various tax fields and checkboxes. The viewer interface includes a toolbar at the top with options like Save, Refresh, Filter, Favorites, Add, Delete, and History. At the bottom of the viewer, there are navigation controls for page 1 of 2 and a download button.



Select the Full Screen button  to expand your view. You can scroll through or page through the document using the buttons in the bottom of the viewer. You can use the Download button  to save the file to a local or network drive.



View an Employee's 1095-C

If you have contracted with Dayforce to print and file your ACA information, you can view the employee's 1095-C on the Search Employee Documents page.

Path: My Records > Search Employee Documents

Search for and select the employee. On the 1095-C tab, select the line for the document, then click **View as PDF** to open the online viewer.



Select the Full Screen button  to expand your view. You can scroll through or page through the document using the buttons in the bottom of the viewer. You can use the Download button  to save the file to a local or network drive.

Generate W-2 Corrections (W2-Cs)

You can enter corrections to an employee's W-2 using the W2 Corrections form on the Search Employee Documents page. Although you can use the standard W-2C form from the IRS to manually create the correction, the benefit to creating a W-2C within My Records is the ability to access and reprint the form from within My Records, for both you and the employee.



Correcting a Social Security Number is not an option in My Records because the SSN is the key to the employee's record. If this is the data element that needs correcting, you need to use another method to create the W-2C. You can find the standard W-2C form on the IRS web site www.irs.gov.

In the Documents section of the page, a second line for the W-2 year will display with a Correction link in the Actions column on the right side of the page.

Documents							
W2 1095-C							
View as PDF Download							
Year	Type	State	FEIN	Dist Method	Other	Actions	
2017	W-2	GA	[REDACTED]	Paper			
2017						[Correction]	



My Records doesn't generate an electronic version of a W-2C that can be filed with the Social Security Administration or other state and local jurisdictions. You must print the form. Use a laser printer, because other inks may not be compliant.



Refer to the [General Instructions for Forms W-2 and W-3](#) on the IRS web site for more information about Form W-2 and W-2C such as the codes to use for Box 12, and other special instructions.

To generate a W-2C, select the employee, then select the **Correction** link for the year you need to correct. The **W2 Corrections** form will open.

Note that certain items such as the Employer Name and FEIN, plus the employee's SSN are read-only. Boxes outline each field where data entry is allowed.

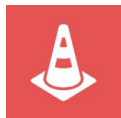
W2 Corrections ✕

Editing W-2

Fill in the information for the W-2C below, and then click Save to save your changes, or Cancel to go back to the previous screen without creating a W-2C. After saving your changes, use the View link next to the W-2C to view a preview of the W-2C forms. Once you are satisfied that the W-2C is correct, click on the Post link next to the W-2C. Employees will not be able to access the W-2C until you have posted it.

<p>a. Employer's name, address and ZIP code</p> <div style="background-color: #ccc; height: 20px; width: 100%;"></div>	<p>c. Tax year/Form corrected - W2C</p> <div style="background-color: #ccc; height: 20px; width: 100%;"></div>	<p>d. Employee's correct SSN</p> <div style="background-color: #ccc; height: 20px; width: 100%;"></div>				
<p>b. Employer's Federal EIN</p> <div style="background-color: #ccc; height: 20px; width: 100%;"></div>	<p>g. Original Employee's name Tester01 R Record QR</p>					
<p>Note: Only complete money fields that are being corrected (exception: for corrections involving MQGE, see the General Instructions for Forms W-2 and W-3, under Specific Instructions for Form W-2c, boxes 5 and 6).</p>	<p>h. Employee's first name and initial</p> <div style="background-color: #ccc; height: 20px; width: 100%;"></div>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Last Name</td> <td style="padding: 2px;">Suffix</td> </tr> <tr> <td style="height: 20px;"><div style="background-color: #ccc; width: 100%;"></div></td> <td style="height: 20px;"><div style="background-color: #ccc; width: 100%;"></div></td> </tr> </table>	Last Name	Suffix	<div style="background-color: #ccc; width: 100%;"></div>	<div style="background-color: #ccc; width: 100%;"></div>
Last Name	Suffix					
<div style="background-color: #ccc; width: 100%;"></div>	<div style="background-color: #ccc; width: 100%;"></div>					
<p>i. Employee's address and ZIP code</p> <div style="background-color: #ccc; height: 20px; width: 100%;"></div> <div style="background-color: #ccc; height: 20px; width: 100%;"></div> <div style="background-color: #ccc; height: 20px; width: 100%;"></div>						

Save
Cancel



Correcting a Social Security Number is not an option in My Records because the SSN is the key to the employee's record. If this is the data element that needs correcting, you need to use another method to create the W-2C. You can find the standard W-2C form on the IRS web site www.irs.gov.

Scroll down through the form to locate the box or boxes that need to be corrected.

The W2 Corrections form will show the previously reported wage and tax information on the left. Enter the corrected information for only the specific boxes on the right. If the previously reported data for the box is correct, leave it blank on the form.

W2 Corrections ✕

Editing W-2

Fill in the information for the W-2C below, and then click **Save** to save your changes, or **Cancel** to go back to the previous screen without creating a W-2C. After saving your changes, use the **View** link next to the W-2C to view a preview of the W-2C forms. Once you are satisfied that the W-2C is correct, click on the **Post** link next to the W-2C. Employees will not be able to access the W-2C until you have posted it.

Previously Reported	Correct Information
1. Wages, tips, other compensation 10000.00	1. Wages, tips, other compensation <input style="width: 90%;" type="text"/>
2. Federal income tax withheld 2520.99	2. Federal income tax withheld <input style="width: 90%;" type="text"/>
3. Social security wages 10000.00	3. Social security wages <input style="width: 90%;" type="text"/>
4. Social security tax withheld 820.00	4. Social security tax withheld <input style="width: 90%;" type="text"/>
5. Medicare wages and tips 10000.00	5. Medicare wages and tips <input style="width: 90%;" type="text"/>
6. Medicare tax withheld 145.00	6. Medicare tax withheld <input style="width: 90%;" type="text"/>

Save
Cancel

7. Social security tips	7. Social security tips <input style="width: 90%;" type="text"/>
8. Allocated tips	8. Allocated tips <input style="width: 90%;" type="text"/>
9.	9. <input style="width: 90%;" type="text"/>
10. Dependent care benefits	10. Dependent care benefits <input style="width: 90%;" type="text"/>
11. Nonqualified plans	11. Nonqualified plans <input style="width: 90%;" type="text"/>

You can add items for Box 12. Click **Add** below Box 11 to enable the data entry fields for Box 12.

11. Nonqualified plans	11. Nonqualified plans <input type="text"/>
See IRS instructions for Box 12	
<input type="button" value="+ Add"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Enter the code on the left and the amount to be reported on the right. Click Add again if there are more items to report. A red X will display that allows you to delete any row you've just entered.

See IRS instructions for Box 12	
12 b. DD	12 b. 6130.00 ✖
<input type="button" value="+ Add"/>	

If the employee had existing items in Box 12, you can enter corrected amounts on the right. You can also click Add to enable additional fields.

See instructions for box 12	
12 a. C 96.42	12 a. <input type="text"/>
12 b. D 6752.77	12 b. <input type="text"/>
<input type="button" value="+ Add"/>	



The IRS allows up to four items to be reported in Box 12 on Copy A. On the standard IRS Form W-2, items for Box 12 are labeled 12a, 12b, 12c, and 12d, with separate sections for the code and the amount. On the Dayforce form, only the codes and amounts will display.

You can update the checkboxes for Box 13, such as adding or removing the Retirement Plan indicator. You can add items for Box 14 – Other. Click **Add** below the Box 13 checkboxes to enable the data entry for Box 14 labeled **Other**.

13. <input type="checkbox"/> Statutory Employee <input type="checkbox"/> Retirement Plan <input type="checkbox"/> Third-Party Sick Pay	13. <input type="checkbox"/> Statutory Employee <input checked="" type="checkbox"/> Retirement Plan <input type="checkbox"/> Third-Party Sick Pay
<input type="button" value="+ Add"/>	

Enter a brief description on the left and the amount to be reported on the right. A red X will display that allows you to delete any row you've just entered.

13. <input type="checkbox"/> Statutory Employee <input type="checkbox"/> Retirement Plan <input type="checkbox"/> Third-Party Sick Pay	13. <input type="checkbox"/> Statutory Employee <input checked="" type="checkbox"/> Retirement Plan <input type="checkbox"/> Third-Party Sick Pay
Other (see instructions) <input type="text"/>	Other (see instructions) <input type="text"/> ✖
<input type="button" value="+ Add"/>	



Refer to the [General Instructions for Forms W-2 and W-3](#) on the IRS web site for more information about Form W-2 and W-2C such as the instructions for what to report in Box 14-Other.

The W2 Corrections form also includes Boxes 15 to 20 so you can enter corrections for State and Local wages and taxes. At the bottom of the section, you can click Add to add a new state or local jurisdiction.

15. State NY	15. State NY
Employer's state ID number <input type="text"/>	Employer's state ID number <input type="text"/>
16. State wages, tips, etc. <input type="text"/>	16. State wages, tips, etc. <input type="text"/>
17. State income tax <input type="text"/>	17. State income tax. <input type="text"/>
18. Local wages, tips, etc. <input type="text"/>	18. Local wages, tips, etc. <input type="text"/>
19. Local income tax <input type="text"/>	19. Local income tax <input type="text"/>
20. Local name	20. Local name
<input type="button" value="+ Add State"/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

If you just need to add local wage and tax information, you will still need to fill out Boxes 15 (State) and Employer's state ID number, then complete Boxes 18 to 20 to provide the local wages, local taxes, and the Locality Name.

15. State	15. State NY ✖
Employer's state ID number	Employer's state ID number
16. State wages, tips, etc.	16. State wages, tips, etc.
17. State income tax	17. State income tax.
18. Local wages, tips, etc.	18. Local wages, tips, etc. 34933.40
19. Local income tax	19. Local income tax 698.67 ✖
20. Local name	20. Local name NYNRES

+ Add State

Save
Cancel

Click **Save** to save your entries. The Search Employee Documents page refreshes to display the W-2C line for the employee. New Actions available include Edit, Delete, and Post.

Documents

W-2 1095-C

View as PDF
 Download

Year	Type	State	FEIN	Dist Method	Other	Actions
2017	W-2	NY		Paper		
2017	W-2C			Electronic	Seq:0	[Edit] [Delete] [Post]

If you need to make further adjustments or corrections, click **Edit**. You can also delete the W2C.

Select the W-2C line, then **View as PDF** to review your entries. The document includes the employee and employer copies, the copies for their Federal and State/City/Local tax returns, plus the forms to be filed with the Social Security Administration and the State/City/Local jurisdiction.

DO NOT CUT, FOLD, OR STAPLE THIS FORM

44444		For Official Use Only ▶ OMB No. 1545-0008																																									
a Employer's name, address, and ZIP code		c Tax year/Form corrected 2017 / W-2																																									
b Employer's Federal EIN		d Employer's correct SSN																																									
Note. Only complete money fields that are being corrected. For corrections involving MQGE, see the General instructions for Form W-2, box 15, and W-3, under Specific Instructions for Form W-2, box 15 and E.		e Corrected SSN and/or name (Check this box and complete boxes f and/or g if incorrect on form previously filed.) <input type="checkbox"/>																																									
		f Employee's previously reported SSN																																									
g Employee's previously reported name		h Employee's first name and initial Last name Suffix																																									
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Previously reported</th> <th style="width: 25%;">Correct information</th> <th style="width: 25%;">Previously reported</th> <th style="width: 25%;">Correct information</th> </tr> </thead> <tbody> <tr> <td>1 Wages, tips, other compensation</td> <td>1 Wages, tips, other compensation</td> <td>2 Federal income tax withheld</td> <td>2 Federal income tax withheld</td> </tr> <tr> <td>3 Social security wages</td> <td>3 Social security wages</td> <td>4 Social security tax withheld</td> <td>4 Social security tax withheld</td> </tr> <tr> <td>5 Medicare wages and tips</td> <td>5 Medicare wages and tips</td> <td>6 Medicare tax withheld</td> <td>6 Medicare tax withheld</td> </tr> <tr> <td>7 Social security tips</td> <td>7 Social security tips</td> <td>8 Allocated tips</td> <td>8 Allocated tips</td> </tr> <tr> <td>9</td> <td>9</td> <td>10 Dependent care benefits</td> <td>10 Dependent care benefits</td> </tr> <tr> <td>11 Nonqualified plans</td> <td>11 Nonqualified plans</td> <td>12a See instructions for box 12</td> <td>12a See instructions for box 12</td> </tr> <tr> <td>13 Statutory employee <input type="checkbox"/> Retiree plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/></td> <td>13 Statutory employee <input type="checkbox"/> Retiree plan <input checked="" type="checkbox"/> Third-party sick pay <input type="checkbox"/></td> <td>12b</td> <td>12b</td> </tr> <tr> <td>14 Other (see instructions)</td> <td>14 Other (see instructions)</td> <td>12c</td> <td>12c</td> </tr> <tr> <td></td> <td></td> <td>12d</td> <td>12d</td> </tr> </tbody> </table>				Previously reported	Correct information	Previously reported	Correct information	1 Wages, tips, other compensation	1 Wages, tips, other compensation	2 Federal income tax withheld	2 Federal income tax withheld	3 Social security wages	3 Social security wages	4 Social security tax withheld	4 Social security tax withheld	5 Medicare wages and tips	5 Medicare wages and tips	6 Medicare tax withheld	6 Medicare tax withheld	7 Social security tips	7 Social security tips	8 Allocated tips	8 Allocated tips	9	9	10 Dependent care benefits	10 Dependent care benefits	11 Nonqualified plans	11 Nonqualified plans	12a See instructions for box 12	12a See instructions for box 12	13 Statutory employee <input type="checkbox"/> Retiree plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>	13 Statutory employee <input type="checkbox"/> Retiree plan <input checked="" type="checkbox"/> Third-party sick pay <input type="checkbox"/>	12b	12b	14 Other (see instructions)	14 Other (see instructions)	12c	12c			12d	12d
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For Privacy Act and Paperwork Reduction Act Notice, see separate instructions. Copy A—For Social Security Administration
 Form **W-2c** (Rev. 8-2014) **Corrected Wage and Tax Statement** Department of the Treasury
Internal Revenue Service
Cat. No. 61437D

Post the W2-C

To accept the changes and print the W-2C, click **Post**. After you click Post, the W-2 tab on the Search Employee Documents page redisplay the list of W-2s and W-2Cs for the employee. The Edit and Post options no longer appear on the page, but a Correct option for the W-2C appears. Once a W2C is posted, if you still need to make a correction you can delete the W2C, then use the [Correction] link for the original W-2 to start over.

Documents

W-2 1095-C

View as PDF | Download

Year	Type	State	FEIN	Dist Method	Other	Actions
2017	W-2	NY	██████████	Paper		
2017						[Correction]
2017	W-2C		██████████	Electronic	Seq:1,Posted	[Delete]

Once you click Post, the employee will be able to see the W2C when they log into My Records.



My Records doesn't generate an electronic version of a W-2C that can be filed with the Social Security Administration or other state and local jurisdictions, so you must print the form. Download the PDF file to a local or network drive, then print to your local printer.



Dayforce Tax Service Note: My Records does not communicate the W-2C information to Dayforce Tax Service. You must submit the W-2C to Dayforce Tax Service to amend tax data and allow the Tax Service to prepare the correcting transmittal form (the W-3C).

Reminders for Forms W-2C

- The only Forms W-2C that display in My Records are those created in My Records. Forms W-2C created manually outside My Records do not display.
- If you are a Dayforce Tax Service customer, you need to send the Form W-2C to Dayforce.
- If you are a Dayforce Tax Service customer and you have sent the Form W-2C to Dayforce, you cannot make changes to it. If you need to make changes, generate another Form W-2C and send a copy to Dayforce Tax Service.
- Correcting a Social Security number in SeeMyW2 is not an option. If this data element is incorrect, you need to use another method to create the Form W-2C, such as the standard W2-C form on the IRS web site.
- Dayforce strongly recommends the use of a laser printer; other inks may not be compliant.

W-2C Batch Update

W-2 corrections require specific information to identify your company and the employee. The batch update file will need multiple rows per employee, depending on the type of correction you need to enter. For example, for each correction you'll need a Company Header Record to indicate the FEIN, a User Record to indicate the employee's SSN and any Federal wage and/or tax corrections, and if applicable, State Records.

Create the W-2C Batch Update File

The W-2C Batch Update page has a download link with instructions that describe each field you will need to include in the records, plus examples of correctly and incorrectly formatted records.

Sample of the instructions spreadsheet:

24	FIELD	DESCRIPTION	NOTES
25	Company Records		A company record (RE) is required for every User (RW) or State (RO) record included in your file.
26	RE header	This is the field that designates a Company record.	This is a required field and must be the first record in your input file.
27	FEIN	This is your companies FEIN number.	This is a required field.
28	Company Name	This is the name of the company to affect.	This is a required field.
29			
30	User Records		Every User record (RW) must be preceded by a Company record (RE).
31	RW header	This is the field that designates a User record.	This is a required field.
32	Tax Year	This will determine the tax year for the search.	This is a required field.
33	SSN	Employee's SSN number.	This is a required field. Do not include the dashes.
34	Employee First Name	This is to be filled in only if the first name is going to be changed.	This is not a required field
35	Employee Middle Name	This is to be filled in only if the middle name is going to be changed.	This is not a required field.
36	Employee Last Name	This is to be filled in only if the last name is going to be changed.	This is not a required field.

You can upload a CSV (comma delimited) file or a pipe (|) delimited ASCII file. A sample CSV file is available from the link on the page so you can see how the records should look in your file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	RE	77777777	General Products												
2	RW	2008	111111123	JOHN		DOE								23456	
3	RO	HI		123											
4	RW	2008	111111125									32707			12345
5	RO	FL	1234567890	123123	12345	54321	123	Casselbery							
6															

File Formatting Tips:

- Use Excel® to generate a CSV file.
 - Each line should be terminated with a new-line character, which Excel® will do for you when you save the file as a CSV file.
 - Always start the first line on row 1. Do not leave in any column headings.
 - Each field in the instructions spreadsheet represents a column in the file.
 - Leave the column blank if that field, such as Social Security Tips, does not apply to the employee.
 - If the field is not required, the system needs the pipe or comma to indicate an empty field.
 - Do not leave empty rows between lines.

- There must be at least two changes for it to be a valid file.
- Create the file with Excel®, then save it as a CSV (Comma Delimited) file.
- CSV files cannot have multiple tabs or worksheets.



The file must be a CSV file or pipe delimited ASCII file. The system will not accept Word documents, Excel® files with the XLS or XLSX file extension, or Unicode based files.

Upload the W-2C Batch Update File

Once you have created the CSV or pipe delimited file, upload the file on the W-2C Batch Update page to create the W-2C records.

Path: My Records > My Actions > W-2C Batch Update > Upload

To upload the data file to create the W2 corrections:

1. On the **W-2C Batch Update** page, click **Browse**, then locate and select your file.

2. Click **Upload**.



Depending on the number of records in your file, this may take several minutes to upload and process the records.

Click the **Status** tab to view the status, the number of employees in the file, and the number of employees changed. Select **View Details** to review any error or validation messages. Once you have resolved any errors and are satisfied all the records are correct, select the line for your file and click **Post File** to save the corrections for the employees.

File ID	File Name	Date/Time	Status	Emp in File	Emp Changed
No data available in table					