

2017 Year End Business Organizer

Form(s) W-2

for

Company Name:

(Note: Complete one packet for EACH company.)

***NOTE:* McRuer CPAs will NOT process forms until we have received this information. If, for any reason, we are unable to complete any payroll documents due to lack of timely information, we will not issue any reports nor assume any liability for penalties associated with a failure to file.**



W-2 Forms

Company Name:

WILL McRuer_{CPAs} BE PREPARING YOUR 2018 FORM(S) W-2?

- Yes – Review and complete **ALL** sections below
- No – Skip to section POSSIBLE PAYROLL ADJUSTMENTS
- Note: These could impact your payroll no matter the processing method.*

REVIEW EMPLOYEE DATA

McRuer_{CPAs} is planning to prepare your 2017 Form(s) W-2. Your participation is required to ensure the forms are complete and accurate. Please follow the steps provided for efficient processing.

1. Review employee addresses and social security numbers.

- Find prior year Form(s) W-2 posted to your MySafe_{Exchange} account.
(Click here [MySafe_{Exchange}](#) or refer to page #7 for login instructions.)
- Review the details for each employee to ensure we have correct and complete information.
- Complete the information on the form, even if no changes are required.
(Click on following link or see page #4.)

EMPLOYEE INFORMATION UPDATE WORKSHEET

2. Submit your information (even if there are no updates).

Click here [MySafe_{Exchange}](#) or refer to page #7 and follow the login instructions, to submit your information through your secure online account.

3. Review all of the possible payroll adjustments detailed below.

Consider your 2017 situation and determine if you have any Form(s) W-2 adjustments. If you are unsure of your requirements, please **contact Joe Globoke or Michael Froeschl** at joe@kccpa.com or michael@kccpa.com or call 816.741.7882 to discuss.

(NOTE: These are the most common payroll adjustments for our clients and they are not meant to be a complete list of requirements.)

Company Name:

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January 12, 2018

POSSIBLE PAYROLL ADJUSTMENTS

W-2 Forms - Continued

Please consider **each** of the following topics to determine if possible year end payroll adjustments are necessary. Most adjustments must be done by the **last 2017 payroll**.

S-C CORPORATION OFFICER HEALTH INSURANCE:

Accident and health insurance coverage provided by an S-Corporation on behalf of its 2% or greater shareholder **must** be reported on Form W-2. These premiums can be deducted on the individual's income tax return. This reporting requirement includes individual policies owned by a 2% or greater shareholder where the S-Corporation reimburses the shareholder.

Please answer the following to determine whether adjustments are required.

1. Does your business file Form 1120S (US Income Tax Return for an S-Corporation)?
 - Yes – continue to #2
 - No – adjustment **NOT** required, skip to next topic
2. Does your S-Corporation have shareholders that own more than 2% individually?
 - Yes – continue to #3
 - No – adjustment **NOT** required, skip to next topic
3. Does the S-Corporation pay for the health insurance premiums for those shareholders or reimburse the shareholder directly?
 - Yes (to either) – go to #4
 - No – adjustment **NOT** required, skip to next topic
4. Complete the information on the form. (Click on following link or see page #5.)
[S-CORPORATION HEALTH INSURANCE WORKSHEET](#)
5. **If McRuer^{CPAs} is preparing 2018 Form(s) W-2:**
Click here, **MySafe^{Exchange}** or refer to page #7 and follow the login instructions, to submit your information through your secure online account.
6. If another payroll solution is utilized but you would like additional guidance on how to ensure accurate reporting, please **contact Joe Globoke or Michael Froeschl** at joe@kccpa.com or michael@kccpa.com or call 816.741.7882.

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POSSIBLE PAYROLL ADJUSTMENTS-Continued **W-2 Forms Continued**

HEALTH SAVINGS ACCOUNTS (HSA)

Contributions by a Partnership to a partner's HSA for services rendered are treated as guaranteed payments that are deductible by the Partnership and includible in the partner's gross income. This treatment also applies to contributions made by an S-Corporation to a 2% or greater shareholder's HSA.

Please answer the following to determine whether adjustments are required.

1. Is your company a Partnership, S-Corporation, or Other?
 - Partnership – go to #2
 - S-Corporation – go to #3
 - Other – adjustment **NOT** required, skip to next topic
2. Does your Partnership contribute to a partner's HSA account?
 - Yes – go to #4
 - No – adjustment **NOT** required, skip to next topic
3. Does your S-Corp contribute to a 2% or greater shareholder's HSA account?
 - Yes – go to #4
 - No – adjustment **NOT** required, skip to next topic
4. Complete the information on the form. (Click on following link or see page #6.)
[HEALTH SAVINGS ACCOUNT \(HSA\) WORKSHEET](#)
5. **If **McRuer** is preparing 2017 Form(s) W-2:**
Click here, **MySafe** or refer to page #7 and follow the login instructions, to submit your information through your secure online account.
6. If another payroll solution is utilized but you would like additional guidance on how to ensure accurate reporting, please **contact Joe Globoke or Michael Froeschl** at joe@kccpa.com or michael@kccpa.com or call 816.741.7882.



EMPLOYEE INFORMATION UPDATE WORKSHEET

Company Name:

- ALL EMPLOYEE INFORMATION IS CORRECT ON ORIGINAL REPORT
- PLEASE UPDATE EXISTING EMPLOYEE INFORMATION OR ADD NEW EMPLOYEES
- New Update Employee:
- Updated Name:
 - Updated Address:
 - Updated Social Security Number:
-

- New Update Employee:
- Updated Name:
 - Updated Address:
 - Updated Social Security Number:
-

- New Update Employee:
- Updated Name:
 - Updated Address:
 - Updated Social Security Number:
-

- New Update Employee:
- Updated Name:
 - Updated Address:
 - Updated Social Security Number:
-

- New Update Employee:
- Updated Name:
 - Updated Address:
 - Updated Social Security Number:
-



S-CORPORATION HEALTH INSURANCE WORKSHEET

Company Name:

Officer Name:

Shareholder %:

2017 Health Insurance Premiums paid by S-Corp:

Account where payments are posted to in records:

Distributions/Draw Expenses

Officer Name:

Shareholder %:

2017 Health Insurance Premiums paid by S-Corp:

Account where payments are posted to in records:

Distributions/Draw Expense

Officer Name:

Shareholder %:

2017 Health Insurance Premiums paid by S-Corp:

Account where payments are posted to in records:

Distributions/Draw Expense

Officer Name:

Shareholder %:

2017 Health Insurance Premiums paid by S-Corp:

Account where payments are posted to in records:

Distributions/Draw Expense

Officer Name:

Shareholder %:

2017 Health Insurance Premiums paid by S-Corp:

Account where payments are posted to in records:

Distributions/Draw Expense



Company Name:

Company Entity: S-Corp Partnership

Name:

Ownership %:

2017 HSA Contributions Made by Company:

Account where payments are posted to in records:

Distributions/Draw Expense

Name:

Ownership %:

2017 HSA Contributions Made by Company:

Account where payments are posted to in records:

Distributions/Draw Expense

Name:

Ownership %:

2017 HSA Contributions Made by Company:

Account where payments are posted to in records:

Distributions/Draw Expense

Name:

Ownership %:

2017 HSA Contributions Made by Company:

Account where payments are posted to in records:

Distributions/Draw Expense

Name:


Ownership %:

2017 HSA Contributions Made by Company:


Account where payments are posted to in records:

Distributions/Draw Expense


How to **LOGIN** to your secure account

1. Visit www.kccpa.com and click on the  icon located on our Home page
2. Click on user name – sent in previous email
3. Password – sent in previous email


What if I can't **LOGIN** to my secure account?

1. Under the Login box
2. Click “Can’t access your account?”
3. Enter your Login – sent in previous email
4. Enter your email address that would have been associated with your  account
5. Choose one of the following:
 - a. Reset via email
 - b. Reset via security questions (only if previously established)
6. For further assistance, contact Ariell Braem at ariell@kccpa.com or Jeannie Salmon at jeannie@kccpa.com or call 816.741.7882.

How to **VIEW** documents in your secure account

1. Login to your  account.
2. Find the “Documents” heading on the left navigation pane
3. Click on the name of the individual or business to view documents
4. Find the appropriate folder in the middle section of the screen
5. Double click on the appropriate folder(s) until you find the PDF document to view

How to **UPLOAD** documents to your secure account

1. Login to your  account.
2. Find the “Documents” heading on the left navigation pane
3. Click on the “File Exchange” under the Documents heading
4. Find the appropriate folder in the middle section of the screen
5. Double click on the appropriate folder
6. Click the “Upload” icon in the top toolbar
7. Click “Add files”
8. Browse your computer to attach the appropriate files
9. Repeat the “Add files” steps as many times as necessary to attach all files
10. To remove file click the red circle to the right of file
11. Click “Start upload” when all files are attached