Deltek

Year-End in Ajera

Form W-2/W-3 Processing Checklist

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Contents

Form W-2/W-3 Processing Checklist 1
Appendix A: If You Need Assistance 2
Customer Services 2
Deltek Support Center 2
Access Deltek Support Center 3

Form W-2/W-3 Processing Checklist

Refer to the following checklist to ensure that you perform all required W-2 processing activities in the order recommended.

Step	Description	Done?
1.	Review your pays, taxes, deductions, and fringes in **Setup » Company » Payroll**. If Box 14 is selected, verify that the pay, tax, deduction, or fringe is identified by a description in the **W-2 Box Description** field. Otherwise, it appears on the W-2 form as an amount without an identifying description.	
2.	Review your local taxes in **Setup » Company » Payroll**. Verify that each local tax is associated with Box 18–19 Local 1 or Box 18–19 Local 2 and is identified by a description in the **W-2 Box Description** field. Otherwise, it appears on the W-2 form as an amount without an identifying description.	
3.	If you file electronically (using Ajera e-Filing) for Ohio, associate school district taxes to Box 18–19 Local 1 and enter a description in the **W-2 Box Description** field. This ensures that the tax liability displays correctly on the state reconciliation report.	
4.	From the **Reports** menu, click **Government Reporting » Form W-2**.	
5.	Click an option to print the forms in order of employee last name, first name, Social Security Number, or by department (which prints forms by employee last name within each department).	
6.	To print state information on the W-2 form, select the state. If you leave the **No State** option in the field, no state information prints on the form.	
7.	Print or e-file W-2 forms for desired employees.	
8.	Print the W-3 form. From the **Reports** menu, click **Government Reporting » Form W-2**. Complete the information on the Print Form W-2 window. In the **Form** option area, make sure to select the **Form W3** check box. Click the **Print** button. The Form W3 Information window displays. Enter information, and click **OK**.	

Note: No W-2 forms can be printed to pre-printed forms. Only plain paper or perforated plain paper can be used in producing physical W-2 forms in Ajera.

Appendix A: If You Need Assistance

If you need assistance installing, implementing, or using Ajera, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to https://deltek.custhelp.com.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

> **Note:** If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

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