



W-2 Administrator Guide

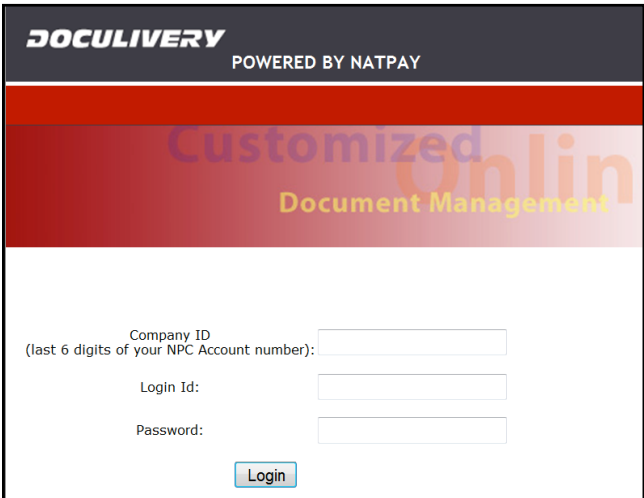
This guide shows you how to:

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Log in to the System:

1. Point your web browser to:
w2.doculivery.com/internal
2. Enter your unique company id.
3. Enter your unique login id.
4. Enter your password.
5. Click the login button.

If you don't have the log in information needed above, please contact Customer Service.



Uploading a W-2 File:

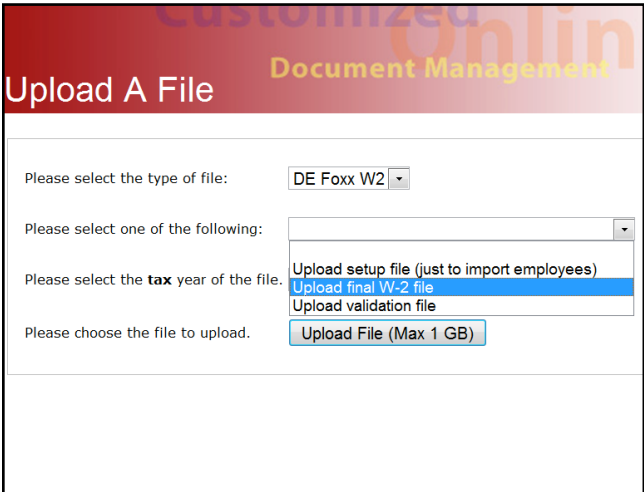
1. Once logged in, click the Upload A File link which is located in the menu bar towards the left side of the screen.



2. Select the file type from the first drop-down menu.
3. From the second drop-down menu, select either:

Upload a setup file: select this option to import new employees hired in the current year.

Upload final W-2 file: select this option to upload your final W-2 file to create W-2s for your employees.



4. From the third drop-down menu, select the tax year of the W-2 file that you want to upload.
5. Click the Upload File button to navigate and select the W-2 file that you want to upload.

Checking the Status of an Uploaded W-2 File:

Once your file has been uploaded, you will be presented with the Uploaded File List page which shows a list of uploaded files and their status.

You may also click the Uploaded File List link in the menu bar at anytime to be presented with the list of uploaded files and their status.

Once a file has been processed, the file status will show "Ready for Review."

When a file is ready for review, click the Select link to continue.

	File Name	File Description	Upload Time	Tax Year	File Status	# of W-2s
Select	xlc local tax 2009.zip	W2 File	11/29/2010 @ 4:42 PM	2009	Ready for review	1611
Select	W2REPORTSTVAL.zip	W2 File	11/29/2010 @ 4:41 PM	2009	Ready for review	15
Select	W2REPORTSTF&C.zip	W2 File	11/29/2010 @ 4:41 PM	2009	Ready for review	9
Select	W2REPORTSTDEFA.zip	W2 File	11/29/2010 @ 4:41 PM	2009	Ready for review	39
Select	fxc local tax 2009.zip	W2 File	11/29/2010 @ 4:40 PM	2009	Ready for review	42

Viewing File Details and Individual Employee W-2s:

After you have clicked a particular Select link from the Uploaded files page, you will be presented with that particular W-2 file's details page.

The Uploaded File details page shows you a list of all employees in that particular W-2 file.

You may click the View W-2 file link next to a particular employee's name to view their W-2.

File Name: xlc local tax 2009.zip
 Status: Ready for review
 Final File? YES
 The file began processing on 11/29/2010 at 4:42 PM.
 687 new employees were added.
[Click here for totals in this file.](#)
 This file has not been released. [Release File](#)

The following 1611 W-2s are in the file:

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	First Name	Last Name	SSN
View W-2	PATTI	CYR	001-00-0000
View W-2	DEREK	COWAN	002-00-0000
View W-2	OMAR	MOHAMUD	001-00-0000
View W-2	AHMED	HUSSEIN	002-00-0000
View W-2	MOHAMED	ALI	001-00-0000
View W-2	KASSIM	KASSIM	002-00-0000
View W-2	HASSAN	ABDI	001-00-0000
View W-2	JOHN	WHITE II	002-00-0000
View W-2	WILLIAM	RIDEOUT	001-00-0000
View W-2	LISA	EMERY	002-00-0000

Checking Totals for File Verification:

Once you are viewing the details of a particular W-2 file on the Uploaded File details page, click the Click Here for Totals in This File link to view the totals for that particular W-2 file.

Releasing W-2 Files to Your Employees:

Once you have verified that the W-2 file is correct by checking the file's totals and viewing particular employee's W-2s, click the Release File button.

Clicking the Release File button sends the W-2s to your employees who have opted in to receive electronic W-2s, and also makes the W-2 files available online.

Upload A File | Uploaded File List | Manage Employee | Preferences | View Opt In Report | View W-2 | Emp
Add Internal User | Edit Internal User | Log Out

Uploaded File

File Name: xlc local tax 2009.zip
Status: Ready for review
Final File? YES
The file began processing on 11/29/2010 at 4:42 PM.
687 new employees were added.
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View W-2	MOHAMED	ALI	001-00-0000
View W-2	KASSIM	KASSIM	002-00-0000
View W-2	HASSAN	ABDI	001-00-0000
View W-2	JOHN	WHITE II	002-00-0000
View W-2	WILLIAM	RIDEOUT	001-00-0000
View W-2	LISA	EMERY	002-00-0000

Viewing an Opt-In Report:

- Once logged in to the W-2 website, click the View Opt In Report link in the menu towards the top right side of the screen.
- Choose a tax year from the drop-down menu.
- Select one of the two Click Here links to download the opt-in report. The spreadsheet version may be opened in Microsoft Excel for greater sorting options. You may also view the report as an HTML web page. This view will list your employees in the order of their SSN, and will let you know who has or has not opted in for online W-2s.

Upload A File | Uploaded File List | Manage Employee | Preferences | **View Opt In Report** | View W-2 | Emp
Add Internal User | Edit Internal User | Log Out

Uploaded File

Please choose the tax year for which you wish to view the opt-in data:

[Click here](#) to download the opt-in report as a spreadsheet.
[Click here](#) to view the opt-in report as HTML.

- Once you have clicked to download or view an opt-in report, you may see a message stating that the report you requested is being processed, and that you may retrieve this report by clicking on the Jobs links in the menu.... Click the OK button to continue.
- Click the Jobs link in the menu area.
- Click the Download link next to the particular job or opt-in report type that you would like to download to your computer.

Upload A File | Uploaded File List | Manage Employee | Preferences | View Opt In Report | View W-2 | **Employe**
Add Internal User | Edit Internal User | **Jobs** | Log Out

Download **Delete** **Job Submitted Date** **Job Description** **Job Status**

Download	Delete	12/8/2010 @ 1:32 PM	Opt-in report (as CSV)	The job is complete.
Download	Delete	12/8/2010 @ 1:29 PM	Opt-in report (as HTML)	The job is complete.

