

# PEO Guide - Year 2021

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Prepared by: **Pension Services, Inc**

## 1) W2 Summary/ Tax and Wage Summary

As part of the items needed to complete the census submission, you must provide W2 and W3 forms. Typically, your PEO provider might not give you access to actual W2 copies. If your PEO does not provide W2 employer copies, please alternative below:

The **W2 Summary Report** or **Tax and Wage Summary Report** work as substitutes for the W2/W3 forms. Most PEO use similar software and can produce similar custom W2 summary reports. Please request your PEO to make the report on excel or CSV file format.

We have provided a sample below for the PEO W2 summary (see below). Before you submit your file, please review the report to determine if it contains all the necessary information. The report must include compensation information [Gross Earnings and deferral information reported on box 12 (401k pre-tax deferrals and Roth deferrals)]. Also, the report must have a complete SSN

**Note:** Once you secure the W2 summary from your PEO, please review the notes below and compare to determine if the required information is included.

Tax Year	ER ID	Client ID	EE ID	SSN	Employee Full Name	First Name	Last Name	Gross Earnings	Federal Taxable Wages	Federal Income Tax Withheld	Social Security Wages	Social Security Tax Withheld	Medicare Wages and Tips	Medicare Tax Withheld	Box 12 Code	Box 12 Amount	Box 13 Statutory Employee Box	Box 13 Retire Plan Box	Box 13 Third-Party Sick Pay	Box 14 Code	Box 14 Amount	State	State Taxable	State Withheld	State Employer ID	
1 YEAR	ID	ID	ID	767-86-7097	Full name	Name	Lname	51015.13	13555.99	1761.15	13555.99	1761.59	13555.99	13333.99	DD	17668.8		X		DEN		1243				
2 YEAR	ID	ID	ID	766-72-0099	Full name	Name	Lname	59111.97	51556.1	6551.97	56095.75	1577.37	56095.75	31093.73	D	3388.53		X		VIS		130				
3 YEAR	ID	ID	ID	696-28-8650	Full name	Name	Lname	139713.05	131009.51	111671.5	111900	3119.3	139713.1	139713	D	73000		X		SCORP		17271.43				
4 YEAR	ID	ID	ID	592-67-2529	Full name	Name	Lname	50556.16	19511.16	1550.19	50571.16	1509.19	50571.16	30371.11	D	960		X		VIS		34				
5 YEAR	ID	ID	ID	595-02-6676	Full name	Name	Lname	511976.33	507111.65	179505.6	111900	3119.3	511976.3	311971.3	D	19873		X		SCORP		13029.71				
6 YEAR	ID	ID	ID	597-98-6598	Full name	Name	Lname	1107.51	1330.57	103.35	1011.91	115.3	1011.91	1011.91	D	137.55		X		DEN		77				
7 YEAR	ID	ID	ID	595-75-8652	Full name	Name	Lname	100	100	0	100	13.6	100	100	DD	361				VIS		102.3				
8 YEAR	ID	ID	ID	762-08-2726	Full name	Name	Lname	51553.71	50711.31	5105.91	50711.31	1155.5	50711.31	30711.31	DD	7697.5				DEN		340				
9 YEAR	ID	ID	ID	765-82-7987	Full name	Name	Lname	53165.13	55311.16	1695.66	56551.16	1335.61	56551.16	31331.11	D	770		X		VIS		1343.3				
10 YEAR	ID	ID	ID	656-82-2675	Full name	Name	Lname	1651.5	1651.5	91.01	1651.5	101.35	1651.5	1131.3	DD	7055.77				VIS		34				
11 YEAR	ID	ID	ID	592-57-9222	Full name	Name	Lname	51053.71	50500.11	5155.95	51700.11	1105.51	51700.11	31700.11	D	1700		X		MED		1343.3				
12 YEAR	ID	ID	ID	595-55-8269	Full name	Name	Lname	19131.95	13139.55	5051.13	13139.55	1167.75	13139.55	13139.33	DD	6833				MED		933.3				
13 YEAR	ID	ID	ID																							
14 YEAR	ID	ID	ID																							
15 YEAR	ID	ID	ID																							
16 YEAR	ID	ID	ID																							
17 YEAR	ID	ID	ID																							
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28 YEAR	ID	ID	ID																							
29 YEAR	ID	ID	ID																							

**NOTE:** We have provided this as a sample report. Based on previous experience, it seems that PEOs providers use similar applications. Therefore, although reports slightly differ from the sample, we believe they should generate this information in a very similar fashion excel file with all data fields.

## 2) Demographics (birthdate, hire, and other information)

We recommend consulting with your PEO to determine which will be easiest to export a demographic (census) report in excel format. The report consist of essential information that must at least include:

- Full Name
- Gender
- Full Social (preferably)
- Birthdate
- Hire Date
- Termination Date
- Rehire Date
- Employee Type: Full Time employee or Part Time.

### **Final note:**

Once you obtain all these reports and information from your payroll provider portal, you should proceed to complete our template request for the Census. With these reports, you have all the necessary data to prepare your census report successfully.

We strongly suggest using our Census guide to verify how to input map all this information correctly on our template. This will significantly expedite your time required to complete the request.