

# PEO Guide - Year 2021

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## 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.

The image shows a screenshot of an Excel spreadsheet titled "W2 Summary". The spreadsheet contains columns for tax year, employee information, earnings, taxes, and various boxes (12-14). Three callout boxes are overlaid on the spreadsheet:

- A box labeled "Compensation" points to the "Gross Earnings" column (column J).
- A box labeled "401k pre-tax deferrals and Roth deferrals" points to the "Box 12 Code" and "Box 12 Amount" columns (columns P and Q).
- A box labeled "SSN" points to the "SSN" column (column E).

| 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       | 13555.93              | 1761.15                     | 13555.93              | 1761.59                      | 13555.93                | 13333.93              | 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           | 3338.53       |                               | 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                      |                             | INS         |               | 340     |               |                |                   |
| 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                      |                             | MED         |               | 470.4   |               |                |                   |
| 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           | 13873         |                               | X                      |                             | SCORP       |               | 2123.32 |               |                |                   |
| 6 YEAR   | ID    | ID        | ID    | 597-98-6598 | Full name          | Name       | Lname     | 1107.51        | 1330.57               | 103.55                      | 1011.91               | 115.3                        | 1011.91                 | 1011.91               | D           | 137.55        |                               | X                      |                             | DEN         |               | 34      |               |                |                   |
| 7 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                      |                             | VIS         |               | 102.3   |               |                |                   |
| 8 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                      |                             | SCORP       |               | 13      |               |                |                   |
| 9 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           | 13873         |                               | X                      |                             | SCORP       |               | 342.4   |               |                |                   |
| 10 YEAR  | ID    | ID        | ID    | 597-98-6598 | Full name          | Name       | Lname     | 1107.51        | 1330.57               | 103.55                      | 1011.91               | 115.3                        | 1011.91                 | 1011.91               | D           | 137.55        |                               | X                      |                             | DEN         |               | 1343.3  |               |                |                   |
| 11 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           | 13873         |                               | X                      |                             | SCORP       |               | 34      |               |                |                   |
| 12 YEAR  | ID    | ID        | ID    | 597-98-6598 | Full name          | Name       | Lname     | 1107.51        | 1330.57               | 103.55                      | 1011.91               | 115.3                        | 1011.91                 | 1011.91               | D           | 137.55        |                               | X                      |                             | DEN         |               | 77      |               |                |                   |
| 13 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           | 13873         |                               | X                      |                             | SCORP       |               | 361     |               |                |                   |
| 14 YEAR  | ID    | ID        | ID    | 597-98-6598 | Full name          | Name       | Lname     | 1107.51        | 1330.57               | 103.55                      | 1011.91               | 115.3                        | 1011.91                 | 1011.91               | D           | 137.55        |                               | X                      |                             | MED         |               | 102.3   |               |                |                   |
| 15 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           | 13873         |                               | X                      |                             | SCORP       |               | 13      |               |                |                   |
| 16 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     |               |                |                   |
| 17 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                      |                             | LIFE        |               | 342.4   |               |                |                   |
| 18 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       |                               |                        |                             | MED         |               | 1343.3  |               |                |                   |
| 19 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                      |                             | VIS         |               | 34      |               |                |                   |
| 20 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         |               | 1333.22 |               |                |                   |
| 21 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          | 5611          |                               |                        |                             | MED         |               | 34      |               |                |                   |
| 22 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          | 5611          |                               |                        |                             | MED         |               | 933.3   |               |                |                   |
| 23 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          | 5611          |                               |                        |                             | MED         |               | 933.3   |               |                |                   |
| 24 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          | 5611          |                               |                        |                             | MED         |               | 933.3   |               |                |                   |
| 25 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          | 5611          |                               |                        |                             | MED         |               | 933.3   |               |                |                   |

**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.