

# run ADP Download Guide - Year 2021

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Introduction.

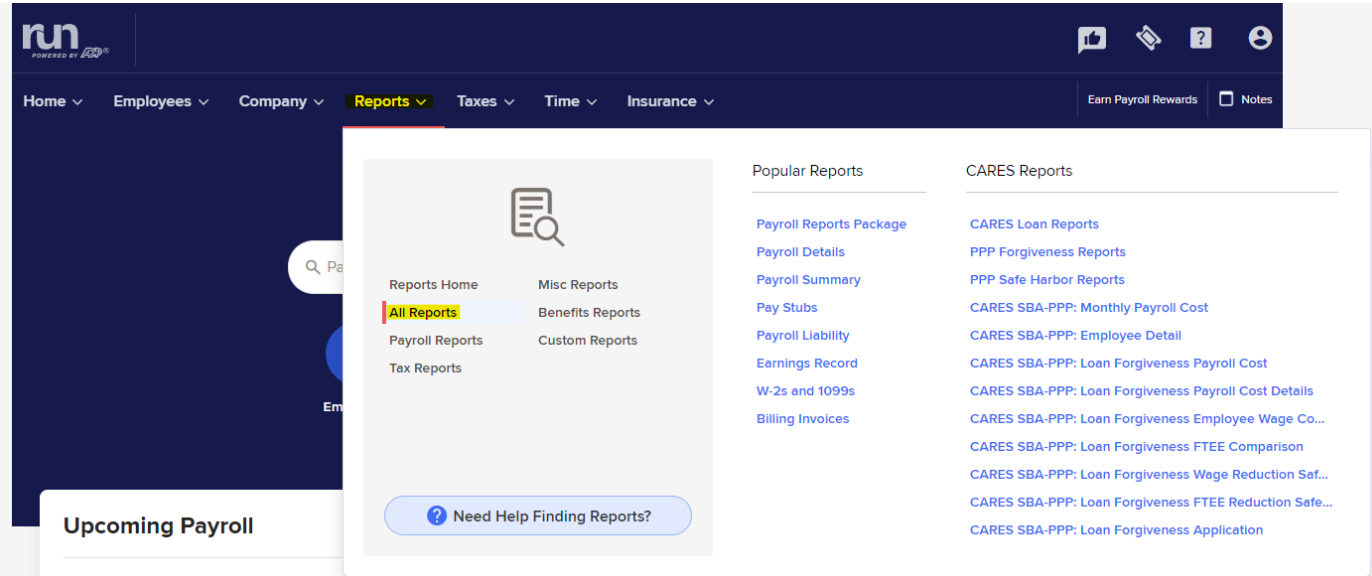
You will need to download the employee summary reports and tax W2/W3 reports to complete your census report. If you use total ADP RUN, these reports are available on your RUN portal.

Please review and complete the guide for instructions.

1) Downloading your Employee Summary Report

run ADP home page

- a. Locate Reports under the main navigation controls (see image).
- b. On the dropdown menu, search for "All Reports" and click this option.



Reports home page

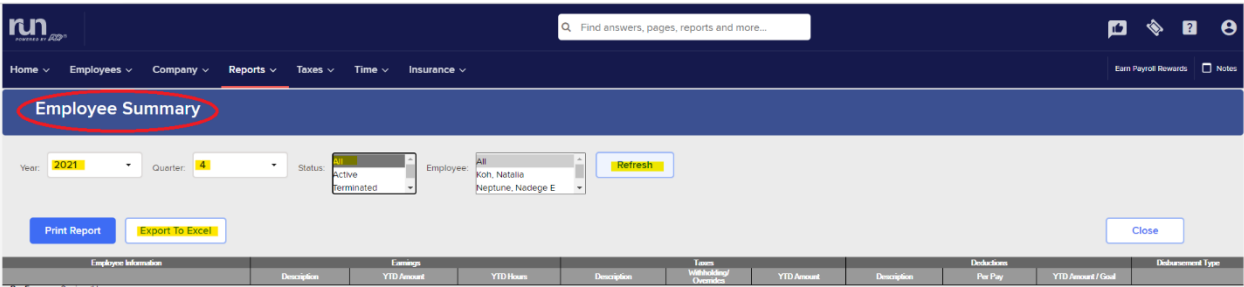
- a. Under Reports Home, locate the search/find box and type “Summary”
- b. A list will get refreshed, and then from the list select “Employee Summary.”

The screenshot shows the 'Reports Home' page. At the top, there is a navigation bar with 'Home', 'Employees', 'Company', 'Reports', 'Taxes', 'Time', and 'Insurance' menus. A search bar is present with the text 'Find answers, pages, reports and more...'. Below the navigation bar, the 'Reports Home' section features a search input field with 'Summary' entered. To the right of the search field are buttons for 'Create Report Package' and 'Create New Custom Report'. Below the search field is a table with columns for 'All', 'Payroll', 'Taxes', 'Benefits', 'Misc', and 'Custom'. The table lists various reports with their descriptions. The 'Employee Summary' report is highlighted in yellow.

All	Payroll	Taxes	Benefits	Misc	Custom
Name		Description			
Payroll					
Payroll Summary		▼ The Payroll Summary report contains the total wages, taxes, deductions, and employer liabilities sorted by employee/contractor and by check date.			
Month, Quarter, Year-to-Date Summary		▼ The Month, Quarter, Year-to-Date Summary report displays month, quarter, and year-to-date totals for the company, for earnings, taxes, deductions, net pay, and employer liabilities. You can also choose to include payroll details.			
Taxes					
Quarterly Local Tax Reconciliation		▼ The Quarterly Local Tax Reconciliation report contains the summary of the quarter-to-date local tax details for each local taxing authority.			
Benefits					
Deduction Summary		▼ The Deduction Summary report contains the deduction amounts withheld from your employees by deduction type.			
Misc					
Employee Summary		▼ The Employee Summary report contains all personal information, earnings, taxes, deductions, and the year-to-date amounts of each.			

Employee Summary Report options/parameters

- a. Ensure the following parameters are selected when preparing the report for download. Assuming we are working on your 2021 data, you will need to select:
  - Year: 2021**
  - Quarter: 4**
  - Employee Status: All**
  - Employee: All**
- b. Make sure to click **refresh** and then you download by clicking under **“Export to excel.”**



**Note: Save a copy of the Employee Summary report (Excel File). Remember to save the file on your desktop or download folder for easy retrieval.**

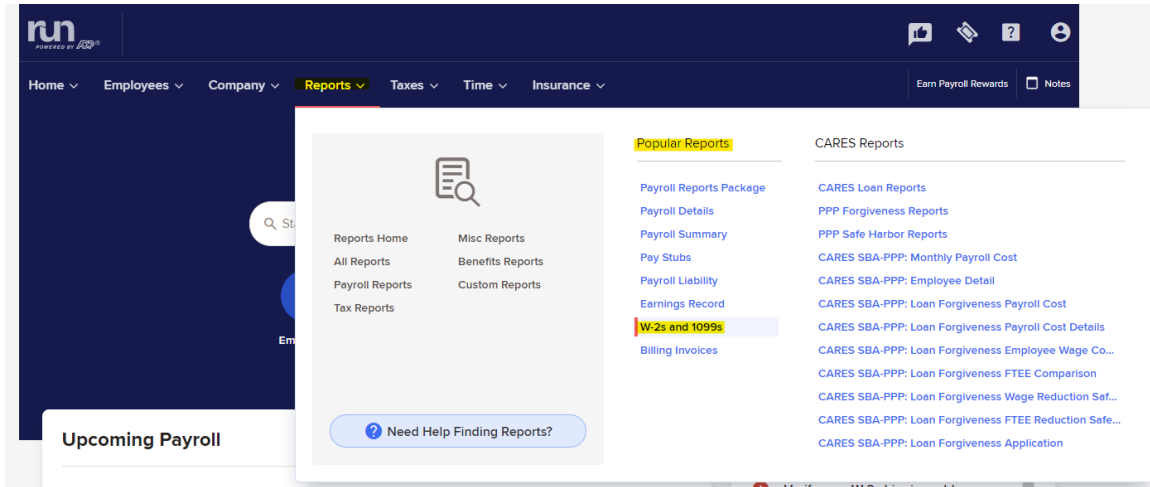
**When you open the excel file saved, ensure the year is for 2021 and the 4<sup>th</sup> quarter.**

Employee Summary										
Employee Information		Earnings		Taxes Withholding/ Overrides			Deductions		Disbursement Type	
Description	YTD Amount	YTD Hours	Description	YTD Amount	Description	Per Pay	YTD Amount / Goal			
<b>Pay Frequency: Semi-monthly</b>										
<b>Redinger, Elsa</b>										
Gross	47603.63		FIT	Married7	1721.43	401(k) plan	7.00%	3336.78		
Hourly: 21.5000	46301.33	1777.40	SOCSEC		1966.46	Loan	100	2100.00		
SSN: aaaa-5345	366.70	0.00	MEDICAPE		691.19					
Hire Date: 01/01/2002 Birth Date: 3/18/1978 Status: Active Emp Type: Fulltime										
<b>Torres, Jennifer</b>										
270 SW 23rd Cranbrook Drive										
Hourly: 25.0000										
SSN: aaaa-5558										
Hire Date: 06/12/2005	Gross	44101.70	FIT	Married1	1613.60	401(k) plan	5.00%	2203.93		
Birth Date: 12/19/1939	Regular	47776.00	1777.40	SOCSEC	1740.61					
Status: Active Emp Type: Fulltime										
<b>Pay Frequency Totals: Semi-monthly</b>										
Gross	91765.33		FIT		2307.69	401(k) plan		5546.71		
S	215136.88	3468.80	SOCSEC		13445.96	Loan		2100.00		
Bonus	366.70	0.00	MEDICAPE		3144.61					
<b>Total Employees - Semi-monthly: 2</b>										
<b>Company Totals:</b>										
Gross	91765.33		FIT		2307.69	401(k) plan		5546.71		
Regular	215136.88	3468.80	SOCSEC		13445.96	Loan		2100.00		
Bonus	1733.40	0.00	MEDICAPE		3144.61					
<b>Total Active Employees - Company: 2</b>										
<b>Total Employees - Company: 2</b>										

## 2) Downloading your W2 Forms.

### run ADP home page

- a. Locate Reports under the main navigation controls (see image).
- b. On the dropdown menu, locate the option “W-2s and 1099s” and click this option.



### W-2 and 1099's page

- a. Make sure to download the W2 by clicking under “W2” for the correct year. (in this case, we are downloading the 2021 year)
- b. Save the PDF file.

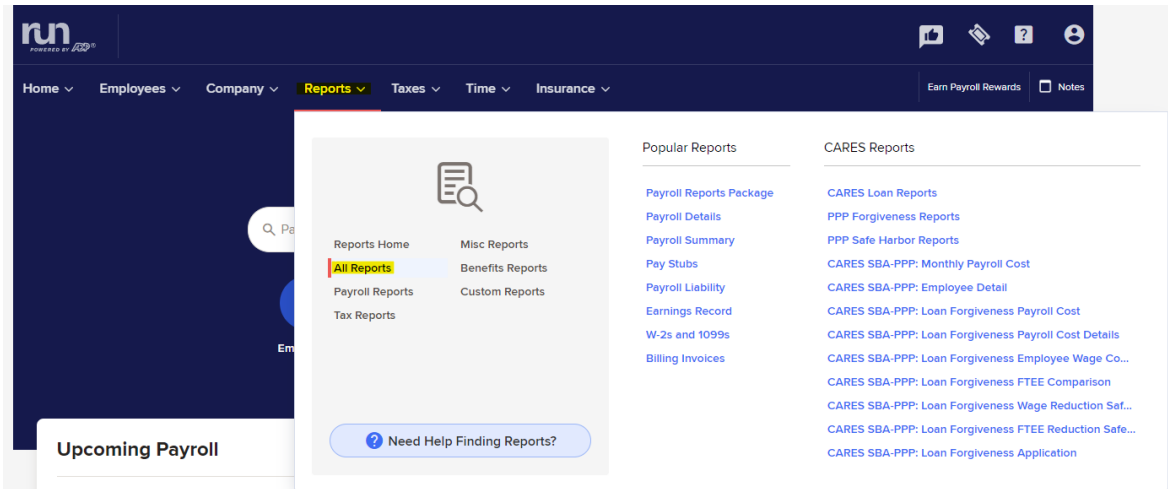
A screenshot of the 'W-2s and 1099s' page in the run ADP system. The page has a search bar at the top and navigation tabs for 'Home', 'Employees', 'Company', 'Reports', 'Taxes', 'Time', and 'Insurance'. Below the navigation is a table with the following data:

Document	Year	Date Prepared
W2	2021	

### 3) Downloading your W2 Preview Report.

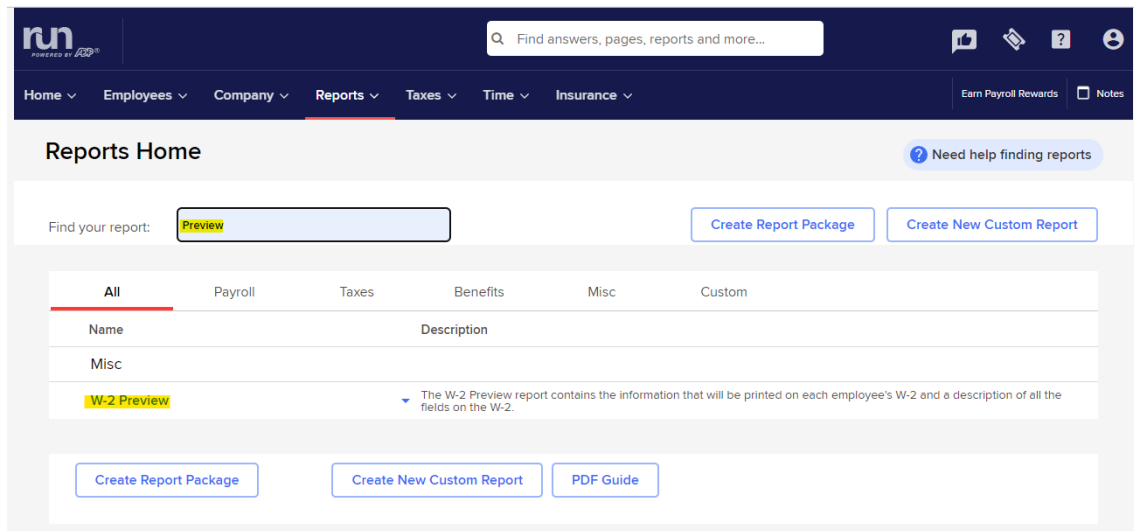
#### run ADP home page

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- b. On the dropdown menu, search for "All Reports" and click this option.



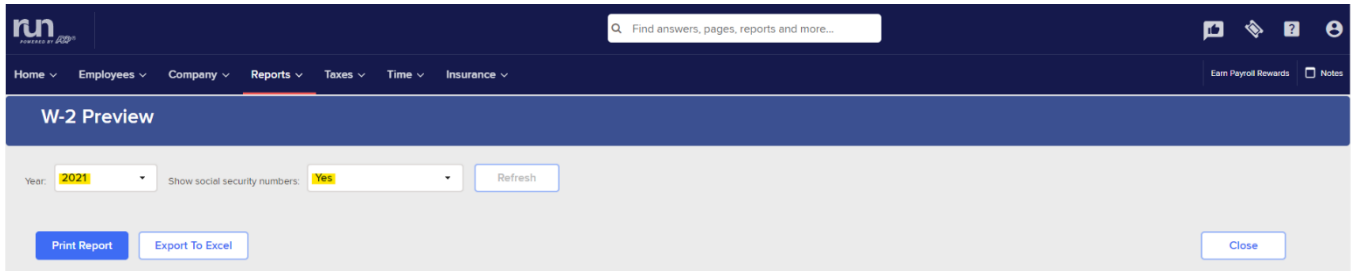
#### Reports home page

- a. Under Reports Home, locate the search/find box and type "Preview"
- b. A list will get updated, and then select "W-2 Preview."



W-2 Preview Report options/parameters

- a. Ensure the following parameters are selected when preparing the report for download. Assuming we are working on your 2021 data, you will need to select:
  - Year: 2021**
  - Show social security number: Yes**
- b. Make sure to click **refresh** and then you download by clicking under **“Print Report.”**



**Note: Save a copy of the W-2 preview file. Remember to save the file on your desktop or download folder for easy retrieval.**

W-2 Preview

Employer's Name :		YOUR COMPANY													
Employer's FEIN :		81-3947581													
Employer's ZIP Code :		33435													
Earnings Summary	Wages, Tips, other Comp	Federal Income Tax Withheld	Social Security Wages	Soc Sec Tax Withheld	Medicare Wages	Medicare Tax Withheld	State Wages, Tips, Etc	State Income Tax	Local Wages, Tips, Etc	Local Income Tax	Soc Sec Tips Box 7	Adv EIC Box 9	Box 12		
	Box 1	Box 2	Box 3	Box 4	Box 5	Box 6	Box 16	Box 17	Box 18	Box 19	Allocated Tips Box 8	Dep Care Box 10	Box 13		
Rodriguez, Elsa				SSN : 494-95-5345								SIT : FL Local :			
Gross Pay	82091.20												D		
Less 401(k) (D-Box 12)	775												3336.78		
Reported W-2 Wages/Tax													Stat EE - N		
													Ret plan - Y		
													3PSP - N		
Torres, Jennifer				SSN : 544-26-5558								SIT : FL Local :			
Gross Pay	48000												D		
Less 401(k) (D-Box 12)	2786												2209.93		
Reported W-2 Wages/Tax													Stat EE - N		
													Ret plan - Y		
													3PSP - N		
<b>FEDERAL TOTALS</b>		<b>W3 Kind of Employer: None apply</b>													
Gross Pay	91765.33												D		
Less 401(k) (D-Box 12)	5546.71												5546.71		
Reported W-2 Wages/Tax	211323.57												Stat EE - 0		
													Ret plan - 2		
													3PSP - 0		
<b>STATE AND LOCAL TOTALS</b>															

**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.