



### Hours of Operation: (Eastern)

Monday - Thursday 9 am - 6 pm

Friday 9 am - 5 pm

### January Extended Hours:

Monday - Thursday 9 am - 8 pm

Friday 9 am - 5 pm

Saturday 10 am - 1 pm

### Support Lines & Offices Closed:

Thanksgiving – November 22nd & 23rd

Christmas Eve & Day – December 24th & 25th

New Years Day – January 1st

## Payroll EOY instructions

Installing your new 2019 Payroll program is not the same as performing the Payroll End-of-Year function. One is an update to the program and needs to be installed as soon as you receive it. The other is a procedure within the program to advance the system into the New Year.

**Two** things need to occur to perform the End-of-Year Procedure in Payroll:

1. **Install** the Church Windows Payroll 2019 program on your computer when you receive it.

**Network Users:** If you will be installing Church Windows Payroll 2019 on a network, please make sure that you update **all computers** using Payroll.

2. If you transfer Payroll to Accounting, you must create the 2019 Accounting year.

- **Then** you need to run the End-of-Year Procedure to open the 2019 payroll year.

Church Windows Payroll 2019 will be issued as soon as possible after the release of the tax tables for the new year. It updates the tax files for 2019, provides the 2018 tax forms and, when installed as an update, retains all prior years' history.

**Reminder** – If you try to run W-2s before installing the update, they will say **2017!**

**Important Note:** Before April, a Payroll Service Release (SR) will be issued that will include the W4 and 941 forms for 2019. These forms are not available to us in time to include them in the year-end release. It is very important to install the update before printing and submitting the 1<sup>st</sup> quarter Form 941.

## Steps to perform the Payroll End-of-Year Procedure:

### Step # 1 - Make a backup of your data

- Click *Sys. Admin.>Backup Data*

### Step # 2 - Perform the end-of-year procedure

- Click *Sys. Admin.>End of Year Procedure*
- Click *Yes* to move to the new year
- Click *Yes* or *No* for “*Would you like to clear any accumulated vacation and sick pay carried into 2019?*”
- You will receive a message saying that the End-of-Year procedure has been successfully completed. Click *OK*
- Click *Sys. Admin>System Profile*. The Year box should now show *2019*.

You can easily toggle back and forth between the two years until you are finished with 2018.

To return to the prior year, 2018

- Click *Sys. Admin.>System Profile*
- Click on the drop-down arrow for the Payroll year and select *2018*

Be sure to move back into 2019 before running a Payroll for the new year.

### Social Security Administration E-Filing

If you use the SSA E-filing process, you file everything electronically yourself. There is no charge. You do need a PIN. You can file for a pin with SSA directly.

**NOTE:** The text file created when using the SSA E-filing process may be used for State filings. Some states require a pin for filing. Your state return may be filed with an SSA file even if you do not file your Federal with SSA.

### Nelco Wage Filer

Nelco Wage Filer that is in Church Windows Payroll, may be used only for filing Quarterly 941s and Annual 944 forms. You will need an IRS pin to file 941s, which takes about 8 weeks to obtain. You can start that process, for no charge, using the Nelco Wage Filer.

- Quarterly 941s or Annual 944 - You can file these forms electronically with the IRS using the Nelco Wage filer.
- We recommend that you keep copies of all 941 reports and W-2s for at least four years.

**W-2s** There are three format options for W-2 forms when you print W-2's through CW Payroll:

**STANDARD IRS forms:** these must be printed on forms you purchase from an office supply company and you must print each W-2 separately (e.g., Federal copy, State copy, Employee's copy).

**4 UP:** These forms print four different copies of the employee's W-2 on a single page. You will print two copies of these per employee. The employee gets one page of the forms and the church uses the copies on the second page to send to the various taxing agencies and to keep on file. These forms also must be purchased from a supply store. You will want to get the "4 UP – ALT" style.

**BLACK AND WHITE:** The forms may be printed directly from Church Windows onto 20# paper; you do not have to order or purchase forms. IRS regulations require them to be printed with a laser printer (NOT an ink jet). These forms print 2 employees to a page (except Copy C).

- Copy A is the copy the church sends to the Social Security Administration.
- Copy 1 is the form the church sends to the state and local taxing agencies, so if your employees pay both state and local taxes, you may need to print a copy for the state and another copy for the local government.
- Copy D is the employer's copy to keep.
- Copy B is the copy the employee sends to the federal government.
- Copy C is the copy the employee keeps for his/her records.
- Copy 2 is the copy the employee sends to the state and local taxing agencies, so if your employees pay both state and local taxes, you may need to provide the employee multiple copies.

If you use the Black and White forms, you **MUST** give each employee a copy of the instructions. The instructions are automatically printed from Church Windows when you print Copy C.

**1099s** **MUST** be printed on Standard IRS 1099 forms with red ink. Forms may be purchased from an office supply company and you must print each 1099 type separately (e.g., Federal copy, State copy, Contractor's copy).

*Dynamic Systems*, a partner of Church Windows, provides year end tax forms.

[Click to visit the Church Windows page on the Dynamic Systems website](#)