

HOW TO OVERRIDE CALCULATIONS ON FORM W-2

Question

PLEASE REFER TO THE STEPS BELOW:

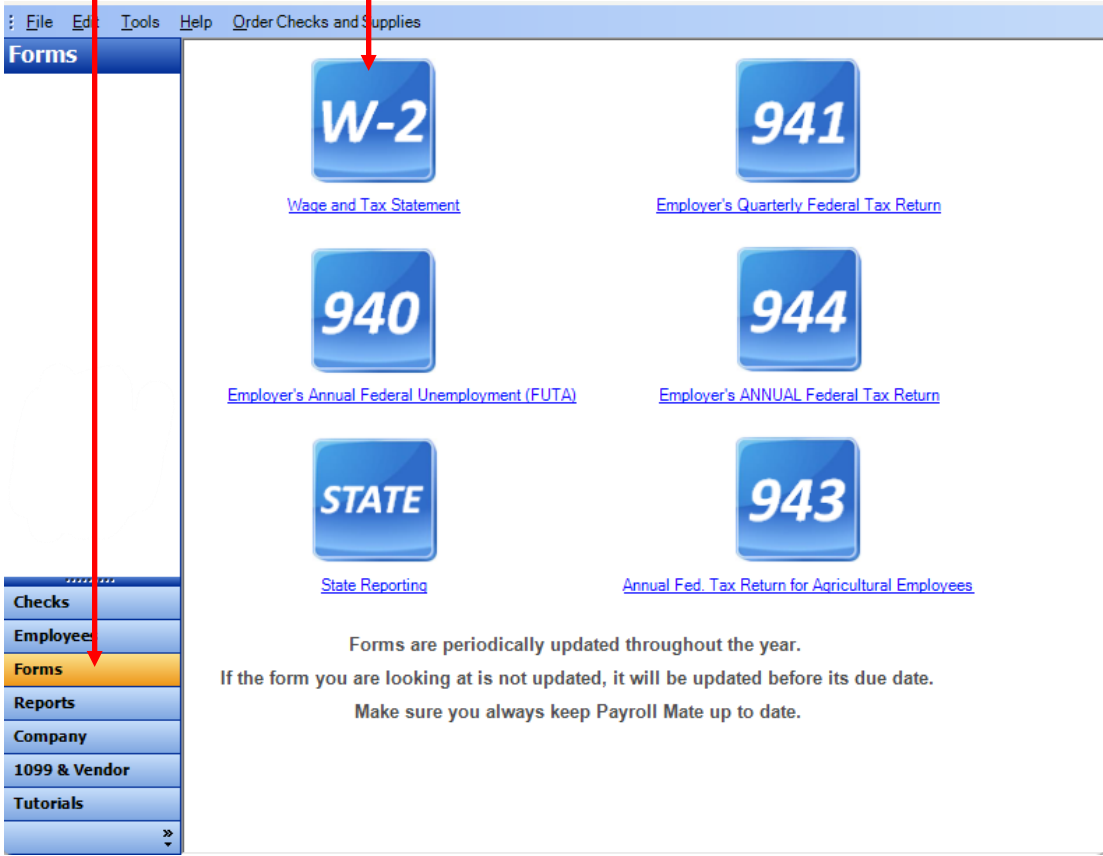
Answer

Make sure you are in the correct company.

1. Click **Forms**
2. Click **W-2** (Wage and Tax Statement)

Click Forms1

Click W-22



The screenshot shows the Payroll Mate software interface. At the top, there is a menu bar with 'File', 'Edit', 'Tools', 'Help', and 'Order Checks and Supplies'. Below the menu bar, there is a sidebar on the left with a list of options: 'Forms', 'Checks', 'Employees', 'Reports', 'Company', '1099 & Vendor', and 'Tutorials'. The 'Forms' option is highlighted in yellow. In the main area, there are six large blue buttons arranged in a 3x2 grid. The top-left button is labeled 'W-2' and has a red arrow pointing to it from the 'Click W-2' step indicator. Below the 'W-2' button is the text 'Wage and Tax Statement'. The top-right button is labeled '941' and has the text 'Employer's Quarterly Federal Tax Return' below it. The middle-left button is labeled '940' and has the text 'Employer's Annual Federal Unemployment (FUTA)' below it. The middle-right button is labeled '944' and has the text 'Employer's ANNUAL Federal Tax Return' below it. The bottom-left button is labeled 'STATE' and has the text 'State Reporting' below it. The bottom-right button is labeled '943' and has the text 'Annual Fed. Tax Return for Agricultural Employees' below it. At the bottom of the main area, there is a text box that says: 'Forms are periodically updated throughout the year. If the form you are looking at is not updated, it will be updated before its due date. Make sure you always keep Payroll Mate up to date.'

3. The W-2 / W-3 Wizard dialog box will appear. Carefully read the information, click **Next**

W-2 / W-3 Wizard

This wizard allows you to print W-2 / W-3 forms.

The wizard contains one page for the W-2 information, and another page for the W-3 information.

You can use the Employee drop down list in the W-2 page to move between the different employees.

Please note that any changes you apply to the W-2 boxes will be lost once you exit this wizard except for the values in the Red boxes.

If you make any changes to the W-2 boxes that you want to get reflected on the printed W-2/W3 forms, please make sure to print the forms (W-2/W-3) before you exit this wizard.

Please also note that any changes you apply to the W-2 boxes will NOT affect other payroll forms such as form 941 or other payroll reports.

To continue, please click here or click the "Next" button below

Click Next 3

Cancel < Back Next > Close

4. Click **Override Calculations**

Click Override Calculations

4

W-2 Page

Employee [Use this drop-down list to move between different employees]
 Smith, Wilson [SSN: 111-11-1111]

Click Here to Continue to the W-3 form

W2

Preview Print **Override Calculations**

1 Wages, tips, other compensation 3542.31	2 Federal income tax withheld 426.10	14 Other SDI 0.00
3 Social security wages 3807.70	4 Social security tax withheld 236.08	
5 Medicare wages and tips 3807.70	6 Medicare tax withheld 55.21	15 State IL
7 Social security tips 0.00	8 Allocated tips 0.00	Employer's state ID number xxxxxxx
Box 9 is no longer in use	10 Dependent care benefits 0.00	16 State wages, tips, etc. 3542.31
11 Nonqualified plans 0.00	See instructions for box 12	17 State income tax 180.35
13 Statutory Retirement Third-party employee plan sick pay ☐ ☐ ☒	Code Amount 12 a D 265.39 12 b 12 c 12 d	18 Local wages, tips, etc. 3807.70 19 Local income tax 200.00 20 Locality name

Cancel < Back **Next >** Close

5. Warning dialog box will appear. Carefully read the information, **click in the box** to place a checkmark and acknowledge that you are making changes at your own risk.

6. Click **OK**

Warning

After clicking this button you will be able to override the values for the boxes shown on this screen.

The form you generate from inside Payroll Mate will reflect your changes, but these changes will not be saved in the program.

Please also note that these changes will not be reflected on other tax forms such as form 941.

All numbers generated by this form are compiled from checks you have created during the year. Changes made to this form will cause discrepancies with other forms you may have generated or will generate using Payroll Mate.

☒ By checking this box you acknowledge that you are making changes at your own risk and understand that you might be required to submit corrected tax forms in the future.

Click OK **OK** Cancel

Click in the box

5

Click OK

6

OK

Cancel

7. **Make your changes** to a field or fields for the first employee (Smith, Wilson in this example)

Make your changes 7

To make changes to another employee, click the dropdown arrow and select the employee. Example:

Employee [Use this drop-down list to move between different employees]
 Smith, Wilson [SSN: 111-11-1111]
 Smith, Wilson [SSN: 111-11-1111]
 Whitaker, Nelson [SSN: 294-58-1212]

W-2 Page

Employee [Use this drop-down list to move between different employees]
 Smith, Wilson [SSN: 111-11-1111] [Click Here to Continue to the W-3 form](#)

W2

[Preview](#) [Print](#) [Enable Calculations Again](#)

1 Wages, tips, other compensation 3542.31	2 Federal income tax withheld 426.10	14 Other SDI 0.00
3 Social security wages 3807.70	4 Social security tax withheld 236.08	
5 Medicare wages and tips 3807.70	6 Medicare tax withheld 55.21	15 State IL
7 Social security tips 0.00	8 Allocated tips 0.00	Employer's state ID number xxxxxx
Box 9 is no longer in use	10 Dependent care benefits 0.00	16 State wages, tips, etc. 3542.31
11 Nonqualified plans 0.00	See instructions for box 12	17 State income tax 180.35
13 Statutory Retirement Third-party employee plan sick pay	Code Amount	18 Local wages, tips, etc. 3807.70
☐ ☐ ☒	12 a D 265.39	19 Local income tax 200.00
	12 b	20 Locality name
	12 c	
	12 d	

[Cancel](#) [Back](#) [Next](#) [Close](#)

IMPORTANT!!

You may now Print your W-3 form and/or generate the E-file containing the values you overwrote.

Your changes WILL NOT be SAVED.

Upon closing the windows, the figures will go back to the system generated values.

Should you need to print the system generated values as well, you can select **Enable Calculations Again**. Your figures will go back to the system generated values.

You may now select **Click Here to Continue to the W-3 form** that will contain the changes you made to print for generate the E-File. **OR** Click **Next** to use the next screen

W-3 Page

Preview Form W-3

If you click the Preview button and you still can't see the preview window, please look at the bottom of your screen, you should see a second icon for the form (next to the Payroll Mate icon). You can maximize it to show the form preview window.

Print Form W-3

Create W-2/W-3 Electronic File (EFW2)

[How to E-File W-2 Forms with the SSA Using Payroll Mate](#)

Cancel

< Back

Next >

Close