Payroll Checklist

These items can be done as soon as your 2026 software is set up

- Update leave balances and rate of pay
  - Click File Maintenance
  - Click Amend Rates of Pay
  - Make appropriate updates to: wages, leave, duties, county tax rate
- Run 2026 payroll (as needed)

Creating W2s for Employees

Create W2s

- Open W2 Program
- Confirm Federal ID, State ID, Library name and address
- Click on Fix W2 Info
  - Check for any two-line addresses and update to one line
  - Check that there are no commas in duties
- Build W2 file
- Print W2s on paper and CHECK FOR ACCURACY
- Print two on official W2 form and check for alignment (call AVC if they are not aligned)
- Print all copies of W2 for all employees
- Print W-3

Create 100R

- Build 100R Information File
- View 100R Information
  - Check to make sure first line shows headings (call AVC if the first line is not headings)
- Build Gateway 100R csv file
- Connect to Gateway Website and upload file

If you are uploading W2s to the state:

- Click Required information to Upload W2s to Indiana Department of Revenue
- Confirm information
- Click Build W2 for transfer
- Print filing guidelines
- Connect to IN.GOV and follow guidelines