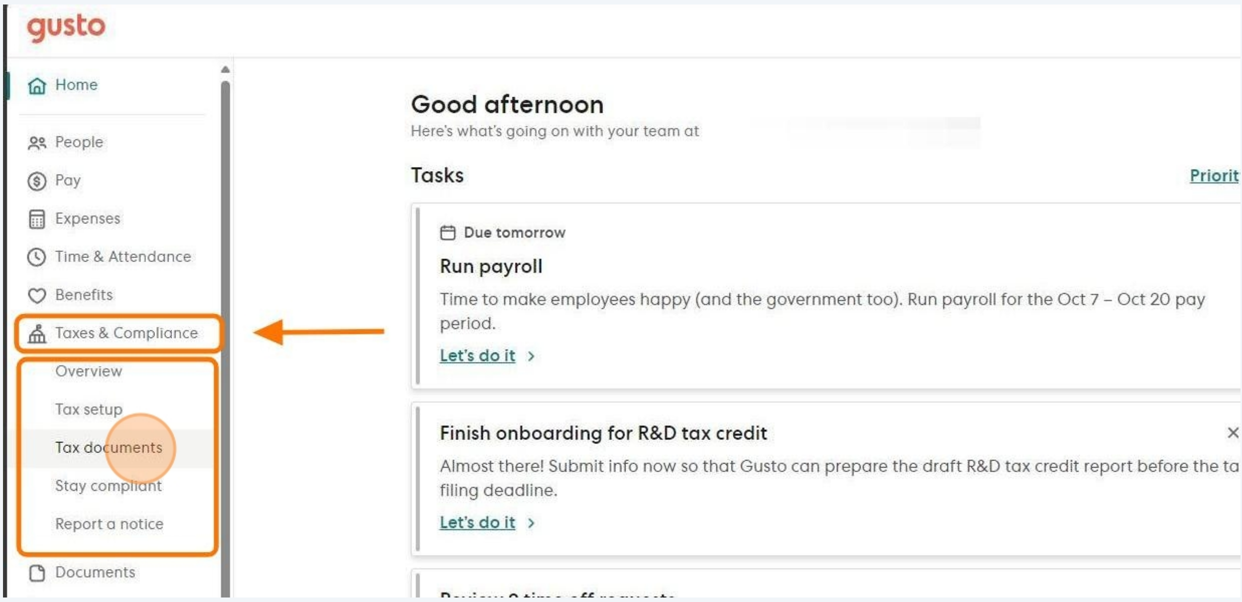
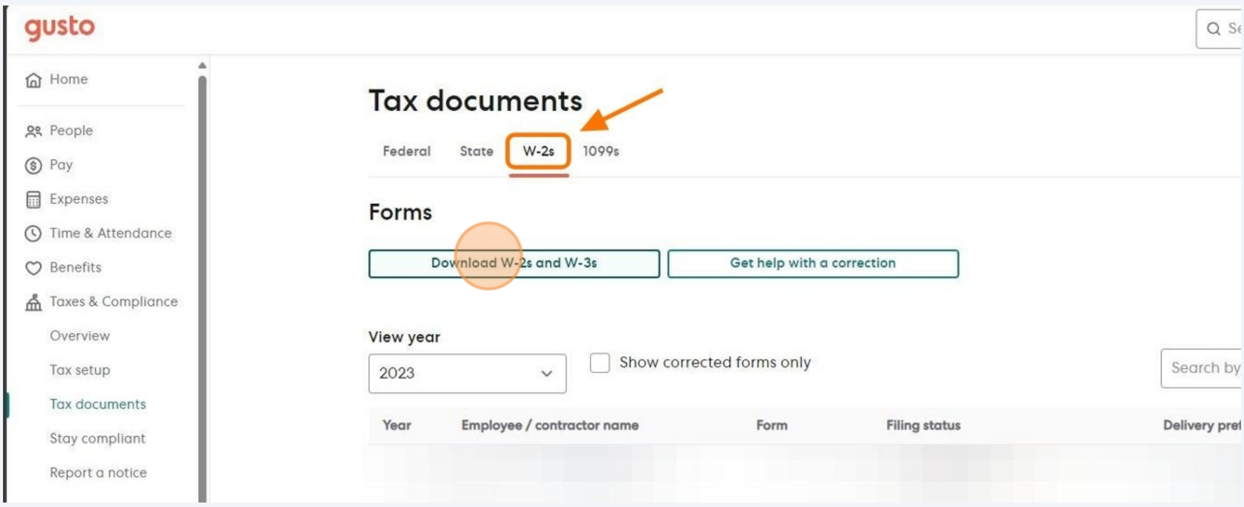
Gusto Guide 2024

Instructions for Downloading W-2 and W-3 Forms

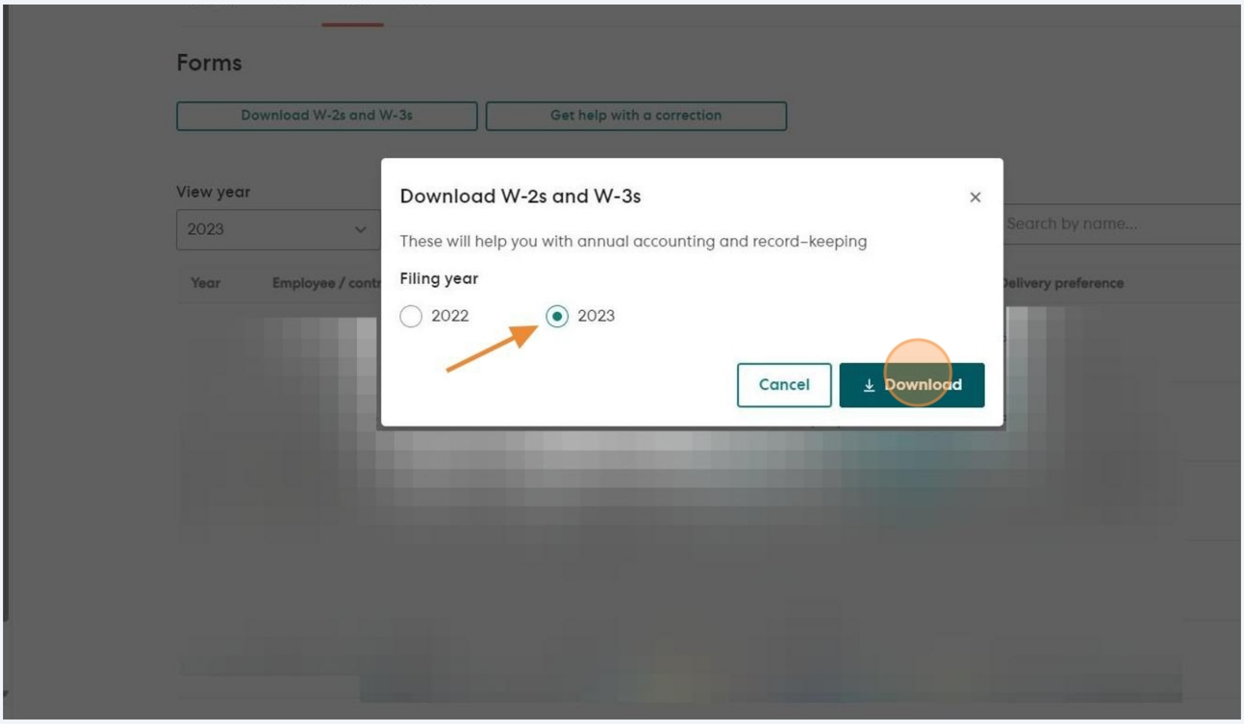
1. On the Gusto homepage, navigate to the side menu. Click on **Taxes & Compliance**, and from the dropdown menu, select **Tax Documents**



2. Once the **Tax Documents** menu appears, click on **W-2s**. Next, select **Download W-2s and W-3s**. You can preview the W-2s by clicking on **View Year** and selecting the appropriate year



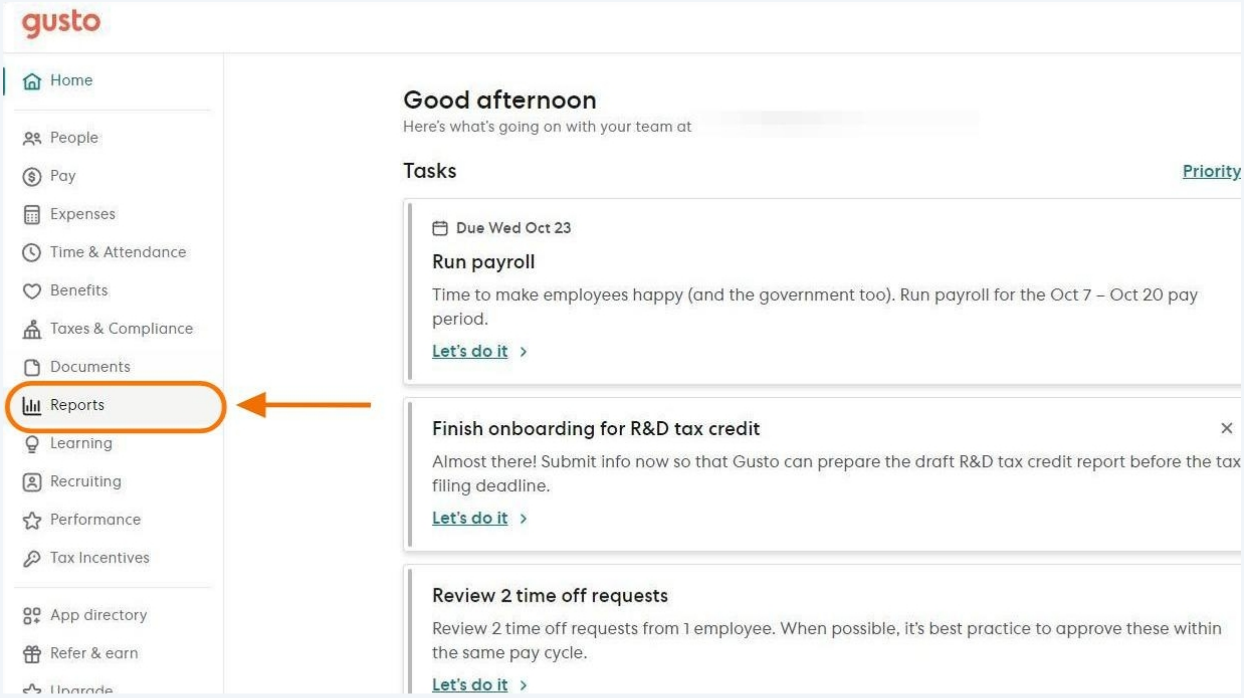
3 Once you click on **Download W-2s and W-3s**, select the appropriate year for the W-2 and W-3 documents. Ensure you download the year corresponding to the census request. You can always return to this section to download additional years if needed.



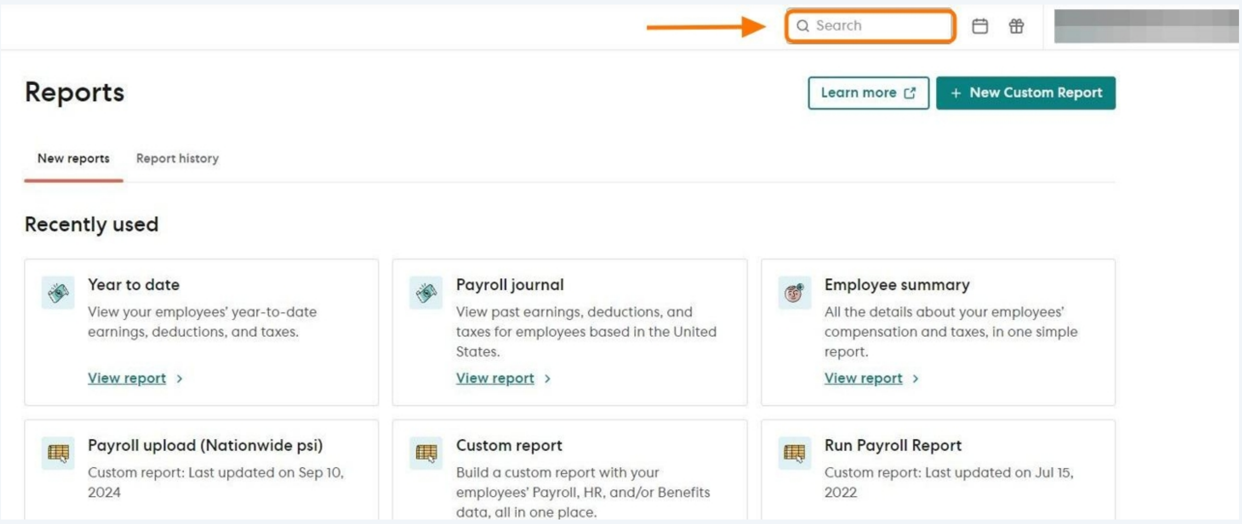
4 The forms will be located in your **Downloads** folder, either in your browser or on your computer's local downloads folder.

Instructions for Downloading and Creating a Custom Payroll Report

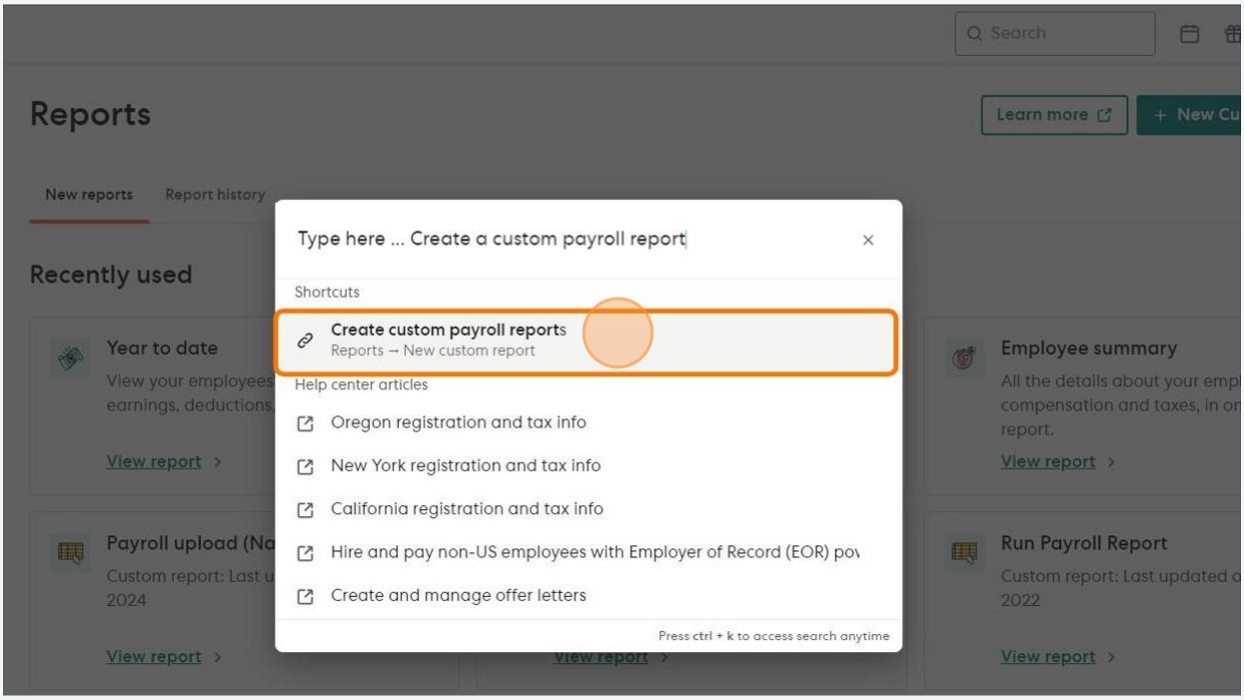
5 Navigate to the side menu and select **Reports**.



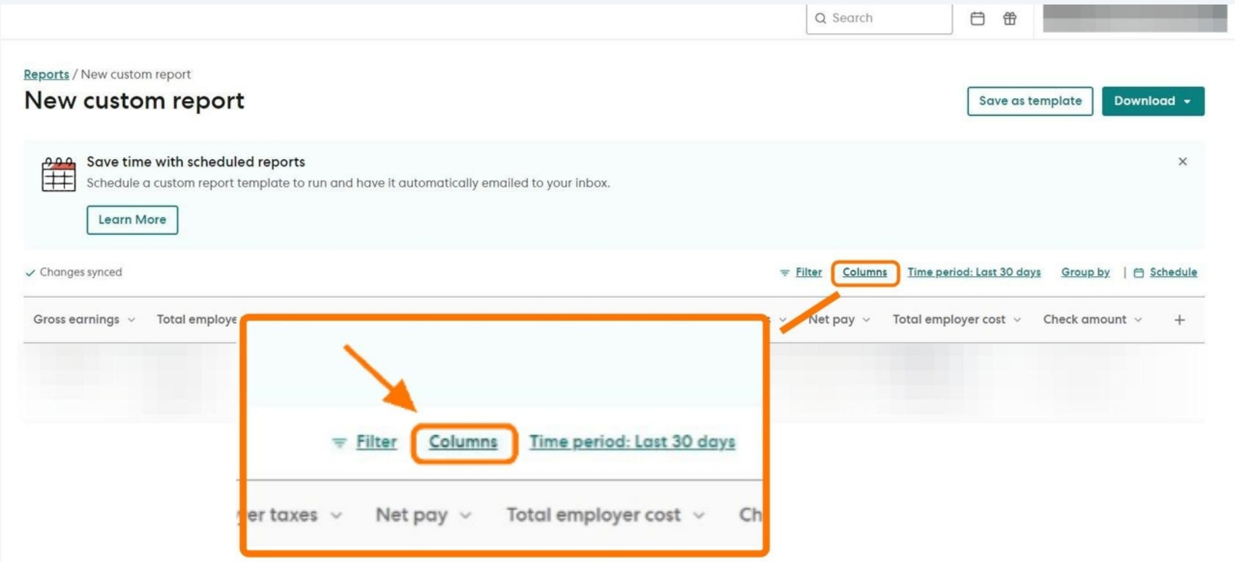
6 In the **Reports** menu, click on the **Search** bar.



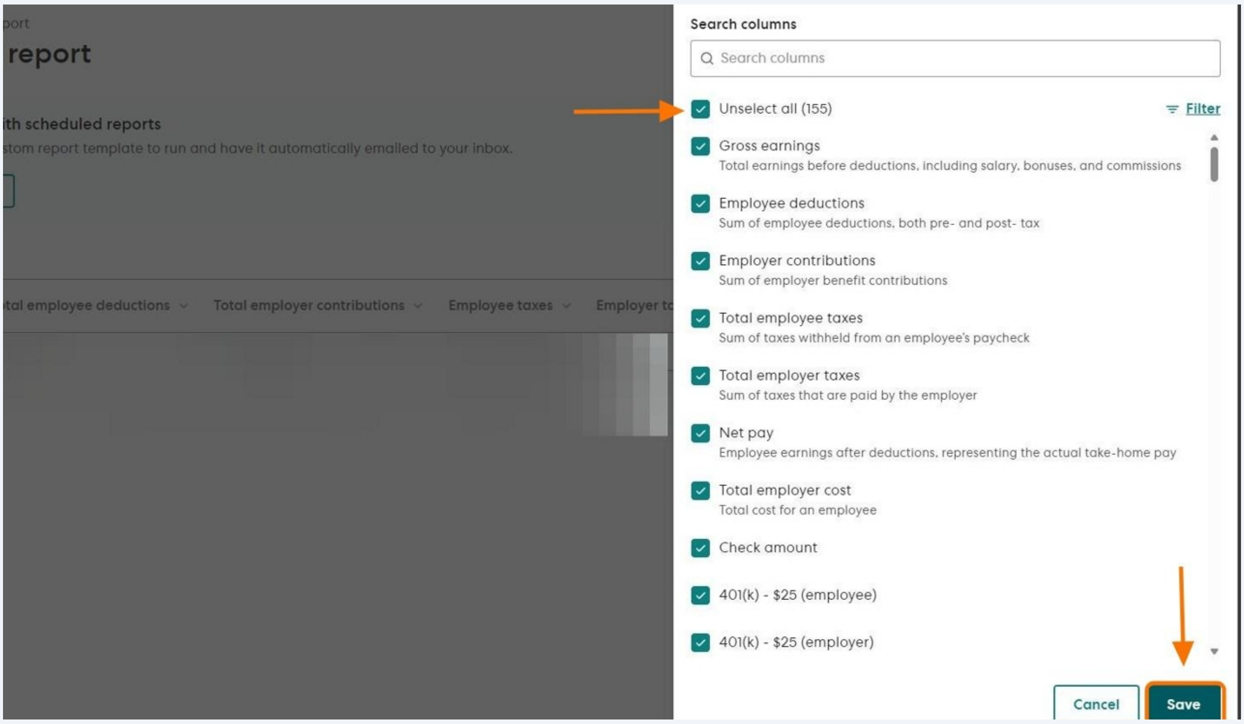
7 Once the search menu is open, type **Create a Custom Payroll Report** in the search bar.



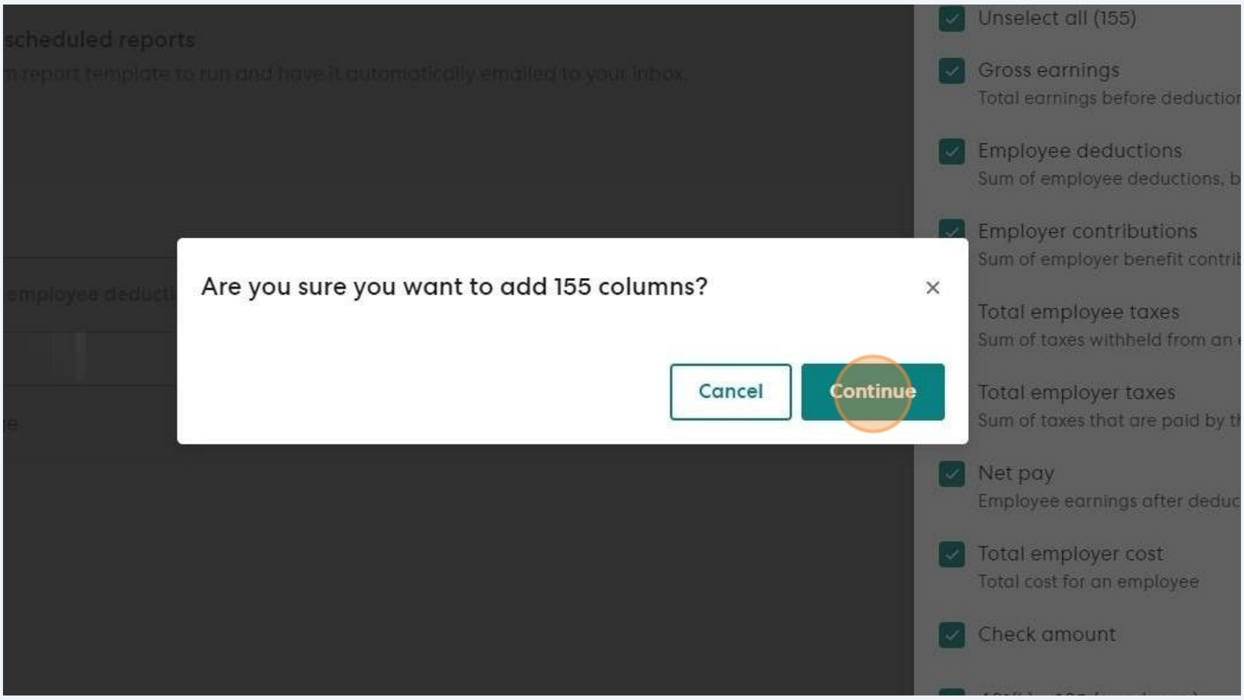
8 On the **New Custom Report** page, go to the lower menu and select **Columns**.



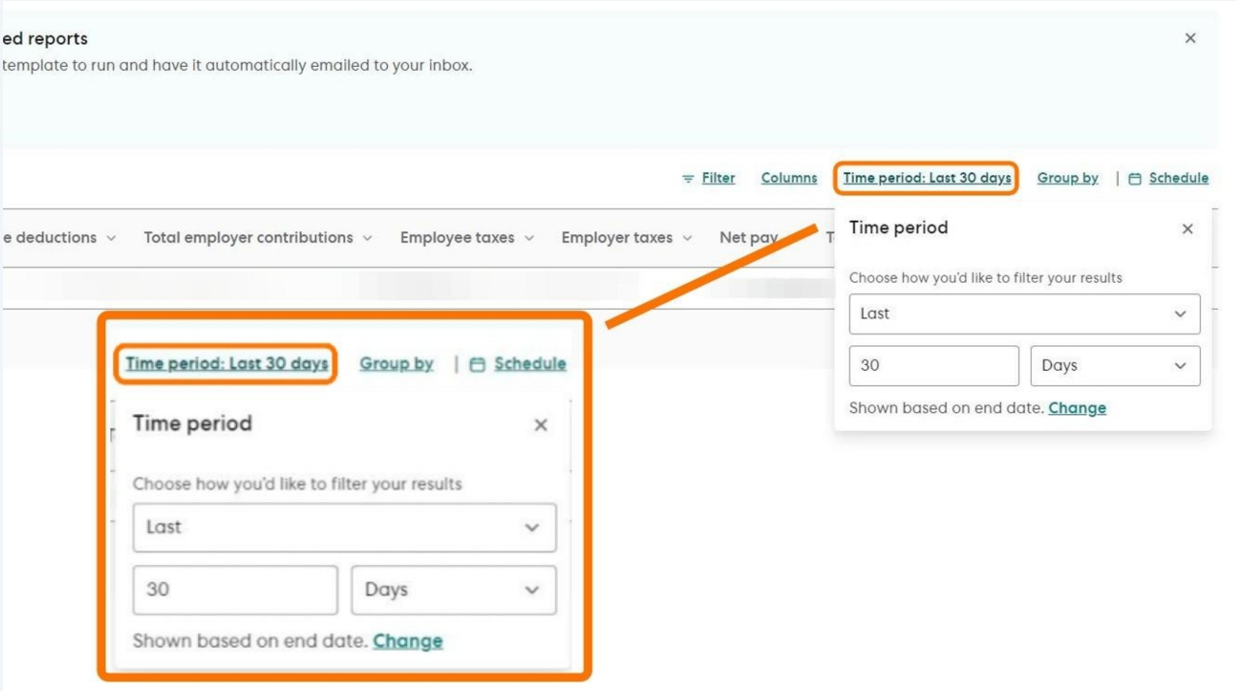
9 Check the box for **Select All** to include all payroll columns in the report, then click **Save.**



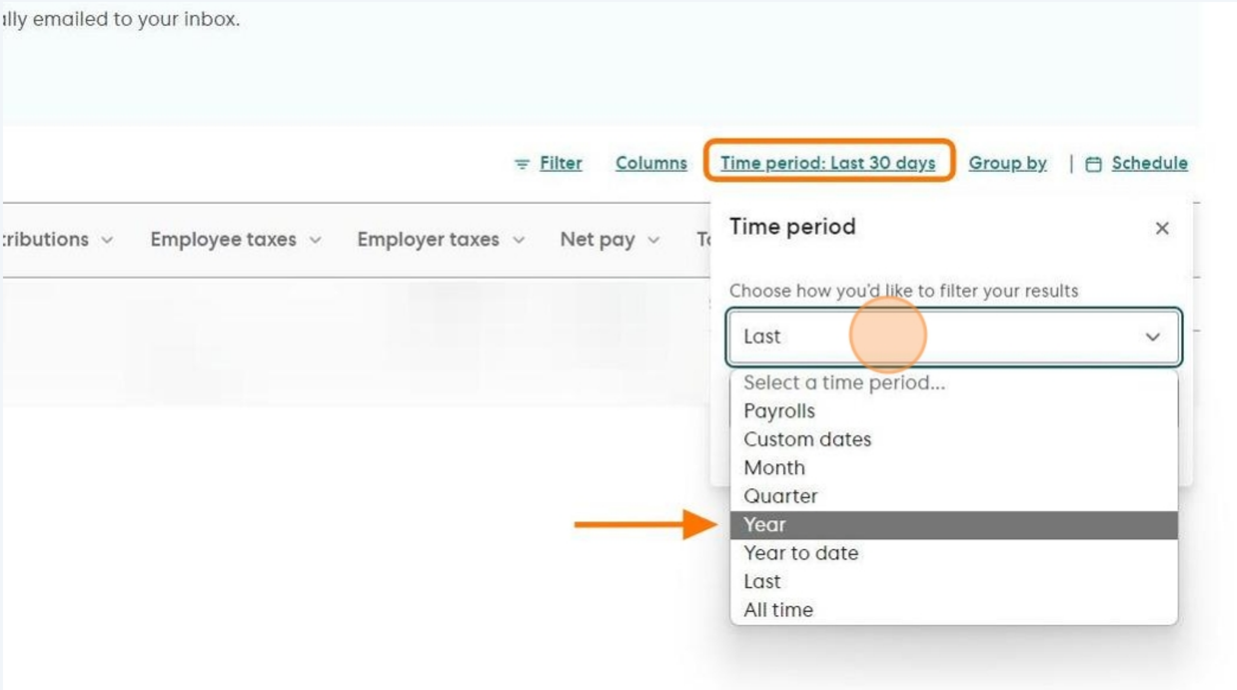
10 A new window will pop up. Click **Continue** to proceed.



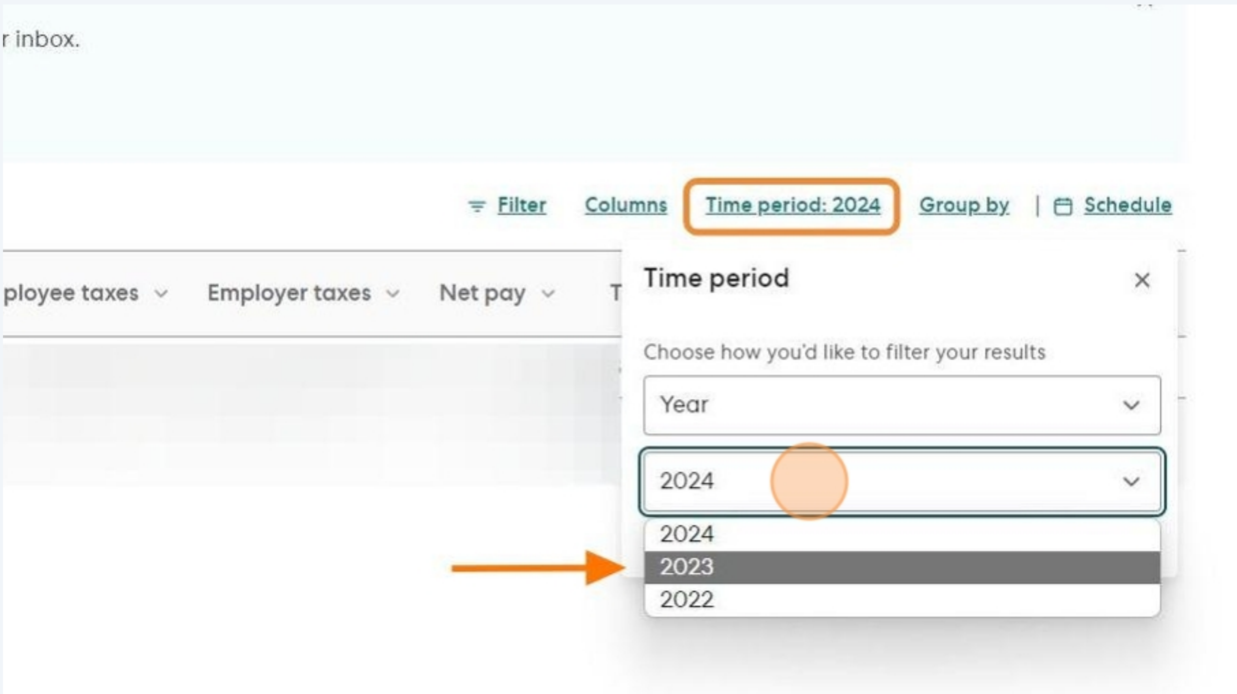
11 Once you're back on the **New Custom Report** page, go to the lower menu and select **Time Period**.



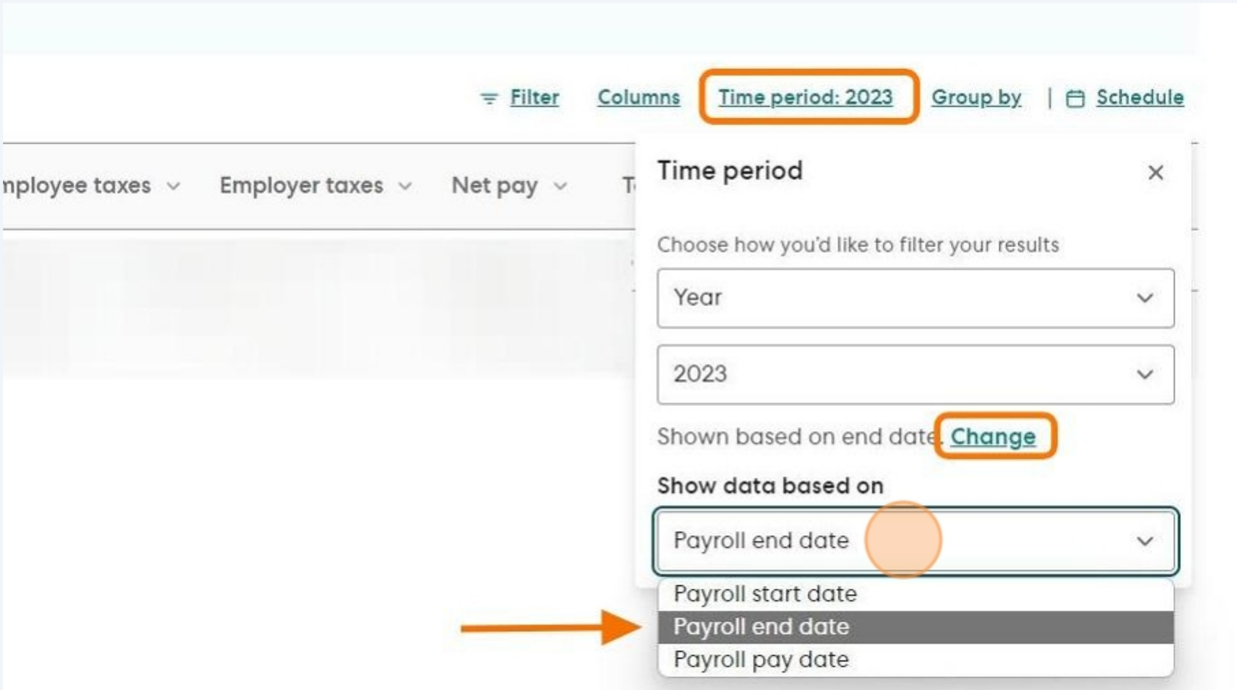
12 In the **Choose how you'd like to filter your results** section, select **Year** from the dropdown menu.



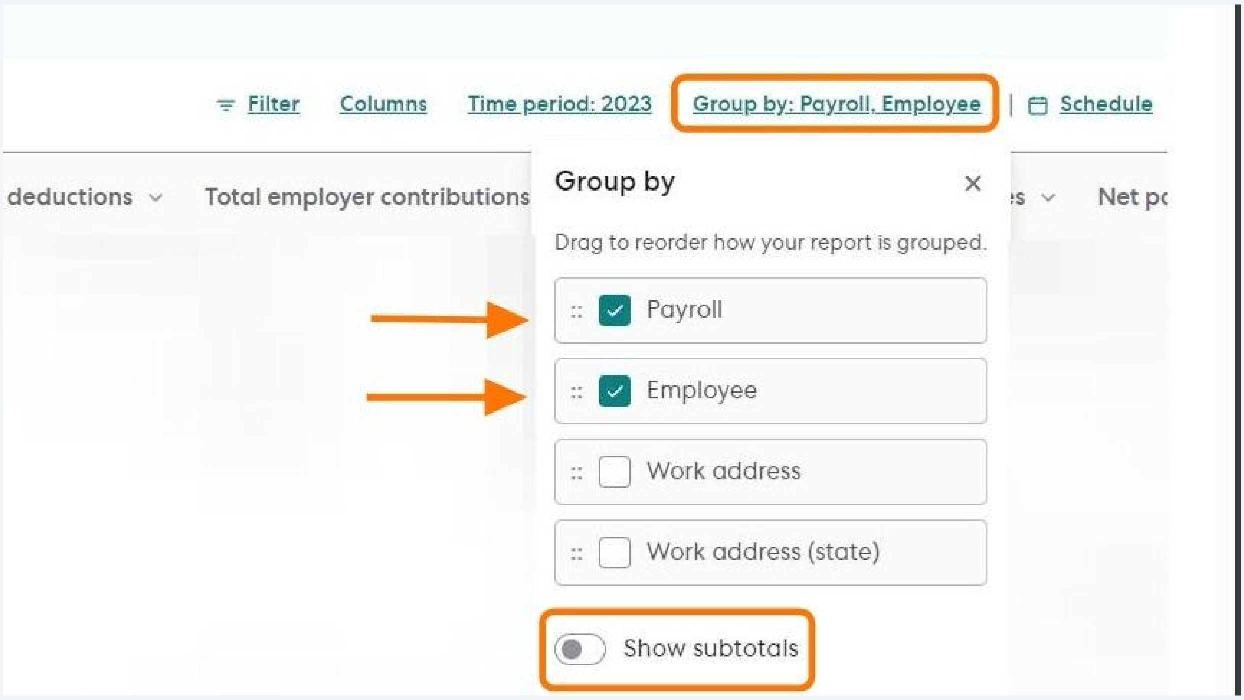
13 Then, select the specific year that corresponds to the census request. Keep in mind that you can return and choose other year periods if necessary



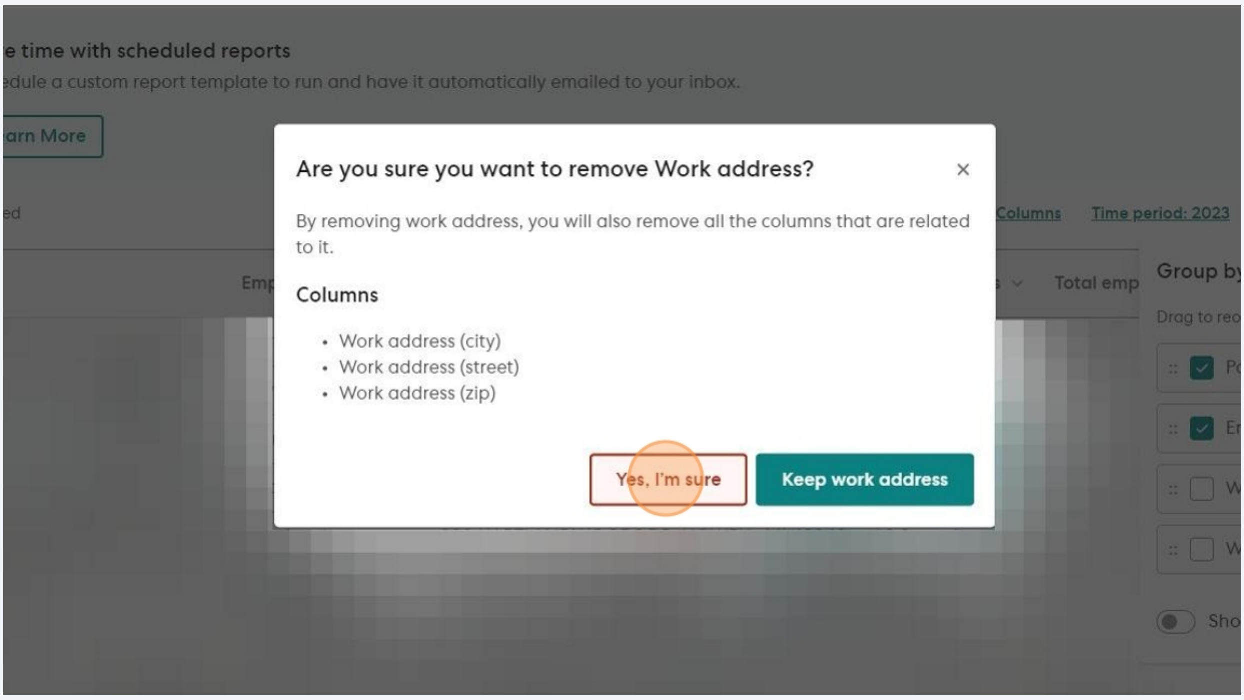
14 Click **Change**, and verify that the **Show data based on** option is set to **Payroll End Date**.



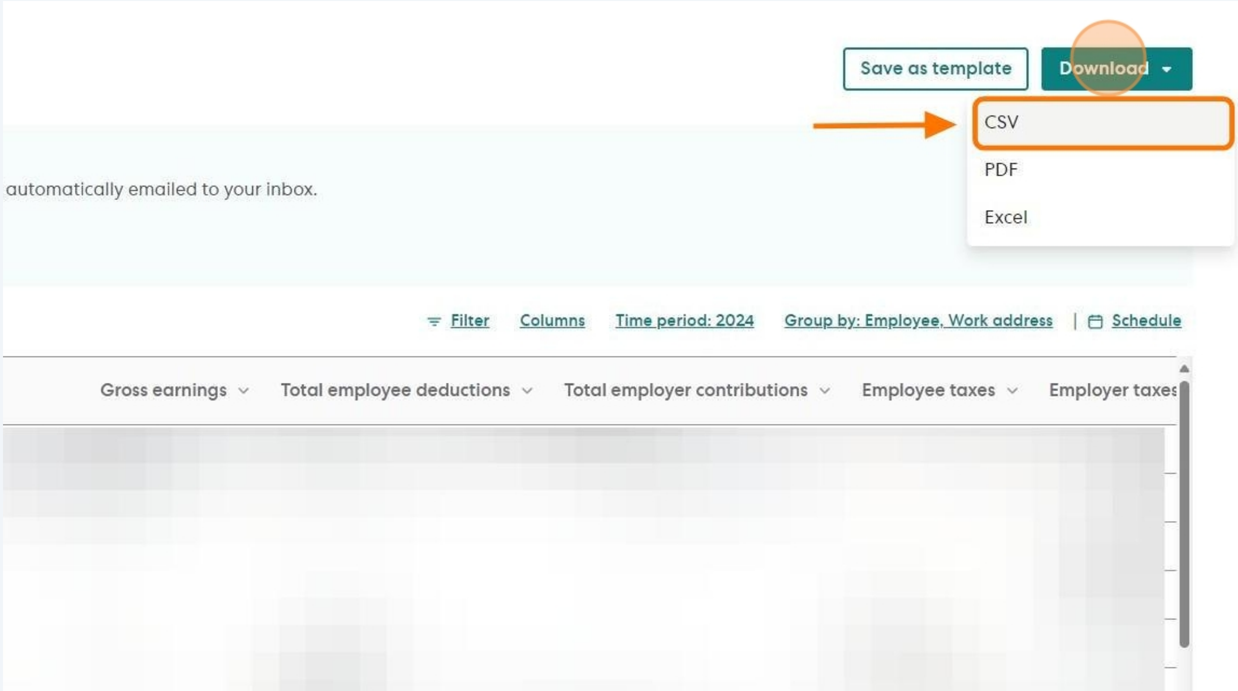
15 Then, on the lower menu, select **Group By**. Ensure the dropdown menu matches the settings shown in the image below: select **Payroll** and **Employee**, and make sure **Show Subtotals** is not selected.



16 When you uncheck **Work address**, a confirmation message will appear. To proceed with removing **Work Address**, click **Yes, I'm sure**.



17 Click **Download** and select **CSV** as the file format.



18 Once the report has been downloaded, you can locate it in your browser's **Downloads** section or in your computer's local **Downloads** folder.