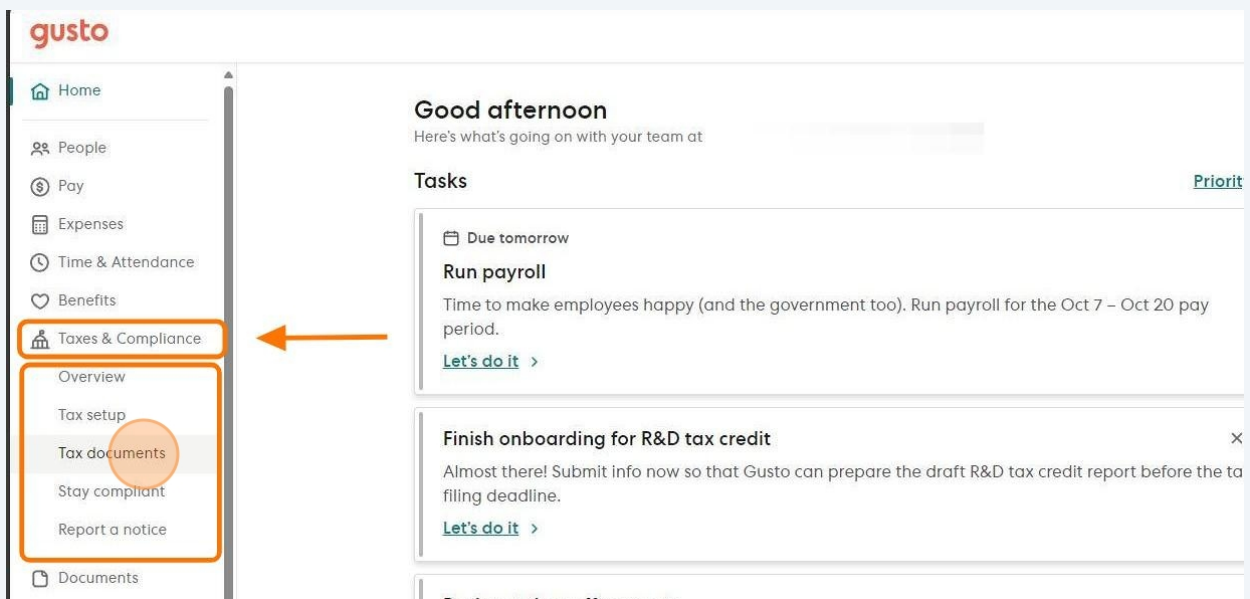


Gusto Guide 2024

Instructions for Downloading W-2 and W-3 Forms

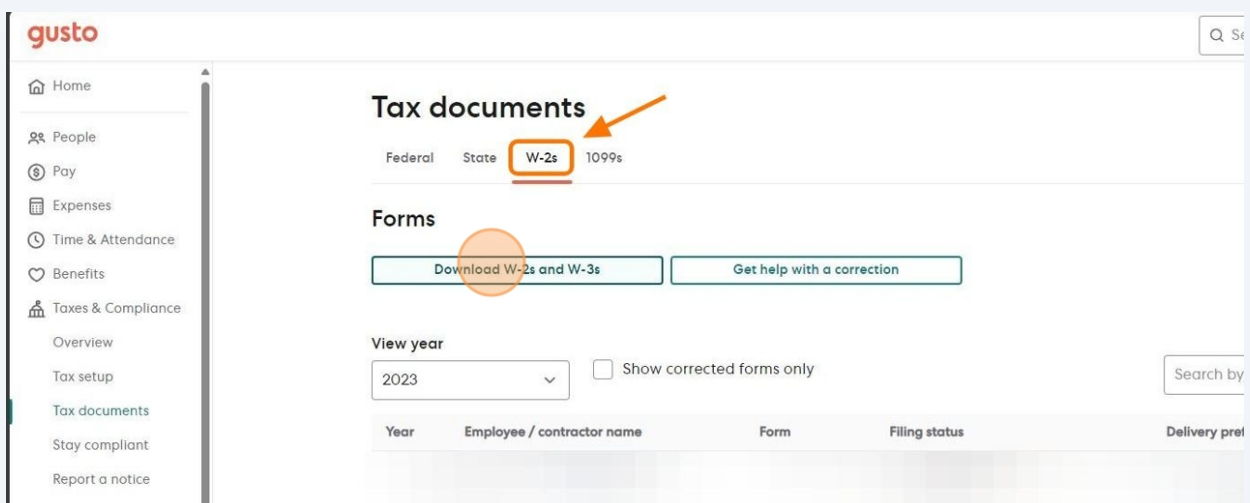
1

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



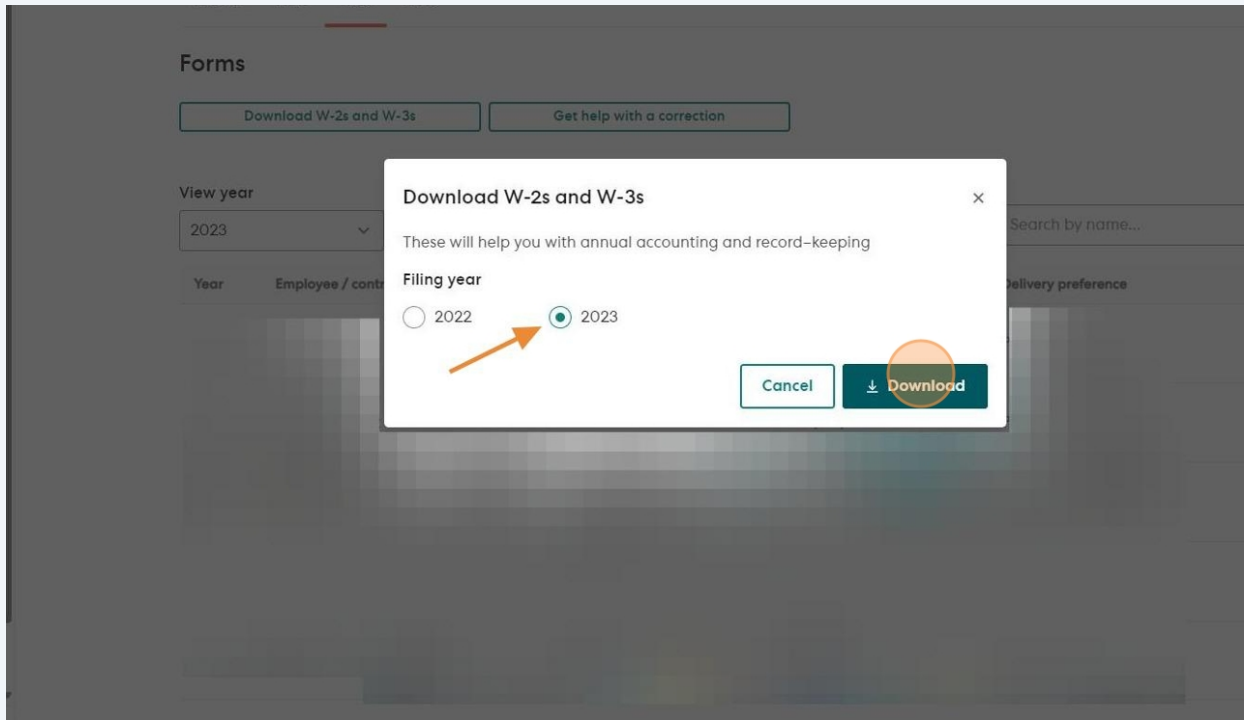
2

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



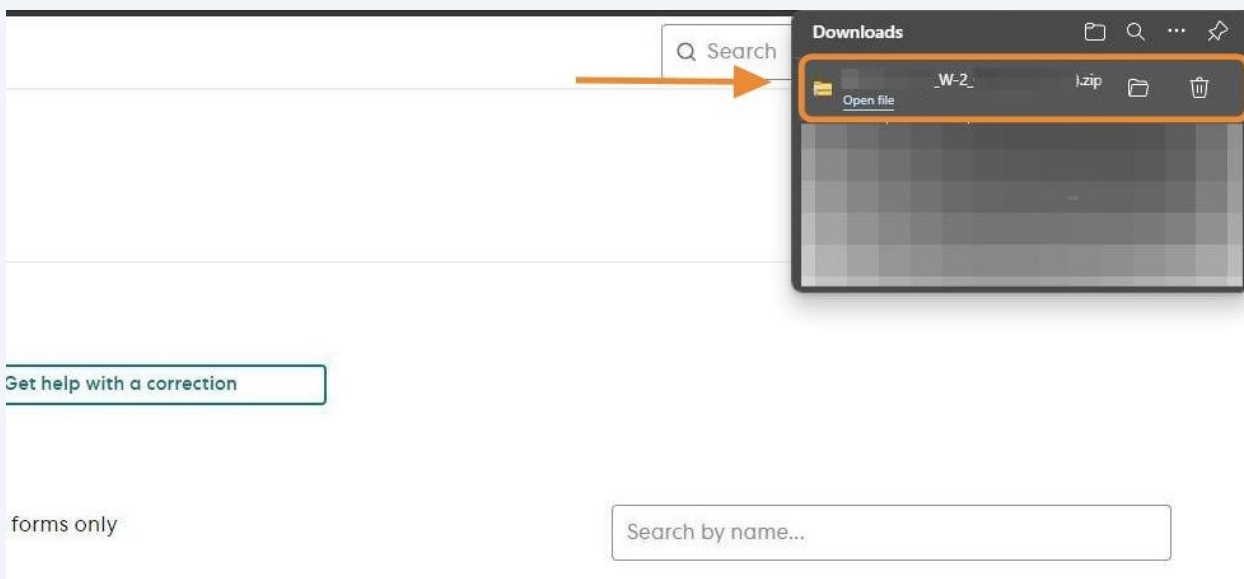
3

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.



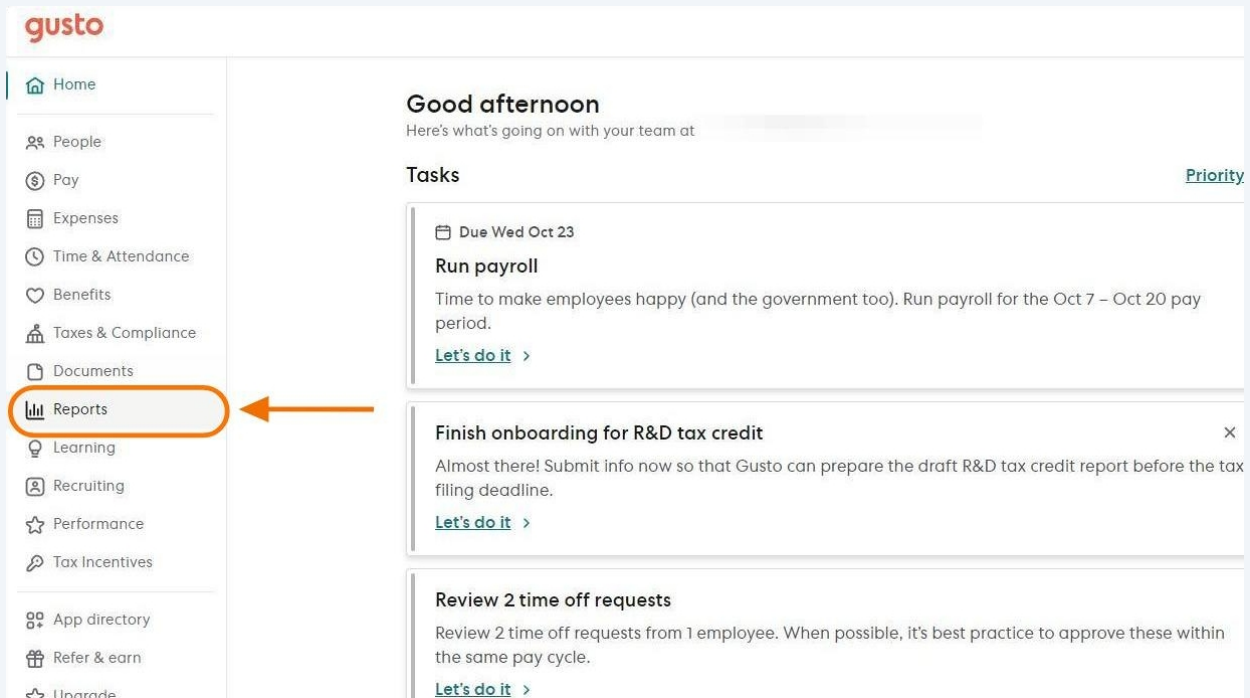
4

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



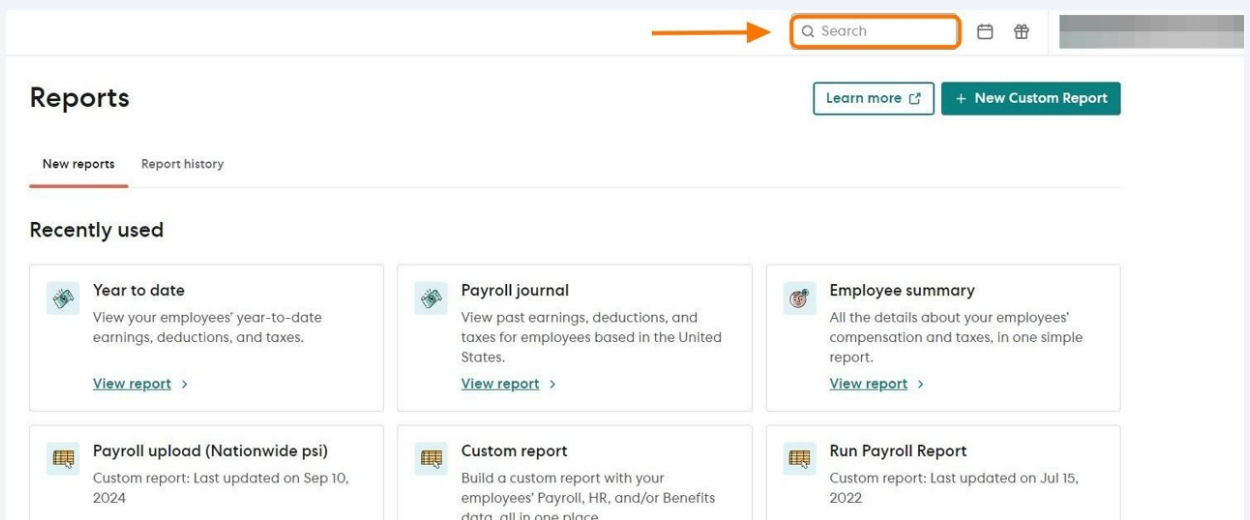
Instructions for Downloading and Creating a Custom Payroll Report

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



The screenshot shows the Gusto dashboard interface. On the left is a side menu with various navigation options. The 'Reports' option, represented by a bar chart icon, is highlighted with an orange circle and an orange arrow points to it from the right. The main content area on the right displays a 'Good afternoon' greeting, a 'Tasks' section with a 'Priority' label, and three task cards: 'Run payroll', 'Finish onboarding for R&D tax credit', and 'Review 2 time off requests'. Each task card includes a brief description and a 'Let's do it >' link.

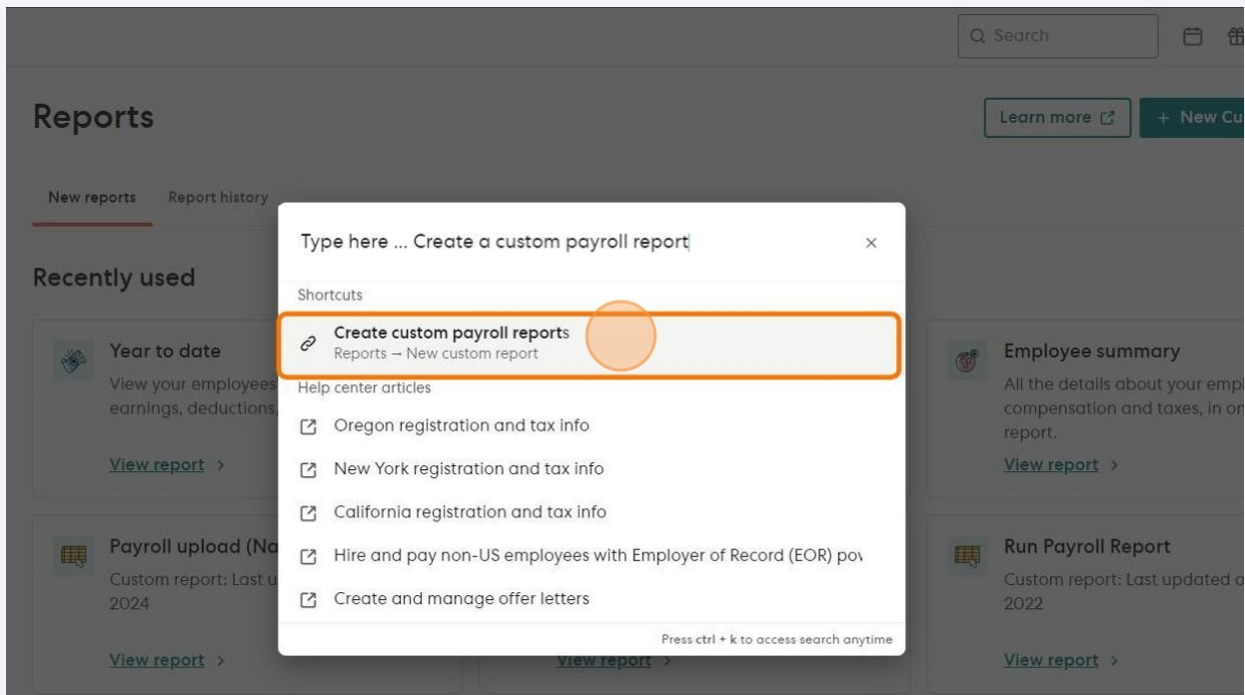
6 In the **Reports** menu, click on the **Search** bar.



The screenshot shows the 'Reports' page in the Gusto dashboard. At the top right, there is a search bar with a magnifying glass icon and the text 'Search', which is highlighted with an orange circle and an orange arrow points to it from the left. Below the search bar are two buttons: 'Learn more' and '+ New Custom Report'. Underneath, there are two tabs: 'New reports' (selected) and 'Report history'. The main content area is titled 'Recently used' and contains six report cards arranged in a 2x3 grid. Each card has an icon, a title, a brief description, and a 'View report >' link. The reports are: 'Year to date', 'Payroll journal', 'Employee summary', 'Payroll upload (Nationwide psi)', 'Custom report', and 'Run Payroll Report'.

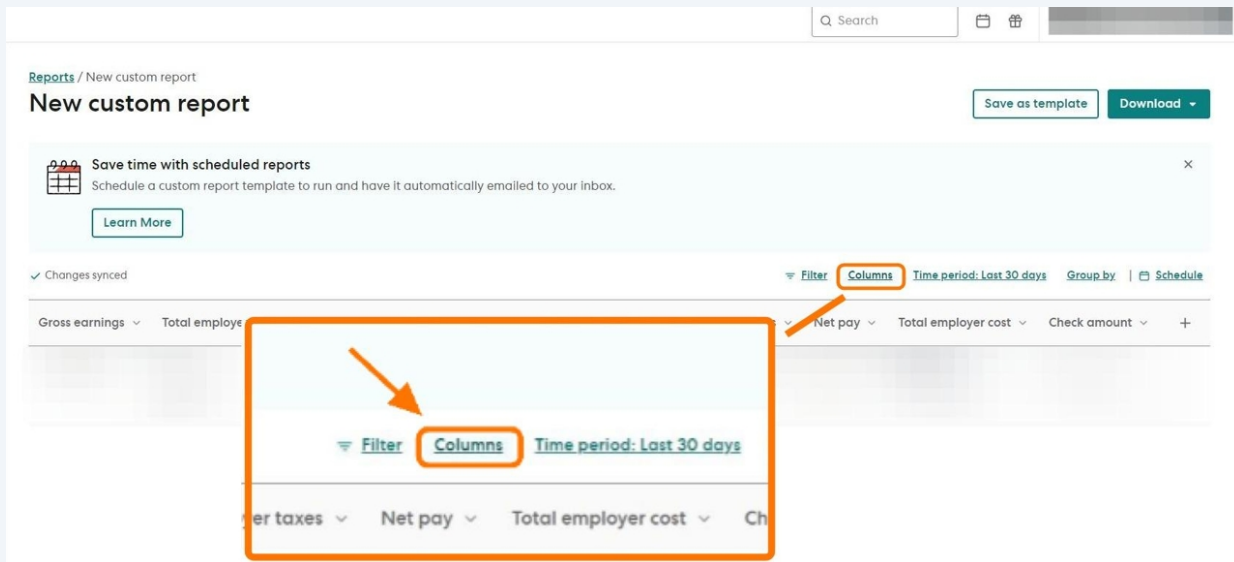
7

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**.

The screenshot shows a 'Search columns' panel on the right side of a report configuration interface. The panel contains a search bar and a list of 155 columns, all of which are checked. The first item in the list is 'Unselect all (155)'. Below it are various payroll categories such as 'Gross earnings', 'Employee deductions', 'Employer contributions', 'Total employee taxes', 'Total employer taxes', 'Net pay', 'Total employer cost', 'Check amount', and '401(k) - \$25 (employee)'. At the bottom of the panel are 'Cancel' and 'Save' buttons. An orange arrow points to the 'Unselect all (155)' checkbox, and another orange arrow points to the 'Save' button.

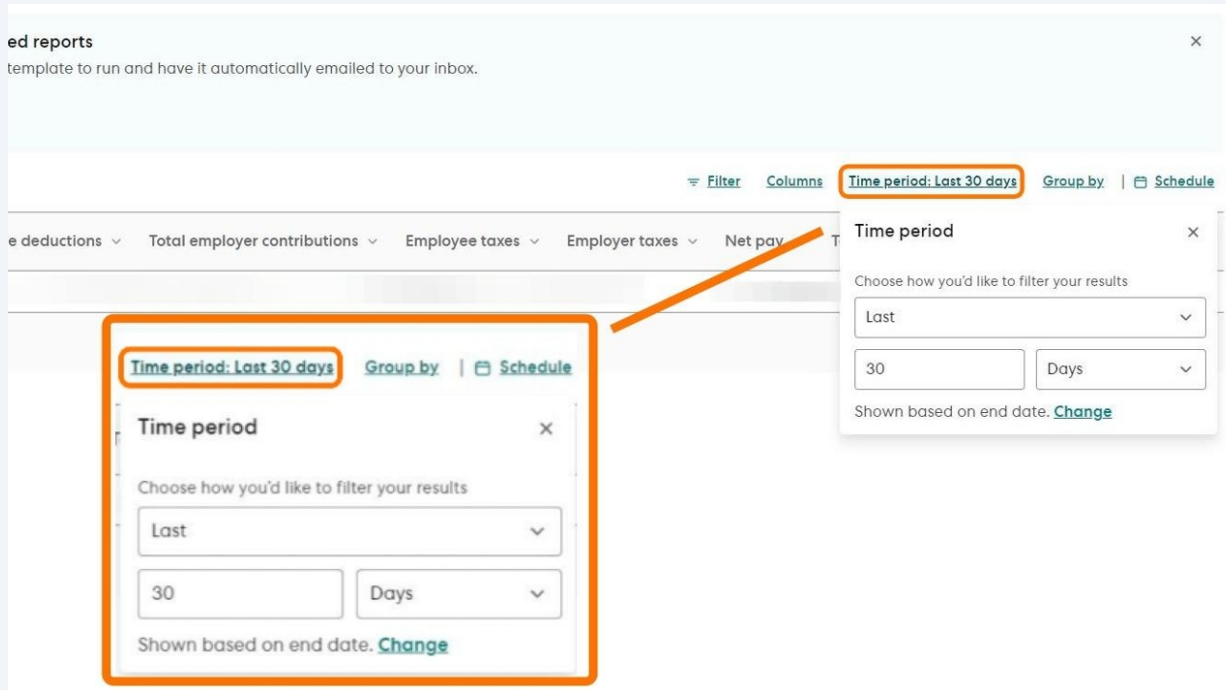
10

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

The screenshot shows the same report configuration interface as in the previous step, but with a confirmation dialog box overlaid in the center. The dialog box has a white background and a grey border. It contains the text 'Are you sure you want to add 155 columns?' and a close button (X) in the top right corner. At the bottom of the dialog box are two buttons: 'Cancel' and 'Continue'. The 'Continue' button is highlighted with a yellow circle.

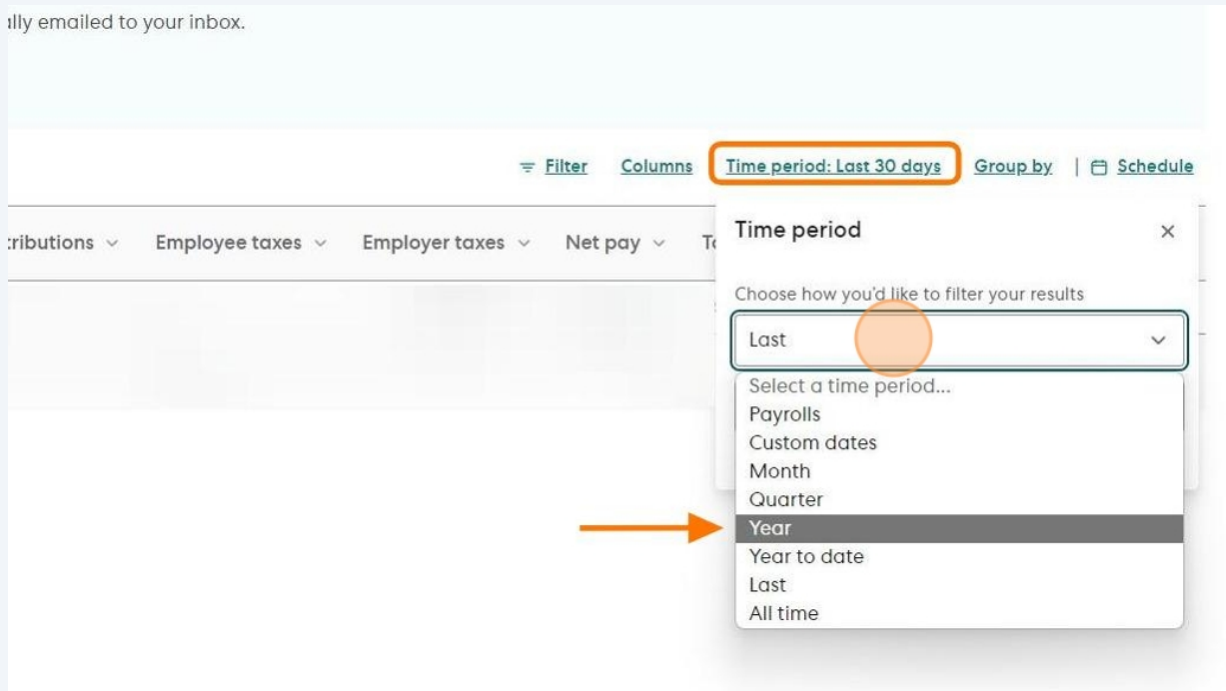
11

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



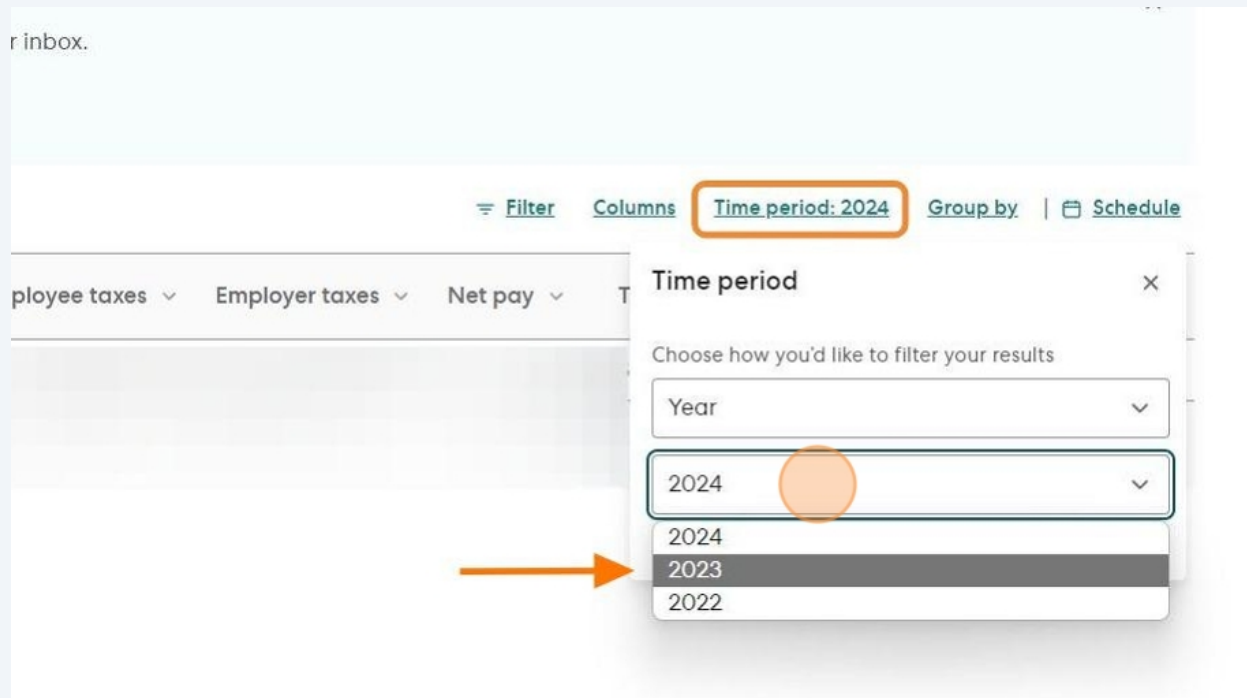
12

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



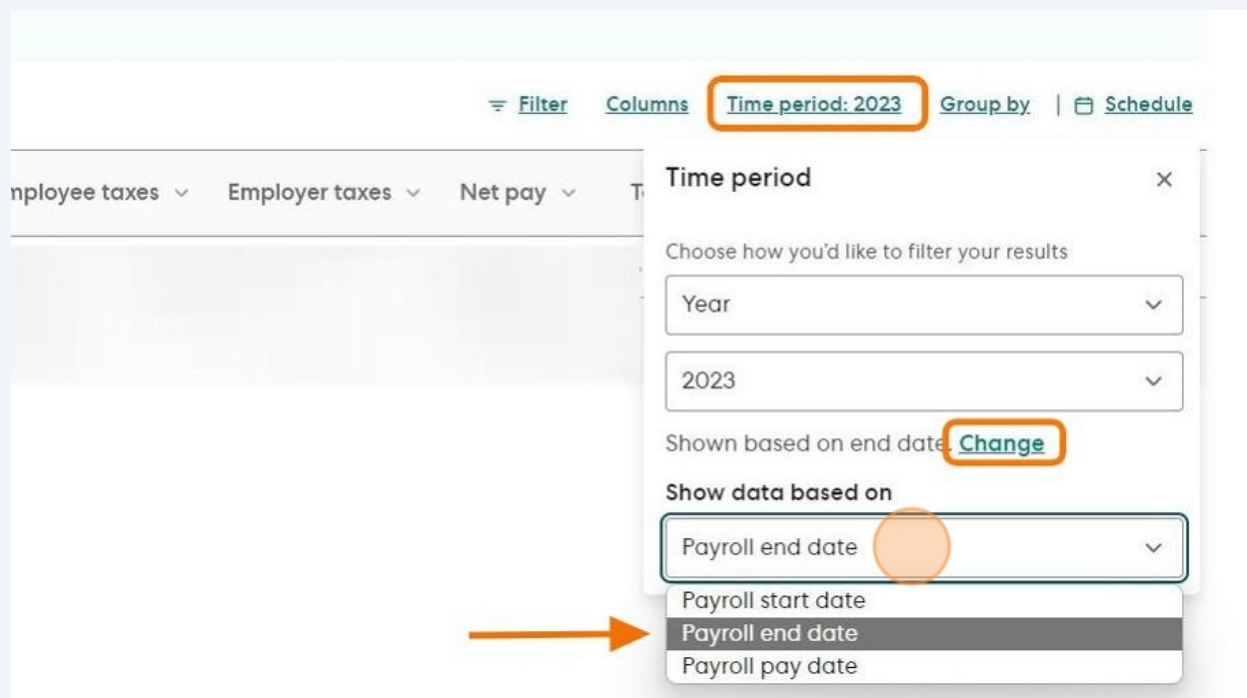
13

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



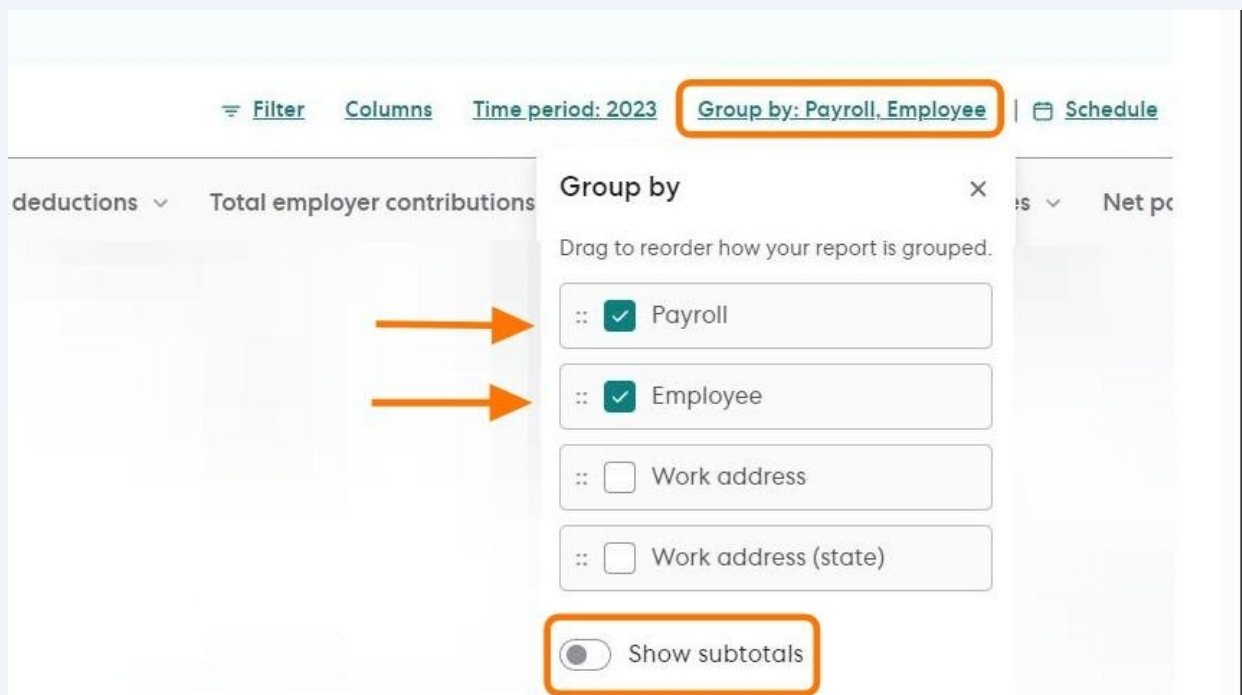
14

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



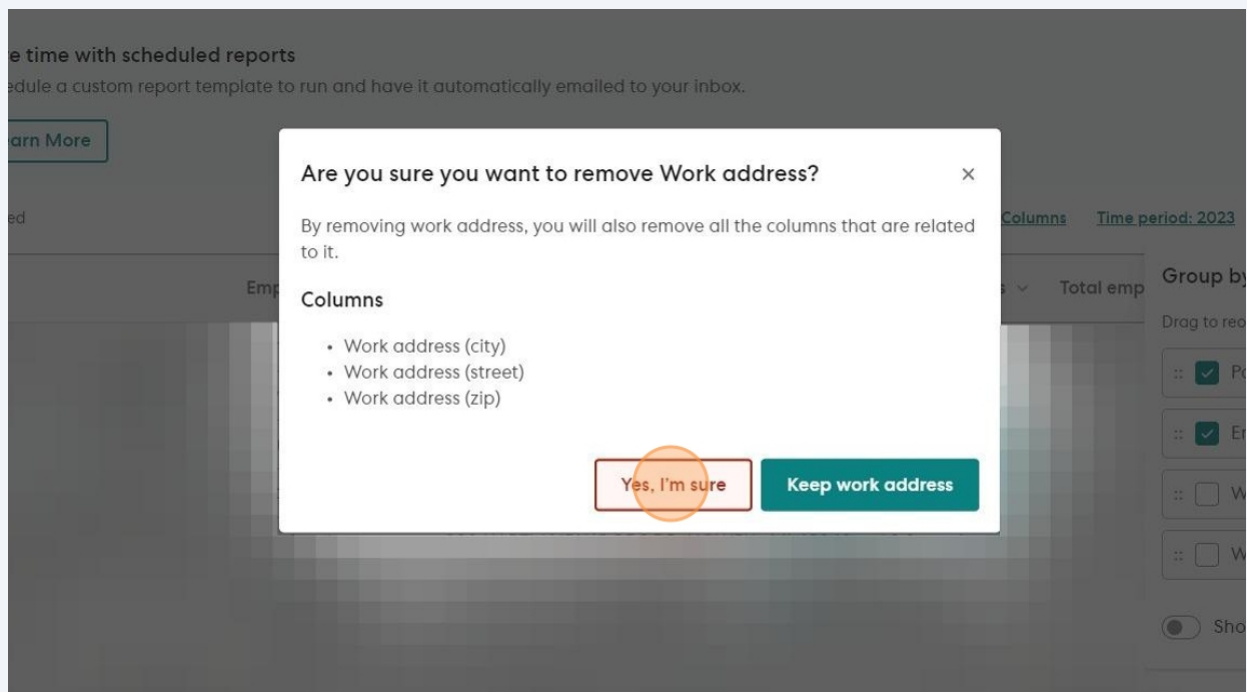
15

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.

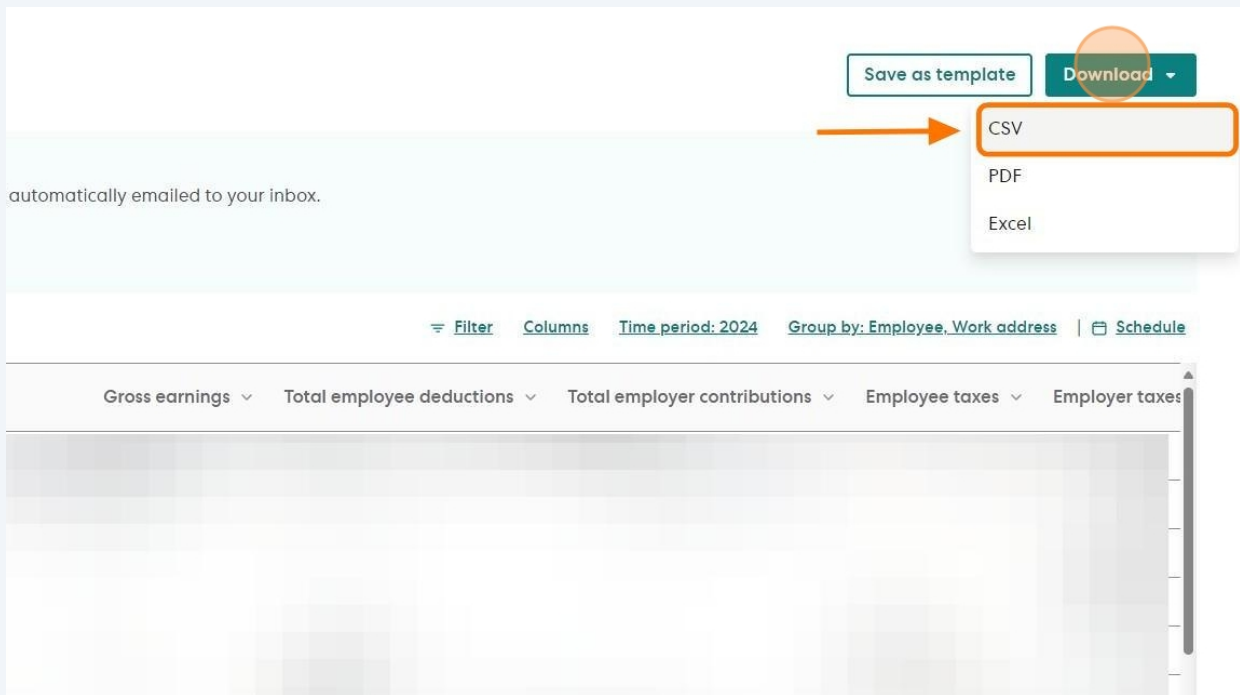


16

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.

