Paychex Guide 2024

How to Download the W-2 forms

1 On the Paychex Flex homepage, locate the side menu and select **Analytics & Reports** from the available options.

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Analytics & Reports Overview	cs & Reports Lator cost			
Payroll Center Company Directory	MAIN		2 Reorder Manage Tiles	
HIR Human Resources	Dashboard	Live Reports	Custom Analytics Build a New Report	
Company Details	Analytics & Reports	Payroll Labor Cost New Hires & Turnover Employee Listings	Check Stubs	
THER	Payroll Center	View All Reports	View checks	
Help Center	Company Directory	So Employee registration	Time & Attendance Learn more	

2 After navigating to the **Analytics & Reports** page, select the **Overview** tab. In the **Quick Reports** section, click on **View All Reports** to access the full list of available reports

MAIN (1) Dashboard Analytics & Reports Overview Labor cost			
Payroll Center Secondary Directory			, Reorder Manage
HIR Human Resources	Quick Reports	Live Reports	Custom Analytics
Company Details	2 Sets Favorites	Payroll Labor Cost New Hires & Turnover	Build a New Report
GI General Ledger	Last Payroll	Employee Listings	Check Stubs View checks
	View All Reports	View All Reports	Time & Attendance
Quick Reports	Retirement Learn more	Sector Employee registration	Learn more
Sets Favorites Last Payroll			
View All Reports			

3 In the open side menu, type **W-2 Wage and Tax Statement** into the search bar and click **Search** to locate the report.

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			Quick Reports Sets All Reports	Ļ
		1	Q type here W-2 Wage and Tax Statement	X Search
			Payroll Top Reports	2
Quick Reports	A Live Reports	- 6	Payroll Journal	>
Sets	Payroll Labor Cost		Employee Earnings Record	>
Favorites Last Payroll	New Hires & Turnover Employee Listings		Check Stub	>
			Cash Requirements	>
View All Reports	View All Reports		Department Summary	>
Retirement	2 Employee registration	ے ر	Tax Deposit Notice	>
Learn more			Year To Date Report	>
			Customizable Top Reports	View All (34)
			Payroll Journal	>

4 From the search results, locate the **W-2 Wage and Tax Statement** report.

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		< Back × Search Results
3	Custom Analytics Build a Custom Report	Q type here, W-2 Wage and Tax Statement X Search Output Format
ive Reports	Tasks	Results in All Reports (46) W-2 - Wage and Tax Statement An Internal Revenue Service (IRS) information return that is filed annually to report annual employee wages and taxes withheld.
:	Relax, no new tasks,	W-3 - Transmittal of Wage and Tax Statements An Internal Revenue Service (IRS) transmittal form that is sent to the Social Security Administration (SSA) showing total earnings, Social Security wages, Medicare wages and withholding for all employees for the previous year.
	View All	W-2 - Employer Copies Employer copies of Form W-2, an Internal Revenue Service (IRS) form filed annually to report employee wages and taxes withheld.
	S. People	State W-2/1099 Transmittal Returns A state tax return that is filed annually to reconcile the company's withholding

	K Back	1
	W-2 - Wage and Tax Statement	Show Description
	Last 30 days	Last 30 days
	Run Date	Run Date
Live Reports	Last 20 days	Last 30 days
Payroll Labor Cost	Last 30 days	Last 90 days
New Hires & Turnover	Last 90 days	Last 180 day
Employee Listings	Last 190 days	Custom
View All Reports	Last 180 days	
	Custom	

5 Set the run date to **Custom** by selecting the appropriate option.

6 Adjust the custom date range to cover the full year, from January to December. Refer to the census request to determine the specific year you need to select. Click done. You can revisit this section later to download W-2 forms for other years if necessary.

			Custom Date Range
	Live Reports Payroll Labor Cost		Cancel
	New Hires & Turnover Employee Listings	÷.	
orts	View All Reports	Ō	
			No reports to see here. Try again with a different date range, or contact your Paychex representative for assistance.

Check the box next to **Report Title** to select the W-2s for all employees, then click **Download** to save the file.

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	< Back	* * *
	W-2 - Wage and Tax State	sment Show Description
	Q Fliter Reports	
	Download (131)	Jan 1, 2023 - Dec 31, 2023 -
M Live Reports	Report Results	
Payroll Labor Cost	Report Title	Run Date ↓
New Hires & Turnover		Dec 30, 2023 8:47 AM
Employee Listings		Dec 30, 2023 8:47 AM
View All Reports		Dec 30, 2023 8:47 AM
Employee registration	()	Dec 30, 2023 8:47 AM
		Dec 30, 2023 8:47 AM

After clicking **Download**, a new window will appear. In this window, select the option **Combine Them** to proceed.





8

Ready!

Your W-2 forms will then be saved to your computer's download folder.

How to Download the Payroll Year To Date Report

9 Navigate back to the **Analytics & Reports** page by using the side menu. Once there, locate the **Quick Reports** section and click on **View All Reports** to access the full list of available reports.

Analytics & Reports Overview Labor cost				
Payroll Center			# Reorder Manage Tiles	
Human Resources	C Quick Reports	Live Reports	Custom Analytics	
Hiring Company Details	Sets	Payroll Labor Cost	Build a New Report	
] General Ledger	Favorites Last Payroll	New Hires & Turnover Employee Listings	Check Stubs	
HER Company Settings	View All Reports	View All Reports		
) Company Setungs	Retirement	2 Employee registration	Time & Attendance Learn more	
Quick Reports	Learn more			
Sets				
Favorites				
Last Payroll				

10 Once the **Quick Reports** menu is open, click on **All Reports** and locate the **Year-to-Date Report**. Alternatively, you can type **Year-to-Date Report** into the search bar to find it directly.

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		Quick Reports Sets All Reports	×
Custom Analytics		Q Search All Reports	Search
Build a Custom Report	100	Payroll Top Reports	View All (40)
/ Tasks		Payroll Journal	>
-		Employee Earnings Record	>
A.		Check Stub	>
2		Cash Requirements	>
Relax, no new tasks.		Department Summary	>
View All	\$ Last	Tax Deposit Notice	>
s People	OCLODER (Year To Date Report	>

11 When the **Year-to-Date Report** window opens, locate the dropdown menu on the right side of the page. Click the downward arrow and select **Custom** from the list of available options.

	< Back	
	Year To Date Report	Show Descript
Custom Angletics	Q Filter Reports	
Custom Analytics Build a Custom Report	Download	Last 180 day
	Report Results	Run Date
Tasks	Last 180 day:	All I Last 30 day
A C	Run Date	Last 90 day
Relax, no new tasks,	All	Last 180 da
View All	Last 30 days	
	Last 90 days	
S. People	Last 180 days	
Add Employee View People List	Custom	

12 Once the custom date range window opens, enter the date range from January to December. Refer to the census request to determine the specific year required. You can revisit this page later to download reports for other years if needed.

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	Custom Date Range Start Date * End Date *	<u>)23</u>
nalytics stom Report		Cancel Done
	Report Results Report Title	Run Da'e ↓

	< Back	3
	Year To Date Report	Show Description
Custom Analytics	Q Filter Reports	
Build a Custom Report	Report Results	Jan 1, 2023 - Dec 31, 2023
Tasks	Report Title	Run Date ↓
(P)	Year To Date Report	Dec 30, 2023 12:33 AM
Relax, no new tasks.		
View All		
Se People		

13 Check the box next to the **Year-to-Date Report** generated for the specified date range, then click **Download** to save the file.

14 Once the **Year-to-Date Report** is open, click on the **Save** option in the top corner to save the file to your preferred location on your computer for easy retrieval.

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	PAYCHEX	YEAR TO DATE REPORT						(Year, 2023)	
	EMPLOYEE NAME SOCIAL SECURITY # (SSN)	EARNINGS, REIMB &	OTHER PAYMENTS	WITHHOLDINGS		DEDUCTIONS		NET PAY	
		NAME	AMOUNT	NAME	AMOUNT	NAME	AMOUNT		