

## W2 APPROVAL GUIDE

1. Go to [w2copy.com](http://w2copy.com)
2. After receiving the email that your files are ready for approval you can log back on to the website and click [“View Totals”](#).



3. You have the option to view the totals split by EIN or view all totals combined.

Customer Codes			
Code	Name	View Totals	View Eins
IT2001	Test W2 Employer	<a href="#">NOT Split by EIN</a> <a href="#">Split by EIN</a>	<a href="#">View EIns</a>

4. Match the total number of records and each box dollar total according to your records.



5. After reviewing the totals reports go to [“Processing Files”](#) > [“Sample Search”](#)



6. You can enter up to 100 Social Security Numbers to view at a time.

### SAMPLE SEARCH

There is a job that is in need of approval. Click [HERE](#) for more details.

\*Files approved after January 24th are not guaranteed to be postmarked by the 31st

LIMIT 100 ssn numbers for text box and file upload. Try the SSN without dashes first.

**ENTER SSN NUMBERS:**

(One SSN Number per line)

[SEARCH](#)

7. The results are displayed here. Click on ["View"](#) to download or open the pdf.

Search Results			
Name	SSN	Ein	File
Robert O Jenkins (IT2001)	123456789	82-1234567	[View]

8. Check all the boxes and review all of the box information for accuracy in addition check:

- ▼ Street Address
- ▼ Secondary Street Addresses, such as: suites, apartment #'s, and P.O. Boxes
- ▼ FEIN
- ▼ State ID Numbers

ROBERT O JENKINS  
 123 OAK STREET  
 CALDWELL, ID 83605

DMS No. 1245-0008

Form W-2 Wage and Tax Statement 2015		Social security tips		Wages, tips, other comp.		Medical income tax withheld	
Employer's name, address and ZIP code VALLI INFORMATION SYSTEMS, INC 915 MAIN STREET CALDWELL, ID 83605		7609072 RPD		35123.45		2599.16	
Employer's name, address and ZIP code ROBERT O JENKINS 123 OAK STREET CALDWELL, ID 83605		82-1234567		35123.45		999.16	
State OH		State income tax 3192.72		Local wages, tips, etc. 3192.72		Local income tax 74.83	
City MACEDO		State social security number ***-**-6789		Medicare wages and tips 35123.45		Medicare tax withheld 549.00	

Copy to be filed with employer's FEDERAL Tax Return.

- 9. Once you have looked at several samples and verified accuracy, go to ["Processing Files"](#) > ["Approval"](#)



10. Complete your W2 Approval

- A. Check the Approve Box.
- B. Fill in the required information and note any comments or special instructions here.
- C. Check both boxes indicating that you have reviewed the samples and totals and your files are ready to be completed. **THIS IS THE LAST STEP.** Once you hit the ["SUBMIT BUTTON"](#), your file will now be printed and mailed or shipped according to your instructions.

### APPROVAL FORM

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Batches waiting to be approved:  
(check the ones you are approving)

Approve?	Customer Code and Name	Information Approving
<input type="checkbox"/>	(IT2001) Test W2 Employer	<input type="checkbox"/> TOTALS <input type="checkbox"/> SAMPLES

User Information:  
(all fields required)

EMAIL ADDRESS:

NAME:

COMMENTS:

See issues? Choose code(s) affected, check box here, comment. This won't approve the file.

Check here if you have an insert for one or more of these batches.

Verification of Approval:

By checking the "Yes, I Verified the Samples" checkbox below, you are stating that you viewed and verified the samples etc...

Yes, I Verified the Samples

By checking the "Yes, I Verified the Totals" checkbox below, you are stating that you viewed and verified the totals etc...

Yes, I Verified the Totals