

Year 2012: Sage BusinessWorks Year End Tips Guide

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Year 2012: Year End Tips for Sage BusinessWorks

Important Notes!

Although Sage BusinessWorks Accounting retains five years of payroll history, the Payroll module does **not** retain the totals needed for printing W-2s after closing the year. For this reason, it is essential that you verify W-2 figures **before** closing December.

Because you must complete many tasks **before or in conjunction with the last payroll**, please take time now to read through any topics that may affect you.

Section 1: General Information

Web Site Assistance

The Sage Customer Portal Web site provides you up-to-the-minute information, the ability to e-mail inquiries and suggestions to an analyst, and utilities to download documents and the latest releases of Sage BusinessWorks.

Access the Sage Customer Portal from within Sage BusinessWorks:

- On the main Sage BusinessWorks menu, click **Help**. Then point to **Support and Service on the Web**, and click **Online Support**.

Help!

Help with all year-end processing is just a click away. On the main Sage BusinessWorks menu, click **Help**. Then point to **Module Help**, and click **[Module] Contents**. Click the **Index** tab and type the text you wish to search. For example, if you want more information on processing bonuses, here are the steps to follow:

1. On the main Sage BusinessWorks menu, click **Help**.
2. Point to **Module Help**, and click **Payroll** contents. Click the **Index** tab.
3. Type **bonuses**
4. Click **bonuses** on the list displayed.

ⓘ Throughout this document, look for the ⓘ symbol for Sage BusinessWorks Help topics to search.

Back Up Data

Before you close any Sage BusinessWorks module, it is essential that you perform a complete backup of company data. You should retain this backup indefinitely, as it provides critical data for audit purposes.

1. On the Sage BusinessWorks main menu, click **File**, and then click **Backup** to open the **Database Backup Wizard**. Click **Next**.
2. To back up company data, click the company ID to back up, and then click **Next**.
3. In the **Select Backup File Name** window:
 - a. Select a folder or drive from the list on the left. To store the data in a new folder, see the Help topic "Backup," and follow the steps to create a new folder.
 - b. Type a **Backup File Name** at the bottom, and click **Next**. Be careful not to overwrite an existing backup that you want to keep. For easy reference, use a file name that includes the company ID and the date. Example: Sample123112.zip
 - c. Click **Start** to begin the backup. When the backup is complete, a message appears allowing you to back up another company. If you have multiple companies, click **Yes**, and repeat the steps above.

Notes:

- Please perform a backup within Sage BusinessWorks even if another backup utility is used.
- See page 4 for instructions on making a copy of a Sage BusinessWorks company.

ⓘ For information on safeguarding Sage BusinessWorks data, search the Sage BusinessWorks Help Index on **Backup** and **Backups**

Section 1: General Information

- Adjusting Entries** After closing the fiscal year, you can post prior year adjusting entries to all modules **except Payroll**.
- If a prior-year transaction affects G/L revenue or expense accounts, Sage BusinessWorks automatically rolls the values into retained earnings. No additional action is needed.
 - Be sure to make the adjusting entry in the correct module. For example, if you need to make an adjustment to the cash account, you would normally make it through the Cash Management module. Making the adjustment directly in the G/L makes the bank reconciliation more difficult.
 - Do not perform a month-end (or year-end) close or rebuild in the Inventory Control Module during any phase of the Physical Inventory process. Sage BusinessWorks cannot retain book quantity information for a relative inventory update after the close or rebuild.

Prior or Future Transactions	G/L	P/R	A/R, A/P, C/M, I/C, and O/E
Prior month postings	Post 24 months back	Post current quarter only	Post 12 months back
Future month postings	Post 12 months ahead	No future month postings	Post 1 month ahead
Example: Current month = December 2012	Post Dec 2010 through Dec 2013	Post Oct 2012 through Dec 2012	Post Dec 2011 through Jan 2013
Module's current month?	On the main Sage BusinessWorks menu, click File , and then click System Status Report . On the window displayed, click the Module Information button.		

- Required parameter settings** To post transactions to future or prior months, set these parameters:
- On the **A/R** menu, point to **Utilities**, and click **Maintain A/R Parameters**. In the **Allow future postings** list, select either **Warning** or **Yes**.
 - On the main Sage BusinessWorks menu, click **Utilities**, and then click **System Preferences**: Verify **Allow prior month postings** is set to **Yes**.

Section 2: Payroll Tips

- Completing End-of-year Payroll** You must complete many end-of-year Payroll activities before or during the last payroll.
- Contact an accountant or tax advisor for assistance regarding the taxable status of deductions or other pays.
 - Back up data **just before** processing checks or handchecks. If you encounter a problem, you can restore the backup, correct the problem, and reprocess checks.

Yearly Close Checklist Sage BusinessWorks provides an End of Year Checklist for Payroll. After you have completed the last Payroll, review the **Payroll – End of Year Checklist**. To access the Checklist for a module go to the Sage BusinessWorks Launcher. From the Sage BusinessWorks Launcher select View and verify “Viewer” and “Modules” are selected. On the left side of the screen under **Modules**, select **Payroll**. In the viewer, the Common Tasks for the module appear. At the bottom, there are three tabs: Common Tasks, All Tasks, Checklists. Select the tab for ‘Checklists’.

Section 2: Payroll Tips

2013 Tax Table Update

The early Tax Table Update (TTU) will be available for download from the Sage Customer Portal in mid-December. Because the update includes tax tables for 2013, install it only after you have printed W-2s and closed Payroll for December. The early TTU is included on V2011 Service Pack 14 and V2012 Service Pack 5.

Note: Processing a 2013 payroll before installing the 2013 TTU does not cause an issue, because Sage BusinessWorks automatically recalculates FICA, FUTA, SUI and SDI when you run a payroll after installing the update. Although table-driven taxes do not self-adjust, the difference is a few cents in most cases.

Before Closing Payroll for December: Make a Copy of your Company

Create a Sage BusinessWorks backup before performing the December close. If you have not printed **and verified** W-2s and you need to process January's payroll, follow the steps below to create a copy or "clone" of the company data prior to performing a December close.

Important: Do not copy the folder in which the company resides to a new folder. Sage BusinessWorks does not recognize data in the newly-created folder as a company.



Have all other users exit the company and use the copy company option below.

Important!

Do not close Payroll before verifying W-2 figures if still using Sage BusinessWorks **Version 2011**. V2011 allows you to print – **but not correct** – W-2s after you close the month of December.

If using Sage BusinessWorks **Version 2012**, there is no problem closing December even if W-2s have not yet been printed since you will be using Enhanced Tax Reporting.

How to use the Copy Company option.

1. On the main Sage BusinessWorks menu, click **Utilities**, and then click **Maintain Companies**.
2. Click **OK** at the exclusive option message.
3. Click the **Lookup** button  to select the Company ID; click **Accept**.
4. Click the **Copy** button .
5. Enter a new **Company ID** (for example, PAY2012), and click **OK**. Also click '**Copy User security**' to grant same user security as on the original company.

Notes:

- Do not close Payroll for December in the "cloned" company. Use the "cloned" company for printing W-2s only. The cloned company is the archive company and used for printing purposes only.
- The OASDI limit for 2013 is \$113,700. If the early TTU is installed prior to printing W2s, you will need to *change the OASDI limit back to \$110,100 limit for the 2012 W2s. Be sure to set it back to the 2013 limit of \$113,700 after printing 2012 W-2s.

* To change the limit go to the P/R menu, point to **Taxes**, and click **Maintain Tax Tables**. Click the **Lookup** button and select **US**. Click the **Allowances, Limits and Rates** button.

Verify SDI and SUI Rates after Installing TTU

Because the SDI and SUI rates vary from one company to another, the Tax Table Update (TTU) revises these fields in Maintain Tax Tables only. Sage BusinessWorks uses the values stored in **Activate States** (on the **Taxes** menu). After installing the 2013 TTU, verify that the rates in **Activate States** for SDI and SUI are set to the proper values for each company.

Section 2: Payroll Tips

Processing Fringe Benefits as a Lump Sum

IMPORTANT: Fringe Benefits must be processed with a paycheck prior to closing December.

Tip: If you created a fringe benefit deduction in a prior year, you can simply change the active dates. On the **P/R** menu, point to **Utilities**, and click **Maintain Deductions**.

Employees must pay taxes on the monetary value of fringe benefits such as personal use of a company vehicle or the premium for life insurance in excess of \$50,000. Some employers record fringe benefits on each payroll throughout the year; others record a lump sum at the end of the year.

If you record a lump sum, you must include the fringe benefit as a company-paid deduction on the employee's last paycheck for the year. Here's how:

1. Set up a company-paid deduction that is taxable for the employee. On the **P/R** menu, point to **Utilities**, and click **Maintain Deductions**. Set the following parameters:
 - **Calculation method:** Variable, entered on time card
 - **Category:** Company-Individual
 - **Taxable check boxes:** Consult a tax advisor for assistance
 - **Active:** Select the **From** option button, and set **To** and **From** to the date you plan to use on the last paycheck.
2. Click the **W-2** button, and specify the W-2 box for the fringe benefit.
3. On the **P/R** menu, point to **Employees**, and click **Maintain Employees**. Click the **Deductions** button, and add this deduction for each employee who received the fringe benefit.

❗ For time card processing of fringe benefits, search the Sage BusinessWorks Help Index for "Fringe Benefits".

Allocated Tips

Have you already processed your last payroll for the year?

Process a pay check with just allocated tips. Be certain to deactivate all deductions and all other pays except for the allocated tips other pay. Remember to reactivate them when finished.

Allocated tips are the difference between tips reported by an employee and the employee's allocation of 8% of the employer establishment's gross receipts for a calendar year. They are not included in the employee's income, nor does the employer withhold taxes from allocated tips. They are reported in Box 8 of the W-2 only. An Other Pay is used to record allocated tips:

1. On the **P/R** menu, point to **Utilities**, and click **Maintain Other Pays**. Set the following parameters:
 - **Calculation method:** Variable, entered on time card
 - **Category:** Company-Individual
 - **Taxable check boxes:** **Clear** check boxes for all taxable fields, including **Add to Gross**.
 - **Active:** Select the **From** option button, and set **To** and **From** to the date you plan to use on the last paycheck.
2. Click the **W-2** button, and specify Box 8.
3. On the **P/R** menu, point to **Employees**, and click **Maintain Employees**. Click the **Other Pays** button, and add this other pay for each employee for whom you must report allocated tips.
4. In **Time Card Entry**, select **Other Pay / Allocated Tips** from the **Earnings type** list.

❗ For the time card processing of allocated tips, search the Sage BusinessWorks Help Index for "Allocated Tips".

Section 2: Payroll Tips

Bonuses

Bonuses are taxable. Be sure to mark the Other Pay as taxable and select the **Add to Gross** check box.

If you create a time card for an employee receiving a bonus, that time card automatically overrides the standard time card you may have on file for them.

By law, bonuses are taxable. The employee is responsible for paying FWT. However, as an employer, you must normally remit both employer and employee FICA for all bonuses paid. (Regulations vary by state. Please consult a tax advisor for specific state requirements.)

What if I want to hand an employee \$500 in cash?

If you want the employee's bonus to be a flat amount, rather than the bonus amount less taxes use this formula to figure the gross bonus amount:

Formula: Net bonus amount / [1 - (Total tax rate ÷ 100)] = Gross bonus amount

Example: \$500 / [1 - (7.65 ÷ 100)] = \$541.42

To set up and pay bonuses in Sage BusinessWorks, please follow these steps:

1. On the **P/R** menu, point to **Utilities**, and click **Maintain Other Pays**. Set the following parameters:
 - **Calculation method:** Variable, entered on time card
 - **Category:** Individual
 - **Taxable check boxes:** Be sure to select the **Add to Gross** check box. Even though you may not withhold FWT from the bonus, it is normally taxable, so the **FWT Taxable** check box should be selected. Consult a tax advisor for clarification on SWT.
 - **Active:** Select the **From** option button, and set **To** and **From** to the date you plan to use on the last paycheck.
2. On the **P/R** menu, point to **Employees**, and click **Maintain Employees**. Click the **Other Pays** button, and add this other pay for each employee who receives the bonus.
3. Set any other pays to inactive that should not be included in the bonus. (Double-click the other pay, and click the **Inactive** option button.) Close the Other Pays window.
4. In **Maintain Employees**, click the *Deductions* button. Set any deductions to inactive that should not be included in the bonus.

❗ For the time card processing of bonuses, search the Sage BusinessWorks Help Index for "Bonuses".

Payroll Overlaps Two Years

According to IRS regulations, the employee's tax liability is based on the payment date, not the time period the employee worked. Therefore, employees pay taxes in 2013 on any pay checks they receive after 12/31/12, even though work may have actually been performed in 2012.

Deleting Terminated Employees

During the month-end December close, you will see the option to delete terminated employees. You can delete them as a group now or later on an individual basis through Maintain Employees. Payroll history is kept a minimum of two calendar years but can be increased to up to five years. On the **P/R** menu, point to **Utilities**, and click **Maintain Payroll Parameters**. In the **Years to keep history** list, select the number of years desired.

Note: You cannot delete an employee who has had activity within the last two calendar years or within the **Years to keep history** setting.

Third-Party Sick Pay

Third-party sick pay reporting requirements vary significantly from one plan to the next. For this reason, no option is available within Sage BusinessWorks to handle this function. Please review IRS Publication 15-A for information on the requirements that pertain to you. Search the Knowledgebase on the Sage Portal for a workaround for processing Third Party Sick Pay. Use the search key words "Third Party Sick Pay"

Section 2: Payroll Tips

How Sage BusinessWorks Calculates Percentage-based Taxes

Sage BusinessWorks calculates percentage-based taxes (OASDI, Medicare, SDI, SUI, and FUTA) on year-to-date taxable pays, rather than the taxable pay for the current pay period.

Percentage-based tax calculation formula:

$[(\text{YTD taxable pay} + \text{Current period taxable pay}) * \text{Percentage rate}] - \text{YTD tax withheld or accrued} = \text{Tax to withhold or accrue for this payroll}$

Source for figures in the formula above:

YTD taxable pay	On the P/R menu, point to Employees , and click Maintain Employees . Click the Totals button.
Current period taxable pay	Calculated from time card entries
Percentage rate	On the P/R menu, point to Taxes , and click Maintain Tax Tables (OASDI, Medicare, FUTA) or Activate States (SDI, SUI).
YTD tax withheld or accrued	On the P/R menu, point to Employees , and click Maintain Employees . Click the Totals button.

Limitations: Sage BusinessWorks automatically self-adjusts over- or under-withheld taxes when you calculate payroll for an employee within the following limitations:

- Sage BusinessWorks adjusts taxes only when you process payroll. Therefore, Sage BusinessWorks makes no adjustments for a terminated employee.
- If you have over-withheld a tax, Sage BusinessWorks does not reduce the tax already withheld. The program calculates \$0.00 until the difference is made up.
- If an employee has met the taxable limit for the year, Sage BusinessWorks does not self-adjust. Contact Customer Support for further instructions.

940 Worksheet Taxes

Sage BusinessWorks will not be editing the Unemployment (940) worksheet in v2011 for tax year 2012. You will need to use Enhanced Tax Reporting to print the 2012 940 annual form.

Section 3: Processing W-2s

Verifying W-2 figures

We recommend that you first print W-2s on plain paper to verify the figures. Search the Sage BusinessWorks InfoSource Knowledgebase located on the Sage Portal for a complete explanation of how W-2 figures are calculated. To log on to the Sage Portal (see page 2 for instructions), select the Knowledgebase link, and type "How W-2 figures are calculated".

Important Notes:

- The Sage BusinessWorks **Print W-2 Forms** option in version 2011 uses totals from Maintain Employees. However, the **Enhanced Tax Reporting** option uses **payroll check detail** to compile the figures. For this reason, W-2s printed using the **Enhanced Tax Reporting** option do not reflect changes to employee totals made in Payroll Setup mode. See **Editing W-2's in Enhanced Tax Reporting** at the end of this section.
- Beginning with V2012 the option to print W-2s from within BusinessWorks is no longer available. When selecting **Print W-2 Forms** it will automatically launch **Enhanced Tax Reporting** listing the W-2/W-3 forms.

Section 3: Processing W-2s

Previous or Current?

TIP: Previous and Current is not an issue if using **Enhanced Tax Reporting**.

In version 2011 when you access the option to print W-2s, you may have a choice to print "Previous" or "Current" W-2s. When you print W-2 forms for all employees or close the year, a file is created that holds all the necessary information for printing W-2s.

Previous: Sage BusinessWorks prints W-2s from this file.

Current: Sage BusinessWorks prints W-2s based on information currently stored in the employee's record.

Example: If the current open Payroll month is December 2012, the current YTD figures are printed. If your current open Payroll month is January, 2013 and you select **Current**, January 2013 YTD figures print.

Caution! If you select **Current** and then respond **Yes** to the query to save W-2 information, previously saved information is no longer available.

W-2 Form Types

Laser printers: In version 2011 the **Print W-2 Forms** option provides for printing only two W-2s per page (arranged vertically). Versions 2011 and 2012 have the ability to print the actual payroll forms through the **Enhanced Tax Reporting** option. The **Enhanced Tax Reporting** option prints only the 4-up W-2 form - blank, perforated forms must be purchased.

All forms may be purchased from Sage Software (1-800-538-5514), the IRS, or any office supply store.

Notes:

- Sage BusinessWorks does not accommodate side-by-side forms.
- Printing an alignment test first is recommended when using the **Print W-2 Forms** option.
- Beginning with V2012 W-2s can no longer be printed in Sage BusinessWorks. Selecting **Print W-2 Forms** will automatically launch **Enhanced Tax Reporting** to process W-2s.

① For the processing of W-2 forms, search the Sage BusinessWorks Help Index for "W-2" or "Print W-2 Forms."

W-3 Worksheet

In version 2011 after printing W-2s in one continuous run for all employees who had earnings in 2012, you are prompted to print the W-3 worksheet. Be sure to print the report at this time, as no menu option exists to print it later.

Notes:

- Sage BusinessWorks version 2011 prints a W-3 Worksheet only. These figures must be manually transferred to the actual W-3 form. Version 2011 includes the capability to print the actual W-3 form through the **Enhanced Tax Reporting** option. Beginning with Version 2012 W-3s can only be printed through **Enhanced Tax Reporting**.
- If you change figures for any employee, you must reprint W-2s for all employees – not just for those employees whose W-2s changed – to produce a corrected W-3.

Section 3: Processing W-2s

Special Cases: Local Tax and Box 12 Entries

W-2 forms have space for only two local taxes and four entries in Box 12. If an employee's W-2 exceeds this limit, the IRS requires that a second W-2 be created.

To determine whether you have employees who require a second W-2 form, print the Employee Master List to review each employee's deductions and other pays. If you are affected by this limitation, you can use the **Enhanced Tax Reporting** option in Sage BusinessWorks V2011 and V2012 to produce the required second W-2.

Notes:

- A warning appears when a deduction or other pay is added to the employee's record that exceeds the number allowed on the W-2. However, no warning is issued at the time the W-2 is printed.
- When manually processing a second W-2 for an employee, the second W-2 must include information in Boxes b, c, d, and e, and the entry in Box 12 or the local tax in Boxes 18, 19, and 20 only. No entries should be made in Boxes 1 through 8. The Sage BusinessWorks **Print W-2 Forms** option in V2011 does not create the second W-2. You must create it manually and manually adjust the W-3 totals to reflect the additional entry.

Editing W-2's in Enhanced Tax Reporting

If employee totals were manually updated in setup mode, then the W-2 information will need to be edited in the **Enhanced Tax Reporting** grid. A mini tutorial is available on the Sage Portal to assist in editing the grid.

Access the Sage Portal from within Sage BusinessWorks:

On the main Sage BusinessWorks menu, click **Help**. Then point to **Support and Service on the Web**, and click **Online Support**.

Section 4: Electronic Filing

General Information: Electronic Filing

W-2s: In version 2011 when you print W-2s *in one continuous run* for all employees who had earnings during 2012, Sage BusinessWorks creates a special internal file. When you select **Create W-2 Reporting File** from the **Transfer** menu and enter the necessary information for the company, Sage BusinessWorks creates the file, W2REPORT. This is the file you must send, along with the appropriate filing forms, to the Social Security Administration.

Important! You must be using version 2011 service pack 13 of Sage BusinessWorks *before* you create the electronic W-2 reporting file.

This option is no longer available in version 2012. Use **Enhanced Tax Reporting** for e-filing.

Section 4: Electronic Filing

Notes:

- If you change figures for any employees, you must reprint W-2s **for all employees** – not just for employees whose W-2s changed – to correct the file from which Sage BusinessWorks creates the W2REPORT file.
- The Social Security Administration requires that you obtain a User ID and choose a password for electronic filing. Please call 1-800-772-6270 or visit their website, <http://www.ssa.gov/bsowelcome.htm> for more information. On the **P/R** menu, point to **Transfer** and click **Create W-2 Reporting File**. Click the **Contact** tab and enter the User ID.
- The **Enhanced Tax Reporting** option includes the ability to file W-2s electronically as well.
- Beginning with V2012 **Create W-2 Reporting File** option is no longer available in Sage BusinessWorks. Use **Enhanced Tax Reporting** for e-filing.

Electronic File Verification

The Social Security Administration provides a program to verify the wage report's format accuracy prior to submitting it for processing. This program verifies that employee names meet filing requirements and that all required values have been completed. You can download the program from this Web site: <http://www.ssa.gov/employer/accuwage> Use this file to verify the accuracy of the v2011 W2REPORT file prior to submitting it to the Social Security Administration.

California Form DE 9C

The DE-6 and DE-7 have been replaced by forms, the DE-9C and DE-9. California Employers will now report quarterly employee wages on the DE-9C instead of using the DE-6. Also, the Unemployment Insurance, Employment Training Tax, State Disability Contributions and Personal Income Tax will be reported quarterly on the DE-9 instead of annually on the DE-7.

The DE-9C and DE-9 are no longer available within Sage BusinessWorks. Use Enhanced Tax Reporting for these forms.

California employers with 250 or more employees must file the DE 9C electronically. The **Enhanced Tax Reporting** option includes the ability to electronically file the DE 9C file. For complete information, point to **Taxes** and click **Enhanced Tax Reporting**. On the window displayed, click **How do I** and select **About Enhanced Tax Reporting and eFiling**.

Section 5: Accounts Payable

Before You Close A/P for December

You must print 1099 forms **before** closing December. ***When you close the calendar year, all 1099 information for 2012 is removed.*** If you have 1099 vendors, print and review the 1099 Worksheet. When the figures have been verified, print 1099 forms prior to closing December. Even though your fiscal year may not coincide with the calendar year, be sure to print the 1099 forms at the end of the calendar year.

1099 Form Types

Important!

Print 1099s **before** closing December. Closing December sets the Maintain Vendors 1099 payment information field to \$0.00.

Laser printers: 1099 format depends on the option from which you print the forms.

- **Print 1099 Forms** option: Use two up preprinted forms (arranged vertically) per page.
- **Enhanced Tax Reporting** option: Use the 4-up 1099 forms.

Notes:

- 1099-MISC forms may be purchased from Sage Software (1-800-538-5514), the IRS, or any office supply store. (You must use the 1099-MISC form; other forms are not compatible with Sage BusinessWorks.)
- For both dot matrix and laser printers, use a standard 8.5" x 11" printer driver for printing reports.

① For the processing of 1099 forms, search the Sage BusinessWorks Help Index for "1099" and "Print 1099 Forms".

Electronic Filing 1099s

Sage BusinessWorks versions 2011 and 2012 have the ability to create an electronic file for 1099 forms using the Enhanced 1099 Reporting option. On the **A/P** menu, point to **Vendors**, and click **Enhanced 1099 Reporting**.

Call us!

If you have a current ClientCare or PartnerCare phone support plan and have any questions about year-end processing, contact Sage Software Customer Support at 1-800-447-5700 and press 2. We are available from 6:00 a.m. to 5:00 p.m. Pacific time, Monday, Tuesday, Thursday, and Friday and 6:00 a.m. to 4:00 p.m. on Wednesday. (We close at 4:00 p.m. on Wednesdays for staff development.) If you wish to purchase a support plan or upgrade your plan to include phone support, please call 1-800-447-5700 and press 1.