W-2 Forms - Prepare and Print or eFile

Document #:	3042	Product:	CenterPoint® Payroll

This document describes how to print and eFile W-2 forms using CenterPoint Payroll and Federal/State Tax Forms (Aatrix). You can print and eFile forms in any combination. For example, many people choose to eFile the federal and state copies and then print the employee copies. An increasing number of people are using the complete eFile process in which Federal and State copies are eFiled and the employee copy is printed and mailed by Aatrix. The W-2 printing/efiling process includes multiple steps which are detailed below.

Installing the Federal/State Tax Forms (Aatrix) Update

Exporting Data From CenterPoint Payroll

Forms Update

W-2 Setup

Prepare W-2s

Print/eFile W-2s

Frequently Asked Questions

Installing the Federal/State Tax Forms (Aatrix) Update:

Please note that this step can be skipped if the process was already completed when printing 1099s.

1. In CenterPoint Payroll, select **Help > Online Updates > Check for Fed/State Tax Forms Updates**. Your system will be updated with the latest Aatrix Federal and State tax forms.
2. If you don't have an internet connection at this PC, you will need to install the **Federal/State Tax Forms (Aatrix)** by downloading it from our website at a computer that does have internet access. If internet access is not available from any computers, you can call the Red Wing Software Sales department at 800-732-9464, and we'll send the updates to you on a CD once a quarter for a minimal annual fee.

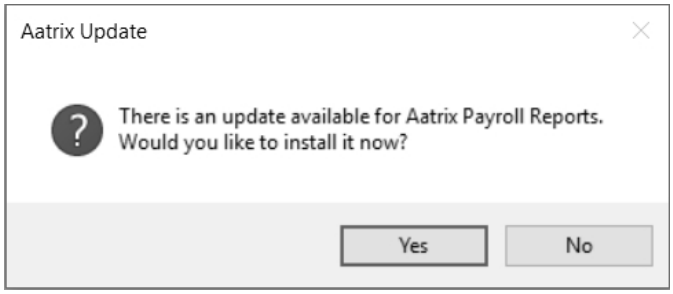
Exporting Data from CenterPoint Payroll

1. Begin processing W-2s by selecting **Reports** > **Federal & State Payroll Forms & Reports** > **Federal Tax Forms**.

Forms Update

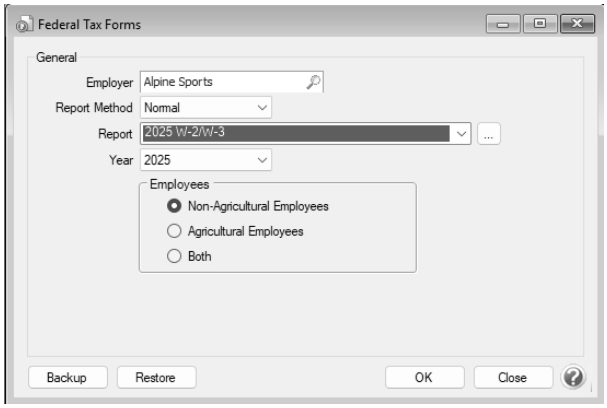
If you have internet access and the latest version of Federal/State Tax Forms (Aatrix) is not installed, the following **Aatrix Update** screen will display when you select the menu selection above.

» If you want to immediately install the update, click **Yes** and follow the on screen instructions. A progress bar will display as the update continues.



» If you do not want to immediately install the update and continue processing without the required update, click **No**.

2. The Federal Tax Forms screen will display.



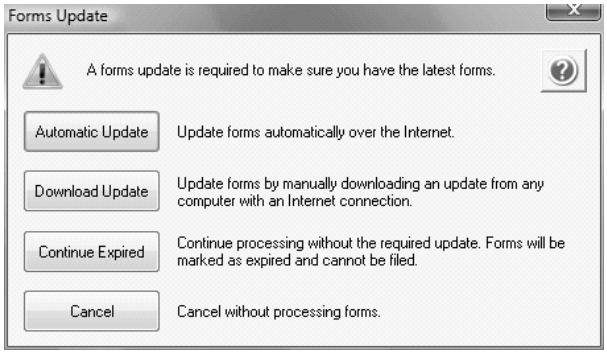
3. Select the appropriate **Employer** and **Report Method**. When you are starting the W-2 process you will select **Normal** in the Report Method. Draft would be used if you want to continue working on a copy that was previously started but not finished. History is only used if you'd like to review the information that was processed and already printed or eFiled.
4. In the **Report** box, select **2025 W-2/W-3** and **2025** in the **Year**. Click **OK**. **Note**: If the 2025 W-2/W-3 is not available in the Report box, then the 4th quarter update for Aatrix has not yet been installed. This can be installed by clicking on **Help > Online Updates > Check for Fed/State Tax Forms Update**.

Note: If you want to add the selected report to the Favorites section of the Report drop-down list, see the Set Report List Favorites section of the Federal/State Tax Forms topic for more information.

5. Under employees, select whether you want to include **Non-Agricultural Employees**, **Agricultural Employees**, or **Both**
6. Click **OK**.

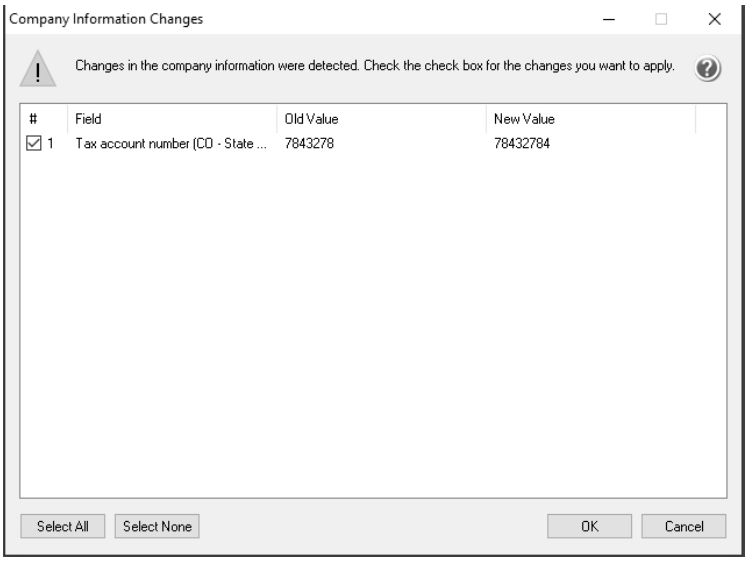
Note: If the Federal Id is blank in Setup > Employers > Taxes tab, a message will display and the form/report will not be processed until the Federal Id is entered.

7. It may take several minutes for the payroll data to be transferred to the W-2 printing process. Actual time will depend on the number of employees in your database.
8. To verify that the correct information transferred to Aatrix, you can print the W-2 Summary report from CenterPoint Payroll by selecting **Reports** > **Reports** > **Payroll Tax Data Reports Federal Tax Reports** to verify federal, FICA, and FUTA and **Reports** > **Reports** > **Payroll Tax Data Reports** > **State & Local Tax Reports** to verify state, local withholding, and SUTA.
   » The following **Forms Update** screen will display if you chose not to perform the Aatrix update when you first selected Reports > Federal & State Payroll Forms & Reports > Federal Tax Forms or State Tax Forms. If you want to continue processing your forms without performing the required update, click **Continue Expired**. Note: Expired forms will be marked as expired and **cannot** be filed. This screen will continue to display each time you choose not to perform the required update until you click Yes when first prompted to install the available update or you click **Automatic Update** or **Download Update** to perform the required update from this screen.



W-2 Setup

If changes have been made in CenterPoint that affect the information used on the selected form, a screen indicating that changes were detected in the company information will display.



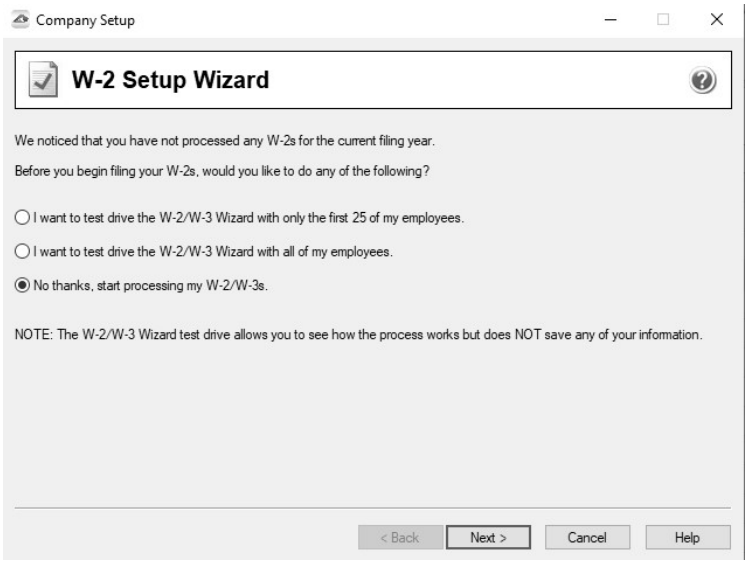
Choose to either accept or reject these changes. To accept only certain changes, use the check box provided to indicate which changes to apply.

Note: Any changes that are accepted will overwrite the current data stored in the Company Setup Wizard in Aatrix. The Company Setup Wizard will display to allow you to review the new data updates.

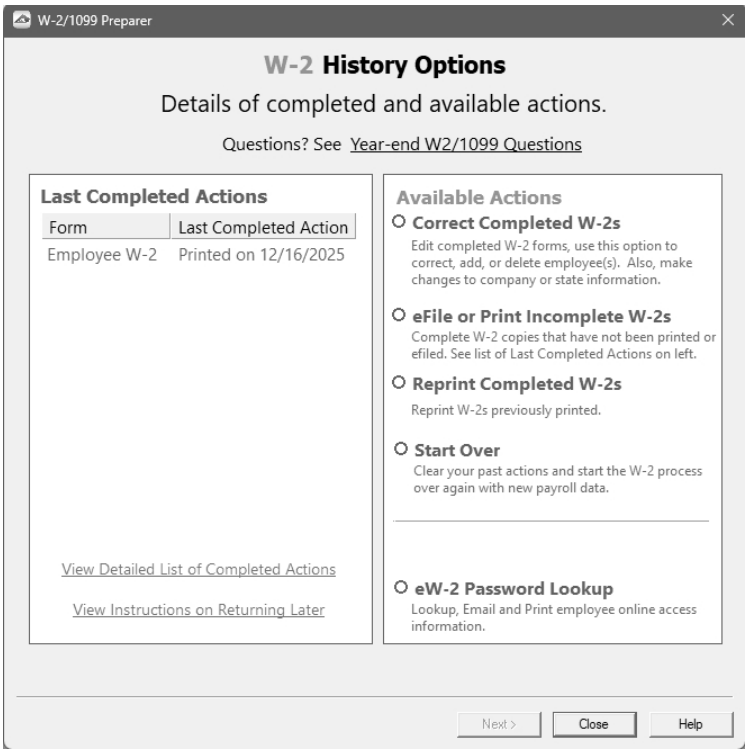
Note: Changing company information in Aatrix does not change company information in CenterPoint. If a change is needed, it is suggested to change company information in CenterPoint.

1. If this is the first time W-2s are being processed this year, the W-2 Setup Wizard will automatically be displayed. The wizard will guide you through the process of verifying data and efiling or printing year end forms. To start the actual W-2/W-3 process, select the recommended **No thanks, start processing my W-2/W-3s**, then click **Next**. To test the process prior to processing the W-2/W-3s, select **I want to test drive the W-2/W-3 Wizard with only the first 25 of my employees or all of my employees**. (The test drive allows you to see how the process works but does not save your selections, changes, or forms.)

This documentation is for informational purposes only. For specific accounting guidance, please contact your accountant.



Note: If you started processing W-2s previously, printed, or eFiled at least one form and then exited the process, a history file would have been created. The following W-2 History File Options screen will be displayed instead of the W-2 Wizard. Choose the appropriate **Available Action** on the right and click **Next**.



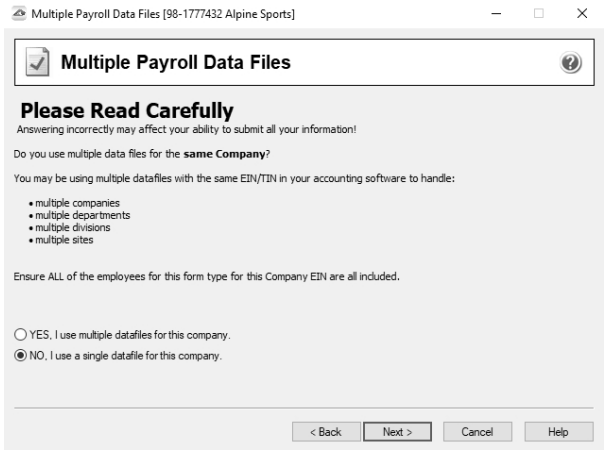
» If the **Reprint Completed W-2s** or **Process Non-Filed W-2 Copies** is selected, it will automatically bring you to the W-2/1099 Preparer detailed in the next section of this document.

2. The Federal Taxpayer Identification Number for this company is displayed. If it's correct, click **Next**. If it's incorrect, click **Cancel**. You will need to go back into CenterPoint Payroll to correct the number by selecting **Setup** > **Employers** > **Taxes** tab, selecting **Federal** from the left side of the screen, and then changing the **Federal Tax Id** on the right side of the screen and then start the export process again.

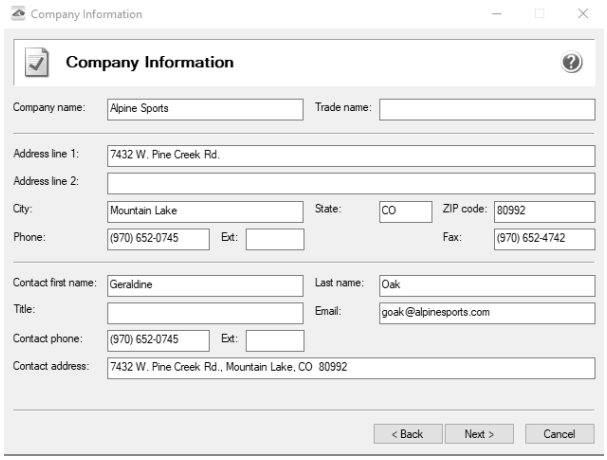


3. The Multiple Payroll Data Files option will be displayed. Select **Yes** if you have multiple payroll data files for the same Company, see the Frequently Asked Questions section in this document for more information. Otherwise select **No** and click **Next**.

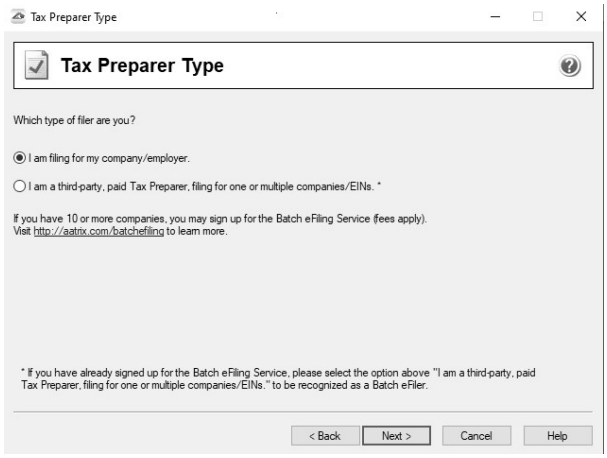
Note: Aatrix cannot accept multiple filings from the same EIN. If you have multiple payroll databases with the same EIN number, they must be merged prior to submission.



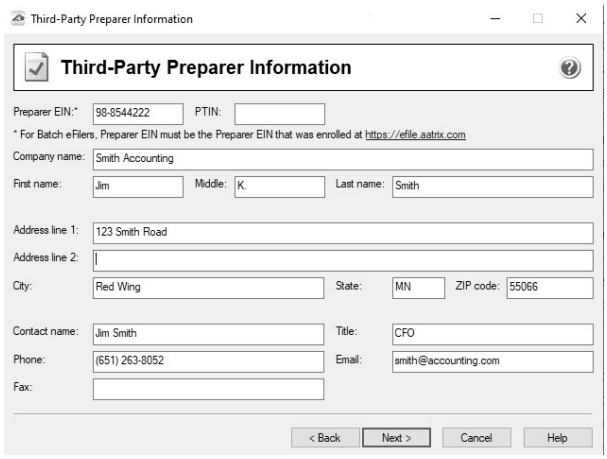
4. Review your **Company Information**. The system will notify you if any required fields have incorrect or missing information. Click **Next** if the screen is correct, if it's incorrect, click **Cancel**. You will need to go back into your program and select **Setup** > **Employers** to correct the information and then start the export process again.



5. Specify the correct **Tax Preparer Type**; processing the W-2s for your company/employer or processing the W-2s as a paid third-party tax preparer. If you are a third-party tax preparer, you will then be prompted for your information. After making the selection, click **Next**.

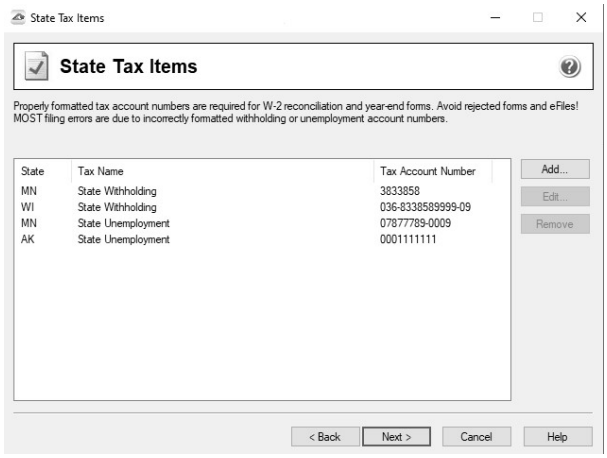


» If you are a third-party tax preparer, you will then be prompted for your information. If you have **Preparer Information (Optional)** entered and **Yes** selected in the **Use Preparer information** setting in **File** > **Preferences** > **Reports** > **Federal Tax Forms**, the paid preparer information will automatically display. Otherwise, enter the information and then click **Next**.



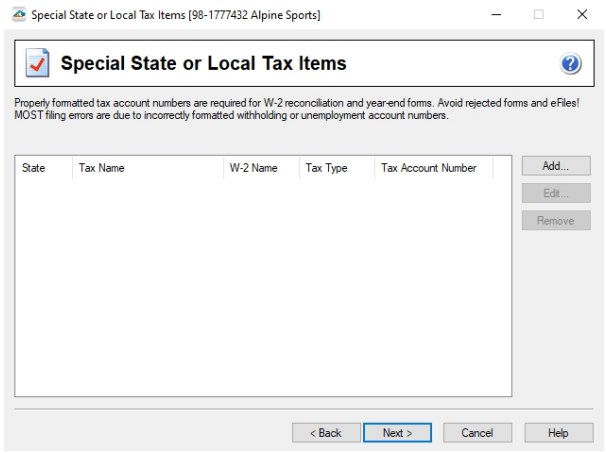
6. The **State Tax Items** screen will display. The Setup Wizard will automatically verify that all required information for listed states are complete and conform to the required formats. Click **Next**.

Note: Most filing errors are due to incorrectly formatted withholding or unemployment account numbers. Verify each state and account number. See the steps listed below to edit or add account numbers.



- Click **Edit** to add any applicable information to each state, for example tax account numbers for state withholding, state unemployment, workers' compensation, etc. States and account numbers exported from CenterPoint Payroll cannot be removed.
- Click **Add** to add a state and applicable tax account numbers. States that are added from this screen can be removed if needed.
- If there is blank or incorrect data on the **State Tax Items** screen, or the tax account number is improperly formatted the line will be highlighted and you will be automatically prompted to correct the data. Enter the correct Tax Account Number (Each state has different requirements, the screen that displays will guide you through the requirements for the state formatted in error.). Some states have more than one account number format, to see all account number formats available, click the "…" button in the Tax Account Number box. You will not be able to continue to the next screen until all required fields are correct.

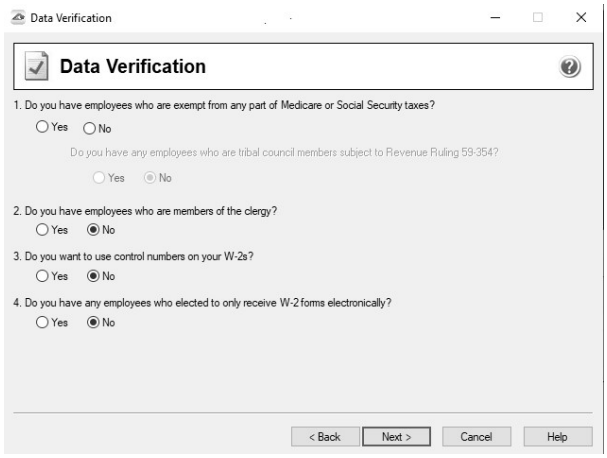
7. The **Special State or Local Tax Items** screen will display. The Setup Wizard will automatically verify that all required information for listed local taxes are complete and conform to the required formats. Click **Next**.



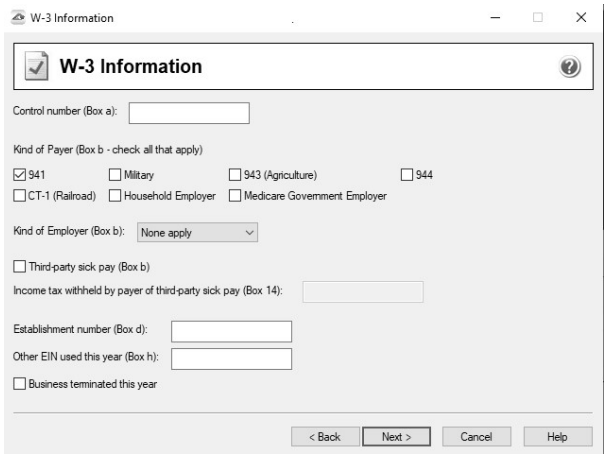
- Click **Edit** to add any applicable information to each local tax, for example tax account numbers local taxes, etc. States and account numbers exported from CenterPoint Payroll cannot be removed.
- Click **Add** to add a local tax and applicable tax account numbers. States that are added from this screen can be removed if needed.
- If there is blank or incorrect data on the **Special State or Local Tax Items** screen, or the tax account number is improperly formatted the line will be highlighted and you will be automatically prompted to correct the data. Enter the correct Tax Account Number (Each locality has different requirements, the screen that displays will guide you through the requirements for the local tax formatted in error.). Some local taxes have more than one account number format, to see all account number formats available, click the "…" button in

the Tax Account Number box. You will not be able to continue to the next screen until all required fields are correct.

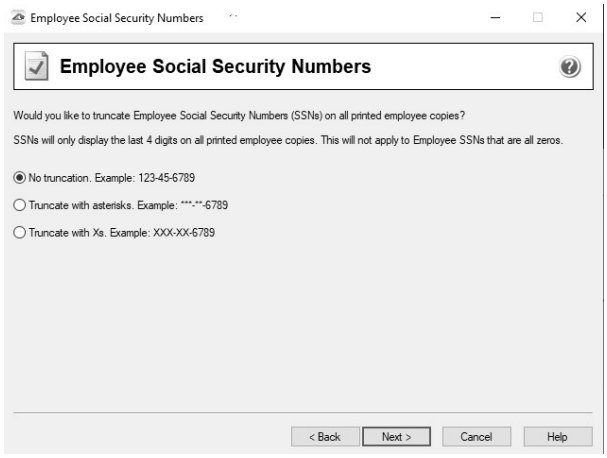
8. The **Data Verification** screen will display five questions. Please review and answer each question accurately as they affect how the W-2s are processed. Once all questions are answered, click **Next**.



9. Review the information on the W-3 Information screen. The Setup Wizard will notify you if any required fields are not filled in or if data is formatted incorrectly.
   - If you are filing for both Non-agricultural and Agricultural employees, select both the **941** and **943 (Agriculture)** check boxes.
   - The **Kind of Employer (Box b)** field will be blank. Please select one of the employer types. Select **None apply** if you are not a 501c non-govt., State/local non-501c, State/local 501c, or Federal govt. employer.

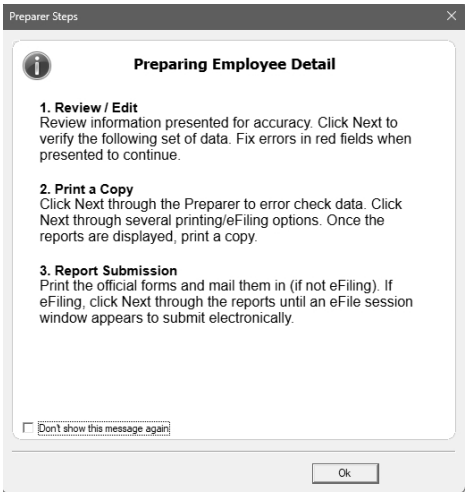


10. The **Employee Social Security Numbers** screen displays, determine if you want to truncate employee social security numbers and how the truncation should appear, with asterisks or X's and then click **Next**.



11. Click **Next** and the data will begin transferring to the W-2/1099 Preparer.

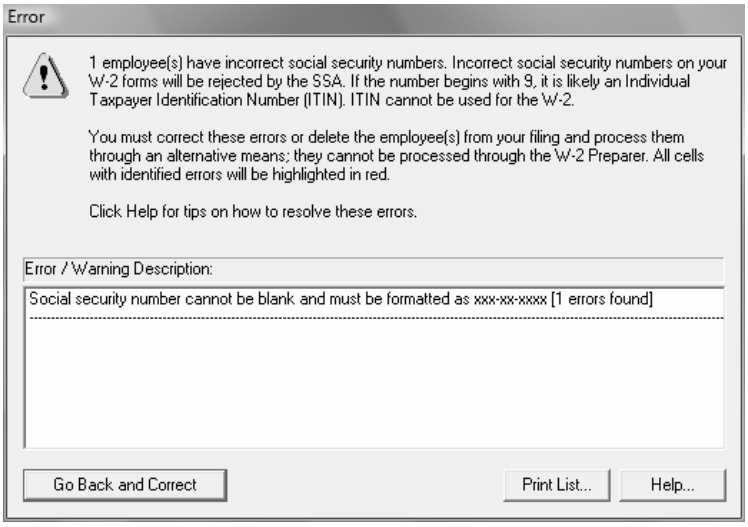
Prepare W-2s



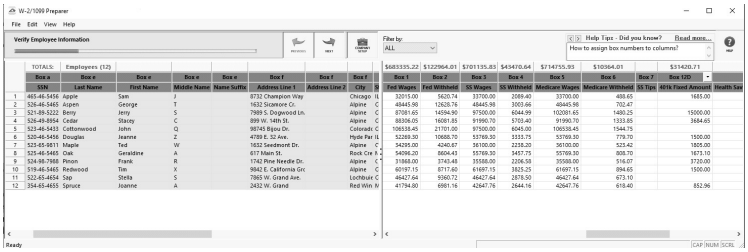
Review the Preparer Steps screen and then click **Ok**.

The W-2/1099 Preparer will walk you through the process of efiling and/or printing your W-2s. Once the displayed data has been reviewed, click the **Next** button to continue to the next screen. The W-2/1099 Preparer will automatically verify that all required fields are filled in and the data is formatted correctly. Anytime the Preparer finds data that is incorrect or missing, it will automatically prompt you to correct it.

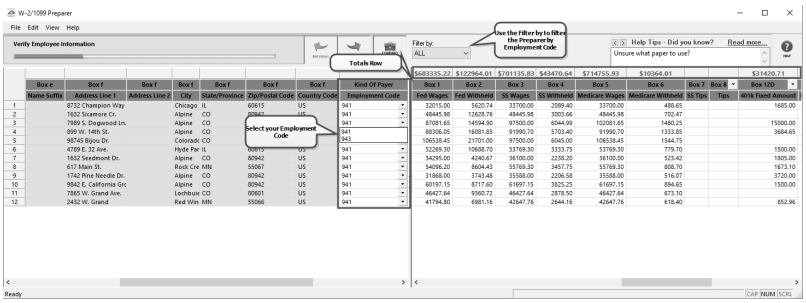
This is an example of what the W-2/1099 Preparer will display if it finds incorrect or missing data on a screen. If this message is displayed, simply click on the **Go Back and Correct** button and the data that needs to be corrected will be displayed in red. Click on the red data and correct the information. Once all data has been corrected, click the **Next** button again to continue to the next screen.



1. The W-2/1099 Preparer will display the information it is currently validating in the top left corner. The information will be highlighted in blue. The first screen of the **W-2/1099 Preparer** is **Verify Employee Information** (box a - f on the W-2). The screen can be adjusted by scrolling or moving the center line from the left to the right.



- If you are filing for multiple Kinds of Payers, the **Filter by** box at the top of the screen can be used to filter for **All**, **941** or **943** payers, and for each employee, in the **Employment Code** box, click the drop-down arrow and then select **943** or **941**.

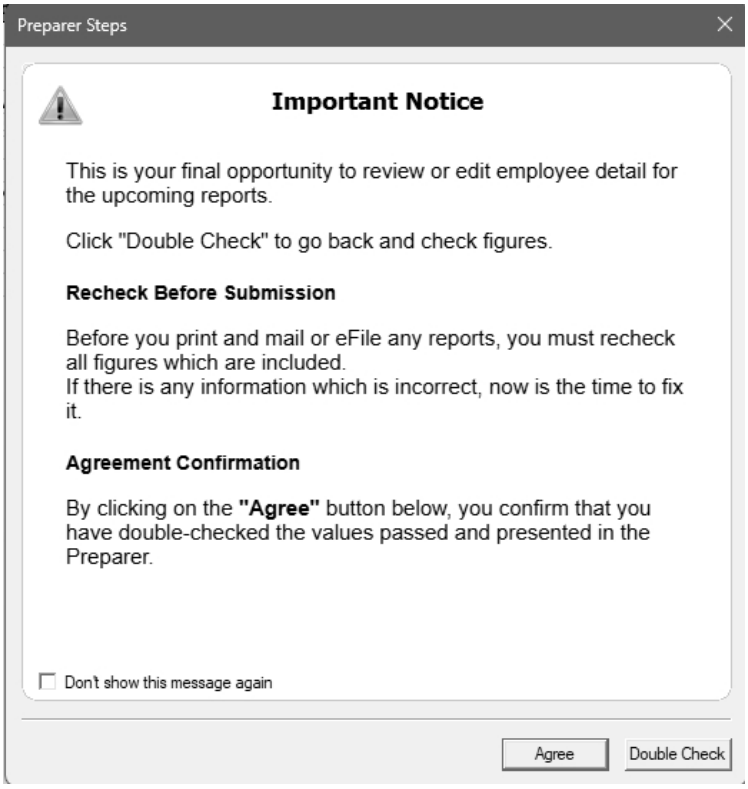


- To add a line to the W-2/1099 Preparer grid, right-click over one of the line numbers on the left side of the screen and select **Insert Row**, enter the number of rows you want to add to the end of the list of employees, and then manually enter the new information into the grid.
- To delete a line from the W-2/1099 Preparer grid, right-click over the line number you want to remove, and then select **Remove Row**.
- To copy a line on the W-2/1099 Preparer grid, right-click over the line number you want to copy, and then select **Copy**.
- To add a copied line to the W-2/1099 Preparer grid, right-click over the line number where the copied row should be inserted, and then click **Paste**.
- To Find information in a column in the W-2/1099 Preparer grid, right-click on the column header name, select **Find**, in the **Find What** box, enter the information you want to locate, and then click **Find Next**.

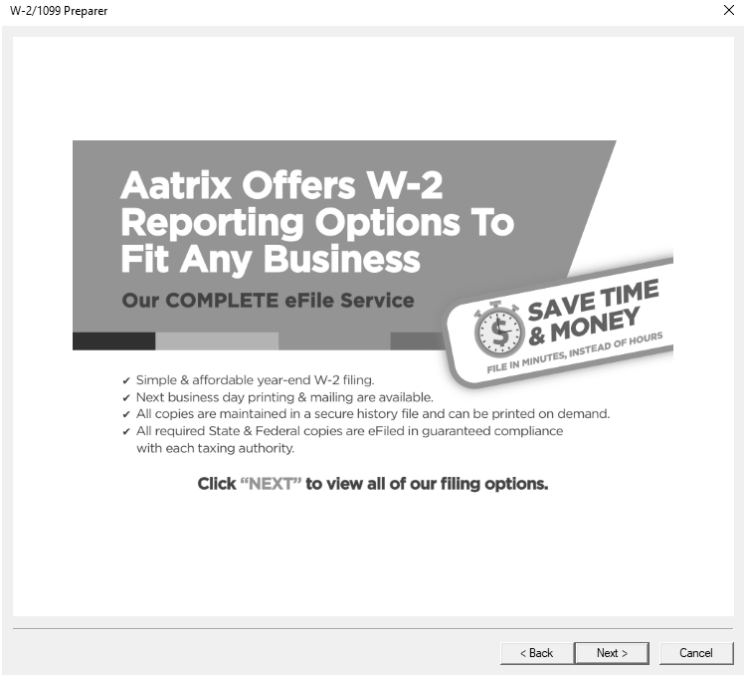
2. Click **Next Step** or the **Next** button at the top of the screen.

Note: The total for the columns appears above the column in the Totals Row.

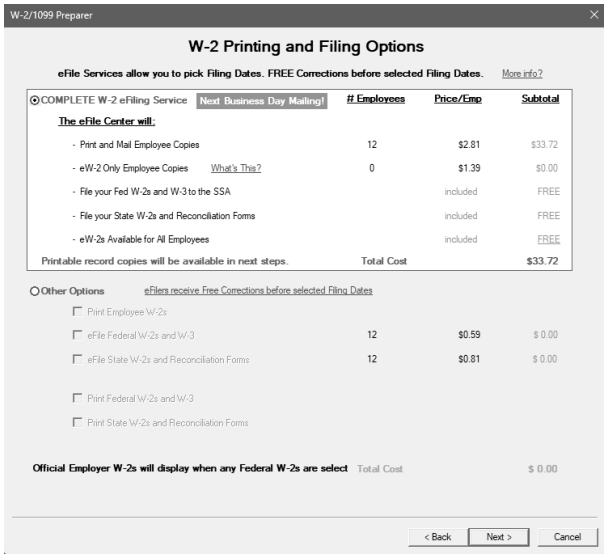
3. The **Verify Additional Employee Information** screen will display next. Review/edit the supplied data, and then click **Next Step** or the **Next** button.
4. Continue reviewing/editing the supplied data on the **Verify Federal Information**, **Verify State Information**, and **Verify Unassigned Columns** screens and clicking **Next Step** or the **Next** button on each screen displayed.



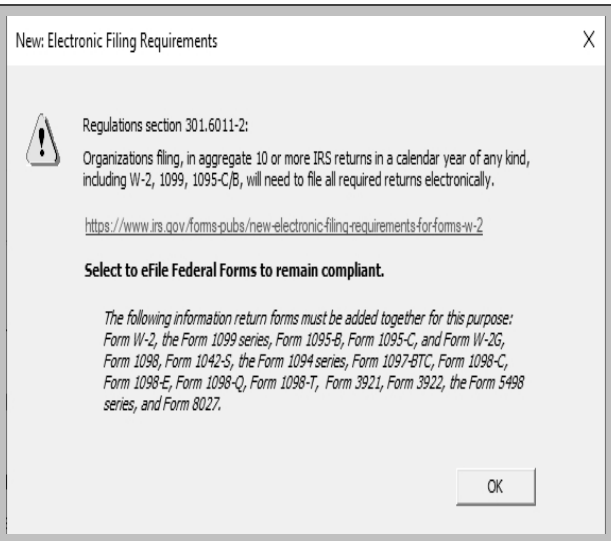
5. Review the Important Information screen. If you want to review/edit the information in the W-2/1099 Preparer grid, click **Double Check**. After you've double-checked the information in the W-2/1099 Preparer grid, click **Agree**.
6. When a Complete eFile Service informational screen displays, click **Next**.



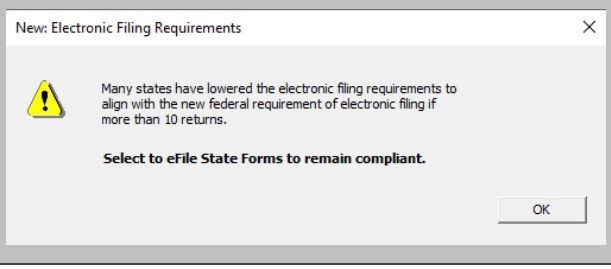
7. The **W-2 Printing and Filing Options** screen will display. eFiling options are displayed with the associated costs and printing forms is free. Choose the appropriate options for your company, and then click **Next**.



Note: If you chose to print your Federal forms, you will receive a New Electronic Filing Requirements screen. This screen outlines the regulation the IRS and the Department of Treasury changed on February 21, 2023 which changed the Federal eFile threshold from 250 to 10. Click here for more information. Click **OK** to return to the filing options screen to continue printing if you are compliant or make eFiling selections to remain compliant.

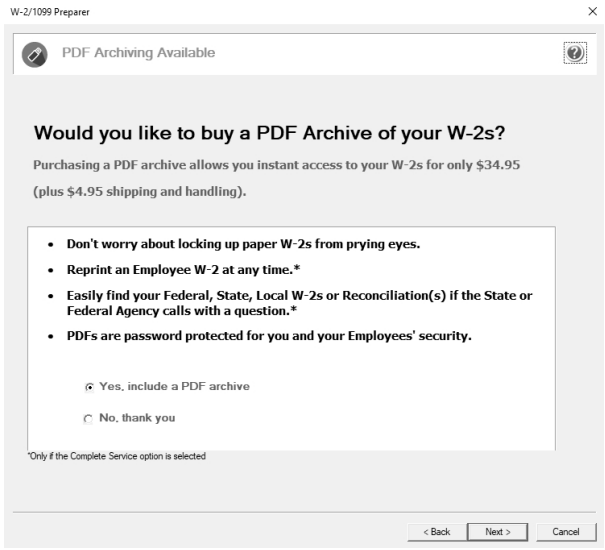


Many states have lowered the efiling requirements to align with the new Federal requirement and you will receive a New Electronic Filing Requirements screen when printing state copies. Click **OK** to return to the filing options screen to continue printing if you are compliant or make eFiling selections to remain compliant.

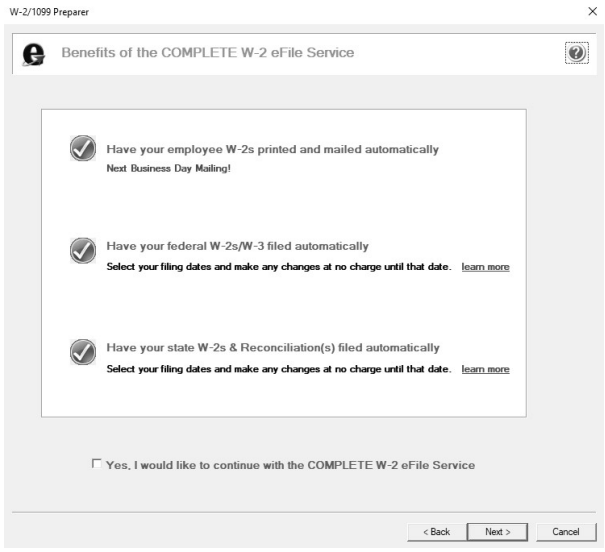


8. If you chose the **W-2 eFiling Service**, you have the option to purchase a PDF archive on a USB drive of your W-2s, select **Yes, include a PDF archive** to purchase an archive or select **No, thank you** to continue without purchasing an archive.

Red Wing Software recommends purchasing a PDF Archive of your W-2s as a backup so you can easily view or reprint a filed W-2 form. If your Aatrix History file becomes corrupt, the file cannot be located, or you get a new computer and the file is not copied to your new computer the PDF Archive can be used instead. See the Frequently Asked Questions section of this document for information about backing up the Aatrix History file.

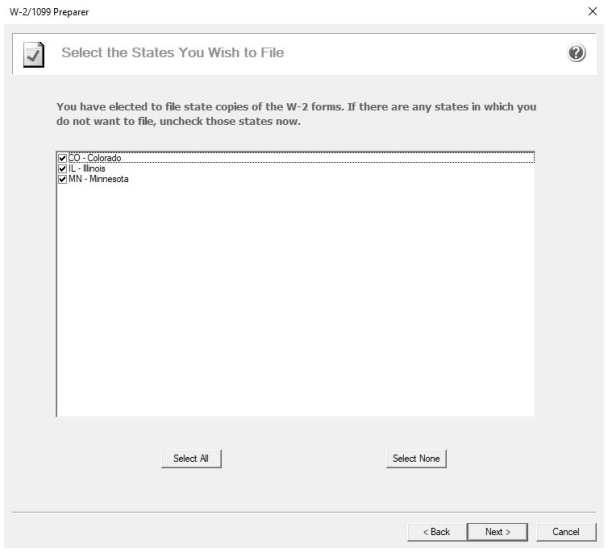


9. If you have not chosen the Complete W-2 eFiling Service option, you have another chance to select that service instead of printing the W-2s yourself. Click **Next** to continue.

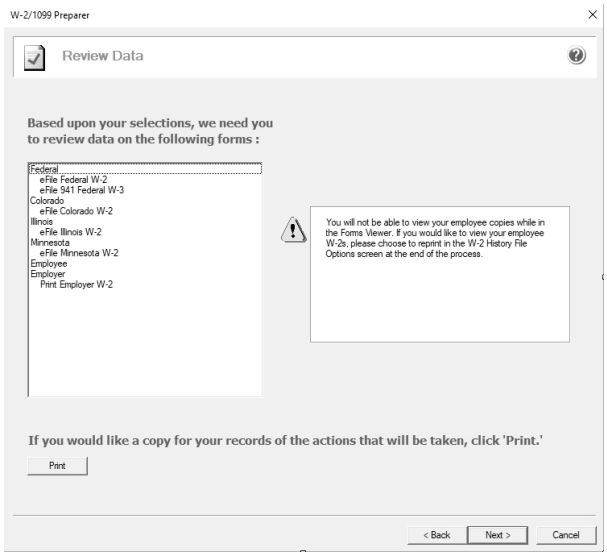


- If you use the Complete eFiling Service for your W-2 forms, there are applicable discounts for using the complete eFile service for your ACA 1095-C forms (does not include the 1095-B forms). To qualify for discounted 1095-Cs:
    a. eFile your W-2s using the Aatrix W-2 Complete eFile Service.
    b. Select a mail date for your employee W-2s that provides you with enough time to complete your ACA filing (the mail date may be adjusted at efile.aatrix.com up to one day prior of the set date).
    c. eFile your ACA forms utilizing the Aatrix Complete eFiling Service and save 50%.
    d. Please click here to view the eFile pricing.
- There may be additional discounts available when you select the UNLIMITED eFile Package which includes Federal & State Unemployment, Wage Withholding Report, New Hire Reports/Payments, and ANY Associated Payment, it does not include additional discounted W-2s, 1099s, or 1095-C forms. Package pricing is based on the number of employees in your company. Please click here to view the eFile pricing.

10. The **Select the States You Wish to File** screen will be displayed if you chose to print or eFile any state forms. States can be unselected if you'd like to file them at a later date. Click **Next** to continue.



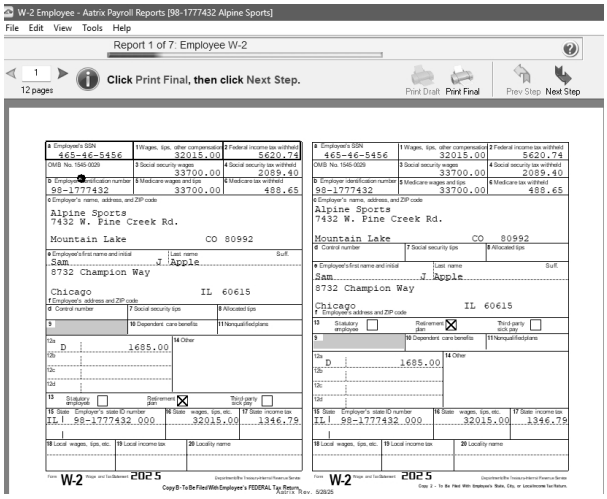
11. The **Review Data** screen will be displayed. If you select the Print button, it will create a printed version of exactly what displays on this screen. If any changes are needed, click **Back**. Otherwise click **Next** to continue.



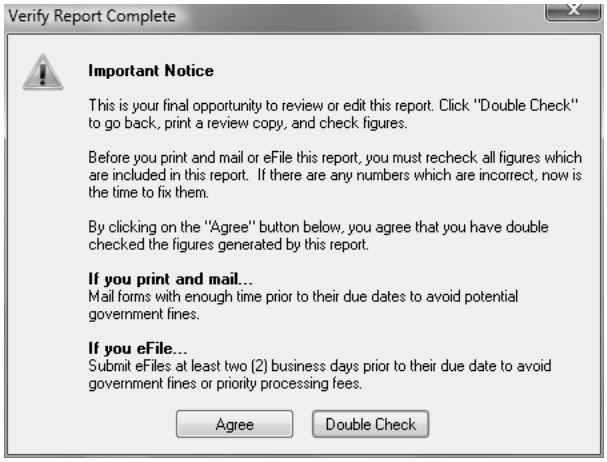
Print/eFile W-2s

12. The first employer W-2 form will be displayed. The form type and the number of form types are displayed in the yellow bar. In the upper-left side of the screen, use the left and right arrows to move through all of the forms for this form type.
    - You can change any figure on the reports that are highlighted blue. Any figure that is highlighted red must be changed before you can print the report. Any figure that is white cannot be changed, but it is a calculated number, so it may be changed by adjusting the fields around the white field. Changing the figures on this screen will only change the printed Federal reports, it will not change the data in CenterPoint. If you make changes, you need to make sure your 941/943 report amounts match your W-2 report amounts for federal wages, social security, medicare wages, and withholding amounts.
    - To print this first form, click **Print Final**. You will be prompted to enter either plain paper or perforated paper. Click **OK**. Once the data is printed, click **Next Step** to continue to the next selected form.

Note: If you are using the Complete eFiling Service, you will not be able to view your employee copies while in the Forms Viewer. If you would like to view your employee W-2 forms, please choose to reprint in the W-2 History File Options screen at the end of this process.



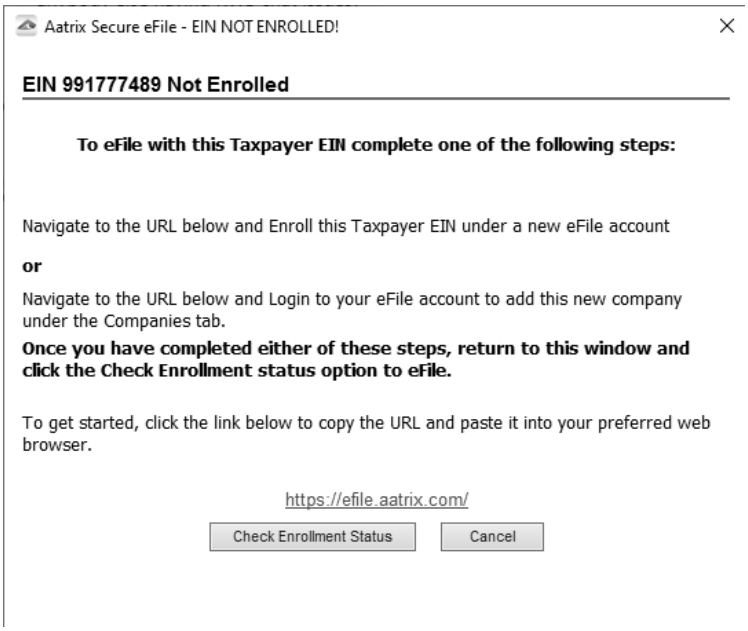
13. The next form will be displayed. Click **Print Copy** or **Print Final** to print the form, then click **Next Step** to continue to the next form. Repeat this process for each selected form.
14. Depending on the form selected to print, the following message may be displayed. Selecting **Double Check** will bring you back to the previous screen so you can verify your data. Selecting **Agree** will bring you to the eFiling login screen.



eFile W-2 Forms

This section will not display if you have not chosen to eFile your W-2 forms.

1. If you have chosen to eFile any of your forms, and you have not filed previously, the Aatrix Secure eFile screen will be displayed.

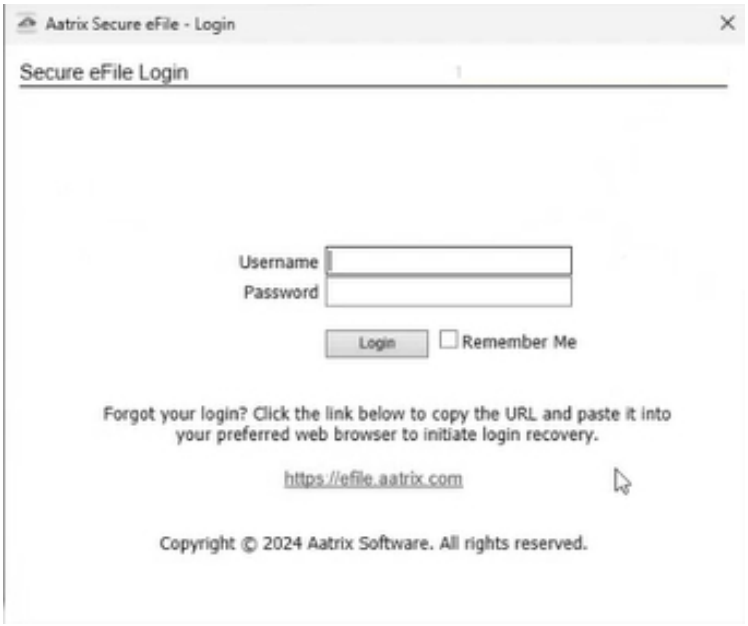


2. If you are not enrolled to eFile with Aatrix:
   - From an internet browser, enter **https://efile.aatrix.com** to go to the Aatrix website
     - Click **Enroll** in the upper-right corner to complete the enrollment process.

     OR

     - Log in to your eFile account to add this new company under the Companies tab.
   - Return to the Aatrix Secure eFile screen and click **Check Enrollment Status**. Enter your login information, and then follow the onscreen instructions to eFile your forms.

3. If you are enrolled to eFile with Aatrix, enter your login information. Verify your enrollment information. To edit your enrollment information, click **Edit** on the Enrollment Information screen, click **Next**, and then follow the onscreen instructions to eFile your forms.



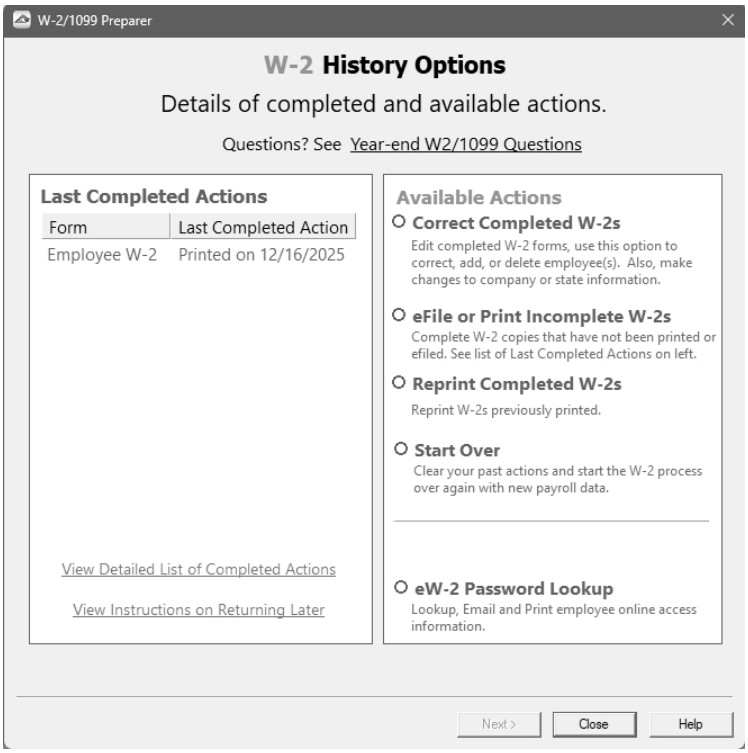
- To view answers to common questions, click here or from an internet browser, enter **https://www.aatrix.com/support/knowledgebase/windows/**
- If you have questions about the calculated sales tax or need to apply for tax exemption for your filing, email **AatrixExemptCerts@sovos.com**.
- For additional information about eFiling , click here or enter **https://partner.aatrix.com/red-wing-software/**
- You will have the option to select to allow your employees to securely import their W-2 information into certain tax software products by approving the Aatrix Tax Form Transfer Agreement displayed during the eFiling process.
- When the eFile process is complete, the Complete screen will indicate that your filing was successfully received for processing. A confirmation email will be sent to the email address specified on this screen.
  - If you have employees that opted to receive their W-2 electronically or selected the Complete eFiling Service, you will need to complete the Online Access Wizard which allows you to lookup, print, or email access letters and passwords. For detailed information, click here.
- The **AFID (Aatrix Filing Identifier)** is a number assigned to your submission for tracking purposes. If you contact Aatrix Support, they will request this number.

Note: It is important to note the AFID (Aatrix Filing Identifier). It will be required when contacting the eFile Center with questions about your submission.

- If you eFiled your W-2 forms, and have questions regarding your filing, contact Aatrix by email at **helpme@aatrix.com**, on their website at **https://efile.aatrix.com/** by clicking **Login** and entering your Aatrix username and password, or on their website at **https://efile.aatrix.com/** by clicking the **Search our FAQs** button.

4. Upon exiting the W-2 process, the **W-2 History File Options** screen is displayed. If no other actions are needed at this time, select **Close**.

- This screen will also be displayed if the W-2 printing process is restarted and you can select to reprint, eFile or print incomplete W-2s, correct, or start the W-2 process again (if you've submitted any of the filing, you'll need to reprint or correct the W-2 forms).
- Use the eW-2 Password Lookup selection to see a full list of your employee passwords and you can distribute as you'd like.



Frequently Asked Questions

Q: Are there any important changes to the W-2 filing process for 2025?

A: There are no specific changes to the W-2 filing process for 2025; however, it is important to remember that the U.S. Department of the Treasury and the IRS issued final regulations on February 21, 2023, that changed the eFile threshold from 250 to 10. The current 10-return threshold comprises an aggregate of return types (W-2, ACA, 1099 forms) covered by the regulation. Click here for more information. For specific W-2 and ACA form information, click here.

Q: If I choose to eFile my W-2 forms, is there a charge per form/employee?

A: Yes, please click here to view the eFile pricing for W-2 and minimum charge for W-2 and other tax forms (the minimum charge applies to each type of form eFiled).

Q. Where do I enter the employer identification number (EIN) that is required when running Federal or State tax forms?

A. Select **Setup > Employers**. Select your **Employer** and click **Edit**. Click on the **Taxes** tab. Under the **Taxes** in the upper left, select **Federal** to display the **Tax Details** on the right. Enter your **Federal Tax Id**.

Each state you calculate payroll taxes with is also listed under the Taxes in the upper left side of the Taxes tab. Under the State, select the **State tax** such as the State withholding or State unemployment to display the **Tax Details** on the right. Enter your **State Id #**. Click **Save** after completing each required State tax number.

Q: How can I verify taxable wages and tax amounts for this year prior to printing W-2s?

A: To verify those amounts, you can print the W-2 Summary report from **Reports** > **Reports** > **Payroll Tax Data Reports** > **Reports** > **Federal Tax Reports** to verify Federal, FICA, and FUTA and **Reports** > **Reports** > **Payroll Tax Data Reports** > **State & Local Tax Reports** to verify state, local withholding, and SUTA.

Q: When is the 2025 filing deadline for W-2 forms?

A: The Internal Revenue Service filing deadline for W-2 forms submitted to the Social Security Administration can be located by using the Search feature on the Internal Revenue Service website at www.irs.gov.

Q. What are the 2025 eFiling deadlines for W-2 Forms?

A. eFiling deadlines can be located from this link: https://efile.aatrix.com/pages/public/FilingDeadlinesPublic.aspx?v=ATX000

Q: I have deductions/benefits that have a code that must appear in Box 8,10, 11, 12, or 14, where do I set that code up?

A: The **Employee** or **Employer** Box 8, 10, 11, 12, or 14 options can be selected in **Setup** > **Deductions & Benefits** > **Detail** tab > **General** tab from the **W-2 - Box Options** box.

Q: How can I determine how many employee W-2 forms I printed last year?

A: The Federal Tax Withheld by Employee report can be used to determine the number of W-2 forms printed last year by selecting **Reports** > **Reports** > **Payroll Tax Data Reports** > **Federal Tax Reports** > **Federal Tax Withheld by Employee** report and using a **Pay Date of Last Year**. The Records included in total will be the number of employee W-2 forms that were printed last year.

Q. I want to send my employee's W-2 forms electronically to be viewed online with Aatrix. How do I set up my employees to receive electronic copies?

A: Follow the steps below to set up your employees to receive electronic copies of their W-2 form:

1. Select **Reports** > **Federal & State Payroll Forms & Reports** > **Federal Tax Forms**.
2. In the **Report** box, select **Electronic W2 Consent**. In the **Year** box, enter **2025**, and in the **Time Period** box, select **One Year**.
3. Follow the on-screen instructions until the form displays, then edit, print, and distribute to your employees. Have your employees sign and return for your records.
4. Make sure each employee (**Setup** > **Employees**) has an email address on file on the **General** tab and the **Consent to Electronic W-2** on the **Payroll** tab selected if they consented to receiving their W-2 electronically.
5. Process your W-2s from **Reports** > **Federal & State Payroll Forms & Reports** > **Federal Tax Forms** by selecting **2025 W-2/W-3**.
6. After the grid of employees displays and is verfied/edited, the W-2 Printing and Filing Options screen will display, select **Complete W-2 eFiling Service** and follow the on-screen instructions to eFile.

Q: We have one employee with a Social Security number that begins with "900". CenterPoint does not accept a number that begins with the digit 9. The number the employee is providing is an ITIN #. How can I process a W-2 for this employee?

A: The Federal Tax Forms (Aatrix) software will not accept a Temporary SSN so to get past this message you will have to enter 000-00-0000 in CenterPoint in **Setup** > **Employees** and then when the employee files their W-2 they can file using the temporary number and then provide you with a SSN after receiving the permanent number.

Q. Do I need to order W-2/W-3 forms or can I print them on plain paper?

A. You are able to print all of your W-2 copies on plain paper; you no longer need to print any on preprinted forms. Even the W-3 Social Security Copy A (often called the "red copy") can be printed on plain paper. Note: There is special perforated blank paper available that is recommended for use when printing employee copies of the W-2s. This paper comes with employee W-2 information printed on the back of the paper (for the employee copy) and blank for the State / Local copies. This paper is available from Computer Forms, Inc. at https://redwing.computerforms.biz/c/tax_forms or by calling 800-458-0158.

Q. Do I need to print my W-2 forms before I close the 2025 year and print January checks?

A. There is no closing process in CenterPoint Payroll, so W-2 forms can be printed anytime.

Q. Why is the 2025 W-2 not available in the list when I select Reports > Federal & State Payroll Tax Forms & Reports?

A. You need to install the latest update of Aatrix Federal and State Tax Forms. Select **Help > Online Updates > Check for Fed/State Tax Forms Updates**. Your system will be updated with the latest Aatrix Federal and State tax forms.

Q. Why am I getting a “forms update” or "mandatory update" message when I try to process my Federal forms (W-2, 1099, etc.) and what do I need to do?

A. At least once a quarter, including at year end, updates are created for the Federal/State Tax Forms (Aatrix) software. When you receive either of those messages, it means that Aatrix has an update available that you should install prior to continuing. If you have internet access at this computer, you can simply select **Automatic Update** and follow the prompts to do the update through the program.



If you have signed up for the service that automatically sends an Aatrix flash drive at the end of each quarter, please follow the instructions that will be included with the flash drive. Those flash drives will begin shipping before January 1, 2026.

If you don't have internet access at the computer that has CenterPoint Payroll installed, but you do have it available at another workstation, follow the instructions below. This process does require the use of a removable drive (CD, thumb, zip or flash drive, USB Drive, etc.).

1. Log into the Red Wing Software website at **www.redwingsoftware.com**, click the **My Account** button, and from the My Account page, select the **Downloads** tab. Under **CenterPoint Payroll** select **Downloads**, and then select **Federal/State Tax Forms (Aatrix)**. Click the download file and then follow the on-screen instructions.
2. When the download is complete, exit the website. Copy the **RedWingForms.exe** file from your desktop to the removable drive (CD, thumb drive, etc.) you’ll be using to move the downloaded file.
3. Take the removable media source to the computer with CenterPoint Payroll and install by double-clicking on the **RedWingForms.exe**.

If you don’t have an internet connection at any of the computers, you can call the Red Wing Software Sales department at 800-732-9464, and we’ll send the Federal/State tax forms (Aatrix) updates to you on a flash drive once a quarter for a minimal annual fee.

Q. Can I change the figures on my Federal reports if they are incorrect?

A. Yes, once the data is in Aatrix Federal/State Tax Forms, you can change any figure on the reports that are highlighted blue. Any figure that is highlighted red must be changed before you can print the report. Any figure that is white cannot be changed, but it is a calculated number, so it can be changed by adjusting the fields around the white field.



Changing the figures on this screen will only change the printed Federal reports, it will not change the data in your payroll program. If you make changes, you need to make sure your 941/943 report amounts match your W-2 report amounts for federal wages, social security, medicare wages, and withholding amounts.

Q. How can I ensure I have a copy of my Federal & State Reporting tax forms to review for historical purposes or when moving to a different computer?

A: The Aatrix History File contains your historical Federal/State Tax Forms and it is necessary to back this file up on a regular basis so that if you purchase a new computer the history can easily be transferred to the new computer by restoring the backup. Red Wing Software suggests backing up your Aatrix History File on a quarterly basis.

1. Select **File > Backup > Backup Aatrix History**.
2. Select the employers to back up history files for.
3. Click **OK**.
4. Select a location to save the AatrixHistoryBackup.zip file to, and then click **Save**.
5. At the Back Up Created message, click **OK**.



The Aatrix History File folder will have one or more sub-folders, each sub-folder contains files for a specific EIN number.

If you are networked and would like to specify where the Aatrix history files are saved instead of the default location <ProgramData>\Red Wing Software\CenterPoint\Aatrix\, follow the steps below.

1. Select **File** > **Preferences** > **Reports** > **Federal/State Tax Form**s.
2. Click the **Application** tab.
3. In the **Use Non-Default File Location** box, select **Yes**.

4. In the **Non-Default File Location** box, change the displayed default location to the network location you want to save the Aatrix History file to.
5. Click **Save**.

If you do not use a custom file location (the Use Non-Default File Location box is set to No), the Red Wing Software default location used is <Users>\<User>\AppData\Local\Aatrix Software\Aatrix Forms\Red Wing\.

You can still perform a manual back up of the Aatrix history files by following the local computer steps above.

Q. I'm attempting to log in to the Red Wing Software website, but it does not recognize my Email and/or Password? What should I do?

A. Follow the instructions below for information about the Red Wing Software website.

To register on the Red Wing Software website:

The Red Wing Software website uses the same login as Red Wing Software's Web Services (Pay Advices, CenterPoint Time Clock, or Employee Portal). If you have an existing account for Web Services, enter the same user credentials to log in to the website. If you do not have an existing account for Web Services, follow the steps below:

1. From a web browser, enter **www.redwingsoftware.com**.
2. In the upper-right of the Red Wing Software home page, click **Log in**.
3. Click **Create One!**
4. Enter your **First Name** and **Last Name**.
5. Enter an **Email** address and a **Confirm Email** address which must match the contents of the Email field for the registration to be processed.
6. Enter a **Password** and **Confirm Password**. Passwords must be at least six characters and no longer than 25 characters, include one numerical character and one lower-case letter.
7. Click **Create**.
8. In the **Account Number** box, enter your company **Account Number**. Your Account Number can be located in a few different places:
    a. From within CenterPoint by selecting **Help** > **About**.
    b. On the Support Certificate that you receive upon renewing Customer Care Membership.
    c. Red Wing Software sends customers a renewal form for Customer Care Membership. This renewal form contains your account number.
    d. Invoices you've received from Red Wing Software contain your account number.
    e. If others at your company have already registered, they can sign into their account and find your company's account number at www.redwingsoftware.com/home/myaccount.
9. Continue entering your **Title**, **First and Last Name**, **Email Address** (which is your login) and a **Password**.
10. Enter the displayed **Security Verification** code, and then click **Submit**.

To log in to the Red Wing Software website:

1. In your web browser, enter **www.redwingsoftware.com**, and press Enter.
2. In the upper-right of the Red Wing Software home page, click **Log in**.
3. Enter your **Email Address** and your **Password**.
4. Click **Log In**.

To reset a forgotten password:

1. In your web browser, enter **www.redwingsoftware.com**, and press Enter.
2. In the upper-right of the Red Wing Software home page, click **Log in**.
3. Click the **Forgot your password?** link.
4. Enter your **Email** address.
5. Click **Email Link**.
6. An email will be sent to your current email address from Red Wing Software. Open the Reset Password email and click the **here** link.

7. Enter your **Email** address, your new **Password**, and then enter your new password again in the **Confirm password** box, and then click **Reset**.
8. Continue with the To log in to the Red Wing Software website section above.

To log out of the Red Wing Software website:

1. On the upper-right side of the Red Wing Software home page, click the **drop-down arrow** next to the **My Account** button.
2. In the displayed menu, select **Log out**.

Q: I'm trying to eFile my W-2s and I can't remember my Aatrix eFile username and/or password, how can I get it?

A: We recommend you contact Aatrix by calling 800-426-0854 or by clicking on the Forgot Login button.

Q: I eFiled my W-2 forms, and I have questions regarding my filing, how do I contact Aatrix ?

A: For specific questions regarding your filing, you can contact Aatrix by email at helpme@aatrix.com, on their website at https://efile.aatrix.com/ by clicking **Login** and entering your Aatrix username and password, or on their website at https://efile.aatrix.com/ by clicking the **Search our FAQs** button.

Q: If I use the Complete eFiling Service for my W-2 forms, are there any applicable discounts for using the complete eFile service for my ACA 1095 forms?

A: Yes, the Aatrix ACA Complete eFile Service can print and mail employee copies and eFile the required reports to the IRS at a discounted rate. To qualify for discounted 1095-C forms, follow the steps below:

1. eFile your W-2s using the Aatrix W-2 Complete eFile Service.
2. Select a mail date for your employee W-2s that provides you with enough time to complete your ACA filing (the mail date may be adjusted at efile.aatrix.com up to one day prior of the set date).
3. eFile your ACA forms utilizing the Aatrix Complete eFiling Service and save 50%.

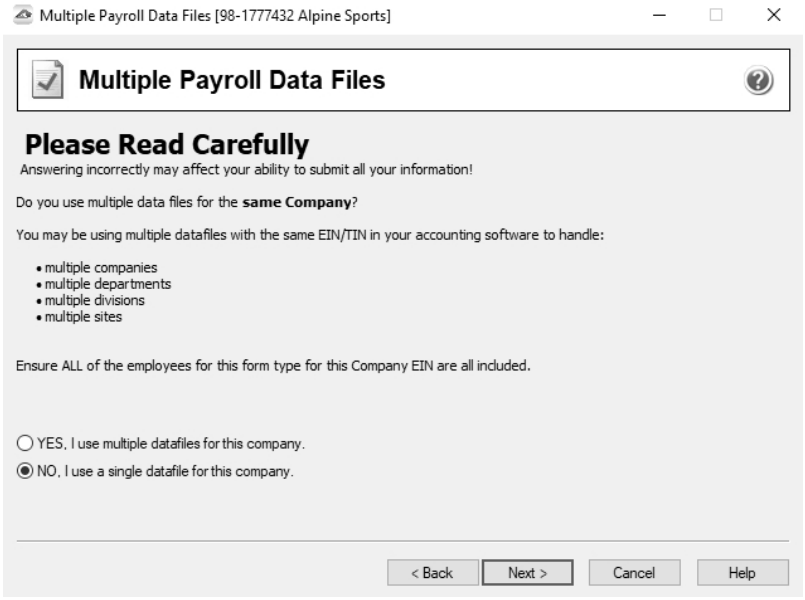
» There may be additional discounts available when you select the UNLIMITED eFile Package which includes Federal & State Unemployment, Wage Withholding Report, New Hire Reports/Payments, and ANY Associated Payment, it does not include additional discounted W-2s, 1099s, or 1095-C forms. Package pricing is based on the number of employees in your company. Please click here to view the eFile pricing.

Q: I have multiple payroll databases for one EIN; how do I merge the databases so I get one set of W-2s?

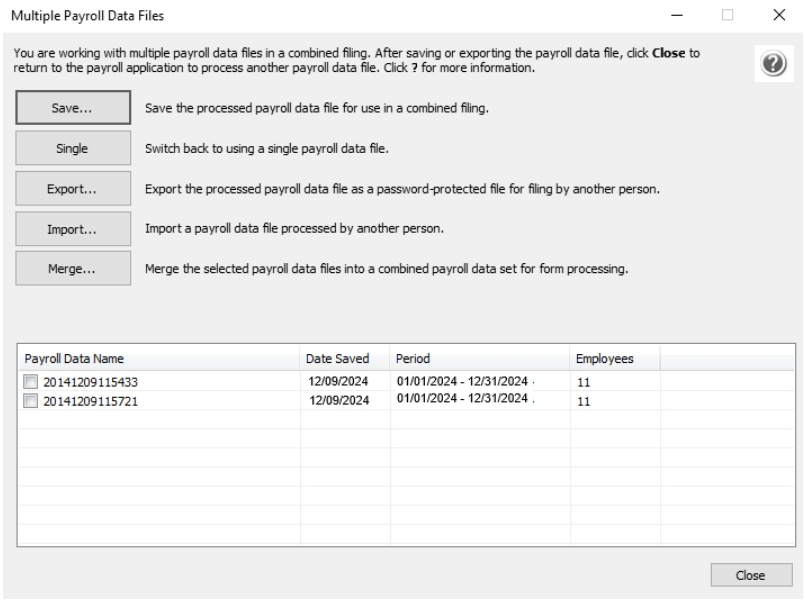
A: Follow the steps below to merge multiple databases into one set of W-2s:

1. Start the W-2 process and continue until the Multiple Payroll Data Files screen displays. On the **Multiple Payroll Data Files** screen, select **Yes**, I use multiple payroll datafiles for the EIN and click **Next** to continue.

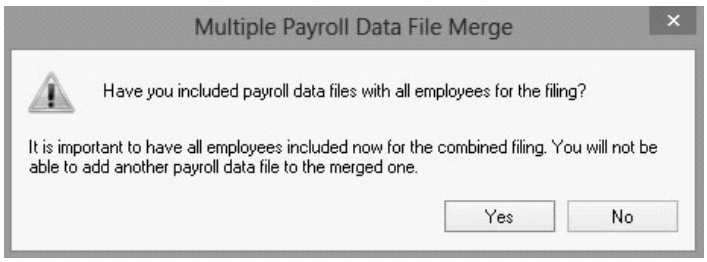
Note: Aatrix cannot accept multiple filings from the same EIN. If you have multiple payroll databases with the same EIN number, they must be merged prior to submission.



2. The next **Multiple Payroll Data Files** screen displays, click **Save,** enter a name for the payroll data file, and click **Close**.



3. Open the other database(s) and repeat steps 1-2 above for all databases you want to merge. When all data files are saved, continue to step 4.
4. At the bottom of the **Multiple Payroll Data Files** screen, select each database to be merged and then click **Merge.**
5. On the **Multiple Payroll Data File Merge** screen, click **Yes**.



6. On the **Multiple Payroll Data Files** screen, click **Continue** to continue processing W-2s.