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ANGELE DAVIS
COMMISSIONER OF ADMINISTRATION

State of Louisiana
Division of Administration
Office of State Uniform Payroll

January 16, 2009

OFFICE OF STATE UNIFORM PAYROLL MEMORANDUM #2009-33

TO: All ISIS HR Paid Agencies

FROM: Jena W. Cary
Director

SUBJECT: Release of 2008 Forms W-2

2008 Forms W-2 were mailed January 16, 2009 to employees using the mailing addresses that were current at the time the W-2 file was created (January 8, 2009).

Note: If an employee's address was changed in ISIS HR to have a check sent to the agency for a special circumstance (ex. deceased employee, termed employee), and the address was not corrected prior to January 8, 2009, the Form W-2 will be mailed to the agency. Agencies are responsible for distributing these W-2's to the employees **and** making the address correction in ISIS HR.

Address Changes

Forwarding service was requested when the forms were mailed. If an employee's address has changed and the employee has an active forwarding service, the Form W-2 will be sent to the forwarding address. If an agency has been notified of other address changes, these must be updated in the ISIS HR system, or the employee can update using LEO. **Please do not have employees call OSUP for address changes.** When Forms W-2 are returned to this office due to an incorrect address, OSUP personnel will first check ISIS HR for the correct address. If the address in the system is the same as on the Form W-2, agency personnel will be contacted to obtain the correct address. These forms will be processed and sent to the correct address as they are received and corrected.

Duplicate W-2's

Beginning February 2, 2009, duplicate 2008 Forms W-2 will be available to employees through Louisiana State Employees Online (LEO). There will be on-line help available for reprinting these forms. Please advise employees to contact your HR/EA office for all questions concerning retrieving duplicate Forms W-2 in LEO. Look for more information about this new functionality coming soon. W-2 reprints will not be available through LEO for employees with pending or issued W-2c's. Contact OSUP about issuing these duplicates.

If a duplicate cannot be printed from LEO, OSUP will accept requests for duplicate 2008 Forms W-2 beginning February 16, 2009. This will allow time for forms with incorrect addresses to be forwarded by the United States Postal Service to the forwarding address and allow time for any forms returned to OSUP to be forwarded to the correct address. For this reason, agencies should not accept requests for duplicate 2008 Forms W-2 until February 16, 2009. Once printed, the reissued forms will be mailed directly to the employee. Please use the OSUP Request for Duplicate form ([OSUP/F037](#)) when requesting duplicates. Note: Request for Duplicate forms must be completed by both the Employee and the Employee Administrator before submission to OSUP. The request can be faxed to this office at (225) 342-1650. Initially, duplicate forms will be printed on a weekly basis; as the requests increase, OSUP will analyze and adjust the reprint schedule as necessary. Agencies should keep a copy of the Request for Duplicate form in the employee's personnel file. Agencies will not be notified when duplicates are mailed.

Active employees can use either method stated above to obtain duplicate copies of their 2008 W-2's. However, separated employees who no longer have access to LEO will have to contact their HR/EA office to obtain duplicate copies by completing the OSUP Request for Duplicate form and forwarding the completed form to our office.

Incorrect W-2's (W-2c's)

If an agency is notified by an employee that his/her Form W-2 is incorrect, the Employee Administrator (EA) must first utilize ISIS HR to research the problem. Some reports to be utilized are Remuneration Statement (ZP106), Payroll Reconciliation Report (ZP145), Employee Wage Type Results Report (ZP64), Employee YTD Wage Type Results Report (ZF73), and Time Entry Audit Report (ZT02). After researching, if it is determined that the W-2 is incorrect, the Employee Administrator must then contact OSUP. If an agency is already aware of any situations and/or problems related to 2008 Forms W-2, contact OSUP for assistance. **Do not instruct employees to call OSUP directly.**

The following calculations will be helpful to agencies to answer employee questions:

Federal/State Taxable Wages (Box 1 / Box 16):

	Gross Wages (obtain using above reports in ISIS HR)
plus	Non Cash Fringe Benefits (obtain using Payroll Reconciliation Report - ZP145 with variant "OSUP/PPM73")
minus	Cafeteria (Box 14)
minus	Deferred Retirement (Box 14)
minus	457 Deferred Compensation Contributions (Box 12a Code G)
minus	403(b) Tax Shelter Annuity Contributions (Box 12a Code E)

Social Security Wages/Medicare Wages (Box 3 / Box 5):

	Gross Wages (obtain using above reports in ISIS HR)
plus	Non Cash Fringe Benefits (obtain using Payroll Reconciliation Report - ZP145 with variant "OSUP/PPM73")
minus	Cafeteria (Box 14)

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Employees should be advised that Form W-2 is the official form to be used to complete IRS Form 1040. Employees should not use the YTD figures on their earning statement or any reports in ISIS HR to complete the IRS Form 1040.

Please advise employees to contact your HR/EA office for all questions on Forms W-2, not OSUP. Questions on ISIS HR reports should be directed to the ISIS HR Help Desk using the ISIS Help Desk Ticket located at the following web address: http://www.doa.louisiana.gov/ois/service/user_support/helpdesk/helpdesk.htm. Any questions pertaining to 2008 Form W-2 processing should be directed to a member of the OSUP Wage and Tax Administration Unit at _DOA-OSUP-WTA@la.gov or (225):

Tracy Smith	219-0191	Wendy Eggert	342-0714
Gary Bennett	342-1652	Cindy McClure	342-5346
Tiko Ary	342-1651		

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