January 31, 2002

OFFICE OF STATE UNIFORM PAYROLL MEMORANDUM #2002-41

TO: All ISIS HR Paid Agencies

FROM: Jena W. Cary
Director

SUBJECT: Release of 2001 Forms W-2

This is to advise agencies that 2001 Forms W-2 were mailed January 29, 2002. All forms were mailed to the employee using the address that was current at the time the W-2 file was created (January 17, 2002).

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 17, 2002, these Forms W-2 will be mailed to the agency. Agencies are responsible for distributing these W-2’s to the employees and for making the address correction in ISIS HR.

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, this must be updated in the ISIS HR system. Please do not have employees call OSUP for address changes. When Forms W-2 are returned to this office because of incorrect addresses, 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.

OSUP will not accept requests for duplicate Forms W-2 until February 19, 2002. This will allow time for forms with incorrect addresses to be forwarded by the United States Postal Service to the forwarding address and to allow time for any forms returned to OSUP to be forwarded to the correct address. Also, agencies should not accept requests for duplicate Forms W-2 until February 19, 2002. Once printed, the reissued forms will be mailed directly to the employee. Please use the attached OSUP Request for Duplicate form (OSUP/F37) when requesting duplicates. This request can be faxed to the OSUP Wage and Tax Administration (WTA) Unit at (225) 342-1653. Initially, duplicate forms will be printed on a weekly basis; as the requests increase, the WTA unit 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.

If an agency is notified by an employee that his/her Form W-2 is incorrect, Employee Administration (EA) must first utilize ISIS HR to research the problem. Some reports to be utilized are Remuneration Statement (ZP106), Employee Wage Type Results Report (ZP64), and Time Entry Detail Report (ZT02). After researching, if it is determined that the W-2 is
indeed incorrect, Employee Administration must then contact OSUP. If an agency is already
aware of any situations and/or problems related to 2001 Forms W-2, contact OSUP for
assistance. **Do not instruct employees to call this office.**

Note: The following two situations are being reported differently in ISIS HR than the way
they were reported in UPS:

1. No suffixes or titles were printed on the W-2’s (ex. Jr, Sr, II, III, RN, MD). This
follows the guidelines of the Social Security Administration
2. All retirement (deferred and non-deferred) is being reported in Box 14. Only if an
employee’s retirement was deferred would it be used in the calculation of Box 1
and Box 16 (Federal Taxable Wages and State Taxable Wages).

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

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

\[
\text{Gross Wages (obtain using reports in ISIS HR)} + \text{Non Cash Fringe Benefits (obtain using reports in ISIS HR)} - \text{Cafeteria (Box 14)} - \text{Deferred Retirement (Box 14)} - \text{457 Deferred Compensation Contributions (Box 12g)} - \text{403(b) Tax Shelter Annuity Contributions (Box 12e)} - \text{501c Tax Shelter annuity Contributions (Box 12h)}
\]

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

\[
\text{Gross Wages (obtain using reports in ISIS HR)} + \text{Non Cash Fringe Benefits (obtain using reports in ISIS HR)} - \text{Cafeteria (Box 14)}
\]

OSUP is currently working with the Office of Information Services to develop procedures for
processing Forms W-2c. When more information is available, agencies will be notified. In the
interim, contact OSUP if there is a question about whether or not a W-2c should be processed.

Questions on ISIS HR reports should be directed to the ISIS HR Help Desk at (225) 342-2677.
Any questions pertaining to 2001 Form W-2 processing should be directed to a member of the
OSUP Wage and Tax Administration Unit at (225):

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rachel Bryant</td>
<td>342-1651</td>
</tr>
<tr>
<td>Rhonda Desselle</td>
<td>342-8928</td>
</tr>
<tr>
<td>Lawanna Green</td>
<td>342-0714</td>
</tr>
<tr>
<td>Dorothy Piazza</td>
<td>342-1652</td>
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</tbody>
</table>

**Attachment: OSUP/F37**
OFFICE OF STATE UNIFORM PAYROLL
REQUEST FOR DUPLICATE

To be Completed by Employee

Date ______/_____/______
Indicate year
______ W-2 ______ W-2c ______ 1099

Reason for request:
______ Lost ______ Never Received
______ Other (explain) ______________________________________

Name ____________________________ Social Security No __________
(_Last) (First) (M I)

Current Mailing Address __________________________________________

Requested by __________________________
(Signature of Employee)

To be Completed by Employee Administration

Personnel No. ________________ Personnel Area No. ________________

Agency Contact __________________________ Telephone __________
(Name)

Has mailing address been updated in ISIS HR (if applicable)? ________ Date _____/_____/_____

Remarks/special instructions __________________________________________

________________________________________

To be Completed by OSUP

Disposition of duplicate

Received ______/_____/______ by __________________________

Printed ______/_____/______ by __________________________

Mailed ______/_____/______ by __________________________