



## 2017.1 School District Number W-2 Update

If you use UAN payroll to produce your employee W-2s, your software may require an update to print W-2s for 2016. Please read this memo carefully. The Ohio Department of Taxation (ODT) has recently requested the following:

Starting with the 2016 tax year (W-2s issued in January 2017), please list the four digit school district number along with the school district name in box 20 when reporting school district withholding. Because of the limited space in box 20, ODT will accept the 4-digit school district number in combination with an abbreviation of the school district name or the letters "SD" for "school district".

[www.tax.ohio.gov/Portals/0/OhioTaxAlert/ArchivedAlerts/4sдинumberonw2.pdf](http://www.tax.ohio.gov/Portals/0/OhioTaxAlert/ArchivedAlerts/4sдинumberonw2.pdf)

UAN has always included a field for entering the district number for school tax withholdings in: Payroll → Maintenance → Withholdings (process group G00). Entered school district numbers have always printed on W-2s in a manner compliant with this new ODT request. For example, the W-2 for an employee who paid school taxes to school district 9999 will list "S.D. 9999" in box 20 as long as that withholding is established as district 9999 in the software.

Prior to 2017.1 however, the district number was not a required field on the withholding setup screen and could be left blank. A district number would not print on the W-2s for any school withholdings that did not have the number entered. Now that the district numbers are required by ODT, all school withholdings in UAN should have their number entered BEFORE closing 2016.

If 2016 **has not** been closed, follow these instructions while working in software year 2016 to ensure ODT W-2 compliance: In Payroll → Maintenance → Withholdings, set the Status filter to "All" and verify that the W-2 Abbreviation column of every school tax contains "S.D. ####" where #### is the school's district number. If any school tax withholding is missing its district

number, edit it to enter the number BEFORE closing 2016. If no school taxes are listed in the withholdings grid, disregard the rest of this memo as no further action is required - However, if the 2017 Federal Tax Table Update has not been previously installed, refer to this document: [uanlink.ohioauditor.gov/communications/pdf/2017 US Tax Table Update and Cyber Security Training.pdf](http://uanlink.ohioauditor.gov/communications/pdf/2017%20US%20Tax%20Table%20Update%20and%20Cyber%20Security%20Training.pdf)

If any generic school withholdings are listed (meaning one school tax withholding in the grid is attached to multiple employees but is being used for more than just one district), see the following document for instructions to separate those school districts and correct the issue: [uanlink.ohioauditor.gov/training/yearend/Version 2017 1 FAQ Highlights.pdf#page=2](http://uanlink.ohioauditor.gov/training/yearend/Version%202017%201%20FAQ%20Highlights.pdf#page=2)

If 2016 is already closed and any school tax withholding is missing its district number, an update must be installed to allow the UAN software to retroactively apply those numbers to 2016 W-2s. Follow the instructions below to install the update, but **ONLY** if 2016 has already been closed:

In Payroll → Maintenance → Withholdings, set the Status filter to "All" and verify that the W-2 Abbreviation column of every school tax contains "S.D. ####" where #### is the school's district number. If any school tax withholding is missing its district number, edit it to enter the number. If no school taxes are listed in the withholdings grid, disregard the rest of this memo as no further action is required - However, if the 2017 Federal Tax Table Update has not been previously installed, refer to this document:

[uanlink.ohioauditor.gov/communications/pdf/2017 US Tax Table Update and Cyber Security Training.pdf](http://uanlink.ohioauditor.gov/communications/pdf/2017%20US%20Tax%20Table%20Update%20and%20Cyber%20Security%20Training.pdf)

After all school tax withholdings have their district numbers entered, close UAN and log into the UAN Link to install the 2017.1 School District Number W-2 Update with the following instructions.

**The update is only for clients who closed 2016 with missing school district numbers.**

**Note:** In multi-user environments, only one computer must perform the update.

**Below are two sets of instructions for downloading and installing the update. The first set is for clients who have access to the internet through their UAN computer. The second set is for clients who do not have internet access through their UAN computer but do have access through another computer (at home or work).**

## Instructions for clients who have access to the internet through their UAN computer:

### Perform all steps from the UAN computer:

- 1) Perform a UAN Backup in: General > Maintenance > Backups > UAN Backup. Label the disc and/or name the backup file: '**Before 2017.1 School District Number W-2 Update**'.  
**Note:** In multi-user environments, only one computer must perform the UAN Backup.
- 2) Using **Internet Explorer**, click *Profile Login* on the top right of the UANLink website ([uanlink.ohioauditor.gov](http://uanlink.ohioauditor.gov)). Your username is your 4-digit **UAN Entity ID**, and your password is your 5-character Auditor of State invoice **customer number** (formatted ##X##).
- 3) Click *Software Patches*.
- 4) Click *2017.1 School District Number W-2 Update*.
- 5) A *Windows* message will appear asking, "Do you want to run or save 2017.1 School District Number W-2 Update.exe from secure.ohioauditor.gov?" Click **[Run]**.
- 6) If a "The publisher could not be verified" message appears, Click **[Run]**.
- 7) If a message appears that states, "2017.1 School District Number W-2 Update.exe is not commonly downloaded and could harm your computer." Click **[Actions]**. A *SmartScreen Filter* window will appear. Select **[More Options]**. Then click the option **[Run Anyway]**.
- 8) If a *Symantec Endpoint Protection* window appears, click the option **[Allow this file]**. A second *Symantec* window will appear, click **[OK]**.
- 9) A *Uniform Accounting Network* message will appear asking, "Install the 2017.1 School District Number W-2 Update?" Click **[Yes]**. The installation process should take less than 1 minute.
- 10) A *Uniform Accounting Network* message will appear stating, "This update was installed successfully". Click **[OK]**. (If a different message appears, follow its instructions to continue)

**Please note:** This update does *not* change the UAN software version number. If you wish to double-check that the update is installed, view the Transaction Log Report for today's date in the software in General > Reports & Statements. You will find a transaction labeled:

*Software Update Complete - Name: 2017.1 School District Number W-2 Update.*

If the 2017 Federal Tax Table Update has not been previously installed, refer to this document: [uanlink.ohioauditor.gov/communications/pdf/2017 US Tax Table Update and Cyber Security Training.pdf](http://uanlink.ohioauditor.gov/communications/pdf/2017%20US%20Tax%20Table%20Update%20and%20Cyber%20Security%20Training.pdf)

**Instructions for clients who do not have internet access through their UAN computer but do have access through another computer (at home or work):**

**Perform steps 1 through 7 from the computer with internet access:**

- 1) Using **Internet Explorer**, click *Profile Login* on the top right of the UANLink website ([uanlink.ohioauditor.gov](http://uanlink.ohioauditor.gov)). Your username is your 4-digit **UAN Entity ID**, and your password is your 5-character Auditor of State invoice **customer number** (formatted ##X##).
- 2) Click *Software Patches*.
- 3) Click *2017.1 School District Number W-2 Update*.
- 4) A *Windows* message will appear asking, "Do you want to run or save 2017.1 School District Number W-2 Update.exe from secure.ohioauditor.gov?" Click on the down arrow beside the **[Save]** button to select **[Save as]**.
- 5) A *Save As* window will open. Select the location of the disc or flash drive where the update file will be saved and click **[Save]**.
- 6) If a "The publisher could not be verified" message appears, click the **[X]**.
- 7) A message will be displayed stating that the download has completed. Click the red **[X]**.

**Perform steps 8 through 13 from the UAN computer:**

- 8) Perform a UAN Backup in: General > Maintenance > Backups > UAN Backup. Label the disc and/or name the backup file: '**Before 2017.1 School District Number W-2 Update**'.  
**Note:** In multi-user environments, only one computer must perform the UAN Backup.
- 9) Insert the disc or flash drive that contains the downloaded '*2017.1 School District Number W-2 Update*' file.
- 10) Using *Windows Explorer*, locate the downloaded '*2017.1 School District Number W-2 Update*' file and double click on it.
- 11) If an Open File – Security Warning appears, Click **[Run]**.
- 12) A *Uniform Accounting Network* message will appear asking, "*Install the 2017.1 School District Number W-2 Update?*" Click **[Yes]**. The installation process should take less than 1 minute.
- 13) A *Uniform Accounting Network* message will appear stating, "*This update was installed successfully*". Click **[OK]**. (If a different message appears, follow its instructions to continue)

**Please note:** This update does *not* change the UAN software version number. If you wish to double-check that the update is installed, view the Transaction Log Report for today's date in the software in General > Reports & Statements. You will find a transaction labeled: *Software Update Complete - Name: 2017.1 School District Number W-2 Update.*

If the 2017 Federal Tax Table Update has not been previously installed, refer to this document: [uanlink.ohioauditor.gov/communications/pdf/2017 US Tax Table Update and Cyber Security Training.pdf](http://uanlink.ohioauditor.gov/communications/pdf/2017%20US%20Tax%20Table%20Update%20and%20Cyber%20Security%20Training.pdf)

Respectfully,

UAN Support