OHIO AUDITOR OF STATE
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UAN
UNIFORM
ACCOUNTING
NETWORK

UAN User Note
January 28, 2025

This UAN User Note contains the following sections:
- 2025 UAN Tax Table Update
- Ohio Submission of the Electronic Form 1099
- New Computer and Printer Delivery Date Selection
- IRS Form 1094/1095
- W-2 Electronic File Updates for RITA and CCA

2025 US TAX TABLE UPDATE

The federal government has released the 2025 tax table. A downloadable **2025 US Tax Table Update** is required for **ALL** UAN users is available on the UANLink. You must download the update regardless of whether or not your application is in temporary mode, regardless of whether or not you have already closed 2024, and regardless of whether you use the Payroll application. This download contains the federal 2025 tax table as well as functionality enhancements to the UAN application.

2025 US TAX TABLE UPDATE STEPS

Below are the steps to install the 2025 US Tax Table Update. The steps are written with the assumption that your system has all of the latest Windows Updates installed. The steps may vary if the latest Windows Updates have not been installed. Also, please note that the steps may vary depending on your internet browser.

Step 1: Perform a UAN Backup in: General → Maintenance → Backups → UAN Backup. Label the disc and/or name the backup file: 'Before 2025 US Tax Table Update'.
Please Note*:* If you have a multi-user network environment setup, only one computer on the network must complete the UAN Backup. However, Steps 2 through 10 must be completed on all UAN computers.

Step 2: Close the UAN application.

Step 3: Using your internet browser, click Profile Login at the top-right corner of the UAN home page (https://uanlink.ohioauditor.gov). The username is your 4-digit UAN Entity ID, and the password is your 5-character Auditor of State invoice customer number.

Step 4: Click Software Patches.

Step 5: Click 2025 US Tax Table Update.

Step 6: The 2025 US Tax Table Update file should automatically download, and the file will appear in the top right corner of your screen. Click on the file name to run the install.

- o If the update did not download and you get a warning message in the top right corner of your screen stating that it was blocked, click on [Keep].

- o You may then receive a Microsoft Defender SmartScreen warning message stating, "This app might harm your device." Verify the Publisher is "STATE AUDITOR, OHIO" and click on the option [Show more]. Then click on [Keep anyway].

- o Click on the file name link in the [All files] to run the install.

Step 7: A "Windows protected your PC" message may appear. Click [More info]. Verify the Publisher is "STATE AUDITOR, OHIO" and then click [Run anyway].

Step 8: A User Account Control window may appear "Do you want this app to make changes to your device?" Enter the password 'FiscalOfficer' (no quotes, capital F and O, and no space). Click [Yes].

Step 9: A Uniform Accounting Network message will appear "Install the 2025 US Tax Table Update?" Click [Yes]. The installation should take less than 1 minute.

Step 10: A Uniform Accounting Network message will appear "This update was installed successfully." Click [OK].

__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 General ➔ Reports & Statements. You will find a transaction labeled Software Update Complete – Name: 2025 US Tax Table Update.

Important: Only wages created after installing this update dated on or after January 1, 2025 will reflect the new tax table withholding rates. Any wages already in batch (saved but not posted) prior to the tax table update, will ***not*** be changed to reflect the new tax rates. Therefore, any existing batch wages should be deleted and then added again after this update.

OHIO SUBMISSION OF THE ELECTRONIC FORM 1099

The Ohio Department of Taxation added a late requirement that requires an electronic submission for the Form 1099. UAN has developed a utility that will convert your Federal 1099 NEC or MISC to the Ohio format. The Tax Table Update will add an icon to your desktop for the utility called **Ohio 1099 Utility**.

Step 1: Double click on the **Ohio 1099 Utility** icon and the following window will be shown:
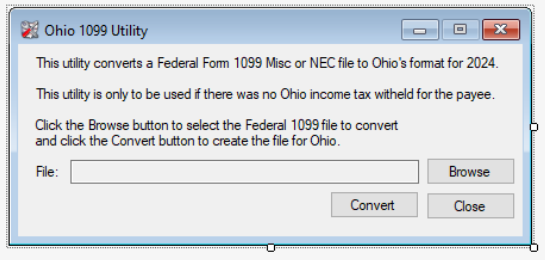
Step 2: Click Browse and locate your Federal 1099 NEC or 1099 MISC.

Step 3: Click on Convert. The utility will convert the file to the Ohio format and will save the new file in the C:_UAN_Efiles folder. The file will be named either "1099 Misc Ohio Upload 2024" or "1099 NEC Ohio Upload 2024".

NEW COMPUTER AND PRINTER DELIVERY DATE SELECTION

This February and March, UAN will replace all of the current HP computers and printers with new HP hardware based on the selection your entity made several weeks ago. UAN has joined with Xtek Partners for coordinating the shipping of the computers. If a situation arises during the process, you may be contacted by an Xtek representative or from an auditor@xtekpartners.com e-mail address. Your computer will be delivered to you by United Parcel Service (UPS).

Please Note: You will not be able to upgrade the UAN application to version 2025.2 on your current HP computer. Version 2025.2 will contain the updated 941 Federal Tax Form and other enhancements.

Starting on January 28, 2025 you will be able to select the delivery date (arrival date) of your shipment. Deliveries will be made between February 10, 2025 and March 7, 2025, Monday through Saturday, deliveries cannot be scheduled for Sundays.

Please Note: Deliveries will be limited to 175 per day, once 175 deliveries for a day are reached the day will no longer be available to be selected.

To select the delivery date of your computer, please access the UAN Hardware Refresh website: auditor.xtekpartners.com. The UAN Equipment Refresh 2025 web site will be available beginning January 28, 2025 through March 3, 2025. If you do not select a delivery date during this period, your entity will be responsible for picking up the computer from UAN's office in downtown Columbus.

Step 1: Enter your UANLink Profile Login credentials and click the 'Submit' button.
- o UAN ID: This is your UAN four digit Id number.
- o UAN Profile Login Password: This is your five character Auditor of State Customer Number (two numbers, one letter, and two numbers) and can be found on your Auditor of State invoice. *Please Note:* The UAN Profile Login password's one letter needs to be input as a capital letter.

Step 2: Verify / Change the shipping information. The defaulted detail is the shipping address that is on file with UAN. The e-mail address was provided by your entity when you made your computer

type selection. This information will be used for shipping of the computer only, it may not necessarily be the same address used for software/application updates. If you would like to change the shipping address, email address and/or phone number for **THIS SHIPMENT ONLY**, edit the necessary field(s) in the Shipping Information Change section in the lower portion of the page.

Please Note: The email address listed is where the UPS tracking information will be sent.

Step 3: Select a delivery date by left clicking on the default date within the 'Requested Delivery Date' field. You will receive a popup calendar for the month of February. You may select any date ranging from February 10, 2025 to March 7, 2025 excluding Sundays.

Step 4: Select the Submit button at the bottom of the page. If successful, you will receive a 'Your information has been saved. Thank you!' message.

Step 5: You will also receive a return email verifying your shipment date and any updated address changes. The email will be from auditor@xtekpartners.com. **If you do not receive this email, please check your spam or junk folder**. This email will confirm your shipping address and delivery date.

Delivery:
Prior to your delivery date you will receive two e-mails from UPS that will contain two unique UPS tracking number.

You will receive two boxes. One box will contain the computer hardware and the second will contain the printer and secondary tray. An individual 18+ years old will need to sign for the shipment from UPS. If an individual 18+ years old is not available to sign for the delivery, UPS will apply a missed shipment form to the door and the shipment will be re attempted. Please read this form carefully to understand your reshipment options including the option of picking up the computer from a nearby UPS location.

Changes to the Delivery Information:
You will be able to change your selected delivery date, shipping address, and contact information throughout this process. However, no changes will be able to be made three business days (Monday – Friday) before the selected delivery date.

Next Steps:
The box delivered by UPS that contains your new HP computer will contain a manila envelope. The envelope contains instructions to access the setup and transfer instructions. The instructions which will be found on the UANlink will guide you in setting up the new computer as well as transferring your UAN data/records from the old computer to the new HP computer. Also, within the envelope is a USB flash drive. The USB drive will be used for the data transfer process and to reimage the old HP computer to factory state. After completing the data transfer and reimaging the old HP computer, the USB drive is donated to your entity and it can be repurposed.

IRS FORM 1094/1095

If your entity is required to submit a Federal 1094/1095 to the IRS please contact UAN Support. There is an additional complication this year which will require you receive assistance from one of our developers.

Only a small number of UAN clients in past years have been required to file the 1094/1095 forms, but it is very important that you determine any requirement for your particular entity and comply if necessary. If you are unsure, start by reviewing pages 69-70 of the Year End Procedures.

W-2 ELECTRONIC FILE UPDATES FOR RITA AND CCA

Disregard this section if you do not report and pay withholdings to the Regional Income Tax Agency (RITA) or The Central Collections Agency (CCA) or if you have already successfully submitted W-2 / W-3 electronic files to them. Recently, both agencies have provided additional clarification to their requirements, some of which was not available at the time of the UAN 2025.1 version update. Understandably, this has resulted in many frequently asked questions from UAN customers. Please review applicable Q&A below if you run into any W-2 e-file creation problems.

RITA - Common W-2 E-file Support Questions

1. How do I access the setup information for RITA electronic filing of W-2 forms?
   Answer: UAN MENU: **Payroll - Maintenance - Withholdings**. Select the local tax withheld and paid to RITA and click Edit. Click the **'EFW2 Local Taxes' tab**. The first step is to select RITA in the Administrator field as seen in the image below. Then the fields required by UAN for RITA will be highlighted:

2. The terms in the EFW2 Local Taxes Tab do not correspond exactly the terms that RITA uses in their instructions?
   Answer: In some cases, UAN had to use generic field descriptions so that the form could be used for both RITA and CCA. Please enter the RITA information that most closely corresponds to the UAN descriptions.

3. Is the 'Place Code' required in the EFW2 Local Taxes tab for each locality reported to the agency?
   Answer: RITA does not require the Place Code.

4. Is the 'Place Name' required?
   Answer: Please enter the name of the taxing entity. RITA does not require the Place Name, but currently it is technically required to complete the form for UAN.

5. UAN requires a 4-digit 'Tax Code' number, but the RITA number for a locality is only 3-digits?
   Answer: Include a leading **zero** in front of the RITA tax code if it is only 3-digits.

6. Why do I need to fill out the EFW2 tab for School Taxes when we do not withhold school taxes for payment to RITA?

> **Answer:** You are **only required** to fill out the **Place Name** field. Please enter the name of the taxing entity in the Place Name field. Disregard all other EFW2 Local Taxes tab fields for school district taxes. RITA does not require this, but **currently** it is technically required to complete the form for UAN in certain circumstances. **Recommended**: fill out the Place Name for all school districts in your withholding list to ensure that you don't miss any that might be technically required by UAN.

7. I closed 2024 but have not completed all the requirements above. Can I still create the E-File?

> **Answer:** Yes, but an extra step is required. First, complete all the steps above. Then go to **Payroll - Reports & Statements - External Forms - W-2 & W-3 Forms**. After you have added and (if necessary) made any unrelated edits to your W-2s, select only the employees from your W-2 & W-3 Forms list that have RITA locality withholdings and click Edit. In the Edit W-2 Form, select the **'Local & Box 14'** tab. Select the 'Print Local: Override' option as seen in the image below (unless you have already done so for some unrelated edit).
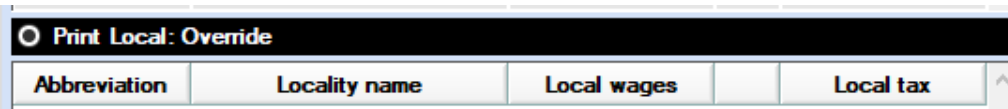

> Click Save and repeat that step for each applicable employee with RITA locality withholdings.

CCA - Common W-2 E-file Support Questions

1. How do I access the setup information for CCA electronic filing of W-2 forms?

> **Answer: UAN MENU: Payroll - Maintenance - Withholdings**. Select the local tax withheld and paid to CCA and click Edit. Click the **'EFW2 Local Taxes' tab**. The first step is to select CCA in the Administrator field as seen in the image below. Then the fields required by UAN for CCA will be highlighted:
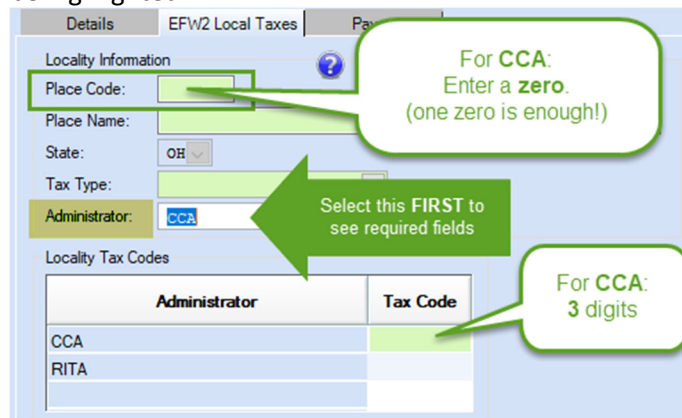
2. The terms in the EFW2 Local Taxes Tab do not correspond exactly the terms that CCA uses in their instructions?

> **Answer:** In some cases, UAN had to use generic field descriptions so that the form could be used for both RITA and CCA. Please enter the CCA information that most closely corresponds to the UAN descriptions.

3. Is the 'Place Code' required by CCA?

Answer: Please enter '**0**' in the Place Code. CCA does not require the Place Code, but **currently** it is technically required to complete the form for UAN.

4. Is the 'Place Name' required by CCA?
    Answer: Enter the name of the taxing entity. CCA requires this information.

5. Why do I need to fill out the EFW2 tab for School Taxes when we do not withhold school taxes for payment to CCA?
    Answer: You are only required to fill out the **Place Name** field. Please enter the name of the taxing entity in the Place Name field. Disregard all other EFW2 Local Taxes tab fields for school district taxes. CCA may no longer requires this, but **currently** it is technically required to complete the form for UAN in certain circumstances. **Recommended**: fill out the Place Name for all school districts in your withholding list to ensure that you don't miss any that might be technically required by UAN.

6. I closed 2024 but have not completed all the requirements above. Can still create the E-File?
    Answer: Yes, but an extra step is required. First, complete all the steps above. Then go to **Payroll - Reports & Statements - External Forms - W-2 & W-3 Forms**. After you have added and (if necessary) made any unrelated edits to your W-2s, select only the employees from your W-2 & W-3 Forms list that have CCA locality withholdings and click Edit. In the Edit W-2 Form, select the **'Local & Box 14' tab**. Select the 'Print Local: Override' option as seen in the image below (unless you have already done so for some unrelated edit).

O Print Local: Override				
Abbreviation	**Locality name**	**Local wages**		**Local tax**
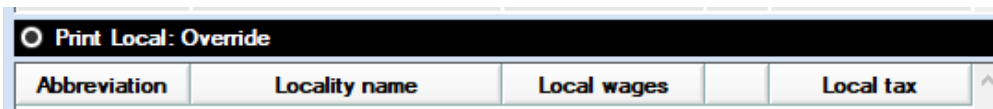
Click Save and repeat that step for each applicable employee with CCA locality withholdings.