

Co Code & Co Name _____ Today's Date _____
 Does this company share an FEIN with another company in our system? Yes No
 If "YES," please list the CO ID(s): _____

CODE ¹	DESCRIPTION	Code Type		If EARNING		If DEDUCTION	
		Earning	Deduction	Taxable	Non Taxable	Pretax	Post tax
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

¹Please note that code names and descriptors may be subject to change per SDP naming structure.
Code names should be no more than 6-8 characters in length, no symbols.

Memo Earning(s) Code Details (complete only if requested code is a memo earning)	YES	NO	N/A
Does code(s) affect net pay? (If "YES," provide details below under "Comments.")	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Should memo amount/hours be printed on check? If "YES," should memo be printed in Earnings or Benefits area? _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	YES	NO	N/A
If the code is an earning, should it be 401(k) or 403(b) eligible?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workers' Compensation Eligible?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Should the code count as 'hours worked' for accruals? If "YES," provide details below under "Comments."	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If the code is an earning, should it reduce an EE's autopay?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Should earning or deduction appear in Form W-2 box? If "YES," what box? _____ (see next page for W2 box definitions)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is there a SDP created G/L account for Client? If "YES," what code should be associated with the G/L? _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Should the code be included in any special calculation or scripting? (If "YES," provide details below under "Comments.")	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Attach any additional instructions regarding code setup to this form (e.g., email).

Comments (e.g., taxability needs to be specified by client, any special requests, specific details)

Client acknowledges it is responsible for ensuring the correct tax treatment for its specific circumstances as SDP does not provide legal or tax advice.

Signature / Date _____

Print Name and Title _____

Commonly used W2 boxes and definitions

Box 10	This amount reports dependent care benefits provided under a dependent care assistance program. Any amount over \$5,000 is also included in Box 1. Complete Form 2441, Child and Dependent Care Expenses, to compute any taxable and nontaxable amounts
Box 11	Shows the total amount distributed to you from your employer's non-qualified (taxable) deferred compensation plan.
Box 12	<p>A — Uncollected Social Security or RRTA tax on tips. Include this tax on Form 1040.</p> <p>B — Uncollected Medicare tax on tips. Include this tax on Form 1040.</p> <p>C — Taxable cost of group-term life insurance over \$50,000 (included in boxes 1,3 (up to Social Security wages base), and box 5).</p> <p>D — Elective deferrals to a section 401(k) cash or deferred arrangement. Also includes deferrals under a SIMPLE retirement account that's part of a section 401(k) arrangement.</p> <p>E — Elective deferrals under a section 403(b) salary reduction agreement.</p> <p>F — Elective deferrals under a section 408(k)(6) salary reduction SEP.</p> <p>G — Elective deferrals and employer contributions (including non-elective deferrals) to a section 457(b) deferred compensation plan.</p> <p>H — Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan.</p> <p>J — Nontaxable sick pay (information only, not included in Boxes 1, 3, or 5).</p> <p>K — 20% excise tax on excess golden parachute payments.</p> <p>L — Substantiated employee business expense reimbursements (nontaxable).</p> <p>M — Uncollected Social Security or RRTA tax on taxable cost of group-term life insurance over \$50,000 (former employees only).</p> <p>N — Uncollected Medicare tax on taxable cost of group-term life insurance over \$50,000 (former employees only).</p> <p>P — Excludable moving expense reimbursements paid directly to a member of the U.S. Armed Forces (not included in Boxes 1, 3, or 5).</p> <p>Q — Nontaxable combat pay. See the instructions for Form 1040 or Form 1040A for details on reporting this amount.</p> <p>R — Employer contributions to your Archer medical savings accounts (MSA). Report on Form 8853, Archer MSAs and Long-Term Care Insurance Contracts.</p> <p>S — Employee salary reduction contributions under a section 408(p) SIMPLE plan (not included in Box 1).</p> <p>T — Adoption benefits (not included in Box 1). Complete Form 8839, Qualified Adoption Expenses, to compute any taxable and nontaxable amounts.</p> <p>V — Income from exercise of non-statutory stock option(s) (included in Boxes 1, 3 (up to Social Security wage base), and 5). See Publication 525, Taxable and Nontaxable Income, for reporting requirements.</p> <p>W — Employer contributions (including amounts the employee elected to contribute using a section 125 (cafeteria plan) to your health savings account (HSA). Report on Form 8889, Health Savings Accounts (HSAs).</p> <p>Y — Deferrals under a section 409A nonqualified deferred compensation plan.</p> <p>Z — Income under a nonqualified deferred compensation plan that fails to satisfy section 409A. This amount is also included in Box 1 and is subject to an additional 20% tax plus interest. See the Form 1040 instructions.</p> <p>AA — Designated Roth contributions under a section 401(k) plan.</p> <p>BB — Designated Roth contributions under a section 403(b) plan.</p> <p>DD — Cost of employer-sponsored health coverage. The amount reported with Code DD isn't taxable.</p> <p>EE — Designated Roth contributions under a governmental Section 457(b) plan. This amount doesn't apply to contributions under a tax-exempt organization Section 457(b) plan.</p> <p>FF — Permitted benefits under a qualified small employer health reimbursement arrangement.</p> <p>GG — Income from qualified equity grants under section 83(i).</p> <p>HH — Aggregate deferrals under section 83(i) elections as of the close of the calendar year</p>
Box 14	<p>Employers can use this W-2 box to report information such as:</p> <ul style="list-style-type: none"> • State disability insurance taxes withheld • Union dues • Uniform payments • Health insurance premiums deducted • Nontaxable income • Educational assistance payments • A member of the clergy's parsonage allowance and utilities • Charitable contributions made through payroll deduction