



# Adilas Project 1909 - Federal Payroll Updates 2022 W2's, 1099's & 1096

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## Overview

### Phase 1 - Review Project Specs

Initial project review to add the 2022 W2, 1099 MISC/NEC & 1096 PDF forms to the Adilas Payroll System. This is an annual process that will need to be completed before the end of the current year.

Deliverables for this phase

- Review the project and get any clarification needed to proceed to the next phase.

Schedule:

- hours .5

### Phase 2 - Order Next Years Forms

Order the next years W2, 1099 MISC, NEC, INT & 1096 PDF forms from the irs.gov website. This needs to be done as early in the year as possible as they can get backordered quickly. These forms will be used to test print the new forms.

Deliverables for this phase

- Order the next years tax forms from the IRS website.
  - Go to the IRS website: <https://www.irs.gov>
  - Click the Forms & Instructions link in the top navbar.
  - In the left menu click "Order Forms and Pubs".
  - Click on "Online Ordering for Information Returns and Employer Returns".
  - Locate the "Tax Year 202? Quantity" column.
  - Order 100 Form W-2
  - Order 100 Form 1096
  - Order 100 Form 1099 MISC
  - Order 100 Form 1099 NEC
  - Order 100 Form 1099-INT
  - Order 1 Instructions W2
  - Order 1 Instructions 1096
  - Order 1 Instructions 1099-MISC & NEC
  - Order 1 Instructions 1099-INT

Schedule:

- hours .5

## Project Outline

### Phases Overview:

Phase 1 - Review Project Specs

Phase 2 - Order Next Years Forms

Phase 3 - Download & Prep Next Years Forms

Phase 4 - Initial Dive/Code Review

Phase 5 - Run/Create DB Update Scripts

Phase 6 - Add Data to Local Database

Phase 7 - Update/Test Calculations Code

Phase 8 - Review/Merge Code & Test New Forms

Fixes - Development

Optional - Development

database updates

- copy current year and flip it to next year (good starting place)
- federal
- state(s) - multiple
- fed/state allowances
- general table

pages (.cfm's and .cfc's)

need to run the database\_updates/tax\_table\_copier.cfm page - this makes a copy of each existing tax record for the new year

check for a new pub 15 on the irs.gov website - usually we only need a couple pages of the huge document. For example pages 1-6 or something like that.

brandon has a number of update files for tax stuff. I have stuff for fed, state, and fed/state allowances - add forms, bulk forms, etc.  
- this may be a good project to add these into master and put them under the database\_updates folder.

we may need to run special database updates to update records.

## Phase 3 - Download & Prep Next Years Forms

Download and prep the next years W2, 1099 MISC/NEC & 1096 PDF forms from the irs.gov website. These will be used to create the new PDF forms.

Deliverables for this phase

- Download, flatten, and prep the next years tax forms from the IRS website.
1. Download new 1099's, 1096, and W2 pdf files.
    - Create a new folder called tax year 2021
    - Go to the IRS website <https://www.irs.gov>
    - Click on Forms & Instructions
    - Click on Prior Year from the menu located on the left side of the page.
    - Click on the List All Current Forms & Instructions button under the search bar.
    - Follow the steps below for each form.
      - a. **1099 MISC**
        - i. Search for "1099 MISC" in the top navbar.
        - ii. Expand the show per page results to 200.
        - iii. Locate and click the "Form 1099-NEC" link.
        - iv. Download the PDF to your local machine (for now, save the file outside of GIT to avoid conflicts).
      - b. **1099 NEC**
        - i. Search for "1099 NEC" in the top navbar.
        - ii. Expand the show per page results to 200.
        - iii. Locate and click the "Form 1099-NEC" link.
        - iv. Download the PDF to your local machine (for now, save the file outside of GIT to avoid conflicts).
      - c. **1099 INT**
        - i. Search for "1099 NEC" in the top navbar.
        - ii. Expand the show per page results to 200.
        - iii. Locate and click the "Form 1099-NEC" link.
        - iv. Download the PDF to your local machine (for now, save the file outside of GIT to avoid conflicts).
      - d. **W2**
        - i. Search for "W2" in the top navbar.
        - ii. Expand the show per page results to 200.
        - iii. Locate and click the "Form 1096" link.
        - iv. Download the PDF to your local machine (for now, save the file outside of GIT to avoid conflicts).
      - e. **1096**
        - i. Search for "1099 NEC" in the top navbar.
        - ii. Expand the show per page results to 200.
        - iii. Locate and click the "Form 1096" link.
        - iv. Download the PDF to your local machine (for now, save the file outside of GIT to avoid conflicts).

## **Phase 3 - Download & Prep Next Years Forms (Cont).**

### 2. Flatten the original IRS PDF files

#### **a. 1099 MISC**

- i. Open the file in Adobe Acrobat Pro and print.
- ii. Save as flat\_2021\_misc.pdf (for now, save the file in the same directory where you saved the original 1099-misc IRS form).

#### **b. 1099 NEC**

- i. Open the file in Adobe Acrobat Pro and print.
- ii. Save as flat\_2021\_nec.pdf (for now, save the file in the same directory where you saved the original 1099-misc IRS form).

#### **c. 1099 INT**

- i. Open the file in Adobe Acrobat Pro and print.
- ii. Save as flat\_2021\_int.pdf (for now, save the file in the same directory where you saved the original 1099-int IRS form).

#### **d. W2**

- i. Open the file in Adobe Acrobat Pro and print.
- ii. Save as flat\_2021\_w2.pdf (for now, save the file in the same directory where you saved the original 1099-misc IRS form).

#### **e. 1096**

- i. Open the file in Adobe Acrobat Pro and print.
- ii. Save as flat\_2021\_1096.pdf (for now, save the file in the same directory where you saved the original 1099-misc IRS form).

## Phase 4 - Initial Dive/Code Review

### Modified Files:

Database file(s):

database\_updates/tax\_table\_copier.cfm

Page file(s):

top\_secret/secure/year\_end\_totals.cfm  
top\_secret/secure/doc\_form\_w2\_prep.cfm  
top\_secret/secure/doc\_form\_1099\_misc\_prep.cfm (Do we  
need to rename file to doc\_form\_1099\_prep?)  
top\_secret/secure/doc\_form\_1096\_prep.cfm

PDF-Form file(s):

top\_secret/secure/doc\_form\_1099\_misc.cfm (does nec & misc)  
top\_secret/secure/doc\_form\_1099\_int.cfm  
top\_secret/secure/doc\_form\_w2.cfm  
top\_secret/secure/doc\_form\_1096.cfm

### New Files:

Database file(s):

database\_updates/update\_20210821.cfm

Page file(s):

none

PDF-Form file(s):

top\_secret/pdf/forms/w2\_2021.pdf  
top\_secret/pdf/forms/1099\_misc\_2021.pdf  
top\_secret/pdf/forms/1099\_misc\_2021\_overlay.pdf  
top\_secret/pdf/forms/1099\_misc\_2021\_overlay\_perforated.pdf  
top\_secret/pdf/forms/1099\_nec\_2021.pdf  
top\_secret/pdf/forms/1099\_nec\_2021\_overlay.pdf  
top\_secret/pdf/forms/1099\_nec\_2021\_overlay\_perforated.pdf

Deliverables for this phase

Schedule:

- days 2

Fees:

\$ 150.00 USD



## Phase 5 - Create/Run DB Update Scripts

Database tables that need to be modified:

fed\_state\_allowances, federal\_tax\_tables, general\_table

Useful Database tables:

tax\_filing\_status, tax\_categories

Download For Use in 2022 Pub15-T:

Review Pages 1-6

Use:

“percentage method tables”

“wage”

Create new database scripts to handle new changes for 2021:

Reviewed tax\_table\_cpoier.cfm and how it applies to database updates

use database\_updates/update\_20201229.cfm (federal) - with multi-inserts as a guide.

use database\_updates/update\_20200129.cfm (states) - with multi-inserts as a guide.

Update

federal\_tax\_tables

1. unclassified (uncommon)

2 - single

3 - married

payroll frequencies table

Run the database update on all servers:

Deliverables for this phase

- Successfully add the 2021 “percentage method tables” and “wage” values into all database servers.

Schedule:

- days 2

Fees:

\$ 150.00 USD



## Phase 6 - Add Data to Local Database

1. Add good 1099 & W2 data to local adilas system to use for testing the year end totals.

- a. **W2**
  - i. Need
- b. **1099 MISC**
  - i. Need
- c. **1099 NEC**
  - i. Need
- d. **1099 INT**
  - i. Need
- e. **1096**
  - i. Need

Deliverables for this phase

- Successfully add the 2021 “percentage method tables” and “wage” values into all database servers.

Schedule:

- days 2

Fees:

\$ 150.00 USD



## Phase 7 - Update/Test Calculations Code

code pages that do the calculations

calculate\_payroll.cfm  
liabilities\_3.cfc  
state\_withholding.cfc (A-L)  
state\_withholding\_2.cfc (M-Z)

Test new calculations

Massachusetts code in state\_withholding\_2.cfc

Deliverables for this phase

- Successfully add the 2021 “percentage method tables” and “wage” values into all database servers.

Schedule:  
- days 2

Fees:  
\$ 150.00 USD

## Phase 8 - Review/Merge Code & Test New Forms

Check all Tabs positioning

Run the database update on all servers:

Deliverables for this phase

- Successfully add the 2021 “percentage method tables” and “wage” values into all database servers.

Schedule:

- days 2

Fees:

\$ 150.00 USD

### Fixes - Development

Status - Unknown

- Update page title from 1099-misc prep form to 1099 prep form
- Bring in custom colors for red text
- add cfqueryparams to queries in tax\_table\_copier.cfm

### Optional - Development

Status - Unknown

Integrate new Bootstrap standards into the following pages:

- top\_secret/secure/doc\_form\_1096\_prep.cfm & top\_secret/secure/year\_end\_totals.cfm
- top\_secret/secure/doc\_form\_1099\_misc\_prep.cfm
- top\_secret/secure/doc\_form\_w2\_prep.cfm
- change top links top\_secret/secure/doc\_form\_1096\_prep.cfm
- top\_secret/secure/recent\_receipts.cfm?
- top\_secret/secure/search\_paychecks.cfm
- top\_secret/secure/add\_edit\_payee\_to\_department.cfm

Approved - Unknown

Unapproved - Unknown

