

Whether you are paper filing or eFiling you will go through our third party tax company, Aatrix. Beginning in 2023, the IRS requires employers with ten or more returns, W-2s and 1099s, to file electronically. Below are the instructions for the process.

Note: Most religious organizations are exempt from SUTA. Before printing ANY tax reports in Payroll, go to Special Functions, Settings, choose the Additional Tax Form Information tab, and put a check mark in the box labeled "This organization is exempt from Unemployment Insurance."

Before you begin the tax filing process, go to *Administration>Sys Info*>fill in the *Tax ID* information.

In Payroll, go to *Reports/Export* at the top of the screen.

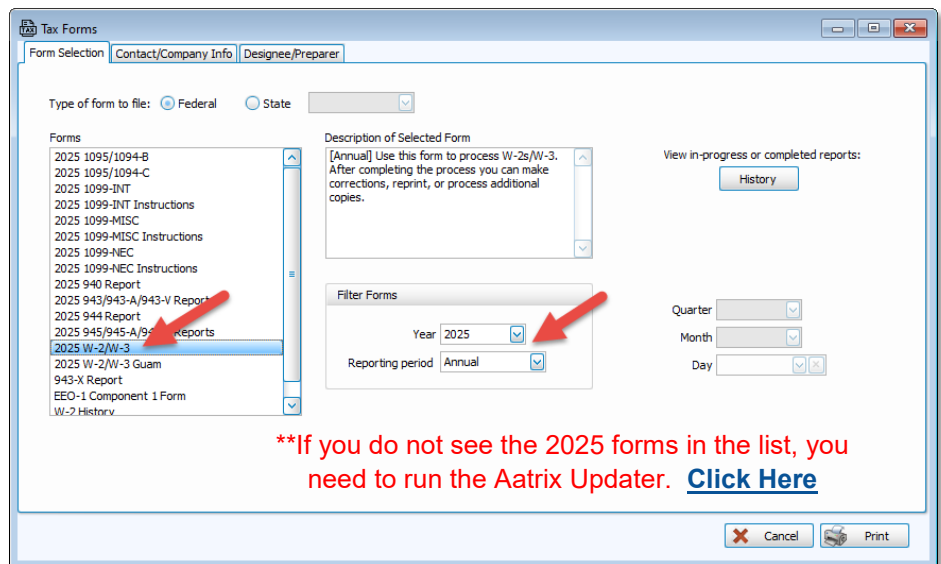
- Select *Tax Reports>Tax Forms*.

Choose Year - 2025

Reporting period - Annual.

Forms - 2025 W-2/W-3

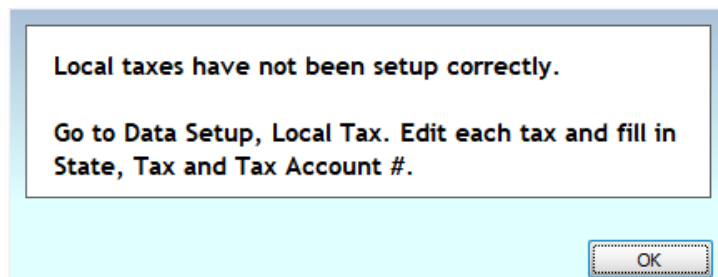
Click *Print*.



If nothing appears about Local Taxes, disregard the section below. If you are in a state with Local Taxes, you may get a box indicating Local taxes have not been setup correctly.

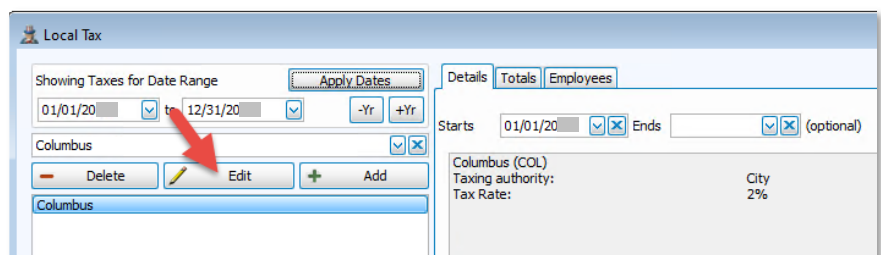
Click *OK*.

Exit out of *Tax Forms*.



Go to *Data Setup>Local Tax*>click to highlight the tax on the left, choose *Edit* and fill in *State, Tax* and *Tax Account #* for each *Local tax*.

(enter your church account # with the taxing authority, NOT the Church Windows Account ID)



Click *Finish*.



Go back to *Tax Reports>Tax Forms>select 2025 W-2/W3 choose Year 2025 and Reporting Period - Annual.*

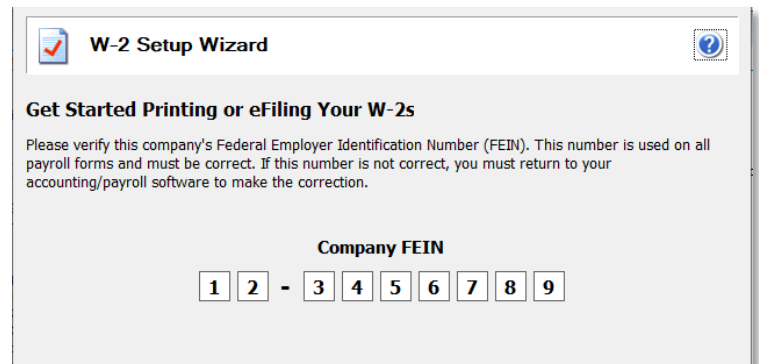
Click *Print*

On the *W-2 Setup Wizard*, choose whether you'd like to *Process your W-2/W-3s*, or *Test Drive the Wizard*. Click *Next* to continue.

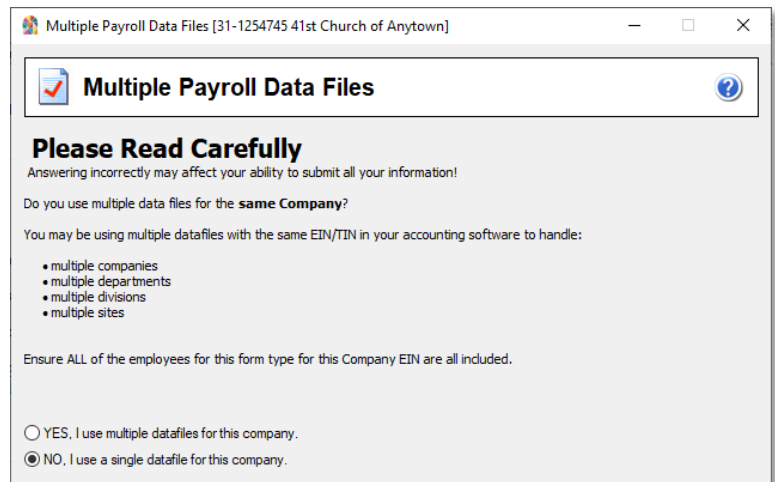
Our example uses *No Thanks, Start Processing your W-2/W-3s*.



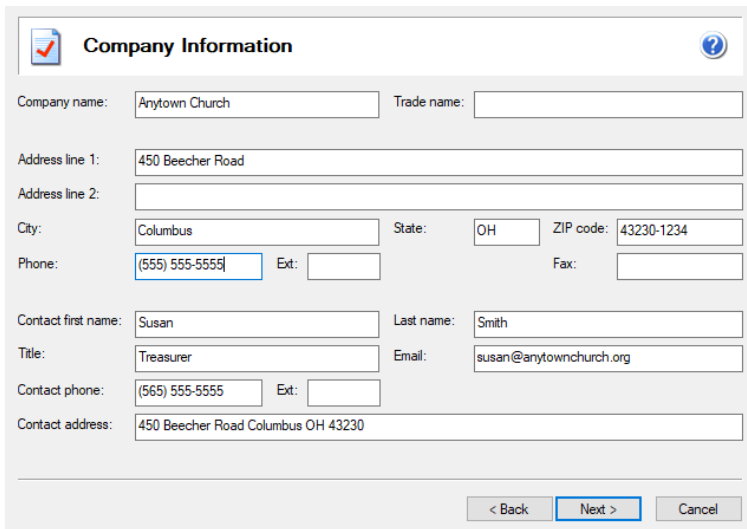
Verify your company's FEIN, edit if necessary. Click *Next*.



Choose *No, I use a single datafile for this company*.



Enter your information, click *Next*.



Company Information

Company name: Anytown Church Trade name:

Address line 1: 450 Beecher Road
Address line 2:

City: Columbus State: OH ZIP code: 43230-1234

Phone: (555) 555-5555 Ext: Fax:

Contact first name: Susan Last name: Smith
Title: Treasurer Email: susan@anytownchurch.org
Contact phone: (565) 555-5555 Ext:

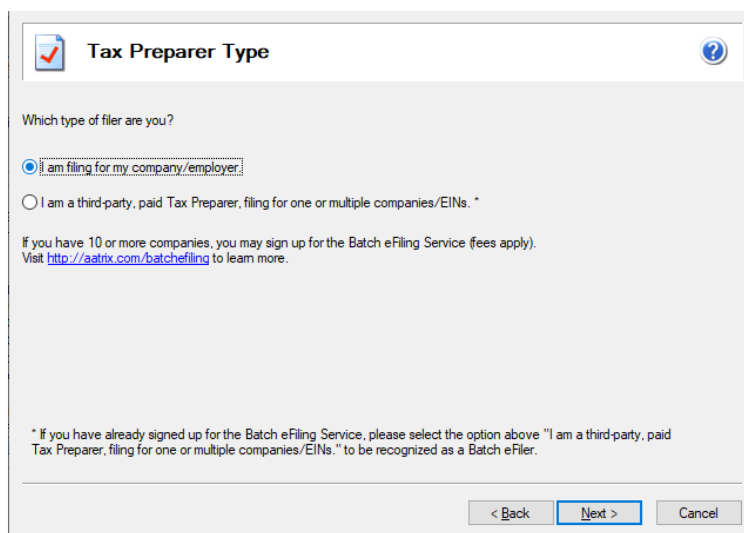
Contact address: 450 Beecher Road Columbus OH 43230

< Back Next > Cancel

Indicate which type of filer you are.

I am filing for my company/employer is likely most relevant.

Click *Next*.



Tax Preparer Type

Which type of filer are you?

I am filing for my company/employer.*

I am a third-party, paid Tax Preparer, filing for one or multiple companies/EINs.*

If you have 10 or more companies, you may sign up for the Batch eFiling Service (fees apply). Visit <http://aatrx.com/batchefiling> to learn more.

* If you have already signed up for the Batch eFiling Service, please select the option above "I am a third-party, paid Tax Preparer, filing for one or multiple companies/EINs." to be recognized as a Batch eFiler.

< Back Next > Cancel

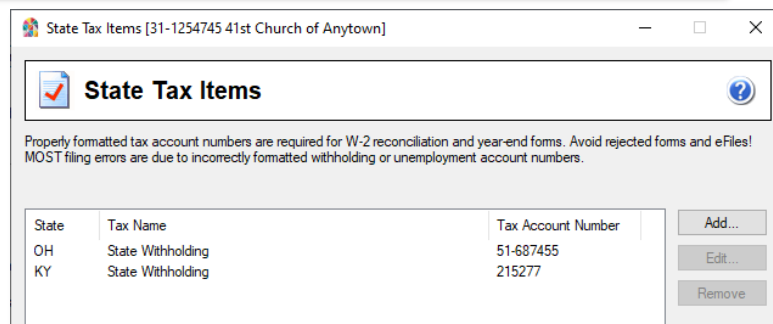
The State Tax Items may need filled in.

Click *Add or Edit* (if prompted).

Fill in the *required fields*.

Click *OK* and *Next*.

If no changes are needed, click *Next*.



State Tax Items

Properly formatted tax account numbers are required for W-2 reconciliation and year-end forms. Avoid rejected forms and eFiles! MOST filing errors are due to incorrectly formatted withholding or unemployment account numbers.

State	Tax Name	Tax Account Number
OH	State Withholding	51-687455
KY	State Withholding	215277

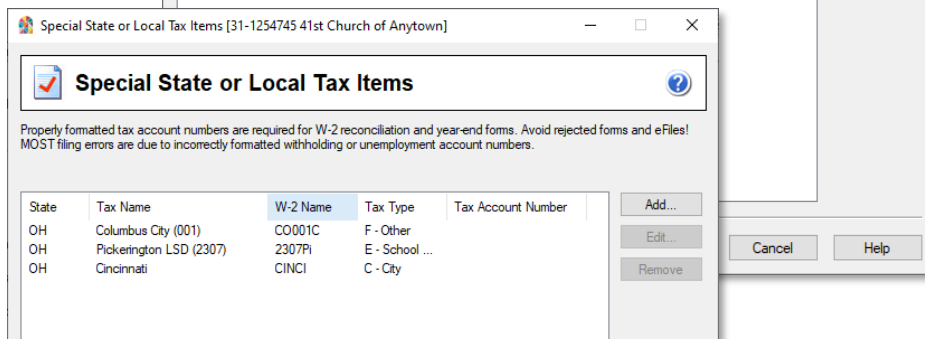
Add... Edit... Remove

Special State or Local Tax Items may need filled in.

Click *Add or Edit* (if prompted).

Fill in the *required fields*.

Click *OK* and *Next*.



Special State or Local Tax Items

Properly formatted tax account numbers are required for W-2 reconciliation and year-end forms. Avoid rejected forms and eFiles! MOST filing errors are due to incorrectly formatted withholding or unemployment account numbers.

State	Tax Name	W-2 Name	Tax Type	Tax Account Number
OH	Columbus City (001)	CO001C	F - Other	
OH	Pickerington LSD (2307)	2307Pi	E - School ...	
OH	Cincinnati	CINCI	C - City	

Add... Edit... Remove

Cancel Help

If no changes are needed, click *Next*.
Data Verification

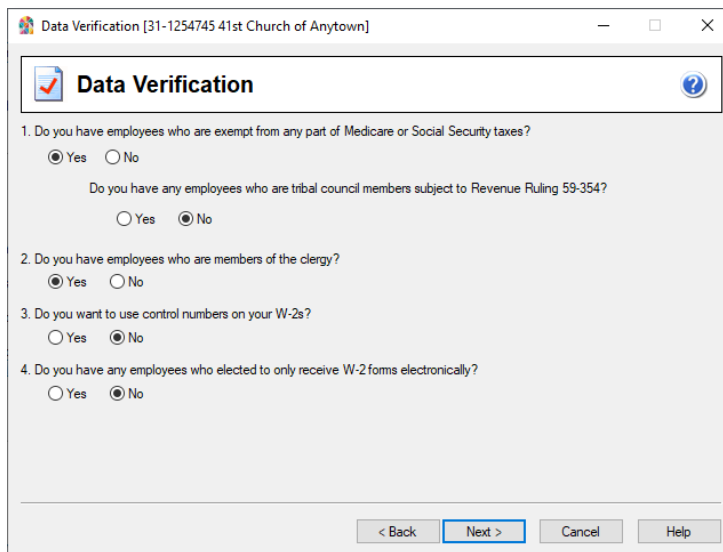
Question 1 - Click *Yes*, because you have clergy that is exempt from Social Security and Medicare on the W-2.

Do you have any employees who are tribal council members subject to Revenue Ruling 59-354?

You will most likely want to choose, *No*.

Click *Next*.

NOTE: It is important to click YES to Question #1 if you have clergy.



Data Verification

1. Do you have employees who are exempt from any part of Medicare or Social Security taxes?
 Yes No

Do you have any employees who are tribal council members subject to Revenue Ruling 59-354?
 Yes No

2. Do you have employees who are members of the clergy?
 Yes No

3. Do you want to use control numbers on your W-2s?
 Yes No

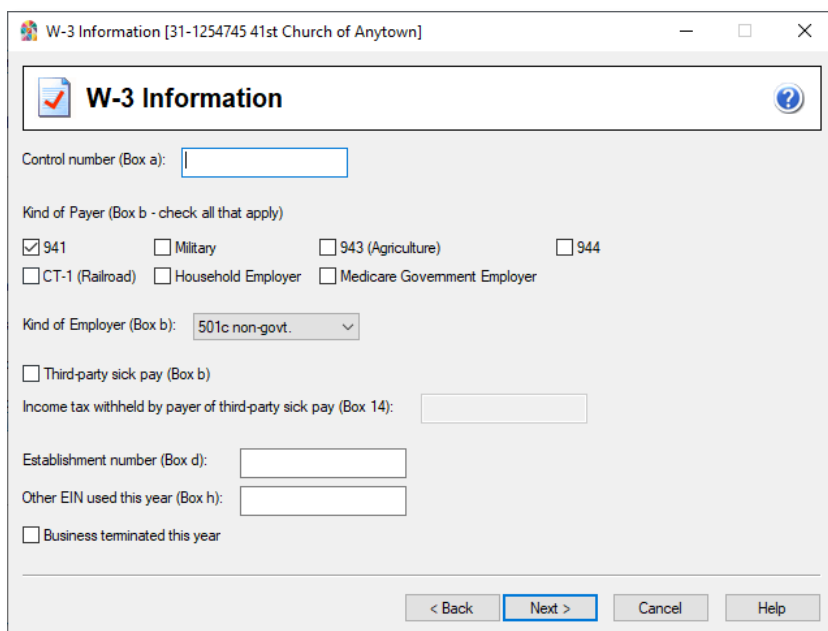
4. Do you have any employees who elected to only receive W-2 forms electronically?
 Yes No

< Back Next > Cancel Help

The needed fields on this screen are:

Kind of Payer - 941 and Kind of Employer - 501c non-govt which are already filled in.

Click *Next*.



W-3 Information

Control number (Box a):

Kind of Payer (Box b - check all that apply)

941 Military 943 (Agriculture) 944
 CT-1 (Railroad) Household Employer Medicare Government Employer

Kind of Employer (Box b): 501c non-govt. ▾

Third-party sick pay (Box b)

Income tax withheld by payer of third-party sick pay (Box 14):

Establishment number (Box d):

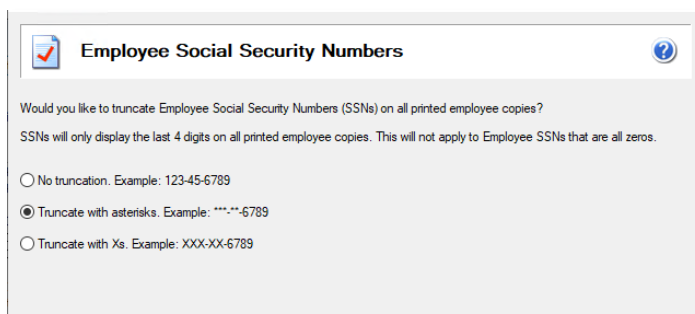
Other EIN used this year (Box h):

Business terminated this year

< Back Next > Cancel Help

Choose *Truncate with asterisks*.

Click *Next*.



Employee Social Security Numbers

Would you like to truncate Employee Social Security Numbers (SSNs) on all printed employee copies?
 SSNs will only display the last 4 digits on all printed employee copies. This will not apply to Employee SSNs that are all zeros.

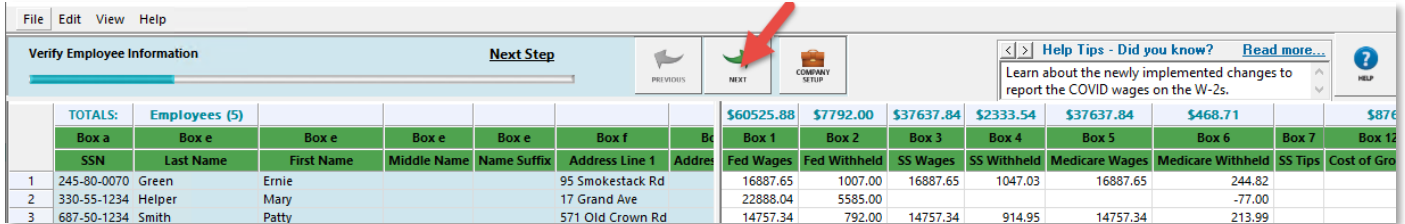
No truncation. Example: 123-45-6789
 Truncate with asterisks. Example: ***-**-6789
 Truncate with Xs. Example: XXX-XX-6789

You will get a message about *Preparing Employee Detail*

1. Review/Edit
2. Print a Copy
3. Report Submission

Click *Ok*.

On the *Employee Information* screen, a list of the W-2s that will be printed appears. Review and click *Next* thru the information verifying the information is accurate. If the wizard believes there is something potentially wrong with the information, it will notify you of the error and highlight it so that you can correct it easily by clicking *Go Back and Correct*. Continue to click *Next* to complete the blue progress bar in the top left. A scroll bar is at the bottom to access additional columns.



TOTALS:								\$60525.88	\$7792.00	\$37637.84	\$2333.54	\$37637.84	\$468.71	\$876
Box a	Box e	Box e	Box e	Box e	Box f	Box	Box 1	Box 2	Box 3	Box 4	Box 5	Box 6	Box 7	Box 12
SSN	Last Name	First Name	Middle Name	Name Suffix	Address Line 1	Address	Fed Wages	Fed Withheld	SS Wages	SS Withheld	Medicare Wages	Medicare Withheld	SS Tips	Cost of Gro
1	245-80-0070	Green	Ernie		95 Smokestack Rd		16887.65	1007.00	16887.65	1047.03	16887.65	244.82		
2	330-55-1234	Helper	Mary		17 Grand Ave		22888.04	5585.00				-77.00		
3	687-50-1234	Smith	Patty		571 Old Crown Rd		14757.34	792.00	14757.34	914.95	14757.34	213.99		

An *Important Notice* will open. Click *Agree* to move forward or *Double Check* to continue in the grid.

An *Aatrix* ad will appear. Click *Next* to continue.

The minimum cost to eFile is \$29.99.

For more information on pricing click here: <https://partner.aatrix.com/church-windows/filing-options/#w2pricing>



There are two **Printing and Filing Options** available; *COMPLETE W-2 eFiling Service* or *Other Options*.

If you need to eFile choose the top option for **COMPLETE W-2 eFiling Service**.

If you have under ten W-2s and 1099s, you may print the forms for free. Choose **Other Options**. Check *Print Employee W-2s*, and uncheck the eFile boxes. *Check to Print Federal W-2s and W-3, and State if applicable.*



Other Options [eFilers receive Free Corrections before selected Filing Dates](#)

Print Employee W-2s

eFile Federal W-2s and W-3 9 \$0.59 \$ 0.00

eFile State W-2s and Reconciliation Forms 9 \$0.81 \$ 0.00

Print Federal W-2s and W-3 (Official Copy)

Print State W-2s and Reconciliation Forms (Official Copy)

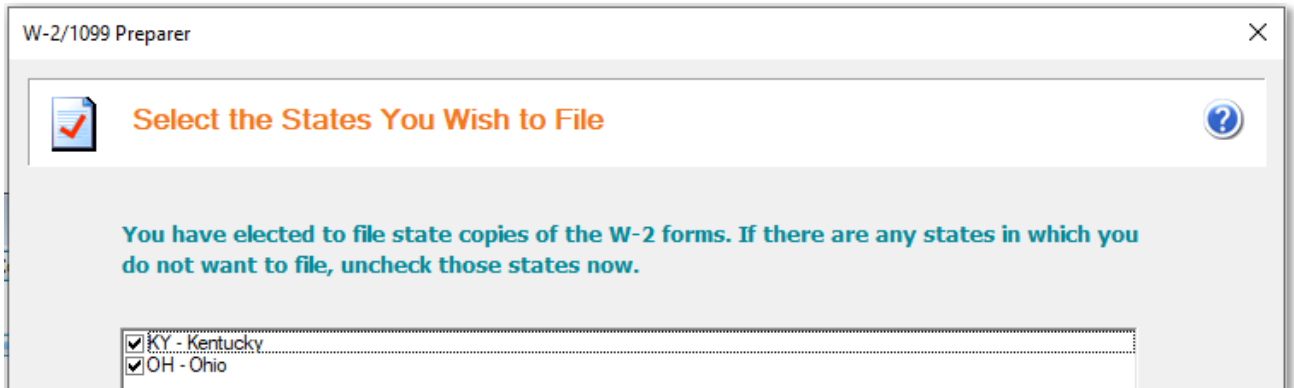
Official Employer W-2s will display when any Federal W-2s are select **Total Cost** \$ 0.00

****If you have ten or more W-2s and 1099s you must eFile.****
Click *Next*.

Aatrix has several screens with different offers and products available. Select your preferences and click Next.

If you checked to file State, select the States you wish to File. Uncheck the states you do not want to file.

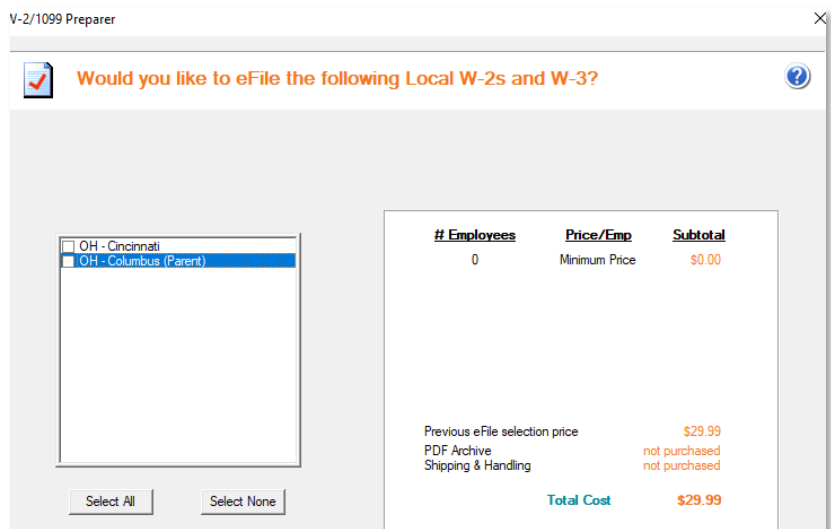
Click Next.



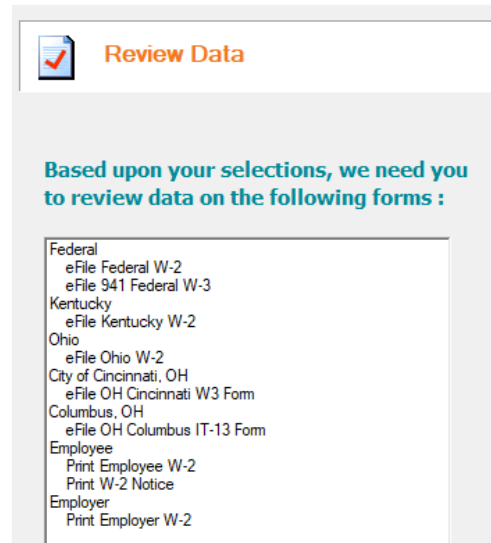
eFiling local W-2s and W-3?
Choose to eFile Local W-2s and W-3 or uncheck the box next to the Local Tax.

NOTE: There is an additional charge to eFile Local Taxes.

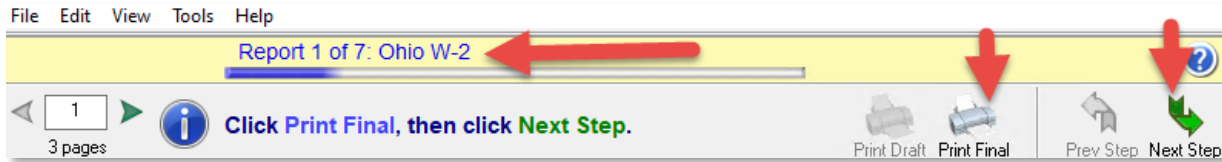
Click Next.



Review Data -
Based on your selections, Aatrix will list the forms to print. Click Next.



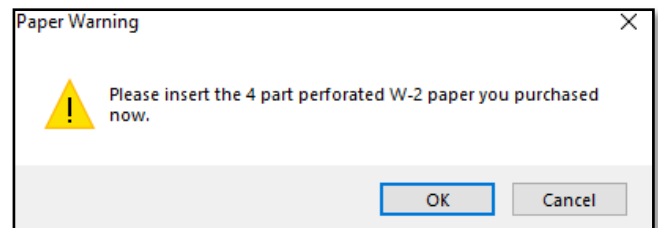
Follow the yellow tool bar prompts to print each form.



Our example shows, 1 of 7 forms to Print.
Use the green left and right arrows to view other reports to print

Click *Print Final* then *Next Step* after each form.

NOTE: A *Paper Warning* message appears to insert the 4 part perforated W-2 paper, click OK. **Your W-2s will print to plain paper. You do not need to purchase the forms.**



NOTE: Aatrix has permission from the SSA to submit Black & White copies of the W-3.

NOTE: You can view in-progress or completed reports on the Tax Form screen, by clicking *History*.

If you are eFiling W-2s, once the printing is complete, click *Next Step* and you will be redirected to **Aatrix Secure eFile**. Please carefully read the screens that appear. Aatrix provides lots of eFiling options. If you have eFiling questions, please contact Aatrix directly.

Aatrix Windows Support

Mondays - Fridays from 8 am - 5 pm CDT
Phone: 701-746-6814
Fax: 701-746-4393
Email: helpme@aatrix.com

Aatrix MAC Support

Mondays - Fridays from 8 am - 5 pm CDT
Phone: 701-746-6017
Fax: 701-746-4393
Email: macsupport@aatrix.com

Please Note: It is important to read all screens carefully as they may be updated or changed by Aatrix. You may redo or restart the document processing at any time.