

W&C File Upload Instructions

Creating File

1. Click “W&C Quarterly Reporting Template”
 - a. This is located at www.perf.in.gov
 - i. Under Employers → Employer Forms
2. **SAVE** file to desktop (do not open)
3. Enter data in **CORRECT FORMAT** in appropriate locations
 - a. See Appendix A
 - b. Upload will not work unless all guidelines are **STRICTLY** followed
 - c. If you are copying and pasting from another excel file make sure to PASTE VAULES ONLY (this is to ensure the format is not altered)
 - i. Copy values
 - ii. Select location to paste too
 - iii. Right click over pasting location
 - iv. Select “Paste Special”
 - v. Select “Values only”
 - d. **DO NOT**
 - i. **DO NOT** use Hyphens (Employer Number and Social Security Number)
 - ii. **DO NOT** change any formatting settings
 - iii. **DO NOT** insert other/extra columns
 - iv. **DO NOT** leave blank rows in between employees information
 - v. **DO NOT** include contributions related to your Employer annual rate on this form
4. Click “Convert to Text” button
 - a. Button located at top of sheet1
5. If error appears then it is most likely one of the following issues:
 - a. Macros are not enabled/allowed
 - i. See Appendix B
 - ii. **CANNOT** proceed without enabling macros
 - b. Run time error with the program
 - i. Check that all the DO NOTs were followed strictly
 - ii. If error persists please contact PERF
6. File Creation
 - a. Depending on the number of employees on your file this could take a couple of minutes please be patient
 - b. As long as the hour glass (processing indicator) is visible leave until finished
 - i. If runs for more than 5 minutes please contact PERF for assistance
 - c. Read pop up message
 - d. Click “OK”
 - e. For your info:
 - i. File location: C:\1000000.txt
 - ii. The file name is equal to your Employer Number
 - iii. The file is located on your computer’s local “C” drive

1. If you do not have a “C” drive you must contact PERF for further instructions
7. Read message and click OK

Uploading File

1. Log onto PERF online
 - a. For more in depth instructions and information see “PERF Online Employer Handbook”
2. Click on “Wages and Contributions” link
3. Enter PERF Online user log in and password if prompted
4. Choose File Type
 - a. TEST Wage and Contribution File (this does **NOT** submit the file to PERF)
 - i. This is not a necessary step but can be done if you want to test the file first
 - b. Wage and Contribution File (using when submitting)
 - i. Actual submission to PERF
5. Select “Browse”
6. Locate text file created by the excel sheet on C: Drive (i.e. 1000000.txt)
7. Enter Employer Code
 - a. This is your Employer number (i.e. 1000000)
8. Click “Upload”

Appendix A: Excel Format

<i>Name & Location</i>	<i>Description</i>	<i>Format</i>
Employer Number (Cell B 2)	<ul style="list-style-type: none"> Represents PERF assigned Employer number 	<ul style="list-style-type: none"> 7 Numbers with NO hyphens
Employer Name (Cell B 3)	<ul style="list-style-type: none"> Represents Employer name 	<ul style="list-style-type: none"> CANNOT exceed 25 characters
Fund (Cell B4)	<ul style="list-style-type: none"> Represents reporting fund 	<ul style="list-style-type: none"> PE only (should already be on file)
Quarter End Date (Cell B5)	<ul style="list-style-type: none"> Represents the reporting quarter end date 	<ul style="list-style-type: none"> MM/DD/YYYY
SSN (Cell A8:A1500)	<ul style="list-style-type: none"> Represents employees social security numbers 	<ul style="list-style-type: none"> 9 numbers with NO hyphens
Last Name (Cell B8:B1500)	<ul style="list-style-type: none"> Represents last name of employee 	<ul style="list-style-type: none"> CANNOT exceed 25 characters
Wages (Cell C8:C1500)	<ul style="list-style-type: none"> Represents wages for the employee 	<ul style="list-style-type: none"> CANNOT exceed 9 numbers plus decimal Enter a decimal even if zero cents Only enter up 2 decimal places
Mand Cntrb Employer Paid (Cell D8:D1500)	<ul style="list-style-type: none"> Represents <u>employer</u> paid mandatory 3% employee contribution (pre-tax) 	<ul style="list-style-type: none"> CANNOT exceed 9 numbers plus decimal Enter a decimal even if zero cents Only enter up 2 decimal places
Mand Cntrb Employee Paid (Cell E8:E1500)	<ul style="list-style-type: none"> Represents <u>employee</u> paid mandatory 3% employee contribution (post-tax) 	<ul style="list-style-type: none"> CANNOT exceed 9 numbers plus decimal Enter a decimal even if zero cents Only enter up 2 decimal places
Vol Pre-Tax Cntrb (Cell F8:F1500)	<ul style="list-style-type: none"> Represents voluntary pre-tax contribution 	<ul style="list-style-type: none"> CANNOT exceed 9 numbers plus decimal Enter a decimal even if zero cents Only enter up 2 decimal places
Vol Post-Tax Cntrb (Cell G8:G1500)	<ul style="list-style-type: none"> Represents voluntary post-tax contribution 	<ul style="list-style-type: none"> CANNOT exceed 9 numbers plus decimal Enter a decimal even if zero cents Only enter up 2 decimal places

Appendix B: Enabling Macros

1. Excel 2007
 - a. Click Microsoft symbol in upper left (circular button)
 - i. Same place you would go to open new document or save a document
 - b. Click "Excel Options" (lower right of drop down)
 - i. A pop up window should appear
 - c. Click "Trust Center" (on left navigation)
 - d. Click "Trust Center Setting..." (far right, in middle of pop up window)
 - e. Click "Macro Settings" (on left navigation)
 - f. Click radio button in front of "Enable all macros"
 - i. It says this is not recommended but will not cause an issue unless you run other macros in excel besides the one provided
 - g. Click "OK" button (lower right)
 - h. Click "OK" button again (lower right)
 - i. **RESTART EXCEL**
 - i. If you do not do this you will not be able to run the macro
 - ii. The software must be restarted for your setting change to effect
 - j. You should now be able to run the Macro within excel by clicking the button on the excel file
2. Excel 2003 or 2000
 - a. Click "Tools"
 - b. Click "Macro" (near bottom)
 - c. Click "Security"
 - d. Select "Security" tab
 - e. Select radio button in front of "Low"
 - i. It says this is not recommended but will not cause an issue unless you run other macros in excel besides the one provided
 - f. Click "OK"
 - g. **RESTART EXCEL**
 - i. If you do not do this you will not be able to run the macro
 - ii. The software must be restarted for your setting change to effect
 - h. You should now be able to run the Macro within excel by clicking the button on the excel file
3. Any other Excel Versions
 - a. Contact PERF