

W2 and W3 Forms

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The IRS requires employers to file payroll Forms W-2 and W-3 at the beginning of each year for the prior year.

- Form W-2 (Wage and Tax Statement) is the end-of-year form you send to each employee and submit to federal, state, and local tax agencies. The form shows an employee's wages and taxes withheld for the year.
- Form W-3 (Transmittal of Wage and Tax Statements) is a summary of all the W-2 forms you are submitting to the federal government.

Payroll Tax Subscription

If you are a **Non-Payroll Plan Subscriber** or a **Basic A Payroll Plan subscriber**, review W2 and W3 data from **payroll summary year-to-date reports** and review the **Exported Data to Excel reports**. Type the employees' W2 forms and employer's W3 form. Forms may be ordered from the [IRS](#) site.

If you are a **QuickBooks Standard, Enhanced A or B Payroll Plan subscriber**, the W2 and W3 forms can be printed directly from QuickBooks.

To process W-2/W-3 forms from QuickBooks, follow these instructions. (Standard, Enhanced A or B Payroll Plan subscribers only)

- 1) Before processing the W2 and W3 forms, perform a **payroll update** (Employees, Get Payroll Updates)
- 2) Review each Form W-2 onscreen, and make any necessary changes.
 - a) Select **Employees** from menu bar.
 - b) Select **Payroll Center**
 - c) Click on the **Process Payroll Forms button** at bottom right of screen.
 - d) Select **Federal Form** and then OK.
 - e) Select appropriate form type and enter the correct year.
- 3) Review and then print the W-2 forms on blank perforated paper or preprinted forms.
- 4) Review and then Print a Form W-3 on blank perforated paper or a preprinted form.
- 5) File your Forms W-2 and W-3.

Online Filing

W2 and W3 forms may be filed online. Go to the [Social Security site](#) for details. County Program Director or County representative must approve all online filings.

W2 Form Corrections

Edits you can make:

Editing a blank field

To enter information into a blank field, click your cursor in the field to activate it, then start typing. QuickBooks displays the new data in a blue font, to indicate that it is new. (It will not be blue when you print your form, however.)

Editing a field that was prefilled with data that was exported from QuickBooks

To edit data in a field that was prefilled from QuickBooks:

1. Right-click in the field and select **Override**.
2. Type the new data in the override box, and press Tab key.
3. The new data appears in the field. It is green on the screen, to indicate that you manually overrode the data that was exported from QuickBooks. (It will not be green when you print the form, however.)

Canceling an override of data that was exported from QuickBooks

To undo an override, right-click in the field and choose **Cancel Override**.

W2-C Form

QuickBooks does not handle W2-C forms, which correct information on W-2 forms already sent to the federal government.

If an employee's W2 form, that was previously sent to Social Security Administration, needs correction, go to the [Social Security site](#) to download the W2-C and W3-C forms.

The corrected W2-C and W3-C forms must be approved by the County Program Director or Council Officer. Send corrected forms to the Social Security Administration.

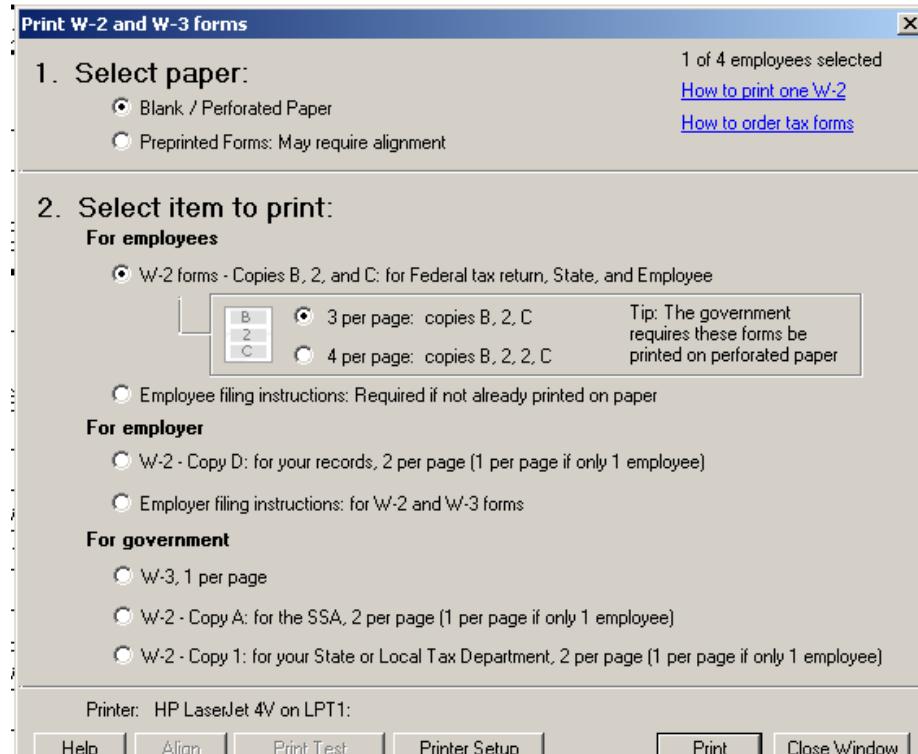
W3 Form

The W3 form must be signed the County Program Director or a Council representative. Bookkeepers must not sign the W3 forms.

The Company's name and employer identification number (EIN) on Forms W-2 and W-3 should be the same as those used on the Form 941- Employer's Quarterly Federal Tax Return, or Form 944 - Employer's Annual Federal Tax Return.

Printing the W2 and W3 Forms

Depending on the type of Payroll Tax subscription, W2 and W3 forms may be printed to blank paper or to preprinted forms.



To ensure the W2 or W3 forms are accepted by the U.S. government, make sure the following are both true:

- Your printer is loaded with 8.5" x 11", or 8" x 11", white- or cream-colored paper, of at least 18-lb. weight.
- The printer ink is black.