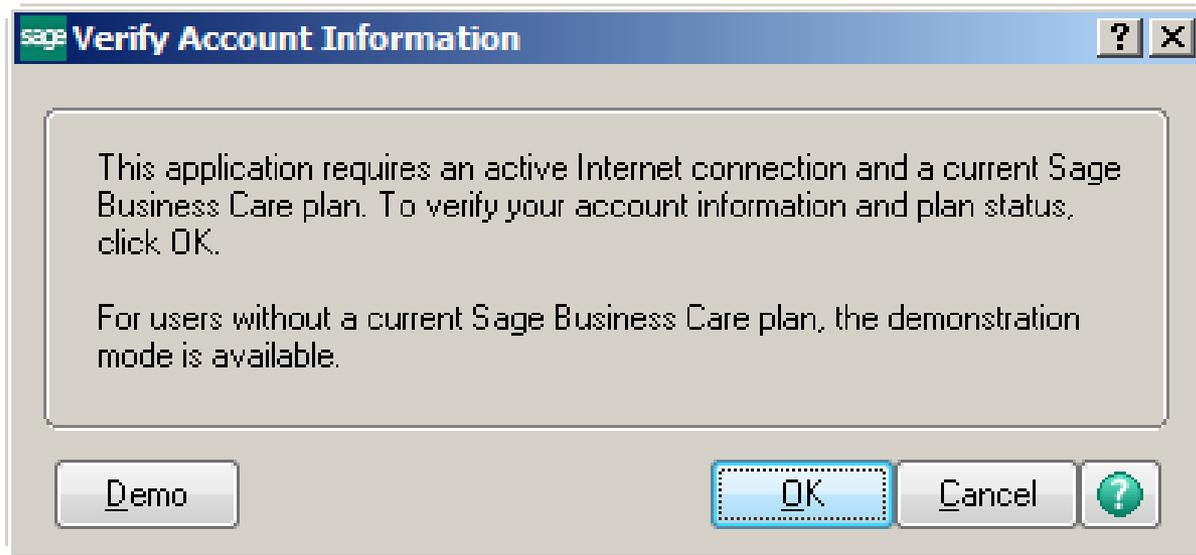


Click OK to start eFiling or Demo if user does not have a current Business Care Plan to run in demo mode. Demo mode allows reports to be printed but will have DEMO printed on them.



# To print or eFile a form – select the form

sage Federal eFiling and Reporting

Form Selection

Federal  
 State  
 Existing Reports

Reporting

Period: Quarterly  
Year: 2010  
Quarter: 2

| Form ID                          | Form Description  |
|----------------------------------|---|
| Federal Tax Deposit (EFTPS)      | EFTPS Form 8109. Use this to make 940, 941, 943, 944,           |
| 2013 940 Report                  | [Annual] Employer's Annual Federal Unemployment (FUTA           |
| 2014 941-X Report                | Adjusted Employer's Quarterly Federal Tax Return or Claim       |
| 2014 941/Schedule B/941-V Report | [Quarterly] Employer's Quarterly Federal Tax Return. Use        |
| 2013 943/943-A/943-V Reports     | [Annual] Employer's Annual Federal Tax Return for Agricul       |
| 2013 944 Report                  | [Annual] Employer's Annual Federal Tax Return use this if       |
| 2013 945/945-A/945-V Reports     | [Annual] Annual Return of Federal Income Tax. Use this t        |
| Electronic W2 Consent            | Use this to print an electronic W-2 consent for each of yo      |
| I-9 Report                       | Employment Eligibility Verification. Use this to report empl    |
| W-2 History                      | Select this option to correct, add, delete, reprint, or look up |

Company

Name: ABC Distribution and Service Corp.  
Address: 7776 S. Pointe Parkway West  
City: Phoenix  
State: AZ ZIP Code: 85044  
Federal ID No.:  
State ID No.:  
Telephone: (555) 555-5555  
Fax:  
Trade Name:

Selections: All Starting Ending  
Date: 04/01/2010 06/30/2010  
Employee No. [checked] 00- [magnifying glass icon]

W2 and Box 14 Selections

Kind of Employer: N = None Apply  
Misc Earnings Code 1 [ ] Misc Deduction Code 1 [ ]  
Misc Earnings Code 2 [ ] Misc Deduction Code 2 [ ]

Activate Accept Cancel ?

## Updating:

Perform either of the following:

- Expand **Payroll, Period End, Federal or State eFiling and Reporting**
- Expand **Accounts Payable, Reports, Form 1099 eFiling and Reporting**

Select **any form**, and click **Accept**.

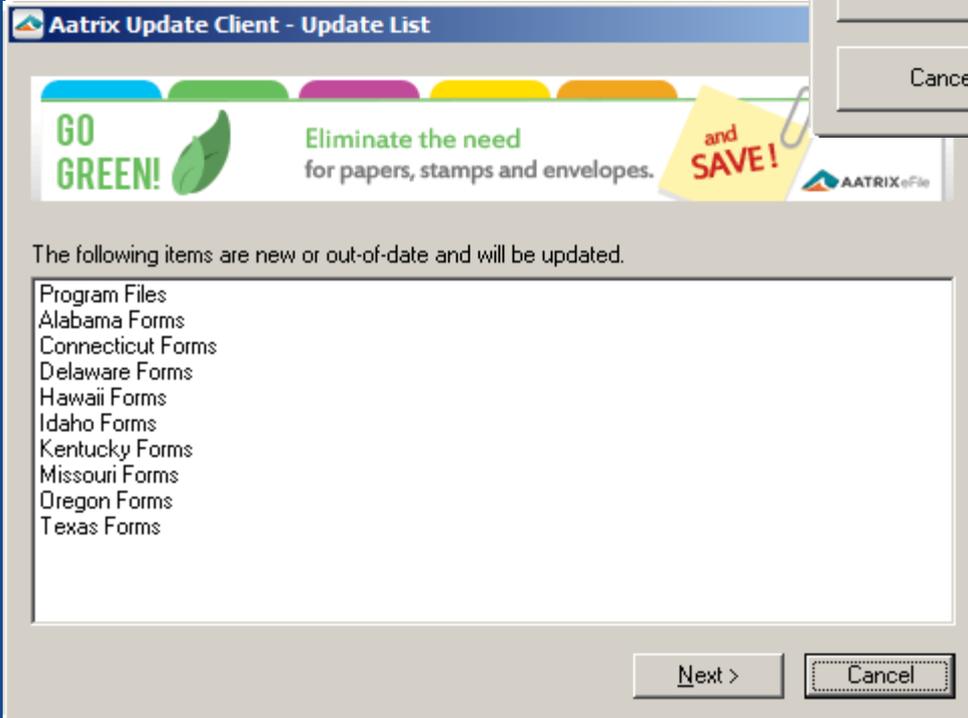
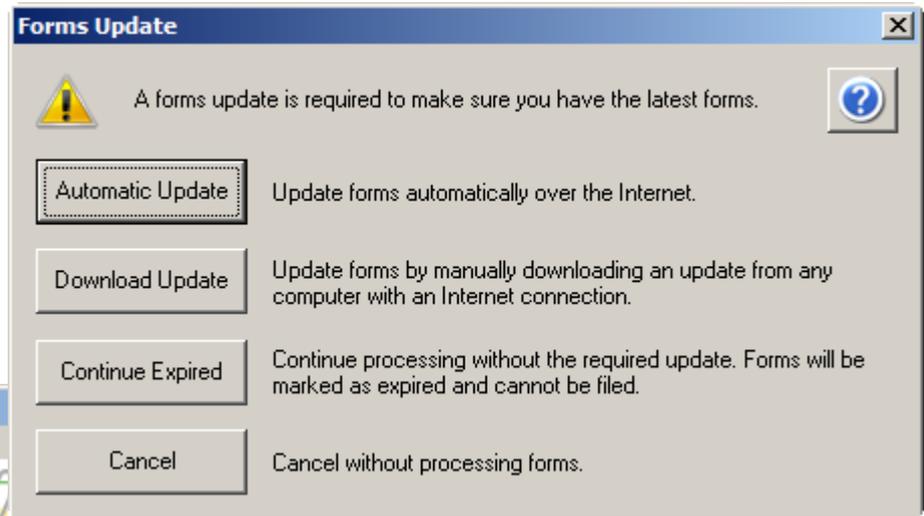
**If a form update is needed**, you will receive one of the following prompts:

- Click **Yes**, At the prompt "**There is a mandatory quarterly update available. It must be installed to continue processing. Do you wish to update now?**"
- Click **Automatic Update** at the prompt "**A forms update is required to make sure you have the latest forms**"

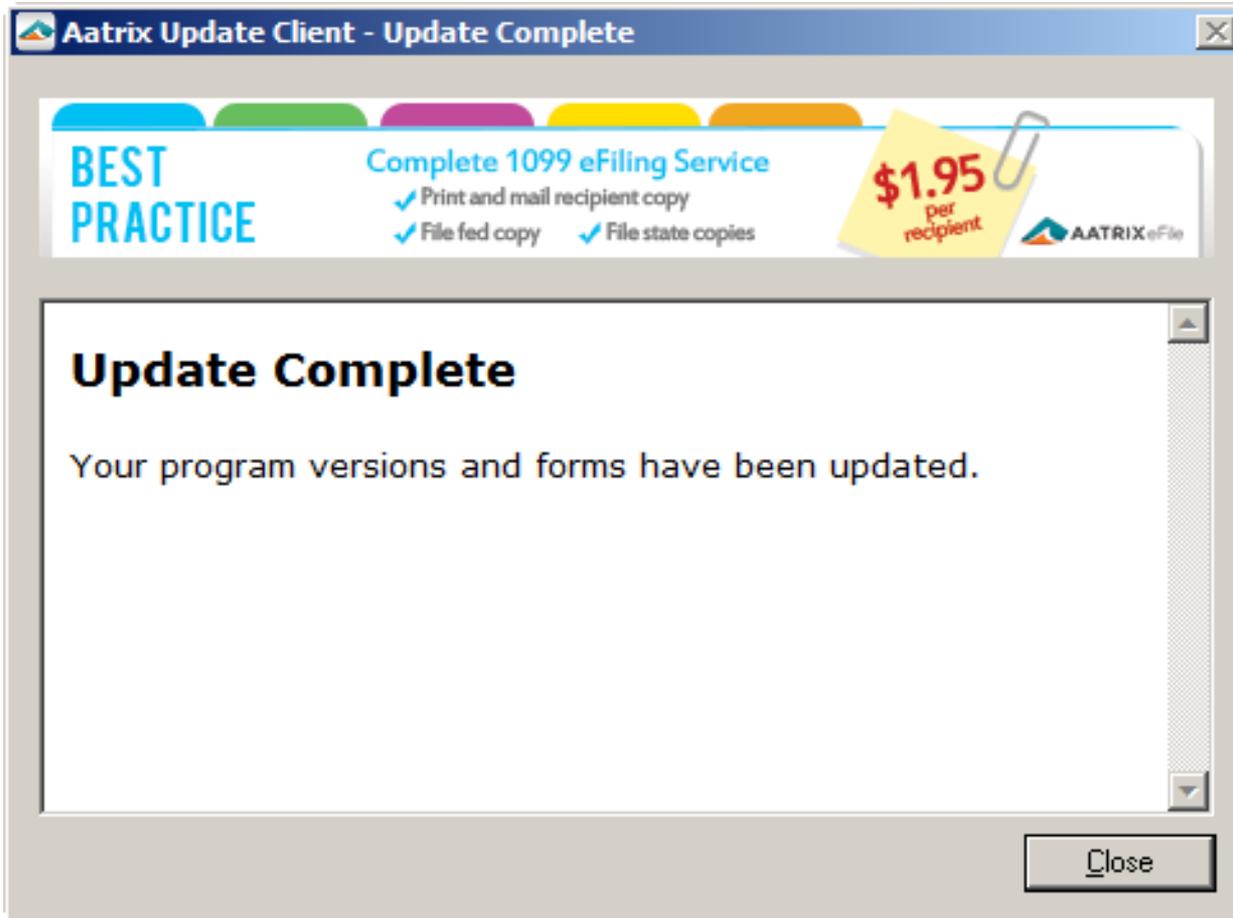
Review the selections, and click **Next**.

Click **Close** at the "**Update Complete**" message

# Aatrix will update the files



When the update is finished, the following screen will pop up. Click Close.



W2/W3 form printing and eFiling form - select the option for processing.

**W-2 Setup Wizard**

We noticed that you have not processed any W-2s for the current filing year.  
Before you begin filing your W-2s, would you like to do any of the following?

- I want to test drive the W-2/W-3 Wizard with only the first 25 of my employees.
- I want to test drive the W-2/W-3 Wizard with all of my employees.
- No thanks, start processing my W-2/W-3s.

NOTE: The W-2/W-3 Wizard test drive allows you to see how the process works but does NOT save any of your information.

< Back   **Next >**   Cancel

# Verify your customer ID number

**W-2 Setup Wizard**

**Get Started Printing or eFiling Your W-2s**

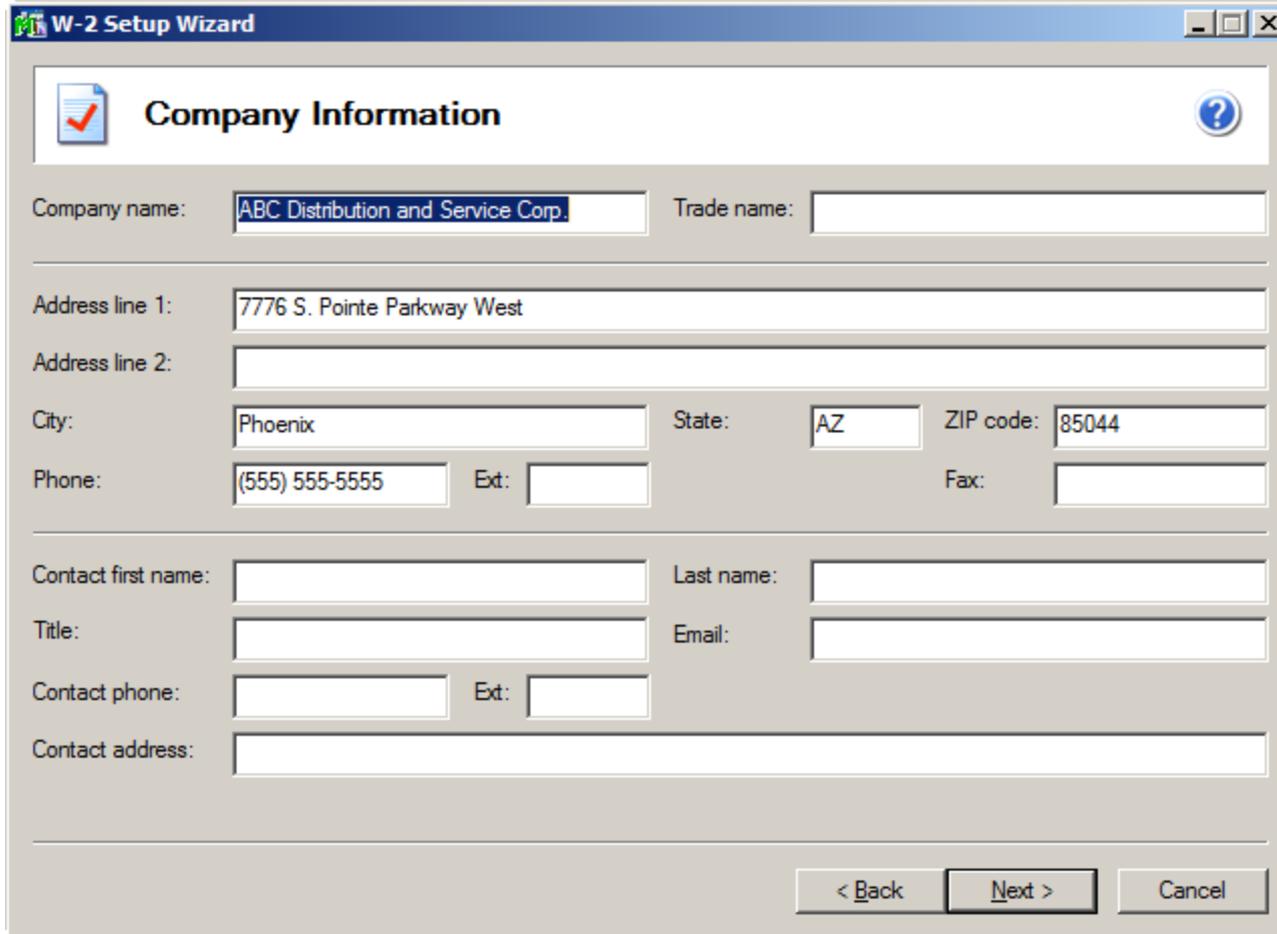
Please verify this company's Federal Employer Identification Number (FEIN). This number is used on ALL payroll forms and MUST be correct. If this number is NOT correct, you MUST return to your accounting/payroll software to make the correction.

**Company FEIN**

8 6 - 1 2 3 4 5 6 7

< Back   Next >   Cancel

Verify the company information – make any necessary changes



The image shows a screenshot of the 'W-2 Setup Wizard' software window. The title bar reads 'W-2 Setup Wizard'. The main window has a header area with a checkmark icon and the text 'Company Information', and a help icon (question mark) on the right. Below the header are several input fields for company and contact information. The 'Company name' field contains 'ABC Distribution and Service Corp.' and the 'Trade name' field is empty. The 'Address line 1' field contains '7776 S. Pointe Parkway West', and the 'Address line 2' field is empty. The 'City' field contains 'Phoenix', the 'State' dropdown is set to 'AZ', and the 'ZIP code' field contains '85044'. The 'Phone' field contains '(555) 555-5555', the 'Ext.' field is empty, and the 'Fax' field is empty. The 'Contact first name' and 'Last name' fields are empty. The 'Title' and 'Email' fields are empty. The 'Contact phone' field is empty, and the 'Ext.' field is empty. The 'Contact address' field is empty. At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'.

W-2 Setup Wizard

**Company Information**

Company name:  Trade name:

Address line 1:  Address line 2:

City:  State:  ZIP code:

Phone:  Ext:  Fax:

Contact first name:  Last name:

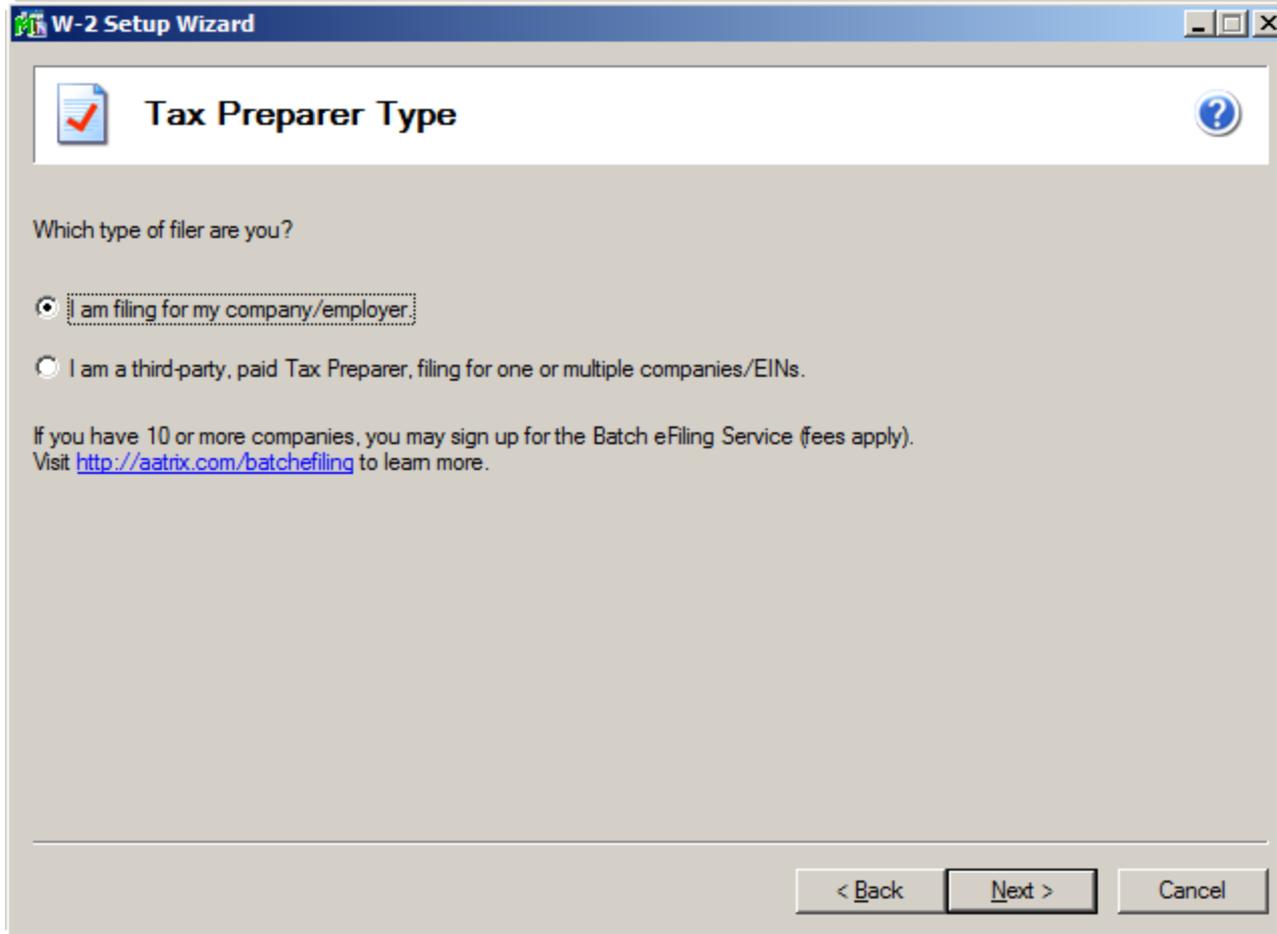
Title:  Email:

Contact phone:  Ext:

Contact address:

< Back Next > Cancel

# Select the Tax Preparer Type



The screenshot shows a window titled "W-2 Setup Wizard" with a sub-header "Tax Preparer Type" and a help icon. The main content area asks "Which type of filer are you?" and provides two radio button options. The first option, "I am filing for my company/employer", is selected. The second option is "I am a third-party, paid Tax Preparer, filing for one or multiple companies/EINs." Below the options, there is a note about Batch eFiling Service for 10 or more companies, with a link to <http://aatrix.com/batchefiling>. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

W-2 Setup Wizard

 **Tax Preparer Type** 

Which type of filer are you?

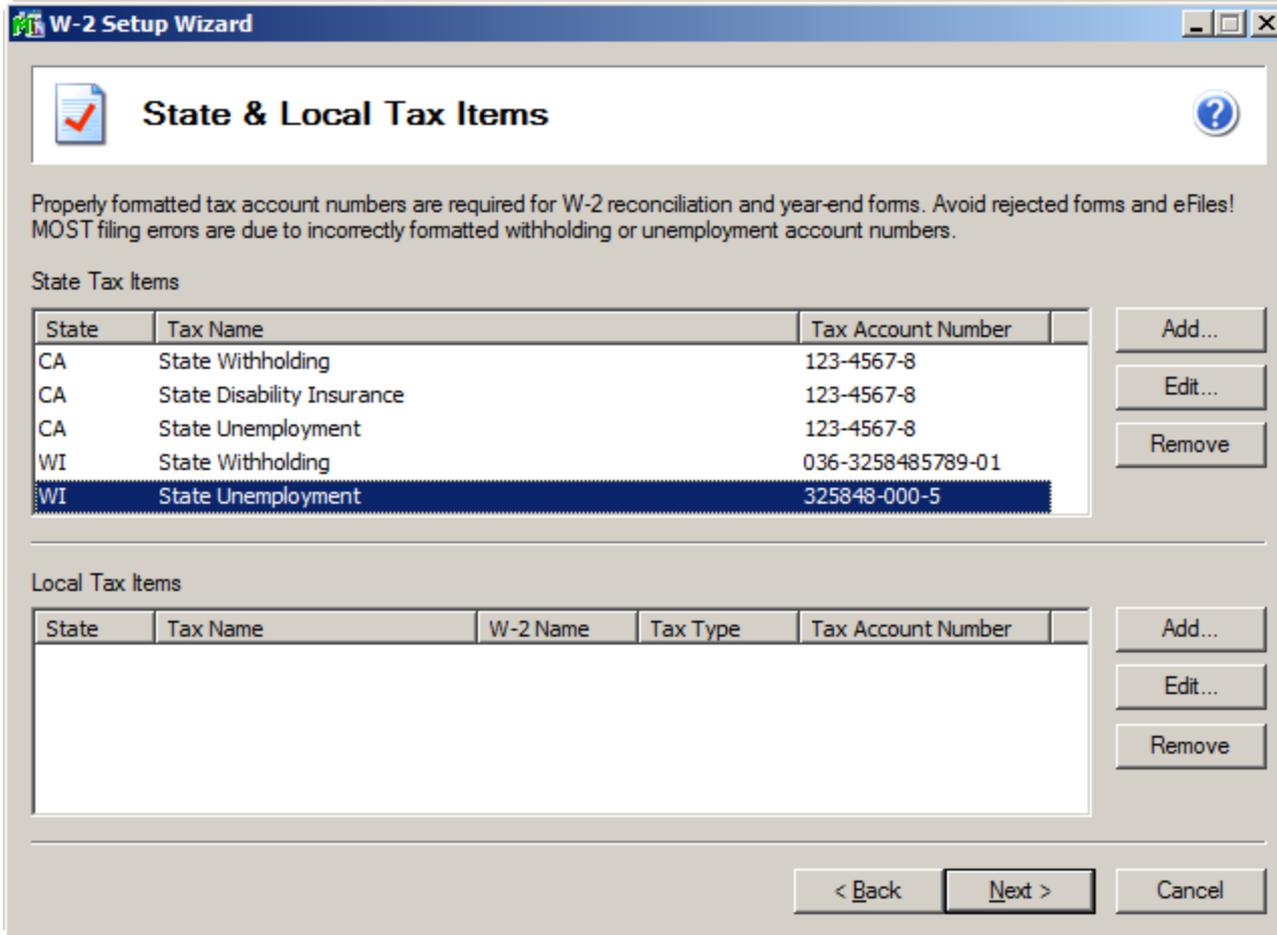
I am filing for my company/employer.

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://aatrix.com/batchefiling> to learn more.

< Back   Next >   Cancel

# Verify the State and Local Tax Accounts – make any necessary changes



**W-2 Setup Wizard**

## State & 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 Items

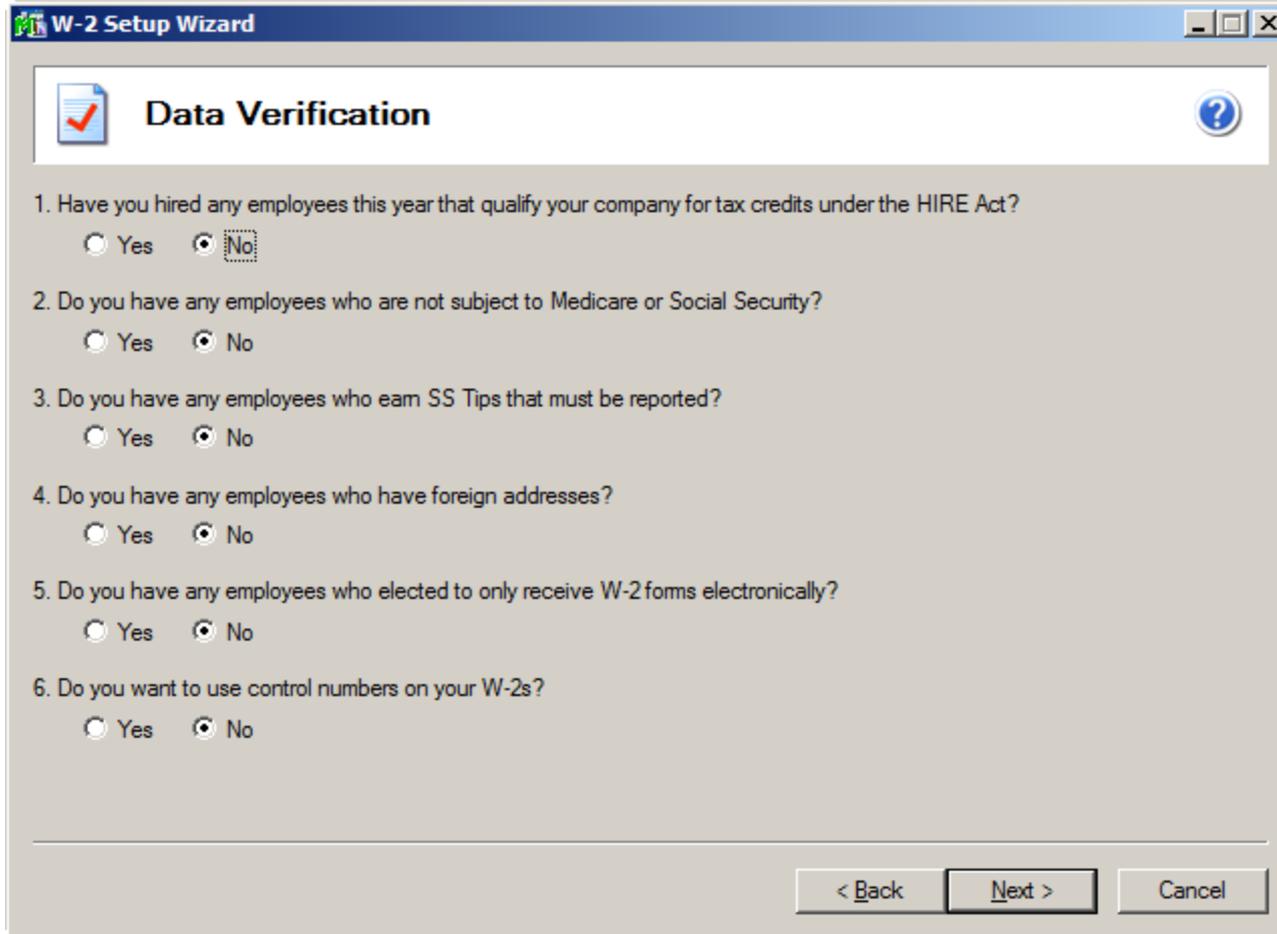
| State | Tax Name                   | Tax Account Number |
|-------|----------------------------|--------------------|
| CA    | State Withholding          | 123-4567-8         |
| CA    | State Disability Insurance | 123-4567-8         |
| CA    | State Unemployment         | 123-4567-8         |
| WI    | State Withholding          | 036-3258485789-01  |
| WI    | State Unemployment         | 325848-000-5       |

Local Tax Items

| State | Tax Name | W-2 Name | Tax Type | Tax Account Number |
|-------|----------|----------|----------|--------------------|
|-------|----------|----------|----------|--------------------|

< Back   Next >   Cancel

# Select the appropriate selections for Employee/W-3 data



The screenshot shows a window titled "W-2 Setup Wizard" with a "Data Verification" header. It contains six numbered questions, each with "Yes" and "No" radio button options. The "No" option is selected for all questions. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

**W-2 Setup Wizard**

**Data Verification**

1. Have you hired any employees this year that qualify your company for tax credits under the HIRE Act?  
 Yes  No

2. Do you have any employees who are not subject to Medicare or Social Security?  
 Yes  No

3. Do you have any employees who earn SS Tips that must be reported?  
 Yes  No

4. Do you have any employees who have foreign addresses?  
 Yes  No

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

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

< Back   Next >   Cancel

Fill in the W-3 information required – standard Kind of Payer Box b is 941.

The screenshot shows a software window titled "W-2 Setup Wizard" with a sub-header "W-3 Information". The window contains several input fields and checkboxes for configuring W-3 information. The "Control number (Box a)" field is empty. Under "Kind of Payer (Box b - check all that apply)", the checkbox for "941" is checked, while others are unchecked. The "Kind of Employer (Box b)" dropdown menu is set to "None apply". The "Third-party sick pay (Box b)" checkbox is unchecked. The "Income tax withheld (Box 14)" field is empty. The "Establishment number (Box d)" and "Other EIN used this year (Box h)" fields are empty. The "Business terminated this year" checkbox is unchecked. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

W-2 Setup Wizard

**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):

Third-party sick pay (Box b)

Income tax withheld (Box 14):

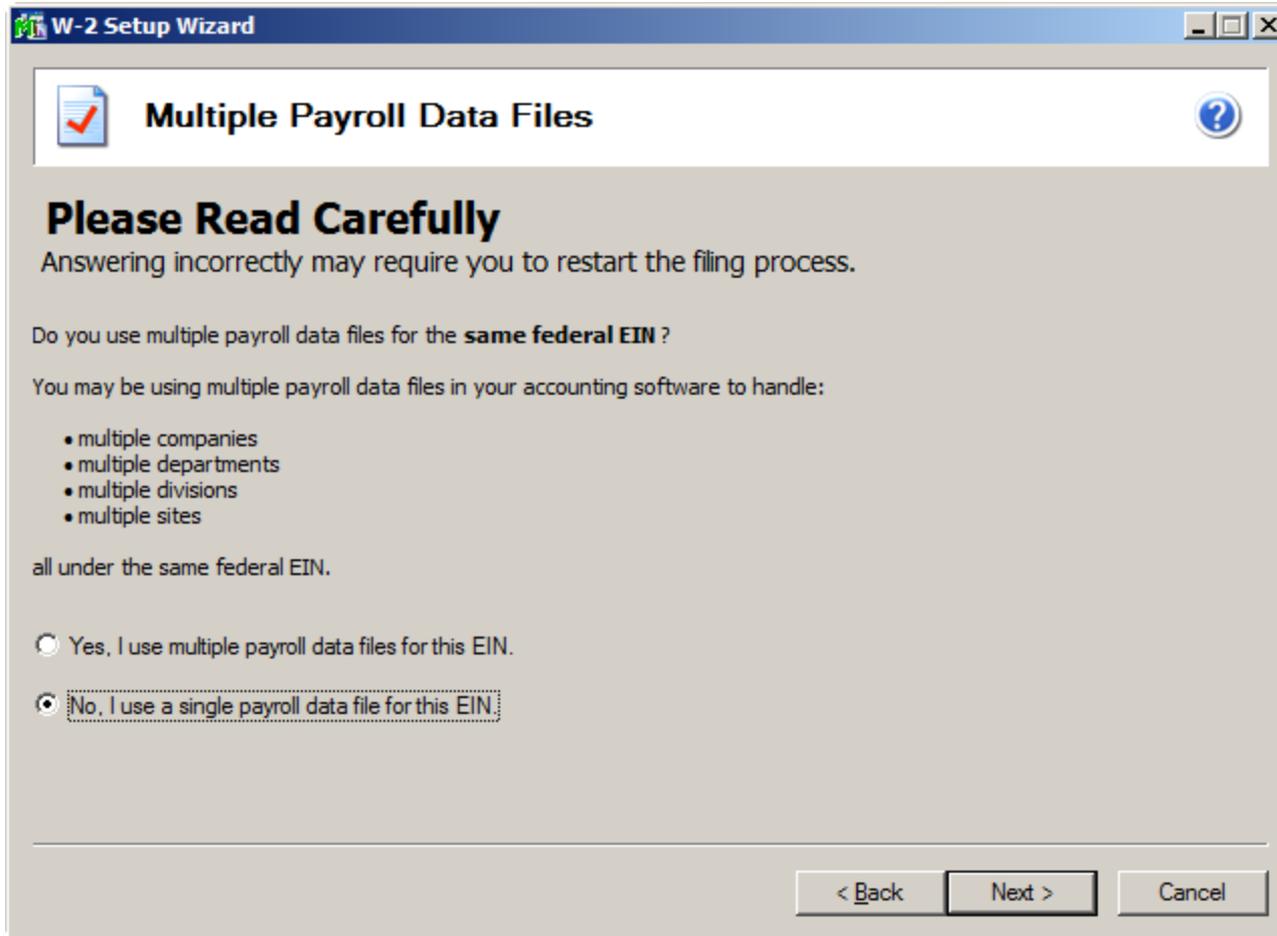
Establishment number (Box d):

Other EIN used this year (Box h):

Business terminated this year

< Back    Next >    Cancel

Answer Yes or No to Multiple Data files for same Federal ID.



The image shows a Windows-style dialog box titled "W-2 Setup Wizard" with a sub-header "Multiple Payroll Data Files". The dialog contains a warning icon and a question mark icon. The main text reads "Please Read Carefully" followed by "Answering incorrectly may require you to restart the filing process." Below this is a question: "Do you use multiple payroll data files for the **same federal EIN** ?". A paragraph explains that multiple files might be used for multiple companies, departments, divisions, or sites under the same EIN. Two radio buttons are present: "Yes, I use multiple payroll data files for this EIN." (unselected) and "No, I use a single payroll data file for this EIN." (selected). At the bottom are buttons for "< Back", "Next >", and "Cancel".

**Multiple Payroll Data Files**

**Please Read Carefully**  
Answering incorrectly may require you to restart the filing process.

Do you use multiple payroll data files for the **same federal EIN** ?

You may be using multiple payroll data files in your accounting software to handle:

- multiple companies
- multiple departments
- multiple divisions
- multiple sites

all under the same federal EIN.

Yes, I use multiple payroll data files for this EIN.

No, I use a single payroll data file for this EIN.

< Back    Next >    Cancel

# Employee Information screen – review and verify data before proceeding

ABC Distribution and Service Corp. - W2/1099 Preparer

File Edit View Help

**Verify Employee Information** ..... then click **Next Step**

Prev Step Next Step

|    | Box a       | Box e     | Box e      | Box 1     | Box 2        | Box 3    | Box 4       | Box 5         | Box 6         | Box 7   | Box 9 |
|----|-------------|-----------|------------|-----------|--------------|----------|-------------|---------------|---------------|---------|-------|
|    | SSN         | Last Name | First Name | Fed Wages | Fed Withheld | SS Wages | SS Withheld | Medicare W... | Medicare W... | SS Tips | EIC   |
| 1  | 986-53-1239 | THOMAS    | JERRY      | 8650.87   | 1018.40      | 8650.87  | 423.56      | 8650.87       | 125.44        |         | 3.05  |
| 2  | 865-31-2399 | JENKINS   | ALLEN      | 8005.32   | 1136.82      | 8005.32  | 417.58      | 8005.32       | 116.08        |         |       |
| 3  | 653-12-3998 | PHILLIPS  | AVERY      | 10312.84  | 1393.10      | 10312.84 | 551.89      | 10312.84      | 149.54        |         |       |
| 4  | 531-23-9985 | THOMPSON  | JOHN       | 7308.00   | 1363.75      | 7308.00  | 374.63      | 7308.00       | 105.97        |         |       |
| 5  | 312-39-9854 | SHAW      | ARTHUR     | 6485.48   | 1024.32      | 6485.48  | 336.75      | 6485.48       | 94.04         |         |       |
| 6  | 123-99-8546 | THOMPSON  | MICHAEL    | 8299.96   | 1149.85      | 8299.96  | 443.69      | 8299.96       | 120.35        |         |       |
| 7  | 239-98-5463 | ALLENDAR  | HARVEY     | 7344.40   | 651.55       | 7344.40  | 385.60      | 7344.40       | 106.50        |         |       |
| 8  | 399-85-4632 | AVILLA    | SUSAN      | 7742.27   | 811.56       | 7742.27  | 392.41      | 7742.27       | 112.26        |         |       |
| 9  | 998-54-6321 | JOHNSON   | MARTHA     | 7429.16   | 935.27       | 7429.16  | 385.20      | 7429.16       | 107.73        |         |       |
| 10 | 985-46-3219 | JENKINS   | JEFFERY    | 8848.23   | 1910.79      | 8848.23  | 449.88      | 8848.23       | 128.30        |         |       |
| 11 | 854-63-2198 | JAMESON   | JAMES      | 7830.00   | 1431.78      | 7830.00  | 401.38      | 7830.00       | 113.54        |         |       |
| 12 | 546-32-1984 | GRASS     | JOHN       | 7605.56   | 1035.71      | 7605.56  | 389.88      | 7605.56       | 110.28        |         |       |
| 13 | 463-21-9843 | JONES     | WILLIAM    | 9244.64   | 1877.07      | 9244.64  | 473.89      | 9244.64       | 134.05        |         |       |
| 14 | 632-19-8435 | HADLEY    | ROBERT     | 5721.12   | 660.46       | 5721.12  | 306.00      | 5721.12       | 82.96         |         |       |
| 15 | 321-98-4356 | RODRIGUEZ | MANUEL     | 8651.04   | 1372.27      | 8651.04  | 439.90      | 8651.04       | 125.44        |         |       |

Existing DB opened

NUM

If any data is found to be invalid, a message box will pop up advising that there is an Invalid entry – which will be highlighted in red. Click on Go Back and Correct to fix.

ABC Distribution and Service Corp. - W2/1099 Preparer

File Edit View Help

**Verify Employee Information** ..... then click **Next Step**

Prev Step Next Step

|    | Box a       | Box e     | Box e      | Box 1  | Box 2 | Box 3 | Box 4 | Box 5 | Box 6 | Box 7 | Box 9 |      |
|----|-------------|-----------|------------|--|-------|-------|-------|-------|-------|-------|-------|------|
|    | SSN         | Last Name | First Name | <b>Warning</b>   |       |       |       |       |       |       |       | 3.05 |
| 1  | 986-53-1239 | THOMAS    | JERRY      | <p> 6 employee(s) have incorrect social security numbers. Incorrect social security numbers on your W-2 forms will be rejected by the SSA. If the number begins with 9, it is likely an Individual Taxpayer Identification Number (ITIN). ITIN cannot be used for the W-2.</p> <p>You must correct these errors or delete the employee(s) from your filing and process them through an alternative means; they cannot be processed through the W-2 Preparer. All cells with identified errors will be highlighted in <b>RED</b>.</p> <p>Click Help for tips on how to resolve these errors.<br/>Please complete or correct required <b>RED</b> fields. Use TAB for the next <b>RED</b> field.</p> <p>Error / Warning Description:<br/>Social security number cannot begin with a '9' [6 errors found]</p> <p>Go Back and Correct    Continue without Correcting    Print List...    Help...</p> |       |       |       |       |       |       |       |      |
| 2  | 865-31-2399 | JENKINS   | ALLEN      |  |       |       |       |       |       |       |       |      |
| 3  | 653-12-3998 | PHILLIPS  | AVERY      |  |       |       |       |       |       |       |       |      |
| 4  | 531-23-9985 | THOMPSON  | JOHN       |  |       |       |       |       |       |       |       |      |
| 5  | 312-39-9854 | SHAW      | ARTHUR     |  |       |       |       |       |       |       |       |      |
| 6  | 123-99-8546 | THOMPSON  | MICHAEL    |  |       |       |       |       |       |       |       |      |
| 7  | 239-98-5463 | ALLENDAR  | HARVEY     |  |       |       |       |       |       |       |       |      |
| 8  | 399-85-4632 | AVILLA    | SUSAN      |  |       |       |       |       |       |       |       |      |
| 9  | 998-54-6321 | JOHNSON   | MARTHA     |  |       |       |       |       |       |       |       |      |
| 10 | 985-46-3219 | JENKINS   | JEFFERY    |  |       |       |       |       |       |       |       |      |
| 11 | 854-63-2198 | JAMESON   | JAMES      |  |       |       |       |       |       |       |       |      |
| 12 | 546-32-1984 | GRASS     | JOHN       |  |       |       |       |       |       |       |       |      |
| 13 | 463-21-9843 | JONES     | WILLIAM    |  |       |       |       |       |       |       |       |      |
| 14 | 632-19-8435 | HADLEY    | ROBERT     |  |       |       |       |       |       |       |       |      |
| 15 | 321-98-4356 | RODRIGUEZ | MANUEL     |  |       |       |       |       |       |       |       |      |
| 16 | 219-84-3567 | MILLER    | SUSAN      |  |       |       |       |       |       |       |       |      |
| 17 | 198-43-5672 | JOHNSON   | JERRY      |  |       |       |       |       |       |       |       |      |
| 18 | 984-35-6721 | SAMPSON   | DAVID      |  |       |       |       |       |       |       |       |      |
| 19 | 843-56-7213 | TOMELLI   | SCOTT      |  |       |       |       |       |       |       |       |      |
| 20 | 435-67-2134 | GOMEZ     | ELIZABETH  |  |       |       |       |       |       |       |       |      |
| 21 | 356-72-1345 | ELLISON   | HELEN      |  |       |       |       |       |       |       |       |      |

NUM

# Choose the Printing and Filing Option – Complete eFiling or Other (Print/eFile)

**W2/1099 Preparer**

### W-2 Printing and Filing Options

Choose **Complete W-2, eFile Fed or eFile State** and pick your filing dates. Corrections before dates are FREE! [More info?](#)

|  | <b># Employees</b> | <b>Price/Emp</b> | <b>Subtotal</b> |
|--|--------------------|------------------|-----------------|
| <input type="radio"/> <b>Complete W-2 eFiling Service</b> <b>Next Business Day Mailing!</b>                                |                    |                  |                 |
| The eFile Center will:   |                    |                  |                 |
| - Print and Mail Employee Copies   | 2                  | \$1.95           | \$ 0.00         |
| - eW-2 Only Employee Copies <a href="#">What's This?</a>   | 0                  | \$0.99           | \$ 0.00         |
| - File your Fed W-2s and W-3 to the SSA  |                    | included         | FREE            |
| - File your State W-2s and Reconciliation Forms  |                    | included         | FREE            |
| - eW-2s Available for All Employees  |                    | included         | FREE            |
| <b>Total Cost</b>  |                    | <b>Minimum</b>   | <b>\$ 0.00</b>  |
| <input checked="" type="radio"/> <b>Other Options</b> <a href="#">Fed or State eFilers receive Free, Easy Corrections!</a> |                    |                  |                 |
| <input checked="" type="checkbox"/> Print my Employee W-2s   |                    |                  |                 |
| <input type="checkbox"/> eFile Federal W-2s and W-3  | 2                  | \$0.49           | \$ 0.00         |
| <input type="checkbox"/> eFile State W-2s and Reconciliation Forms   | 2                  | \$0.69           | \$ 0.00         |
| <input checked="" type="checkbox"/> Print Federal W-2s and W-3 (Official Copy)   |                    |                  |                 |
| <input checked="" type="checkbox"/> Print State W-2s and Reconciliation Forms (Official Copy)                              |                    |                  |                 |
| <input checked="" type="checkbox"/> Print Employer Copy  |                    |                  |                 |
| <b>Total Cost</b>  |                    |                  | <b>\$ 0.00</b>  |

< Back    Next >    Cancel

Click Next to skip the eFiling Service or select the check box to use eFiling

W2/1099 Preparer

### Benefits of the Complete W-2 eFile Service

-  **Have your employee W-2s printed and mailed automatically**  
**Next Business Day Mailing!**
-  **Have your federal W-2s/W-3 filed automatically**  
Select your filing dates and make any changes at no charge until that date. [learn more](#)
-  **Have your state W-2s & Reconciliation(s) filed automatically**  
Select your filing dates and make any changes at no charge until that date. [learn more](#)

Yes, I would like to continue with the Complete W-2 eFile Service

< Back   **Next >**   Cancel

Select Yes or No to print divider sheets to separate the forms

The screenshot shows a dialog box titled "W2/1099 Preparer" with a close button in the top right corner. The main heading is "Divider Sheets" with a document icon and a help button. The text asks: "Divider sheets provide important information about how to file your forms. Would you like to include a divider sheet to separate reports or forms?". There are two radio button options: "Yes, include divider sheets when printing." and "No, do not include divider sheets". The "No" option is selected. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

W2/1099 Preparer

**Divider Sheets**

Divider sheets provide important information about how to file your forms. Would you like to include a divider sheet to separate reports or forms?

Yes, include divider sheets when printing.

No, do not include divider sheets

< Back   Next >   Cancel

This screen shows what forms will be printed. You can elect to print a hard copy of the selections for your records. Click Next to continue.

The screenshot shows a software window titled "W2/1099 Preparer" with a close button in the top right corner. The main area is titled "Review Data" and contains a list of forms to be reviewed. The list is organized into categories: Federal, Wisconsin, Employee, and Employer. Each category has one or more "Print" options. At the bottom of the window, there is a "Print" button and three navigation buttons: "< Back", "Next >", and "Cancel".

**W2/1099 Preparer**

**Review Data**

Based upon your selections, we need you to review data on the following forms:

- Federal
  - Print Federal W-2
  - Print Federal W-3
- Wisconsin
  - Print Wisconsin W-2
- Employee
  - Print Employee W-2
  - Print W-2 Notice
- Employer
  - Print Employer W-2

If you would like a copy for your records of the actions that will be taken, click 'Print.'

Your W2's will be printed – click on Print Final, then Next Step to advance to the next set of forms.

W-2 State - State/Federal eFiling and Reporting

File Edit View Tools Help

Report 1 of 6: Wisconsin W-2

1 page Click Print Final, then click Next Step.

Print Draft Print Final Prev Step Next Step

|   |  |   |  |   |  |
|---|--|---|--|---|--|
| a Employee's SSN<br>886-53-1239   |  | 1 Wages, tips, other compensation<br>8,650.87       |  | 2 Federal income tax withheld<br>1,018.40     |  |
| OMB No. 1545-0008   |  | 3 Social security wages<br>8,650.87                 |  | 4 Social security tax withheld<br>423.56      |  |
| b Employer identification number<br>86-1234567  |  | 5 Medicare wages and tips<br>8,650.87               |  | 6 Medicare tax withheld<br>125.44             |  |
| c Employer's name, address, and ZIP code<br>ABC Distribution and Service Corp.<br>7776 S. Pointe Parkway West<br>Phoenix AZ 85044 |  |   |  |   |  |
| e Employee's first name and initial<br>JERRY A  |  | Last name<br>THOMAS                                 |  | Suff.   |  |
| 4121 W. 35th Street<br>Apartment 201<br>MILWAUKEE WI 53151  |  |   |  |   |  |
| f Employee's address and Zip code   |  |   |  |   |  |
| d Control number  |  | 7 Social security tips                              |  | 8 Allocated tips                              |  |
| 9   |  | 10 Dependent care benefits                          |  | 11 Nonqualified plans                         |  |
| 12a D 27.70   |  | 14 Other  |  |   |  |
| 12b   |  |   |  |   |  |
| 12c   |  |   |  |   |  |
| 12d   |  |   |  |   |  |
| 13 Statutory employee <input type="checkbox"/>  |  | Retirement plan <input checked="" type="checkbox"/> |  | Third-party sick pay <input type="checkbox"/> |  |
| 15 State Employer/state ID number<br>WI 038-3258485789-01   |  | 16 State wages, tips, etc.<br>8,650.87              |  | 17 State income tax<br>491.43                 |  |
| 18 Local wages, tips, etc.  |  | 19 Local income tax                                 |  | 20 Locality name                              |  |

Form W-2 Wage and Tax Statement 2013 Department/Treasury/Internal Revenue Service Copy 1 - For State, City, or Local Tax Department

Aatrix Rev. 2/13/14

|   |  |  |  |   |  |
|---|--|--|--|---|--|
| a Employee's SSN  |  | 1 Wages, tips, other compensation        |  | 2 Federal income tax withheld                 |  |
| OMB No. 1545-0008   |  | 3 Social security wages                  |  | 4 Social security tax withheld                |  |
| b Employer identification number  |  | 5 Medicare wages and tips                |  | 6 Medicare tax withheld                       |  |
| c Employer's name, address, and ZIP code<br>ABC Distribution and Service Corp.<br>7776 S. Pointe Parkway West<br>Phoenix AZ 85044 |  |  |  |   |  |
| e Employee's first name and initial   |  | Last name                                |  | Suff.   |  |
| f Employee's address and Zip code   |  |  |  |   |  |
| d Control number  |  | 7 Social security tips                   |  | 8 Allocated tips                              |  |
| 9   |  | 10 Dependent care benefits               |  | 11 Nonqualified plans                         |  |
| 12a   |  | 14 Other                                 |  |   |  |
| 12b   |  |  |  |   |  |
| 12c   |  |  |  |   |  |
| 12d   |  |  |  |   |  |
| 13 Statutory employee <input type="checkbox"/>  |  | Retirement plan <input type="checkbox"/> |  | Third-party sick pay <input type="checkbox"/> |  |
| 15 State Employer/state ID number   |  | 16 State wages, tips, etc.               |  | 17 State income tax                           |  |
| 18 Local wages, tips, etc.  |  | 19 Local income tax                      |  | 20 Locality name                              |  |

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For Help, press F1 HISTORY Page 1 of 1 NUM

Print all Reports (Federal and State W2's and W3) and then select Next Step.

2013 W-3 - State/Federal eFiling and Reporting

File Edit View Tools Help

Report 5 of 6: Federal W-3

1 page

Click Print Final, then click Next Step.

Print Draft Print Final Prev Step Next Step

|   |   |   |   |   |                                 |  |   |  |
|---|---|---|---|---|---------------------------------|--|---|--|
| <b>33333</b>  |   | a Control number  |   | For Official Use Only<br>OMB No. 1545-0008    |                                 | Aatrix Rev. 11/27/13                           |   |  |
| b Kind of Payer<br>(Check one)                              | 941 <input checked="" type="checkbox"/> | Military <input type="checkbox"/>                       | 943 <input type="checkbox"/>                | 944 <input type="checkbox"/>                  | Kind of Employer<br>(Check one) | None apply <input checked="" type="checkbox"/> | 501c non-govt. <input type="checkbox"/>   | Third-party sick pay<br>(Check if applicable) <input type="checkbox"/> |
|   | CT-1 <input type="checkbox"/>           | Hshld. emp. <input type="checkbox"/>                    | Medicare gov. emp. <input type="checkbox"/> |   |                                 | State/local non-501c <input type="checkbox"/>  | State/local 501c <input type="checkbox"/> |  |
| c Total number of Forms W-2<br>2                            |   | d Establishment number                                  |   | 1 Wages, tips, other compensation<br>16656.19 |                                 | 2 Federal income tax withheld<br>2155.22       |   |  |
| e Employer identification number (EIN)<br>86-1234567        |   |   |   | 3 Social security wages<br>16656.19           |                                 | 4 Social security tax withheld<br>841.14       |   |  |
| f Employer's name<br>ABC DISTRIBUTION AND SERVICE           |   |   |   | 5 Medicare wages and tips<br>16656.19         |                                 | 6 Medicare tax withheld<br>241.52              |   |  |
| 7776 S. POINTE PARKWAY WEST<br>PHOENIX AZ 85044             |   |   |   | 7 Social security tips                        |                                 | 8 Allocated tips                               |   |  |
|   |   |   |   | 9   |                                 | 10 Dependent care benefits                     |   |  |
| 9 Employer's address and ZIP code                           |   |   |   | 11 Nonqualified plans                         |                                 | 12a Deferred compensation<br>55.40             |   |  |
| h Other EIN used this year                                  |   |   |   | 13 For third-party sick pay use only          |                                 | 12b  |   |  |
| 15 State Employer's state ID number<br>WI 036-3258485789-01 |   | 14 Income tax withheld by payer of third-party sick pay |   |   |                                 |  |   |  |
| 16 State wages, tips, etc.<br>16656.19                      |   | 17 State income tax<br>981.83                           |   | 18 Local wages, tips, etc.                    |                                 | 19 Local income tax                            |   |  |
| Contact person  |   |   |   | Telephone number<br>555 555-5555              |                                 | For Official Use Only<br>0000/1048             |   |  |
| Email address   |   |   |   | Fax number                                    |                                 |  |   |  |

Under penalties of perjury, I declare that I have examined this return and accompanying documents and, to the best of my knowledge and belief, they are true, correct, and complete.

Signature \_\_\_\_\_ Title \_\_\_\_\_ Date 12/04/14

Form **W-3 Transmittal of Wage and Tax Statements** 2013 Department of the Treasury Internal Revenue Service

Send this entire page with the entire Copy A page of Form(s) W-2 to the Social Security Administration (SSA).  
Photocopies are not acceptable. Do not send Form W-3 if you filed electronically with the SSA.  
Do not send any payment (cash, checks, money orders, etc.) with Forms W-2 and W-3.

For Help, press F1 HISTORY Page 1 of 1 NUM

# Notice to Employee box - review and click on Next Step.

W-2 Notice - State/Federal eFiling and Reporting

File Edit View Tools Help

Report 6 of 6: W-2 Notice

1 1 page

Click Print Final, then click Next Step.

Print Draft Print Final Prev Step Next Step

Aatrix Rev. 11/27/13

## Notice to Employee

Do you have to file? Refer to the Form 1040 instructions to determine if you are required to file a tax return. Even if you do not have to file a tax return, you may be eligible for a refund if box 2 shows an amount or if you are eligible for any credit.

**Earned Income credit (EIC).** You may be able to take the EIC for 2013 if your adjusted gross income (AGI) is less than a certain amount. The amount of credit is based on income and family size. Workers without children could qualify for a smaller credit. You and any qualifying children must have valid social security numbers (SSNs). You cannot take the EIC if your investment income is more than the specified amount for 2013 or if income is earned for services provided while you were an inmate at a penal institution. For 2013 income limits and more information, visit [www.irs.gov/eflc](http://www.irs.gov/eflc). Also see Pub. 596, Earned Income Credit. Any EIC that is more than your tax liability is refunded to you, but only if you file a tax return.

**Clergy and religious workers.** If you are not subject to social security and Medicare taxes, see Pub. 517, Social Security and Other Information for Members of Clergy and Religious Workers.

**Corrections.** If your name, SSN, or address is incorrect, correct Copies B, C, and 2 and ask your employer to correct your employment record. Be sure to ask the employer to file FORM W-2c, Corrected Wage and Tax Statement, with the Social Security Administration (SSA) to correct any name, SSN, or money amount error reported to the SSA on FORM W-2. Be sure to get your copies of Form W-2c from your employer for all corrections made so you may file them with your tax return. If your name and SSN are correct but are not the same as shown on your social security card, you should ask for a new card that displays your correct name at any SSA office or by calling 1-800-772-1213. You also may visit the SSA at [www.socialsecurity.gov](http://www.socialsecurity.gov).

**Cost of employer-sponsored health coverage (if such cost is provided by the employer).** The reporting in Box 12, using Code DD, of the cost of employer-sponsored health coverage is for your information only. The amount reported with Code DD is not taxable.

**Credit for excess taxes.** If you had more than one employer in 2013 and more than \$7,049.40 in social security and/or Tier I railroad retirement (RRTA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. If you had more than one railroad employer and more than \$3,709.20 in Tier II RRTA tax was

However, if you were at least age 50 in 2012, your employer may have allowed an additional deferral of up to \$5,500 (\$2,500 for section 401(k)(11) and 408(p) SIMPLE plans). This additional deferral amount is not subject to the overall limit on elective deferrals. For code G, the limit on elective deferrals may be higher for the last 3 years before you reach retirement age. For code G, the limit on elective deferrals may be higher for the last 3 years before you reach retirement age. Contact your plan administrator for more information. Amounts in excess of the overall elective deferral limit must be included in income. See the "Wages, Salaries, Tips, etc." line instructions for Form 1040.

**Notes.** If a year follows code D through H, S, Y, AA, BB, or EE, you made a make-up pension contribution for a prior year(s) when you were in military service. To figure whether you made excess deferrals, consider these amounts for the year shown, not the current year. If no year is shown, the contributions are for the current year.

A - Uncollected social security or RRTA tax on tips. Include this tax on Form 1040. See "Other Taxes" in the Form 1040 instructions.

B - Uncollected Medicare tax on tips. Include this tax on Form 1040. See "Other Taxes" in the Form 1040 instructions.

C - Taxable cost of group-term life insurance over \$50,000 (included in boxes 1, 3 (up to social security wage base), and 5).

D - Elective deferrals to a section 401(k) cash or deferred arrangement. Also includes deferrals under a SIMPLE retirement account that is part of a section 401(k) arrangement.

E - Elective deferrals under a section 403(b) salary reduction agreement.

F - Elective deferrals under a section 408(k)(6) salary reduction SEP.

G - Elective deferrals and employer contributions (including nonelective deferrals) to section 457(b) deferred compensation plan.

H - Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan. See "Adjusted Gross Income" in the Form 1040 instructions for how to deduct.

J - Nontaxable sick pay (information only, not included in boxes 1, 3, or 5).

K - 20% excise tax on excess golden parachute payments. See "Other Taxes" in the Form 1040 instructions.

L - Substantiated employee business expense reimbursements (nontaxable).

M - Uncollected social security or RRTA tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See "Other Taxes" in Form 1040 instructions.

N - Uncollected Medicare tax on taxable cost of group-term life insurance over \$50,000 (former

For Help, press F1 HISTORY Page 1 of 1 NUM

Verification of data – review and click on Next Step.

ABC Distribution and Service Corp. - W2/1099 Preparer

File Edit View Help

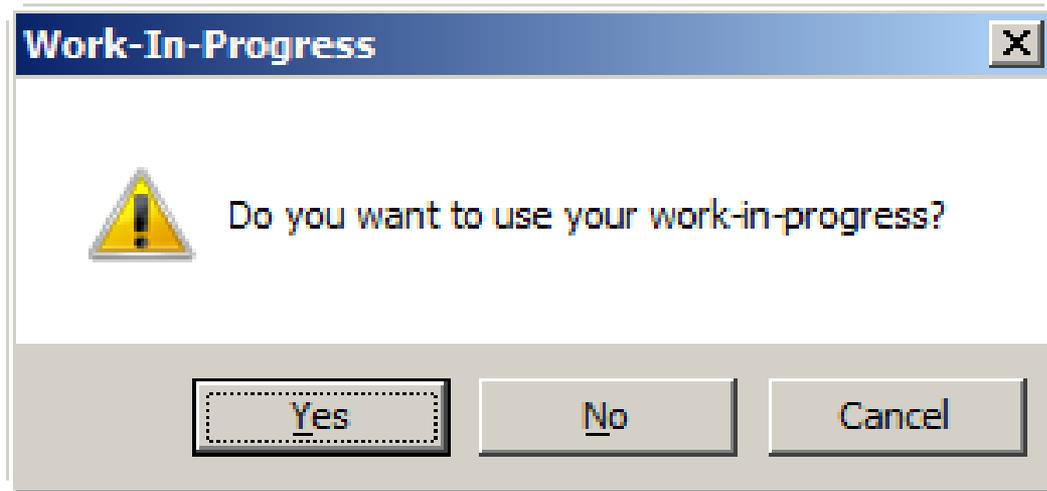
**Verify All Other Data ..... then click Next Step**   

Prev Step Next Step

|        | Box a       | Box e     | Box e       | Box 5         | Box 6         | Box 7   | Box 9 | Box 16   | Box 17 | Box 16   | Box 17 | Bo |
|--------|-------------|-----------|-------------|---------------|---------------|---------|-------|----------|--------|----------|--------|----|
|        | SSN         | Last Name | First Name  | Medicare W... | Medicare W... | SS Tips | EIC   | CA Wages | CA Tax | WI Wages | WI Tax | W2 |
| 1      | 886-53-1239 | THOMAS    | JERRY       | 8650.87       | 125.44        |         | 3.05  |          |        | 8650.87  | 491.43 |    |
| 2      | 865-31-2399 | JENKINS   | ALLEN       | 8005.32       | 116.08        |         |       |          |        | 8005.32  | 490.40 |    |
| Totals |             | 2         | Employee(s) | 16656.19      | 241.52        |         | 3.05  |          |        | 16656.19 | 981.83 |    |

Ready NUM

You can do a test print and your information will be saved – answer Yes if you want to use your work-in-progress.



You can reprint W-2's, eFile or print any W-2's not yet processed, correct completed W-2's or start the process over.

The screenshot shows a window titled "W2/1099 Preparer" with a close button in the top right corner. The main heading is "W-2 History File Options". Below the heading, there is a paragraph: "You have already completed part of your U.S. W-2 filings. Please review what you have completed and select which action you would like to take next." followed by another paragraph: "Each time you complete an action you will be returned to this screen."

The interface is divided into two main sections: "Last Completed Actions" and "Available Actions".

**Last Completed Actions**

| Form            | Last Completed Action |
|-----------------|-----------------------|
| Employee W-2    |                       |
| Federal W-2/W-3 |                       |
| State W-2/W-3   | Printed on 12/02/2014 |
| Local W-2/W-3   |                       |

Below the table are two buttons: "View Detailed List of Completed Actions" and "View Instructions on Returning Later".

**Available Actions**

- Reprint Completed W-2s**  
Reprint a copy of any W-2 filing that you have already completed.
- eFile or Print Incomplete W-2s**  
eFile or print any required W-2 copies you did not process yet.
- Correct Completed W-2s**  
Make corrections to W-2 copies that you have processed. Also, add/delete employees in this process.
- Start Over**  
Clear your past actions and start the W-2 process over again with new payroll data.
- eW-2 Password Lookup**  
Look up your employee's password information.

At the bottom of the window, there are four buttons: "< Back", "Next >", "Close", and "Help".