Quick Guide: W-2 Filing

Filing Federal Form W-2

You create and file your employees' federal W-2s (and the summary Form W-3) the same way you [create and file any payroll tax form](#), including [filing electronically](#), in QuickBooks Payroll.

It's a good idea to **preview** your W-2s before the end of the year, so you can be sure that everything looks right. Doing this before you run your last payroll of the year allows you to make adjustments if you find problems with employees' withholding. Creating preview forms has no effect on your results when you are ready to create and file your final W-2s.

To preview your W-2s, you create them just as if you were going to file them; then review the results and cancel without filing, e-filing, or sending them to TurboTax.

Tip: It's often hard to determine all the tax items that go into the calculations for the boxes on the W-2s, especially box 1.

To help, QuickBooks provides an Excel worksheet tool that lets you see what items QuickBooks used to calculate each box on the W-2. Be sure you have Excel installed on your computer and follow these steps:

1. On the File Forms tab of the Payroll Center, click **Tax Forms Worksheets** in the Reports area near the bottom of the page. (If you are prompted to enable macros in Excel, follow the prompts to do so.)

2. Click **Annual W-2/W-3**, and choose the date range you want.

3. Click **Create Report**.

4. Click on an amount on the worksheet to see the transactions that QuickBooks used to calculate that amount.

Filing State W-2 Forms Electronically

Currently, 36 states require you to file some type of state W-2 or wage and tax statement. However, because each state's submission requirements are different, QuickBooks handles the preparation and filing of these forms differently.

For **Georgia**, **Illinois**, **Indiana**, **Virginia**, and **Wisconsin**, you can [create and file](#) (including [e-filing](#)) your state W-2 the same way you file your other payroll tax forms in QuickBooks.

For the **other states**, QuickBooks helps you create an electronic file in the form required by the state and gives you state-specific instructions on how the state requires you to submit that file. To create state W-2 electronic files for these states, click **E-File State W-2** from the Other Activities area at the bottom of the File Forms page and follow the instructions. (This process requires that you have Excel installed on your computer.)