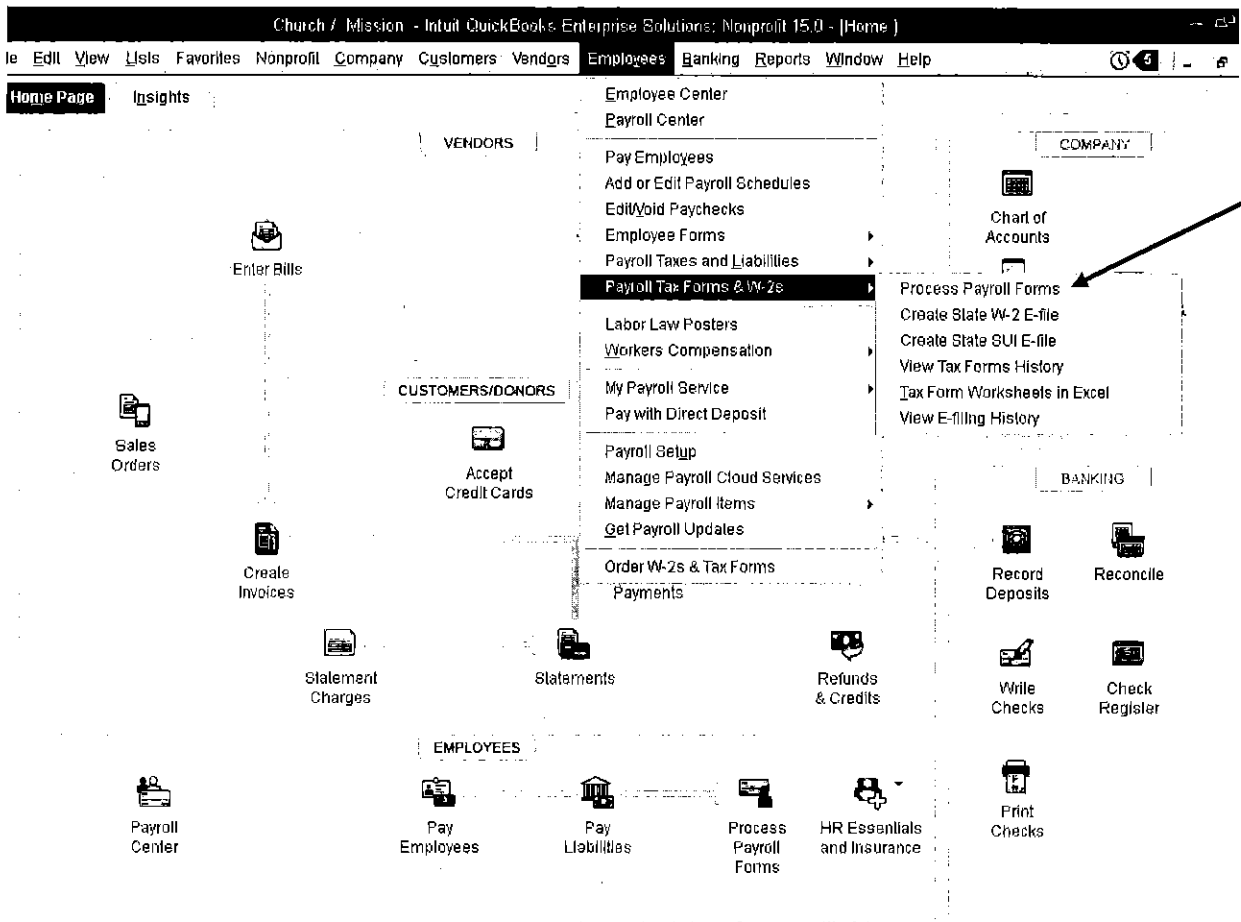


W2 / W3 Forms

1. Choose **Employees > Payroll Tax Forms and W-2s > Process Payroll Forms**.



2. Under File Forms tab scroll down and select **Annual Form W2 and W3 Wage and Tax Statement Transmittal**. You can double click or hit the create form button to start the process.

Church / Mission - Intuit QuickBooks Enterprise Solutions: Nonprofit 15.0 - (Employee Center: Payroll Center (QuickBooks Enhanced Payroll for unlimited e... -

File Edit View Lists Favorites Nonprofit Company Customers Vendors Employees Banking Reports Window Help

My Payroll Service Payroll Updates Payroll Items Hiring Forms Payroll Setup Preferences Support Help

Pay Employees Pay Liabilities File Forms

File Forms

FORM	FEDERAL/STATE	FILING PERIOD
Quarterly Form 941-X - Adjusted Employer's Quarterly Federal Tax Retu...	Federal	Quarterly
Annual Form 940/Sch. A (For Reporting Agents) - Employer's Annual Fe...	Federal	Annually
Annual Form 940/Sch. A - Employer's Annual Federal Unemployment (...)	Federal	Annually
Annual Form W-2/W-3 - Wage and Tax Statement/Transmittal	Federal	Annually

Forms Create Form

Filing History

Saved Filings | E-Filings

PERIOD END DATE	FORM	SAVED PDF
12/31/2013	Annual Form W-2/W-3 - Wage and T...	20131231_W2INTRV1.pdf
03/31/2012	Quarterly Form 941/Sch. B - Employ...	20120331_INWKS941.pdf

October 2015

SU	MO	TU	WE	TH	FR	SA
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

November 2015

SU	MO	TU	WE	TH	FR	SA
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21

Quick Guides

- Payroll Tax Forms
- Electronic Filing
- W-2 Filing

Other Activities

- Manage Filing Methods
- E-File State W-2
- Change Filing Method
- E-File State SUI

Reports

- Tax Form Worksheets
- Local Tax Summary
- Report Center...

Supplies & Services

- Order 1099-MISC Forms
- Order W-2 Forms

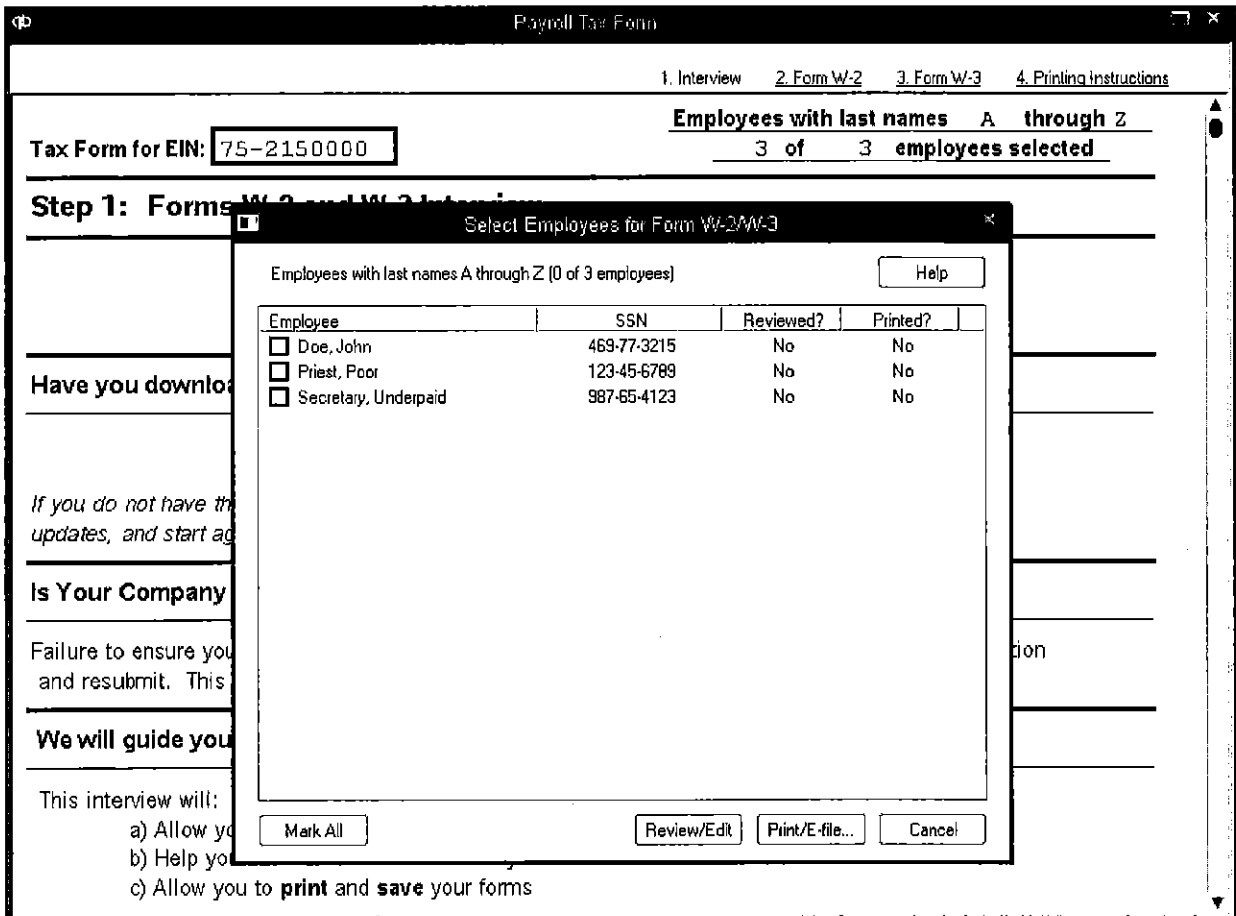
3. You can process W2 / W3 forms for all your employees at one time or for one at a time or a group. By default the "All Employees" option is selected.

The screenshot displays a payroll management software interface. A central dialog box titled "File Form" is open, allowing the user to configure the filing process. The dialog box includes the following elements:

- Form:** Annual Form W-2W-3 - Wage and Tax Statement (Transmittal)
- Auto-Fill Contact Info...** (checkbox)
- SELECT EMPLOYEES:** Process W-2s for: All Employees (3 Employees). Below this, there are fields for "Employee's Last Name - From:" and "To:".
- SELECT FILING PERIOD:** Year: 2014
- Buttons:** OK, Cancel, Help

The background interface shows a menu bar with options like "My Payroll Service", "Payroll Updates", "Payroll Items", "Hiring Forms", "Payroll Setup", "Preferences", "Support", and "Help". Below the menu bar, there are tabs for "Employees", "Hours/Activities", "Payroll", "Pay Employees", "Pay Liabilities", and "File Forms". A sidebar on the left shows "SUBSCRIPTION STATUSES" and "Easier". At the bottom, there is a calendar for November 2015 and several utility sections: "Quick Guides" (Payroll Tax Forms, Electronic), "Other Activities" (Manage Filing Methods, E-File State W-2, Change Filing Method), "Reports" (Tax Form Worksheets, Local Tax), and "Supplies & Services" (Order 1099-MISC Forms, Order W-2 Forms). On the right side, there are PDF links for "W2INTRV1.pdf" and "INWK:841.pdf".

4. In the **Select Employees for Form W-2/W-3** window, select the employees whose W-2 forms you want to print by clicking in the checkmark column on the left side of the window (or click **Mark All** to select all employees displayed).



If you have not yet reviewed all W-2 forms (as indicated by missing checkmarks in the Reviewed column), click **Review/Edit W-2** first. Before QuickBooks can print a W-2 form, it should be reviewed. Once reviewed, click **Print for Your Records**.

Step 2: Form W-2 Worksheet

2014

Displaying: PRIEST, POOR Employee 2 of 3

Employer's Name(s) as Shown on Forms

CHURCH / MISSION

Federal ID Number

75-2150000

a Employee's SSN 123-45-6789
 b Employer's ID number ... 75-2150000
 c Employer's name, address, and ZIP code
CHURCH / MISSION
CHURCH / MISSION
ADDRESS
ADDRESS
CITY State TX
12345
 d Control number

e Employee's name
 First POOR MI Suffix
 Last PRIEST

f Employee's address and ZIP code

1 Wages, tips, other compensation 19,200.00
 2 Federal income tax withheld 1,200.00
 3 Social security wages
 4 Social security tax withheld
 5 Medicare wages and tips
 6 Medicare tax withheld
 7 Social security tips
 8 Allocated tips
 9
 10 Dependent care benefits
 11 Nonqualified plans
 12 Box 12 instrs.
 a DD 8,520.00
 b
 c
 d
 13 Statutory employee
 Retirement plan
 Third-party sick pay

14 Other

[View details about this form](#)

[View Saved Tax Forms](#)

Select Employees...

<<< Previous

Next >>>

Save and Close

Save as PDF...

Print for Your Records...

Check for Errors

Submit Form...

Automatically create an archive when I e-file or print

Edit View

Filing and Printing Instructions

FEDERAL ANNUAL FORM W-2/W-3

Name

Church / Mission

Address

address

address

City, State, and ZIP Code

city, TX 12345

STEP 4 - FILING AND PRINTING INSTRUCTIONS

For each employee there are six different copies of Form W-2:

Copy A to be filed with the Social Security Administration by 03/02/2015

Copy B to be given to the employee by 02/02/2015

Copy C with instructions and Notice to Employee to be given to the employee

Copy D for your records

Copy 1 to be filed with state and/or local tax departments, if required

Copy 2 to be given to employee

PLEASE NOTE: Per IRS regulations and alignment considerations, the employer name, address, city, state and ZIP code lines may be truncated

You must file one W-2 form for each employee paid during the tax year.

View details about this form

View Saved Tax Forms

Select Employees...

<<< Previous

Next >>>

Save and Close

Save as PDF...

Print for Your Records...

Check for Errors

Submit Form...

Automatically create an archive when I e-file or print

5. In the Print W-2 and W-3 forms window,
 - #1 Select Paper, select the preprinted forms button
 - #2 Select item to print: choose which copy you are printing



Print a test copy on plain paper first to check the alignment for the printer you are using. Place the test copy next to the form and hold up to a light to see how it lines up. If it is off you will need to click the align button so that adjustments can be made.

Payroll Tax Forms

1. Interview 2. Form W-2 3. Form W-3 4. Printing Instructions

Filing and Printing Instructions FEDERAL ANNUAL FORM W-2/W-3

Name: Church / M
Address: address
address
City, State, and ZIP: city, TX 1

STEP 4 - F
For each e
Copy A to
Copy B to
Copy C with
Copy D for
Copy 1 to
Copy 2 to

PLEASE NOTE
name, addr

You must f

Print W-2 and W-3 Forms

Employees with last names A through Z (3 of 3 employees)

1. Select paper:

Blank / Perforated Paper [How to print one W-2](#)

Preprinted Forms: May require alignment [How to order tax forms](#)

2. Select item to print: Print the List of Selected Employees

For employees

W-2 - Copy B: for employee's federal tax return, 2 per page (1 per page if only 1 employee)

W-2 - Copy 2: for your State or Local Tax Department, 2 per page (1 per page if only 1 employee)

W-2 - Copy C: for employee records, 2 per page (1 per page if only 1 employee)

Employee filing instructions: Required if not already printed on paper

For employer

W-2 - Copy D: for your records, 2 per page (1 per page if only 1 employee)

Employer filing instructions: for W-2 and W-3 forms

For government

W-3, 1 per page

W-2 - Copy A: for the SSA, 2 per page (1 per page if only 1 employee)

W-2 - Copy 1: for your State or Local Tax Department, 2 per page (1 per page if only 1 employee)

Printer: TSPrint Default on TSPrintPri01:

Help Align Print Test Printer Setup Print Close Window

View details about this form View Saved Tax Forms Select Employees... <<< Previous Next >>>

Save and Close Save as PDF... Print for Your Records... Check for Errors Submit Form...

Automatically create an archive when I e-file or print

Alignment: you can make adjustments from this window.

The image shows a software window titled "Print W-2 and W-3 Forms" with a close button (X) in the top right corner. The window is divided into sections for selecting paper and forms, and a printer selection area.

1. Select paper: Employees with last names A through Z (3 of 3 employees)

- Blank / Perforated Paper [How to print one W-2](#)
- Preprinted Forms: May require alignment [How to order tax forms](#)

2. Select forms:

- W-2 - Copy A: for the SSA, 2 per page (1 per page if only 1 employee)
- W-2 - Copy 1: for your State or Local Tax Department, 2 per page (1 per page if only 1 employee)

Printer: TSPrint Default on TSPrintPrt01:

Buttons: Help, Align, Print Test, Printer Setup, Print, Close Window

Preprinted forms alignment (sub-dialog box):

Move printed text:

- Left: Inches (.08 is one character.)
- Right
- Up: Inches (.08 is half a line.)
- Down

Buttons: Restore Defaults, Print Test, OK, Cancel

6. If the alignment is good you can begin the process of printing each W2c copy and the W3

Be sure your blank or preprinted W-2 forms are loaded correctly in your printer.

If you have a single sheet printer, do not collate your copies. Load all the Copy A forms, and print those. After you have printed all the Copy A forms, load and print the Copy B forms. Continue until you have printed all the copies you need.

Employers must give each employee copies of Form W-2 by an arbitrarily assigned date, usually January 31. Additionally, employers must file Copy A of each W-2 with the Social Security Administration (SSA), along with Form W-3 by February 28 (or March 31, if you file electronically). You should contact the IRS to verify these deadlines.

How to distribute copies of Form W-2:

Copy A: filed with the Social Security Administration.

Copy B: given to the employee.

Copy C: with instructions and Notice to Employee, given to the employee.

Copy D: keep for your records.

Copy 1: filed with state and/or local tax departments, if required.

Copy 2: given to the employee.