

**The Data Entry W-2 reconciliation is available on the HAB website.**

- Available to all employers that are not required to file monthly **and use the upload option.**
- We DO NOT need the hard copy W2s mailed to us.
- If hard copy W2s are needed, we will write for them.

1. hab-inc.com
2. Quick Links (left margin)
3. Business e-file
4. W-2 R Annual Reconciliation
5. Employer Login – email & password
6. Login
7. File Upload Tax Services

The screenshot shows the HAB website interface. On the left is a navigation menu with links: Home, Pending/Incomplete Returns, Data Entry Tax Services, File Upload Tax Services, Previous Returns and Payments, and Other Services. The main content area features a blue header with the text: **\*\*\*You have Pending/Incomplete Returns\*\*\***. Below this, it states: "You have at least one pending/incomplete return that may require action. Please click on the 'Pending/Incomplete Returns' option to view your incomplete returns and receive further instructions." There are several sections with blue headers: **Pending/Incomplete Returns:**, **Data Entry Tax Services:**, **File Upload Tax Services:**, and **Previous Returns and Payments:**. At the bottom, there is a URL: <http://demo-efile.hab-inc.com/Employer/EmployerOptions.aspx>.

**8. W-2 Rec – Upload My Annual W-2 Reconciliation File**

The screenshot shows the 'File Upload Tax Services' page. The left navigation menu is the same as in the previous screenshot. The main content area has a red header: **File Upload Tax Services**. It contains three main sections with blue headers: **EIT - Upload My Earned Income Tax Return**, **LST - Upload My Local Services Tax Return (Simple Format - Single Employer Only)**, and **LST - Upload My Local Services Tax Return (Single or Multi Employer Format)**. Each section provides instructions and lists permitted file formats: CSV File Format, Federal File Format, and PA Standard Format (EFW2-PA). A final section is titled **W-2 Rec - Upload My Annual W-2 Reconciliation File**, also listing the same file formats. At the bottom, a red asterisk note states: "If using the federal format for EIT or W-2 Rec, all records MUST be 128 characters in length, with any unused fields being filled with spaces".

9. Complete the require fields: Tax Year, Have you filed your...., Which method did you use..., Account Type, File Format, File Path.
10. Continue

- Home
- Pending/Incomplete Returns
- Data Entry Tax Services
- File Upload Tax Services**
- Previous Returns and Payments
- Other Services

### Earned Income Tax W-2 Reconciliation File Upload

Required fields are marked with (\*)

Tax Year:\*

Have you filed your Earned Income Tax returns with Berkheimer for the selected tax year?\*

Which method did you use for your Employer Return filing for the selected tax year?\*

Account Type:\*

File Format:\*

File Path:\*

Federal ID:

Friendly File Name:

**\*\*\*Zero filings (i.e. no employees to report) are not required. Please remove any zero filings from your file before uploading. W-2 Reconciliation of the Local Services Tax is not required. Do not use this process for Local Services Tax filing!\*\*\***

**\*\*\*Note: Please be patient when submitting very large files as time to validate and process the data may increase.\*\*\***

**File Path – Sample of the CSV format**

	A	B	C	D	E	F	G	H	I	J	K
1	E	17	12	6.22E+08	Hiring USA	50 N 7th S	Bangor	PA	18013		400504
2	123456789	Joe Some	50 N 7TH	Bangor	PA	18013	17	12	10000	100	480101
3											
4											

11. Review the information
12. Yes or No, will you be submitting a payment or requesting a refund with your EIT W-2 Report?
13. Continue

- Home
- Pending/Incomplete Returns
- Data Entry Tax Services
- File Upload Tax Services
- Previous Returns and Payments
- Other Services

### Earned Income Tax W-2 Reconciliation Submitter Information

#### Reconciliation of Earned Income Tax Withheld From Wages

As reported on Berkheimer Employer's Quarterly Return (Employer Return Form);  
with income tax withheld as shown on Withholding Statements (W-2)

Due By: 2/27/2018 Year: 2017

**Submitter's Name and Address**

Molly	Chyle
50 N 7th St	
Address2	
Bangor	PA 18013

Please note, if you need to change your address please do so by clicking the 'Update Profile' option on the top right of this page. Changing your address here will only affect this individual W-2 Reconciliation File Upload session, and not your user profile.

1. Total number of withholding statement W-2s accompanying this report:	1
2. Total income tax withheld from all wages during the year as shown on W-2s:	\$100.00
3. Will you be submitting a payment or requesting a refund with your EIT W-2 report?	<input type="radio"/> YES <input type="radio"/> NO

Continue
Cancel

14. Review the information.
15. Finish

- Home
- Pending/Incomplete Returns
- Data Entry Tax Services
- File Upload Tax Services
- Previous Returns and Payments
- Other Services

### Earned Income Tax W-2 Reconciliation File Submission Confirmation

#### Reconciliation of Earned Income Tax Withheld From Wages

As reported on Berkheimer Employer's Quarterly Return (Employer Return Form);  
with income tax withheld as shown on Withholding Statements (W-2)

Due By: 2/27/2018 Year: 2017

**Submitter's Name and Address**

Molly Chyle  
50 N 7th St  
Bangor, PA 18013

1. Total number of withholding statements (W-2s) accompanying this report	1
2. Total wages during the year as shown on (W-2s)	\$10,000.00
3. Total income tax withheld from all wages during the year as shown on (W-2s)	\$100.00

Please verify the above data is accurate and complete. Click 'Finish' to submit your Earned Income Tax W-2 Reconciliation file for processing.  
\*\*\*Note\*\*\* The process is not complete until you click 'Finish'. If you do not finish and plan to come back at a later time, you will be forced to start the EIT W-2 Reconciliation process from the beginning.

Finish
Cancel

16. Confirmation Number is displayed and also emailed

The screenshot shows a web application interface. On the left is a vertical navigation menu with the following items: Home, Pending/Incomplete Returns, Data Entry Tax Services, File Upload Tax Services, Previous Returns and Payments, and Other Services. The main content area has a title "Earned Income Tax W-2 Reconciliation - File Upload Confirmation" in red. Below the title, the text reads: "Thank you for submitting your W2Rec report. Confirmation Number: 20884". Underneath, it says: "Your file was successfully uploaded. Please keep the above confirmation number for your reference. Click on one of the options to the left to file another return or 'Log Out' to exit."

17. The return information can be found on the Previously Filed Returns and Payments page.