

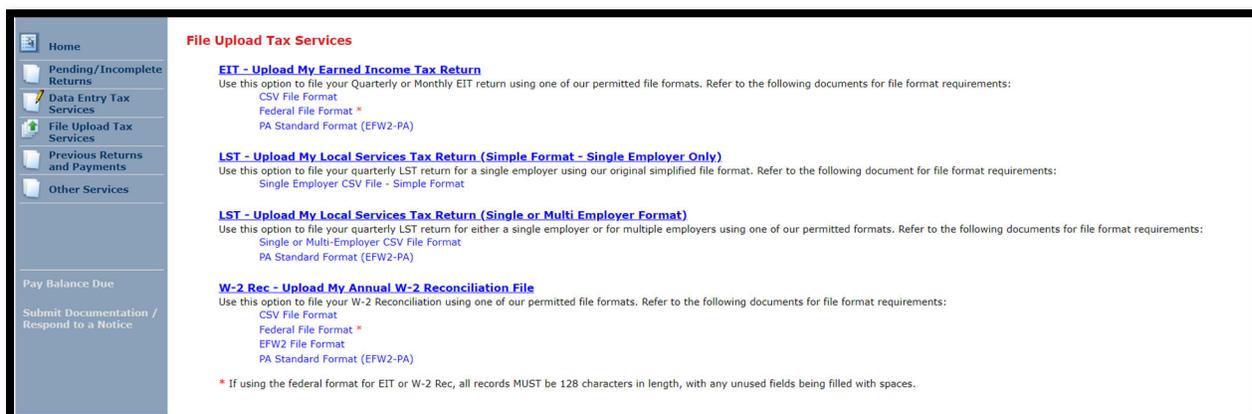
W2-R Annual Reconciliation

Earned Income Tax Withheld From Wages e-File using Our Upload Service

- The service is 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. Go to our [Employer Electronic Filing Site](#).
 2. Review the 4 filing formats.
 - a CSV File – a sample report is on page 4.
 - b Federal File
 - c PA Standard (EFW2-PA)
 - d EFW2 File
 3. Create a report using 1 of the 4 different formats.
 4. Create an account or login.
 - a If you do not already have an account, click on create a new account.
 - b If you already have an account, enter your email and password and login.
 5. File Upload Tax Services

The screenshot displays the Berk-e Employer Electronic Filing Site interface. On the left is a navigation menu with links: Home, Pending/Incomplete Returns, Data Entry Tax Services, File Upload Tax Services (highlighted), Previous Returns and Payments, and Other Services. Below the menu are links for 'Pay Balance Due' and 'Submit Documentation / Respond to a Notice'. The main content area features a warning: '***You have Pending/Incomplete Returns***' with instructions to click on the 'Pending/Incomplete Returns' option. Below this are sections for 'Pending/Incomplete Returns', 'Pending Remittance Stub', 'Data Entry Tax Services', 'File Upload Tax Services' (with a note that monthly filers must use the upload method), 'Previous Returns and Payments', and 'Other Services' (listing PSD Address Confirmation, File Download, Employer Registration, and Employer HAB ID lookup).

6. W-2 Rec – Upload My Annual W-2 Reconciliation File



File Upload Tax Services

EIT - Upload My Earned Income Tax Return
Use this option to file your Quarterly or Monthly EIT return using one of our permitted file formats. Refer to the following documents for file format requirements:
[CSV File Format](#)
[Federal File Format *](#)
[PA Standard Format \(EFW2-PA\)](#)

LST - Upload My Local Services Tax Return (Simple Format - Single Employer Only)
Use this option to file your quarterly LST return for a single employer using our original simplified file format. Refer to the following document for file format requirements:
[Single Employer CSV File - Simple Format](#)

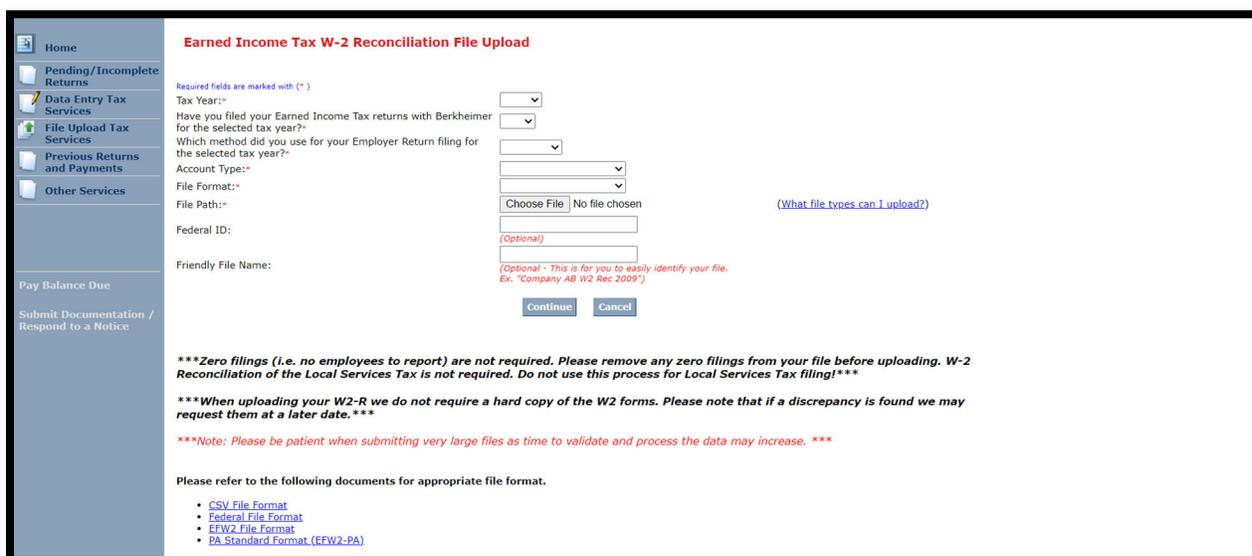
LST - Upload My Local Services Tax Return (Single or Multi Employer Format)
Use this option to file your quarterly LST return for either a single employer or for multiple employers using one of our permitted formats. Refer to the following documents for file format requirements:
[Single or Multi-Employer CSV File Format](#)
[PA Standard Format \(EFW2-PA\)](#)

W-2 Rec - Upload My Annual W-2 Reconciliation File
Use this option to file your W-2 Reconciliation using one of our permitted file formats. Refer to the following documents for file format requirements:
[CSV File Format](#)
[Federal File Format *](#)
[EFW2 File Format](#)
[PA Standard Format \(EFW2-PA\)](#)

* 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.

7. Complete the require fields indicated by an *

8. Continue



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: (Optional)

Friendly File Name: (Optional - This is for you to easily identify your file. Ex. "Company AB W2 Rec 2009")

Continue Cancel

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!

When uploading your W2-R we do not require a hard copy of the W2 forms. Please note that if a discrepancy is found we may request them at a later date.

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

Please refer to the following documents for appropriate file format.

- [CSV File Format](#)
- [Federal File Format](#)
- [EFW2 File Format](#)
- [PA Standard Format \(EFW2-PA\)](#)

- 9. Review the information.
- 10. Answer the question.
- 11. 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) Year: 2023

Due By: 4/30/2024

Submitter's Name and Address

Lynn XXXXXXXXXX

Address1 XXXXXXXXXX

Address2 XXXXXXXXXX

City Stat Zip

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:	2
2. Total income tax withheld from all wages during the year as shown on W-2s:	\$200.00
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

- 12. Review the information.
- 13. 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) Year: 2023

Due By: 4/30/2024

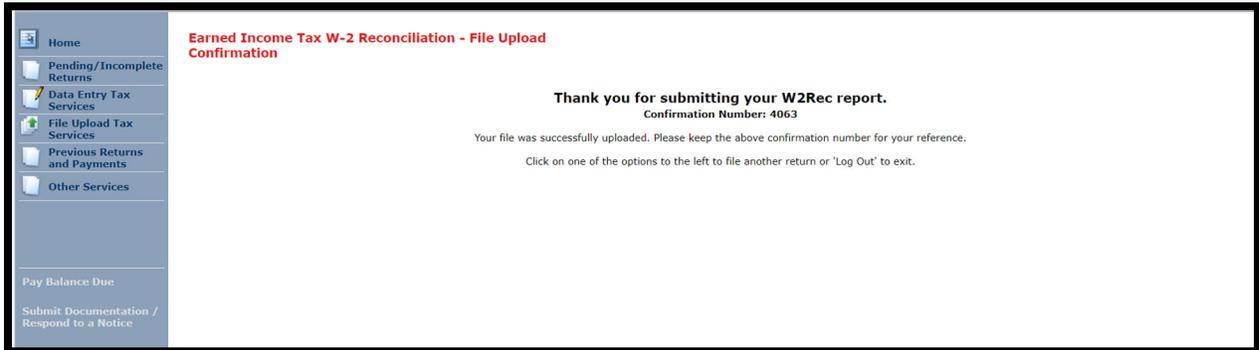
Submitter's Name and Address

Lynn Horn

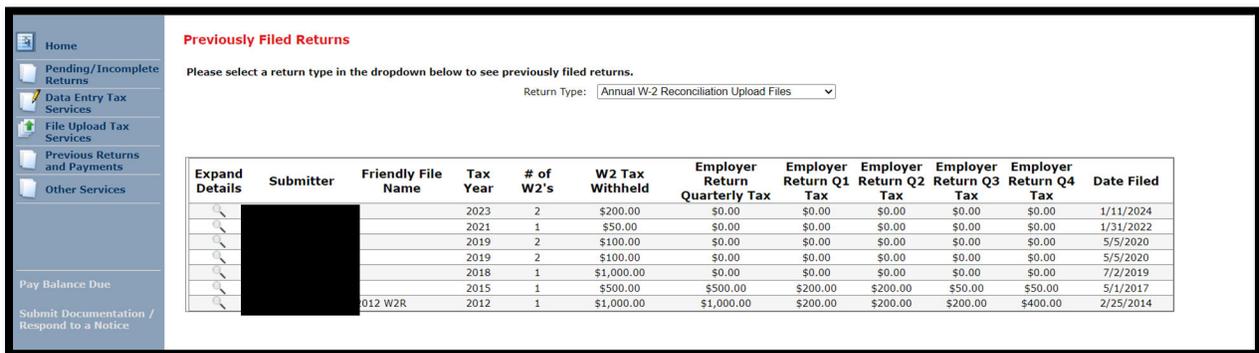
1. Total number of withholding statements (W-2s) accompanying this report	2
2. Total wages during the year as shown on (W-2s)	\$20,000.00
3. Total income tax withheld from all wages during the year as shown on (W-2s)	\$200.00

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.

14. Confirmation Number is displayed and emailed.



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



File Path – Sample of the CSV format

