

# W2-R Annual Reconciliation of Earned Income Tax Withheld From Wages

As reported on Employer's Quarterly Return (Form E-1);  
with income tax withheld as shown on  
Withholding Statements (W-2)



W2R

# W2

**Year:**  
Due by  
Last Day of February

**Filed Online**  
\*see instructions

Please complete information requested and remit to:

HAB - EMP REC  
PO Box 25113  
Lehigh Valley, PA 18002-5113

*You are entitled to receive a written explanation of your rights with regard to the audit, appeal, enforcement, refund and collection of local taxes by calling Berkheimer at 610-599-3182. Or, you can visit our website at www.hab-inc.com.*

*Berkheimer is not the appointed tax hearing officer for your taxing district and will not accept any petitions for appeal. Petitions for appeal must be filed with the appropriate appeals board for your County. Berkheimer can provide you with the proper procedures and forms necessary to file an appeal with the appeals board for your Tax Collection District.*

*Please see reverse for instructions*

### Employer Name

[Grid for Employer Name]

### Address

[Grid for Address]

[Grid for Address]

### City

### State

### Zip

[Grid for City, State, Zip]

### Municipal Location of Business

[Grid for Municipal Location of Business]

### PSD Number

### Employer Acct No.

### Federal ID No.

### TCD Filed With

[Grid for PSD Number, Employer Acct No., Federal ID No., TCD Filed With]

1. Total number of withholding statements (W-2s) accompanying this report

[Grid for number of statements]

2. Total income tax withheld from all wages during the year as shown on (W-2s)

(A) \$ [Grid for tax withheld]

### EARNED INCOME TAX

### Tax Paid

Quarter ended March 31 ..... \$ [Grid for tax paid]

Quarter ended June 30 ..... \$ [Grid for tax paid]

Quarter ended September 30 ..... \$ [Grid for tax paid]

Quarter ended December 31 ..... \$ [Grid for tax paid]

# WEB

3. Total quarterly income tax from wages during the year as reported on Quarterly E-1 Reports

(B) \$ [Grid for quarterly tax]

**TOTAL AMOUNT OF  
ENCLOSED CHECK**

[Grid for total amount of enclosed check]

4. Any difference between A and B must be explained in attached statement. Where A and B do not agree, please remit or request refund.

I DECLARE UNDER PENALTIES PROVIDED BY THE LAW THAT THIS RETURN HAS BEEN EXAMINED BY ME AND TO THE BEST OF MY KNOWLEDGE IS A TRUE, CORRECT AND COMPLETE RETURN.

Signature \_\_\_\_\_ Phone \_\_\_\_\_ Date \_\_\_\_\_

There will be a \$29.00 fee for returned payments.  
There will be an additional fee assessed if no payment is enclosed for tax due at time of filing.

## INSTRUCTIONS FOR FORM W-2R

1. Include municipal location of business in PA, assigned account number and Federal ID number. Include employer's full name and address.
2. If no balance is due, the W2 Reconciliation can be filed online on or before the last day of February following the close of the calendar year at: [www.berk-e.com](http://www.berk-e.com), or return the reconciliation form. If a balance is due, online filing is still available, but payment must be submitted to the address below, along with this completed form with the "Filed Online" box checked. This form must be accompanied by CITY INCOME TAX copy or facsimile of the Form W-2 if a file has not been submitted electronically for each employee from whom income tax has been withheld during said year.
3. The total of all income tax withheld as reflected on W-2s should be entered on line 2. Total Earned Income Tax as reported on a quarterly basis should be entered on line 3.
4. Payment is due, if applicable, when filing the reconciliation. Complete the reverse side of this form and mail to the address below. Include the employee name, SSN, address, municipality and amount being paid with the reconciliation.
5. If an employer's total payroll consists of a number of separate units or establishments, the Form W-2 should be assembled accordingly and a separate reconciliation Form W-2 should be submitted.

**Remit to:**  
**HAB - EMP REC**  
**PO Box 25113**  
**Lehigh Valley, PA 18002-5113**