# Virginia Tax



# eForms W-2 – 1099 Guide

Rev. 06/13/2017

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## **Overview**

<u>eForms</u> is a free, secure online service that allows you to electronically file your wage and tax statements directly with Virginia Tax. eForms are fillable electronic forms that look similar to the paper version of the forms. No sign-up is required.

The eForms W-2 – 1099 Guide will explain:

- How to use eForms to file your W-2 and 1099 data
- How authentication works through your online business account and eForms
- How to save and/or print a summary of your data as an Adobe PDF

## **Authentication Requirements**

Before using eForms to key in wage statement data, you are required to authenticate the business for which you are filing.

There are 2 ways to do this and access the applicable W-2 or 1099 eForm:

- 1. Access directly from the eForms homepage, or
- 2. Access after logging in to your online business account

Authentication ensures that only those individuals who are authorized to access the account data may do so. If invalid information is entered there will be a message advising that the information is incorrect. For assistance, please contact Customer Services at 804.367.8037.

Note: After 6 attempts, you are locked out for 24 hours and cannot file the W-2, 1099-MISC, or 1099-R.

#### eForms Homepage

<u>eForms</u> does not require a separate sign-up. Instead, you are required to authenticate the specific business by providing the following information:

Authenti	cation
To ensu filing	ure you are a valid employer, you must authenticate the business for which you are
busines	In, please have the 9-digit Federal Employer's identification Number (FEIN) for the as you are filing and the total amount of withholding tax payments made during the ar year. Payments are for withholding tax amounts paid only and should not include halty or interest payments.
	Account Number
	30- = FEIN F- Suffix ‡
	Taxable Year
	2016 ‡
	Total Virginia Withholding Tax Paid
	\$
	ок

- The Employer FEIN (and account suffix)
- The tax year for which you are filing
- The total amount of withholding tax paid to the Virginia Department of Taxation during the filing year

**Note**: The total amount of withholding tax paid is the sum of all payments made in the taxable year and does not include penalty or interest paid.

### **Online Business Accounts**

Logging in through an online business account will address the authentication required to use the W-2 eForms.

There are 2 ways to access the applicable eForm when logged into your account:

- 1. Click "File / Pay Taxes" and select the eForms option for the specific W-2, 1099-R, or 1099-MISC eForm.
- 2. Select the eForms option from the VA-6 (or VA-6H) confirmation page.

#### **Business iFile**

Your online business account provides links to **eForms** and **Web Upload**, so you can file wage statements according to your needs.



# Entering W-2, 1099-R or 1099-MISC Data

Once authentication is complete, you will be able to manually enter your data into eForms.

Regardless of your authentication method, the same screens are displayed to key in the wage statement data:

- Employer Information demographics for the employer or payer, FEIN and tax year
- Employee Information entries for each employee or payee

Also, please remember these details:

- The FEIN may not be changed.
- Confirm the correct tax year is displayed for the wage statement data.

Previews of these screens are available in each Appendix listed below.

- Appendix A W-2
- <u>Appendix B</u> 1099-R
- <u>Appendix C</u> 1099-MISC

## **Contact Resources**

If you are unsure of the total Virginia withholding tax paid or have other W-2 or 1099 eForms questions not covered here or in the <u>Electronic W-2 – 1099 Filing Guidelines</u> (ex. amending or correcting data), please <u>Contact Us</u> for further assistance.

For additional information on using eForms, see eForms FAQs.

# Appendix A – W-2 Preview Screens

The images below are screenshots of the W-2 screens in eForms that can only be accessed after completing the eForms W-2 authentication process.

- Do **not** mail a copy of the submitted eForm confirmation page to Virginia Tax.
- Do **not** use these eForms W-2 screens as W-2s distributed to your employees.
- You can submit up to 100 employees per W-2 eForm.

For Assistance:	<u>eForms User Guide</u>	<u>eForms FAQs</u>	Status: NOT FILED	
	<u>W2/1099 Guide</u>	Contact Us		
	W-2		Sign & Confirm	
		EMPLOYER INFORMATION		
For Tax Year	FEIN	Business Name		
		🌢 Business Name		If you used
		Business Contact Name	Business Contact Phone	business ac business inf be filled
Number of	W2's: 1	5	\$0.00	
SSN Fi	rst Name Last Name Addre		VA State VA State Tax Wages Withheld	
		VA 🛔	- +	

### **W-2 Preview Screens**

W-2 eForm with Employee Information



# Appendix B – 1099-R Preview Screens

The images below are screenshots of the 1099-R screens in eForms that can only be accessed after completing the eForms 1099-R authentication process.

- Do **not** mail a copy of the submitted eForm confirmation page to Virginia Tax.
- Do not use these eForms 1099-R screens as 1099-Rs distributed to your payees.
- You can submit up to 100 employees per 1099-R eForm.

business account,	For Assistance:	eForms User Guide	<u>eForms FAQs</u>	Status: NOT FILED	
PAYER INFORMATION         Business Name         2017       Image: Test Name         Business Name         Business Name         Business Name         Business Name         Business Contact Name         Business Contact Name         Business Contact Name         Business Contact Name         PAYEE 1099-R INFORMATION         PAYEE 1099-R INFORMATION         SSN         Distribution         First Name       Address         City       State         Distribution         First Name       Address         City       State         Distribution         First Name       Address         City       State         Distribution       Tax         Withheld		<u>W2/1099 Guide</u>	Contact Us		
For Tax Year       FEIN       Business Name         2017       Image: 2017       Image: 2017       Image: 2017         Image: 2017       Image: 2017       Image: 2017       Image: 2017         Image: 2017       Image: 2017       Image: 2017       Image: 2017       Image: 2017         Image: 2017       Image:		1099-R		Sign & Confirm	
2017       Image: State Tax Withheld       Image: State Tax Withheld </td <td></td> <td></td> <td>PAYER INFORMATION</td> <td></td> <td></td>			PAYER INFORMATION		
2017       In your uses a count, business count, business acount, business acount, business informatic be filled in for your use in your use in your use in your use informatic be filled in for	For Tax Year	FEIN	Business Name		
Business Contact Name       Business Contact Phone <ul> <li>Contact Name</li> <li>Contact Phone</li> </ul> PAYEE 1099-R INFORMATION             Number of 1099-R Payees:         1           Total Virginia State Tax Withheld:         \$0.00           SSN         Distribution           First Name         Last Name           Address         City         State ZIP Code         Gross         Taxable         VA State           Distribution         First Name         Last Name         Address         City         State ZIP Code         Gross         Taxable         VA State	2017 🖕	= 123456789	🌢 Business Name		If you used your or
Business Contact Name Contact Name Contact Name PAYEE 1099-R INFORMATION Number of 1099-R Payees: 1 Total Virginia State Tax Withheld: \$0.00 SSN Distribution First Name Last Name Address City State ZIP Code Gross Taxable VA State Distribution Amount Tax Withheld					business informatio
PAYEE 1099-R INFORMATION         Number of 1099-R Payees:       1         Total Virginia State Tax Withheld:       \$0.00         SSN       Distribution         First Name       Last Name         Address       City       State         ZilP Code       Gross       Taxable         VA State       Tax         Withheld       Withheld			Business Contact Name	Business Contact Phone	
Number of 1099-R Payees:       1       Total Virginia State Tax Withheld:       \$0.00         SSN       Distribution       First Name       Last Name       Address       City       State       ZIP Code       Gross       Taxable       VA State         Codes       Codes       City       State       ZIP Code       Gross       Taxable       VA State			Contact Name	💪 Contact Phone	
Number of 1099-R Payees: 1 Total Virginia State Tax Withheld: \$0.00 SSN Distribution First Name Last Name Address City State ZIP Code Gross Taxable VA State Codes Codes Codes City State City State ZIP Code Gross Taxable VA State Tax Withheld					
SSN Distribution First Name Last Name Address City State ZIP Code Gross Taxable VA State Codes Distribution Amount Tax Withheld			PAYEE 1099-R INFORMATION		
Codes Distribution Amount Tax Withheld	Number of 10	99-R Payees: 1	Total Virginia State Tax Wit	hheld: \$0.00	
Codes Distribution Amount Tax Withheld					_
			Address City State ZIP Co	Distribution Amount Tax	
		3	VA 🛔	-	+

1099-R with Payee Information

or Assistance:	eForms User Guide	<u>eForms FAQs</u>	Status: NOT FILED	
	<u>W2/1099 Guide</u>	Contact Us		
	1099-R		Sign & Confirm	
		PAYER INFORMATION		
or Tax Year	FEIN	Business Name		
2017	<b>123456789</b>	Business Name		
Number of 1	099-R Payees: 2	PAYEE 1099-R INFORMATION     Total Virginia State Tax Wi	ithheld: \$2,000.00	with each 1099-R entry added. Confirm the totals are correct before clicking "Next Step."
SSN Distrib Cod	ution First Name Last Name es	Address City State ZIP Co	ode Gross Taxable VA State Distribution Amount Tax Withheld	
230-11-1212 2 - Ea 230-12-1212 G - D		123 Any St         Richmond         VA         2322           123 Any St         Richmond         VA         2322		<ul> <li>You can add or delete 10</li> <li>Rs prior to submitting th information.</li> </ul>
Γ		and withholding may be entered	ed into the	Next Step

# Appendix C – 1099-MISC Preview Screens

The images below are screenshots of the 1099-MISC screens in eForms and can only be accessed after completing the eForms 1099-MISC authentication process.

- Do **not** mail a copy of the submitted eForm confirmation page to Virginia Tax.
- Do not use these eForms 1099-MISC screens as 1099-MISCs distributed to your payees.
- You can submit up to 100 employees per 1099-MISC eForm.

	<u>eForms Use</u> <u>W2/1099 Gu</u>		<u>eForms FAQ</u> <u>Contact Us</u>	<u>s</u>	Status	NOT FILED		
	1099-	MISC		>	Sign & C	onfirm		
			PAYER INFO	ORMATION				
For Tax Year	FEIN		Business Nam	ne			-	
2017	₹ = 1234	56789	🍐 Busine	ess Name			$\angle$	If you used your onli business account, to business information
			Business Cont	tact Name	Business Cont	act Phone		be filled in for you
					1.0			
Number o	f 1099-MISC Payees		Conta PAYEE 1099-MISC Total Vi			ct Phone		
		: 1	PAYEE 1099-MISC Total Vi	C INFORMATION	hheld: \$0.00			state and zin ande
SSN Virginia State Tax	f 1099-MISC Payees First Name Rents		PAYEE 1099-MISC	C INFORMATION irginia State Tax With City Fishing Boat	hheld: \$0.00 State Medical and Health	ZIP Code Nonemployee		
SSN	First Name	: 1 Last Name Royalties Excess Golden	PAYEE 1099-MISC Total Vi Address	C INFORMATION irginia State Tax With City	hheld: \$0.00 State	ZIP Code	the Pa	
SSN Virginia State Tax Withheld Substitute Payments in lieu of Dividends or	First Name Rents Crop Insurance	: 1 Last Name Royalties Excess Golden	Address Other Income Gross Proceeds Paid to an Attorney in Connection with	C INFORMATION Irginia State Tax With City Fishing Boat Proceeds Section 409A	hheld: \$0.00 State Medical and Health Care Payments Section 409A	ZIP Code Nonemployee	the Pa	<b>yer</b> may <b>only</b> be left if the information is
SSN Virginia State Tax Withheld Substitute Payments in lieu of Dividends or Interest	First Name Rents Crop Insurance Proceeds First Name	: 1 Last Name Royalties Excess Golden Parachute Payment	Address Other Income Gross Proceeds Paid to an Attorney in Connection with Legal Services	C INFORMATION Irginia State Tax With City Fishing Boat Proceeds Section 409A Deferrals	hheld: \$0.00 State Medical and Health Care Payments Section 409A Income	ZIP Code Nonemployee Compensation	the Pa blank	

# **1099-MISC Preview Screens**

1099-MISC with Payee Information

or Assistance: <u>eForms User Guide</u>			eForms User Guide eForms FAQs			s: NOT FILED			
	<u>W2/1099 G</u>	<u>uide</u>	Contact Us						
	1099	-MISC		>	Sign & C	confirm			
			- PAYER INFO	RMATION					
For Tax Year FEIN			Business Nan	ne					
2017	₹ = 1234	156789	🌲 Busin	ess Customer					
			Business Con	tact Name	Business Con	tact Phone		total displayed will update	
			🐣 Custo	mer	<b>%</b> (804)	367-4030	WI	th each 1099-MISC entry added.	
			PAYEE 1099-MIS					nfirm the totals are correct	
Number of	f 1099-MISC Payee			rginia State Tax W			- be	fore clicking "Next Step."	
SSN	First Name	Last Name	Address	City	State	ZIP Code			
Virginia State Tax Withheld	Rents	Royalties	Other Income	Fishing Boat Proceeds	Medical and Health Care Payments	Nonemployee Compensation			
Substitute Payments in lieu of Dividends or Interest	Crop Insurance Proceeds	Excess Golden Parachute Payment	Gross Proceeds Paid to an Attorney in Connection with Legal Services	Section 409A Deferrals	Section 409A Income				
230-11-1212	John	Doe	123 Any St	Richmond	VA	23222	-		
15,000.00	1,000.00	0.00	0.00	0.00	0.00	0.00			
0.00	0.00	0.00	0.00	0.00	0.00	]			
230-12-1212	Mary	Smith	123 Any St	Richmond	VA	23222	- +	You can add or delete prior to submitting the	
10,000.00	0.00	0.00	0.00	0.00	0.00	0.00			
0.00	0.00	0.00	0.00	0.00	0.00	]		Up to 100 1099-MISC an eForm 1099-MISC	
				e entered ir					