Guide to Submitting W-2s, 1099s, and WHT-434

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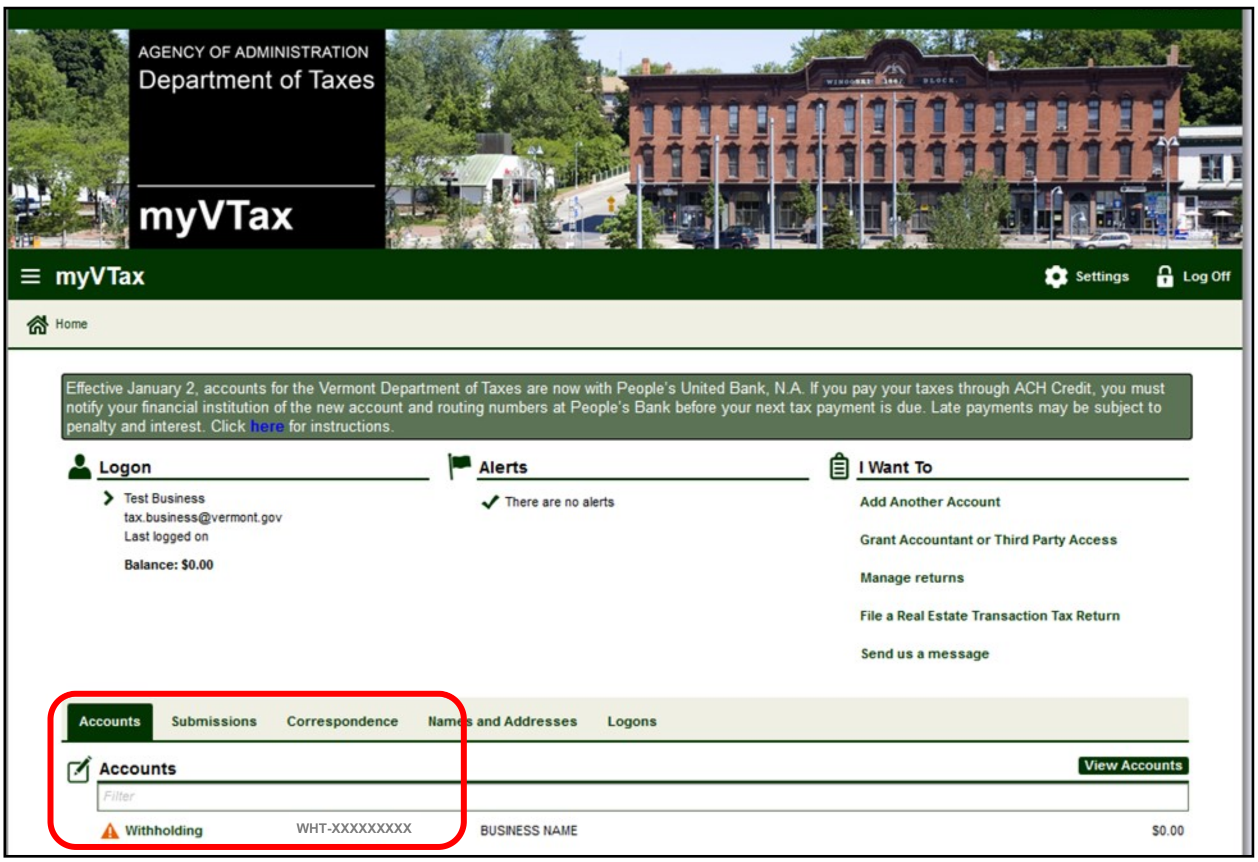
Step 1: Log in to your account

To submit your W-2s, 1099s, and WHT-434, you must log in to your myVTax account and navigate to the Withholding Account by clicking the **Withholding** hyperlink under the **Accounts** tab on the home screen.



Disclaimer: This guide is intended to provide an overview only. Vermont tax statutes, regulations, Vermont Department of Taxes rulings, or court decisions supersede information provided in this guide.

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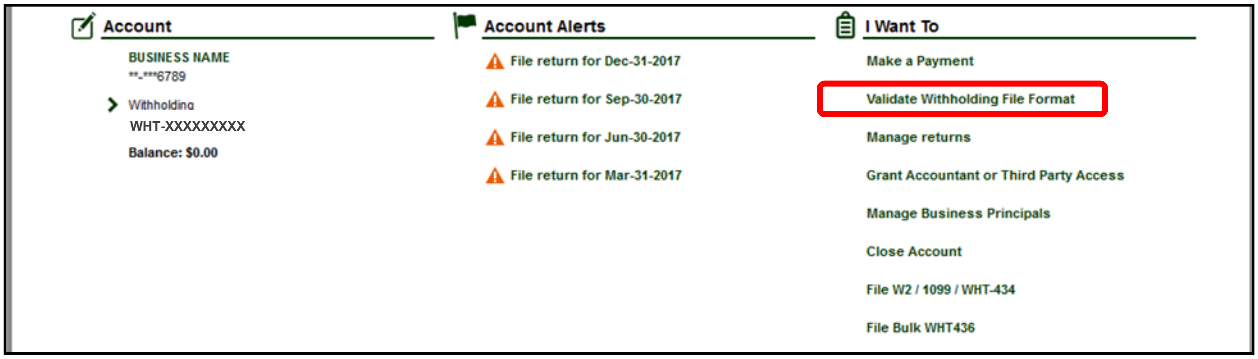
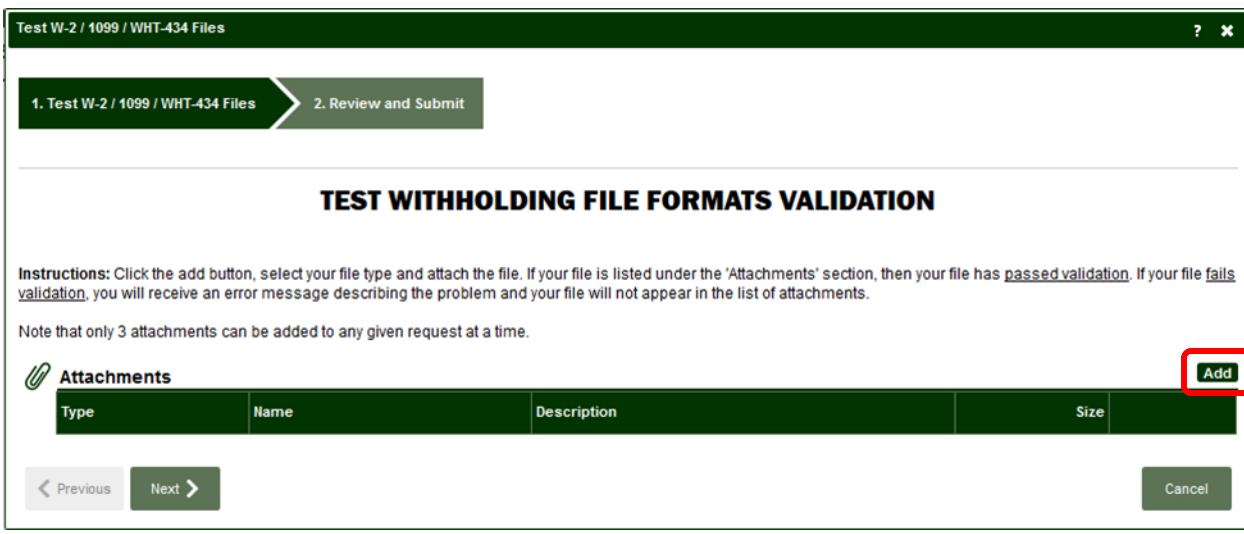
VERMONT DEPARTMENT OF TAXES

Step 2: Test your files for upload

A. Once in "Withholding Account," we strongly recommend that prior to filing or uploading any information, you test your files to make certain they are formatted correctly for myVTax. To do this, click **Validate Withholding File Format** in the "I Want To" section.

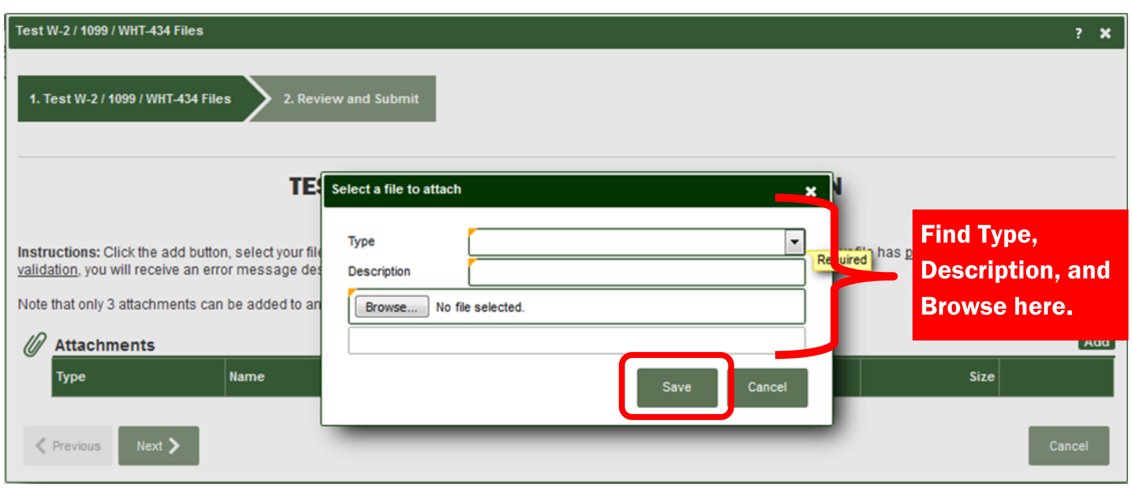


B. The next screen allows you to add and upload a test file to make sure the information you want to upload is in the correct format. To do this, click the **Add** button.

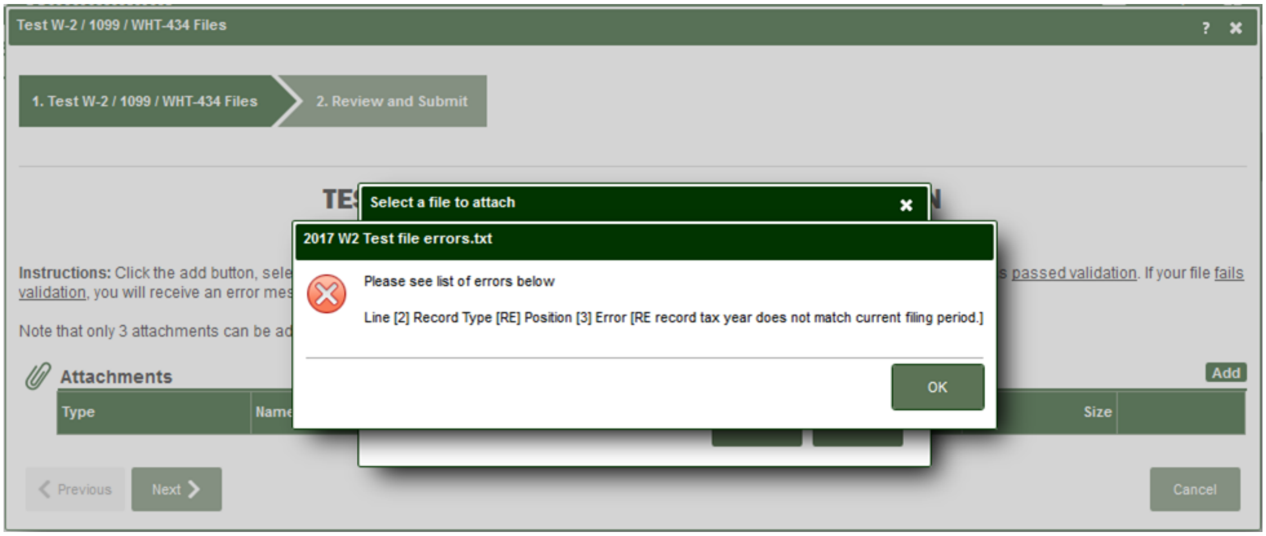


C. Then do the following:

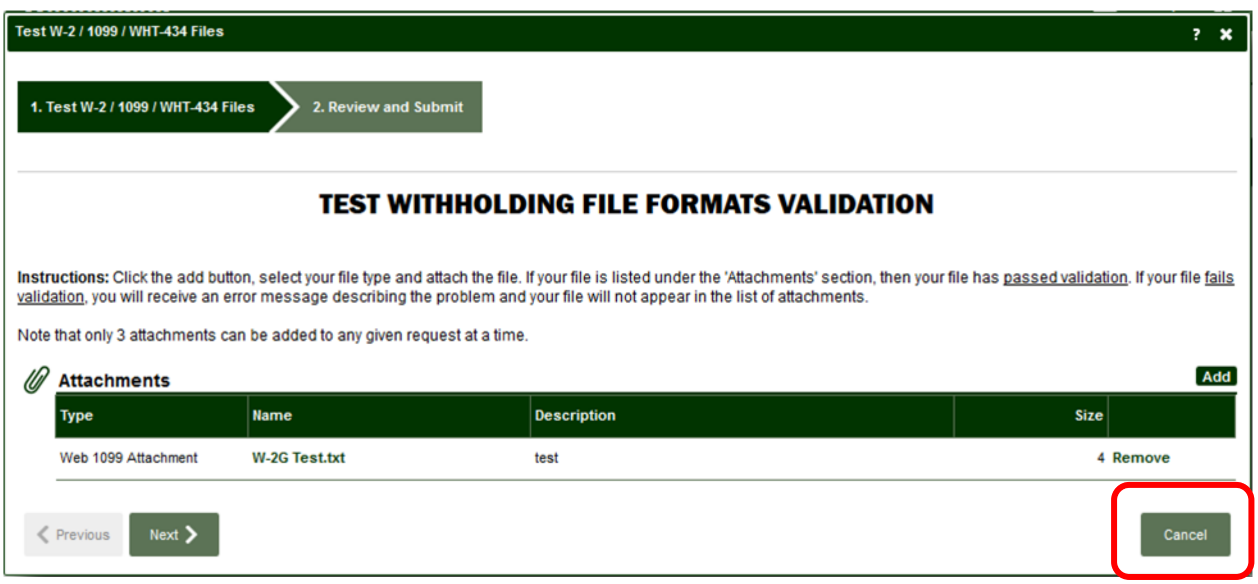
- Select the **Type** by choosing the appropriate option from the drop-down menu.
- Manually enter a **Description.**
- Click **Browse**. Then locate and open the file.
- Click **Save**.



D. If there is an error(s) with the format of the attachment, you will receive an error message with details of the error(s). Click **OK** to close the error message.



E. Once a file has been uploaded, it will appear as shown below. As this is only a test, you will **not** see a "Save" button. Instead, click **Cancel** to return to the previous page.

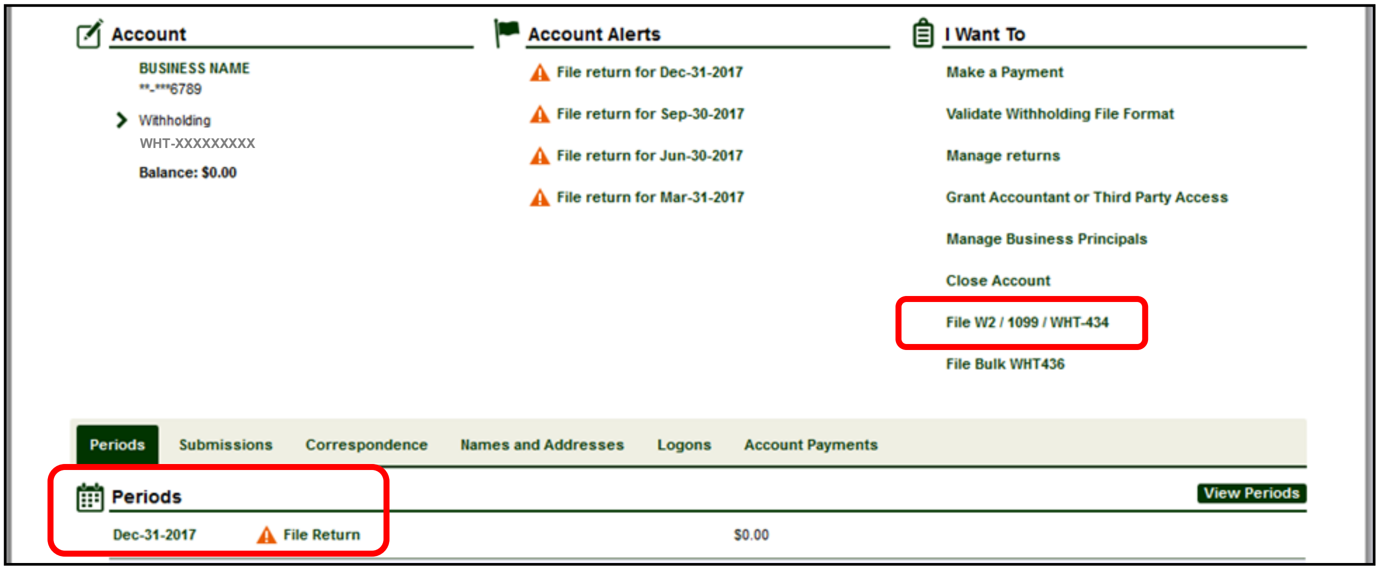


Step 3: Navigate to the W-2, 1099, and WHT-434 submission page

A. To file the WHT-434, W-2s, and/or 1099s, either:

- Click **File Return** next to the 4th quarter period (in this example, it is Dec-31-2017);

  or
- Click **File W2/1099/WHT-434** under the "I Want To" section (**Skip to Step 4).**



B. If you clicked "File Return" in the previous step, click the **File Now** hyperlink next to "Withholding Annual Rec Return."

C. The next screen offers you several options:

a. Upload W-2s

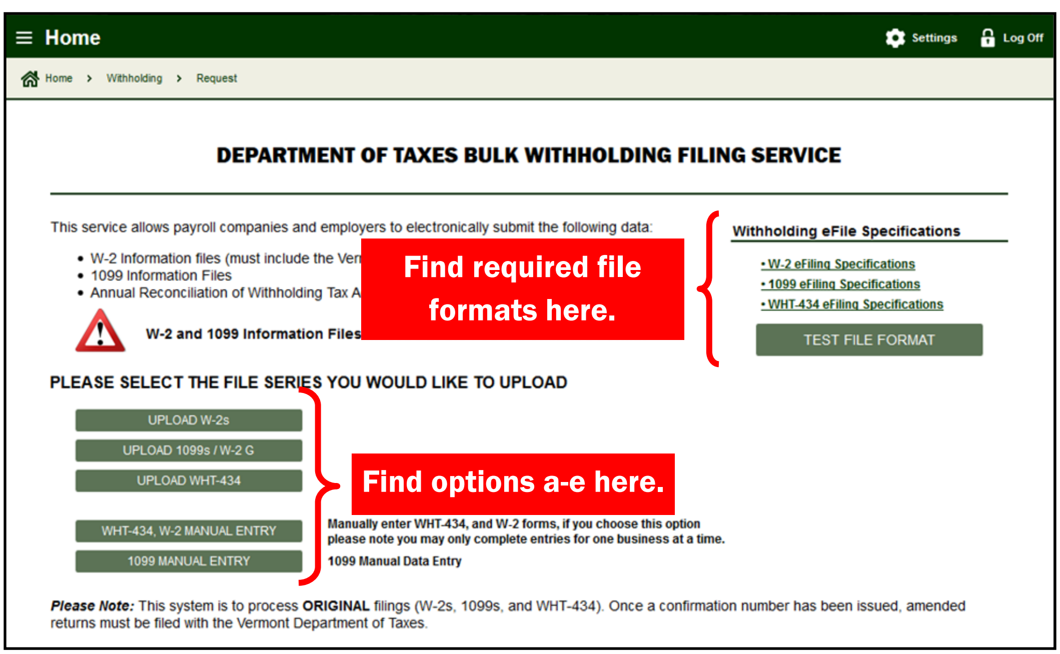
b. Upload 1099s

c. Upload WHT-434

d. WHT-434, W-2 Manual Entry

e. 1099 Manual Entry

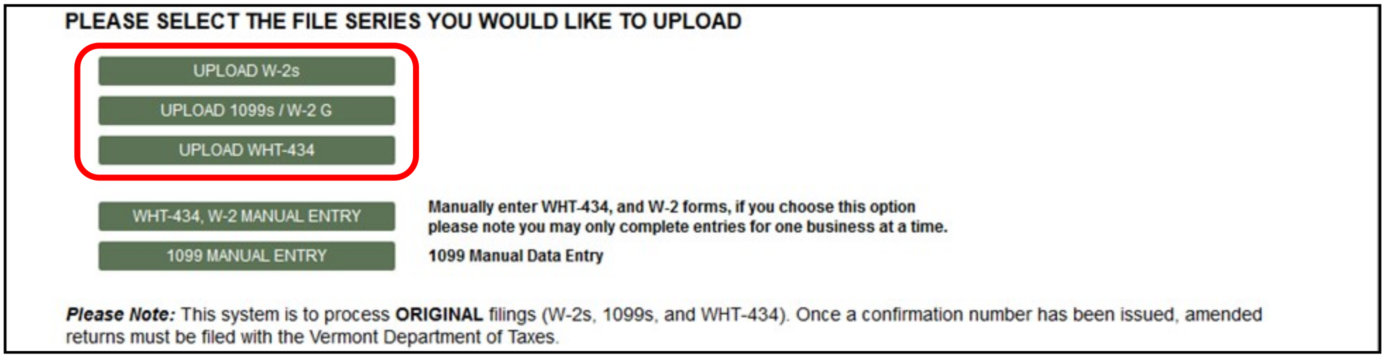
This screen also includes "Withholding eFile Specifications" which explains the required file formats for uploading.



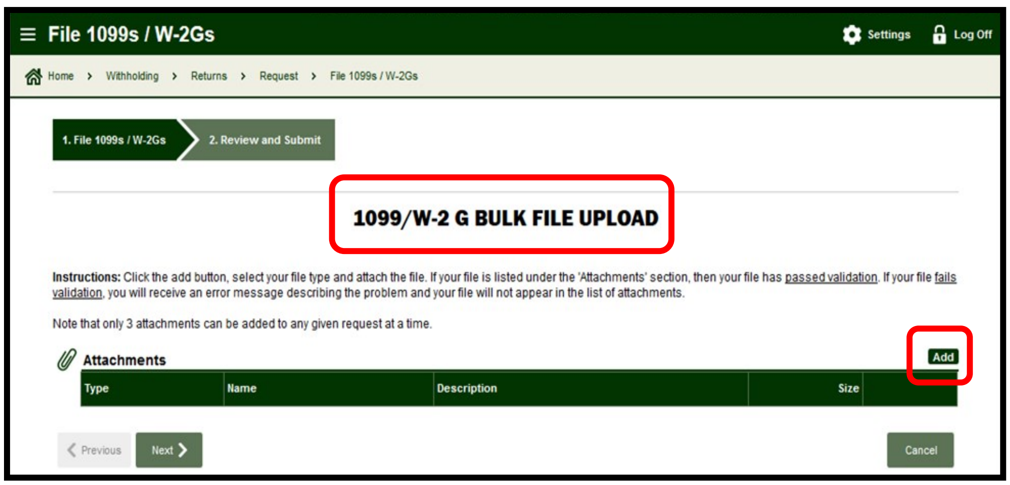
Step 4: How to upload files for W-2s, WHT-434, and 1099s

A. Choose which form you want to submit by clicking **Upload W-2s, Upload 1099s/W-2 G** or **Upload WHT-434**.

Note: The steps for completing the upload shown below are the same for all three types of uploads.

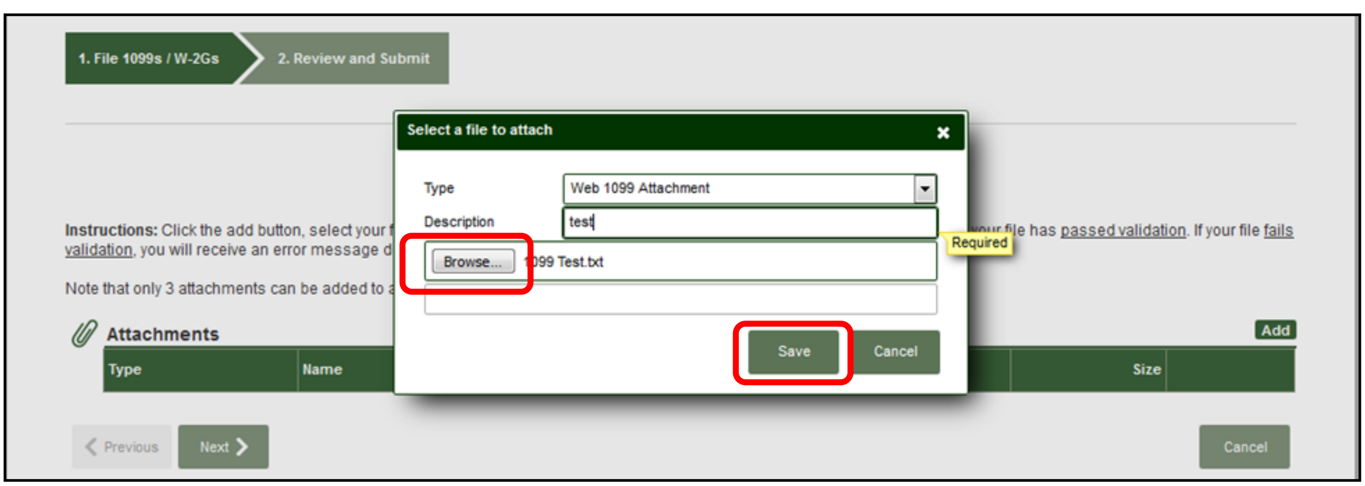


B. In this example, "Upload 1099s/W-2 G" was selected. Once the window opens, click **Add**.

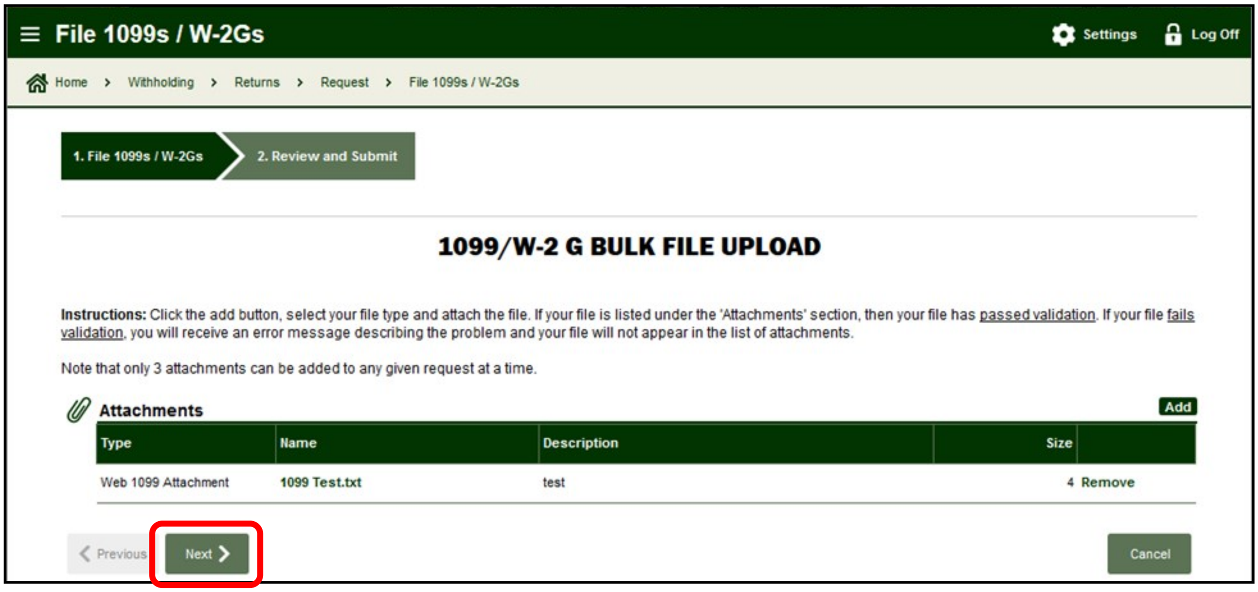


C. In the pop-up window, select the **"Type."** In this example, we have selected "Web 1099 Attachment."

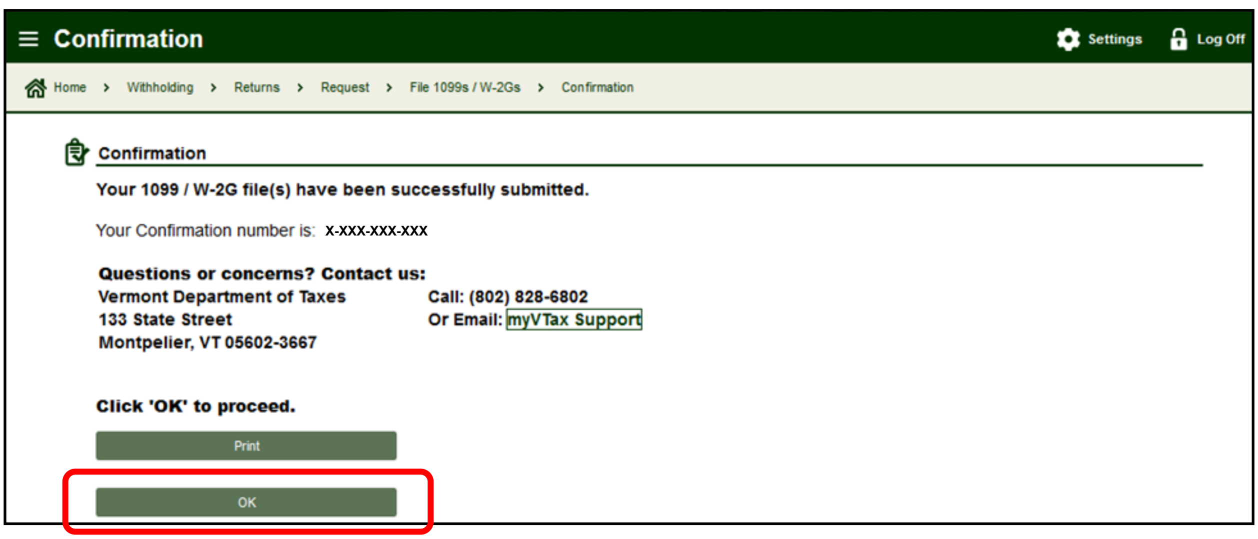
- Enter a **Description**.
- Click **Browse** to choose a file. Locate and open the file you want to upload.
- Click **Save**.



D. Your uploaded attachment will appear. Click **Next** and then **Submit** (not pictured).

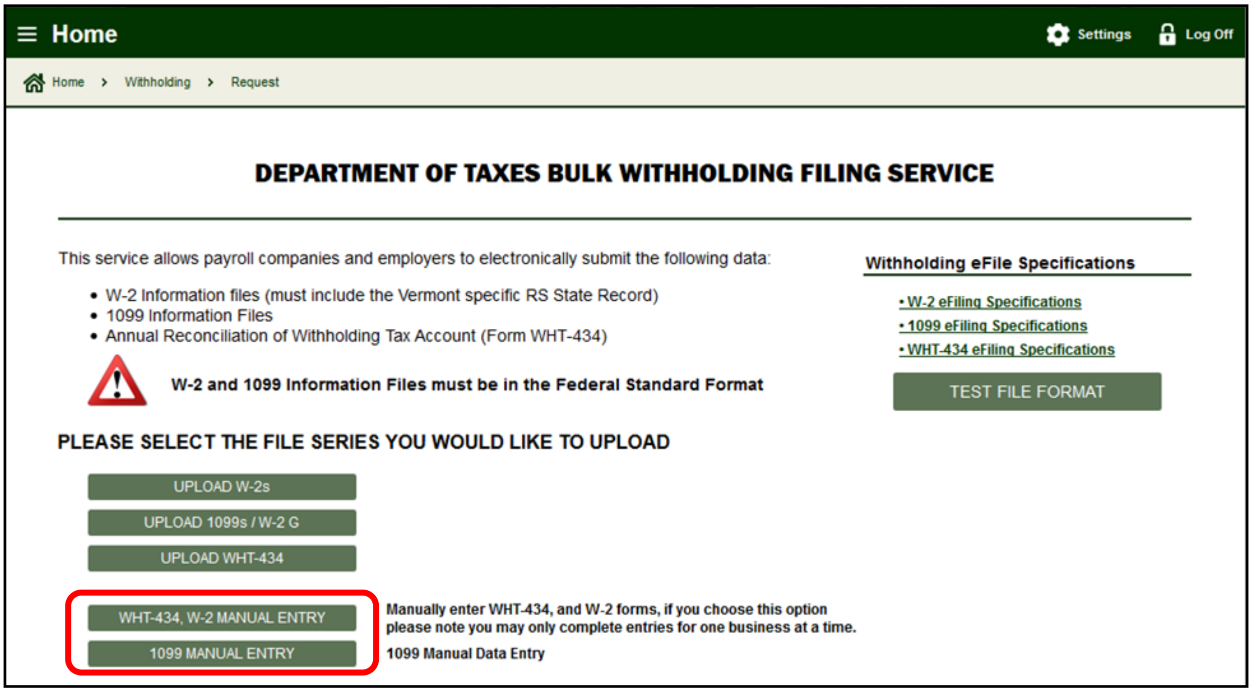


E. Once the file is submitted, you will receive a confirmation that you have successfully submitted your upload. Click **OK** to continue.



Step 5: How to Manually Enter a W-2 and WHT-434

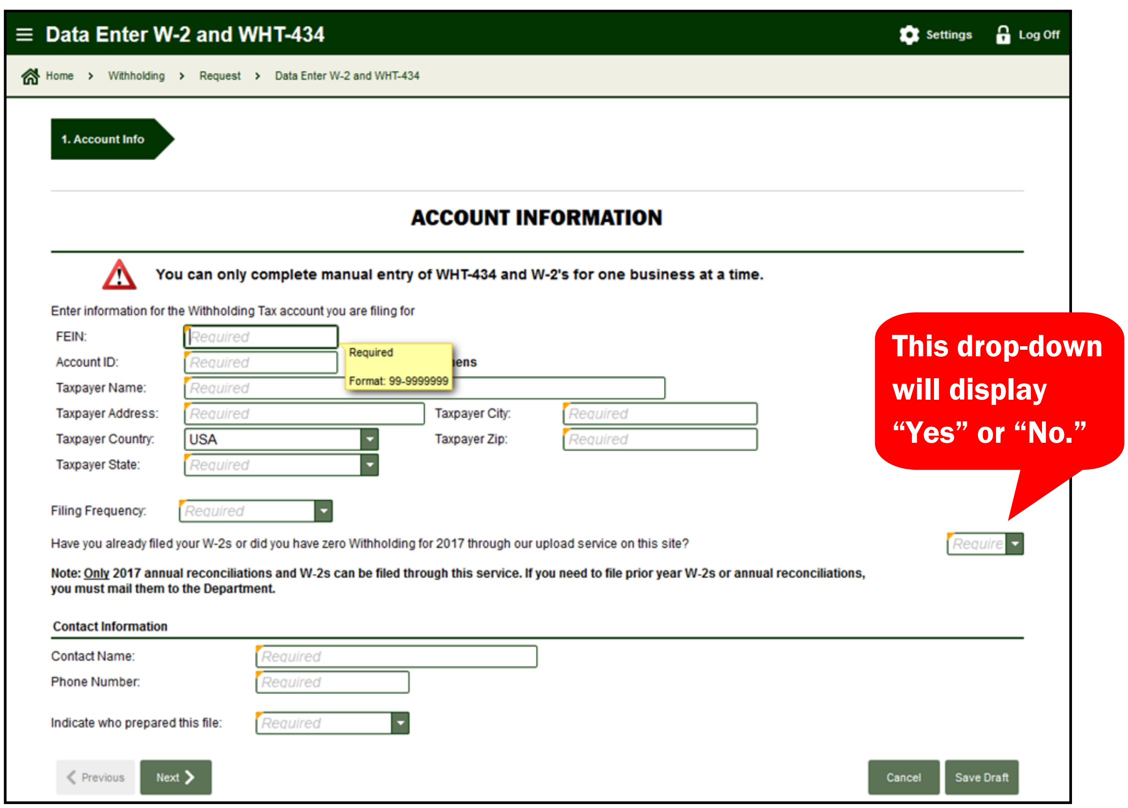
A. As an alternative to uploading files, you may manually enter information by clicking the **WHT-434, W-2 Manual Entry** (see Steps 5B-D) and/or **1099 Manual Entry** (see Step 6). You must fill in each section completely.



B. For "WHT-434, W-2 Manual Entry," complete the required information.

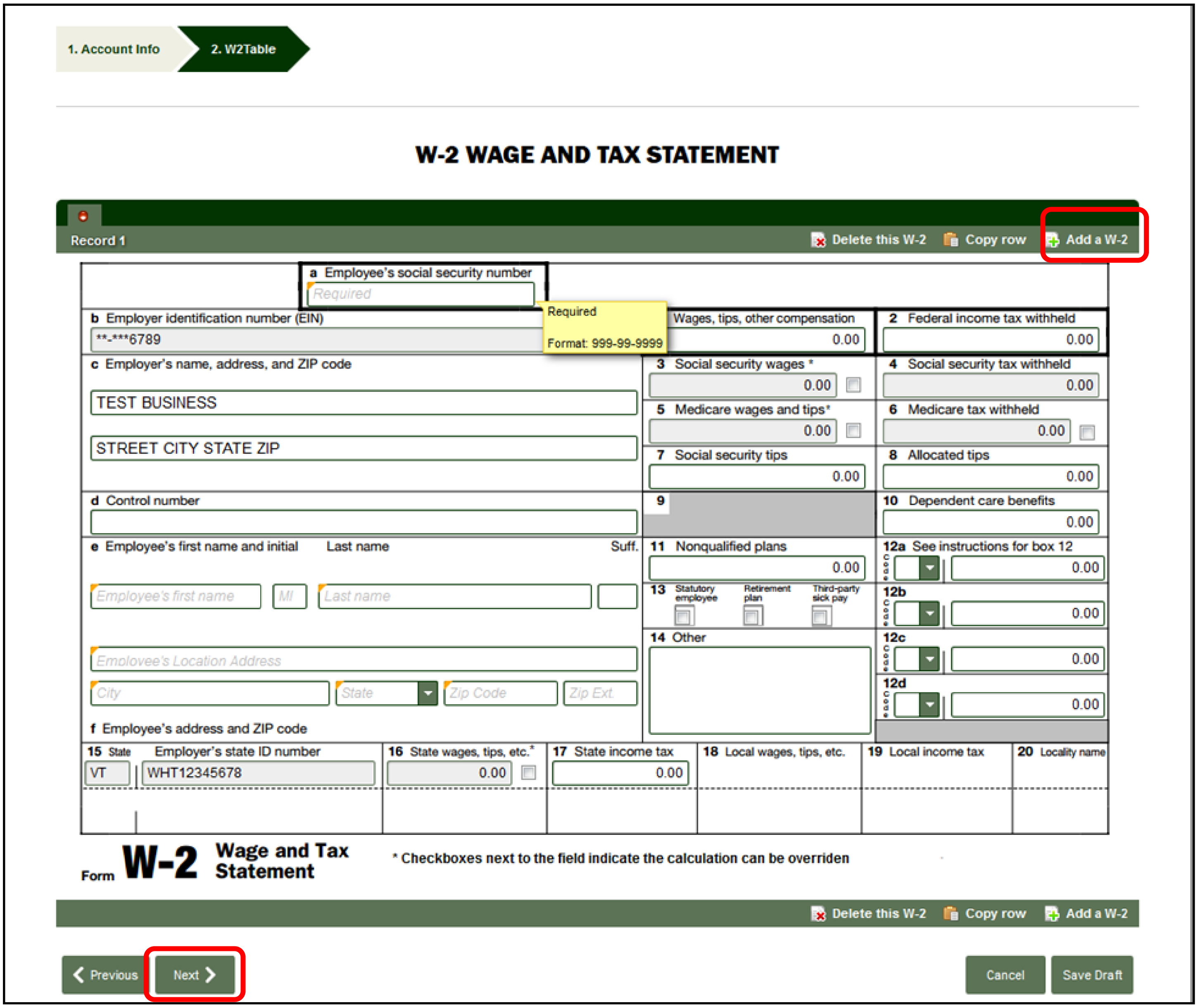
There is a required field in the drop-down box to determine if you have already filed W-2s or have no withholding to report and do not need to file W-2s.

Choose **Yes** or **No**, as appropriate and click **Next**.

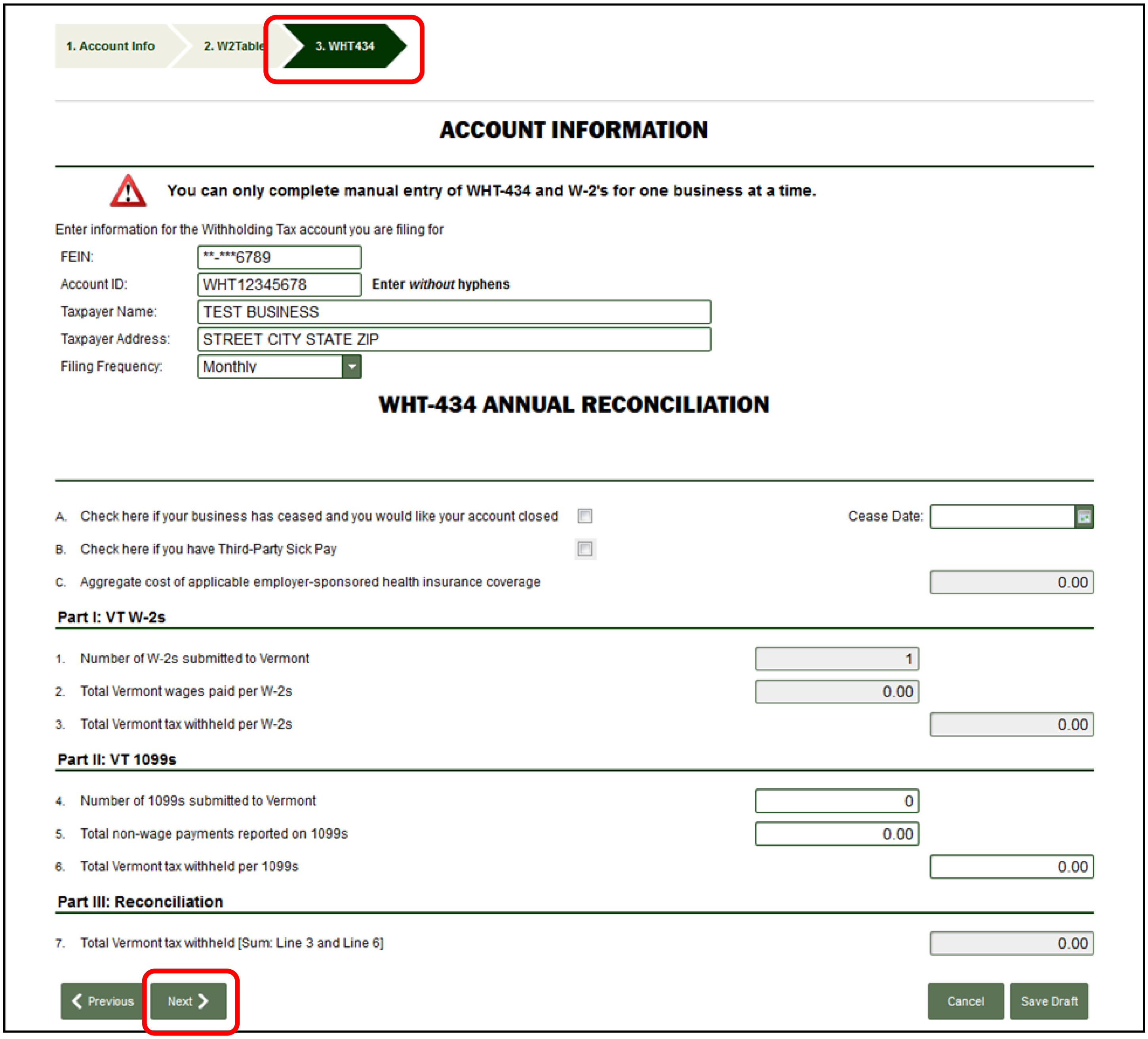


C. If you select "No," you will be able to data enter the W-2s.

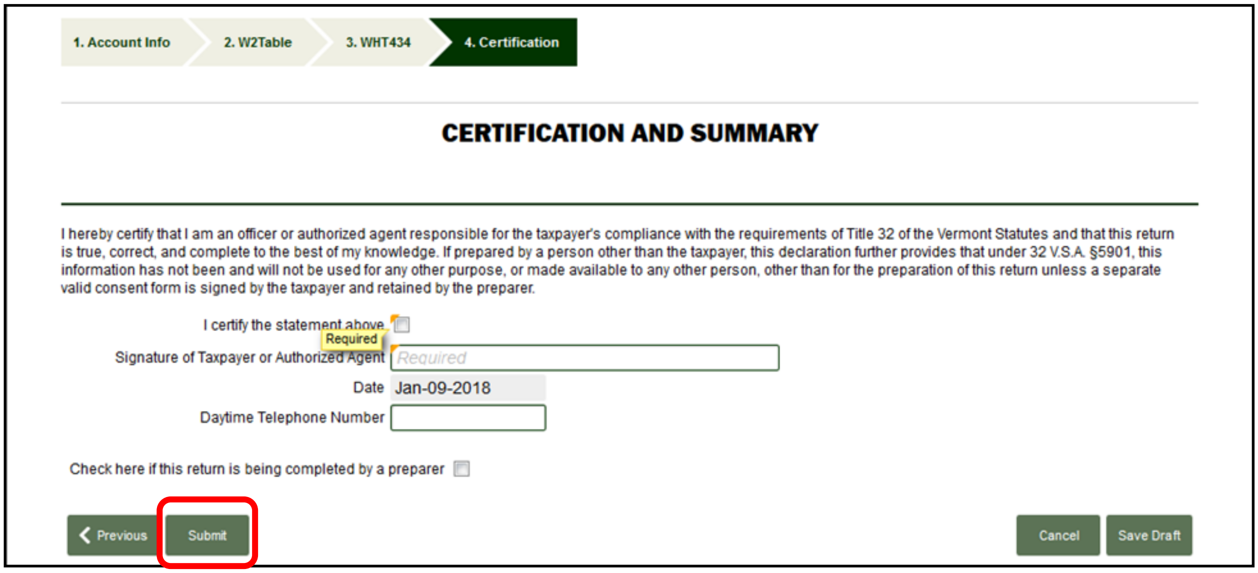
- When you enter information in Box 1, it automatically populates figures into Boxes 3-6.
- Box fields with an asterisk (*) may be edited as needed. To edit a field with an asterisk, select the checkbox next to it and then make your edits in the field.
- To add more than one W-2, click **Add a W-2** located in the upper right corner of the form. Once you've completed all required information in each W-2 for all employees, click **Next**.



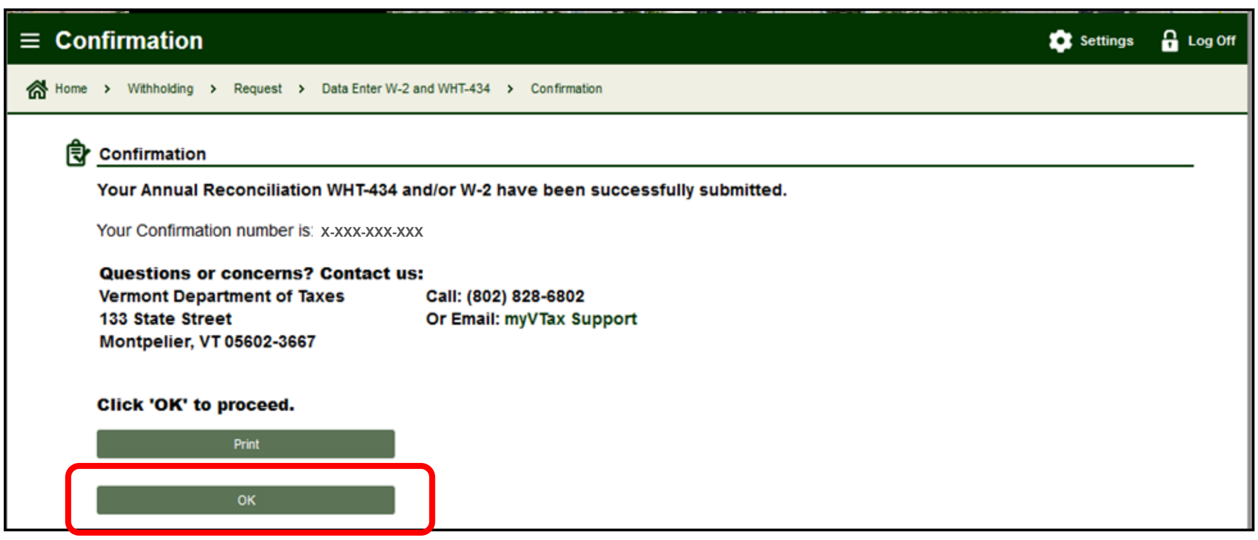
D. After you have submitted all W-2s, you will then complete Form WHT-434, Annual Reconciliation. Some of the information will prefill based on information you entered on previous screens. Fields in gray cannot be changed on this return. Fill in all required information. Click **Next**.



E. Fill in all required information on the “Certification and Summary” screen. Click **Submit**.

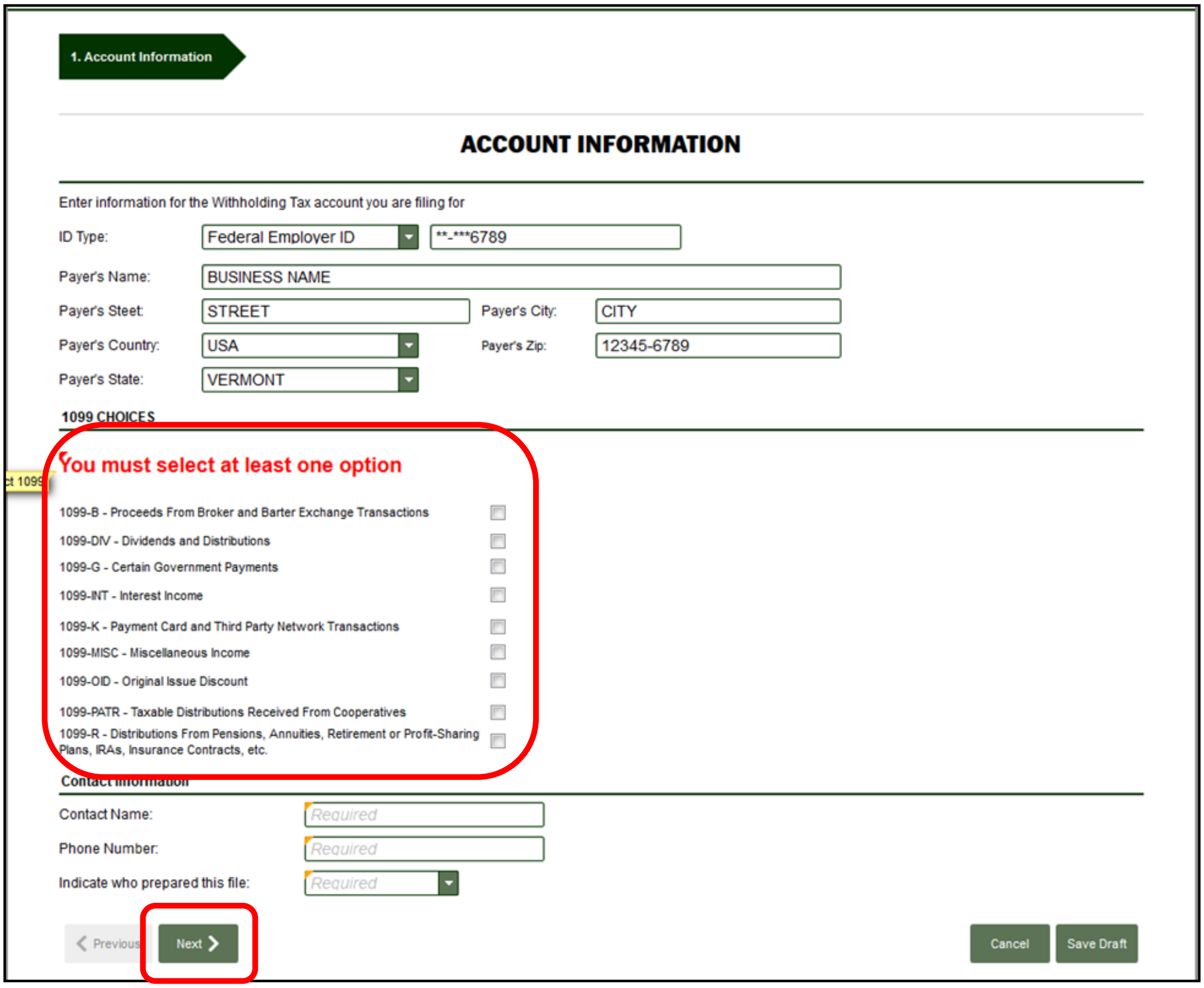


F. After you submit your return, you will receive a confirmation indicating you have successfully submitted your W-2s and/or WHT-434. Click **OK** to continue.

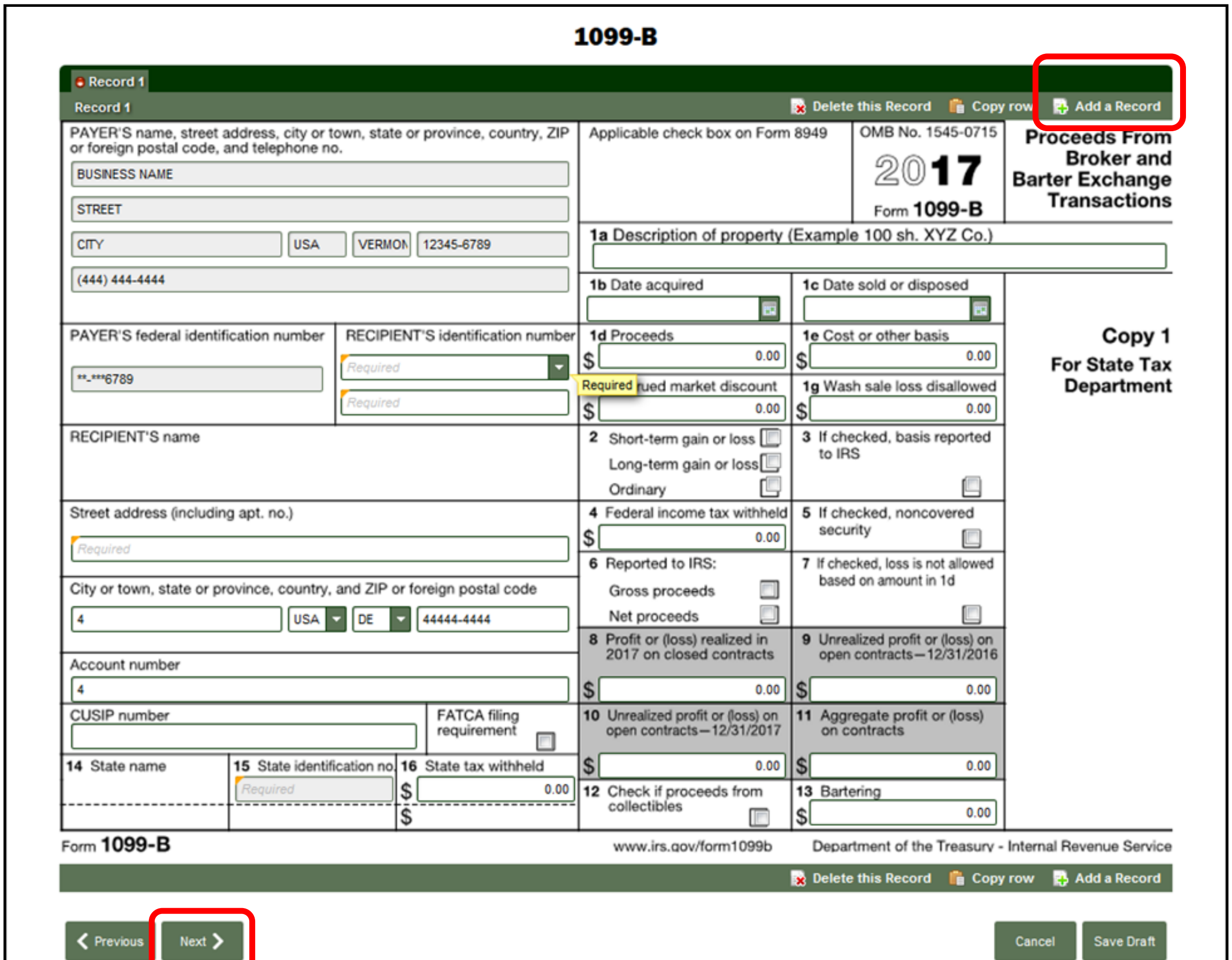


Step 6: How to Manually Enter a 1099

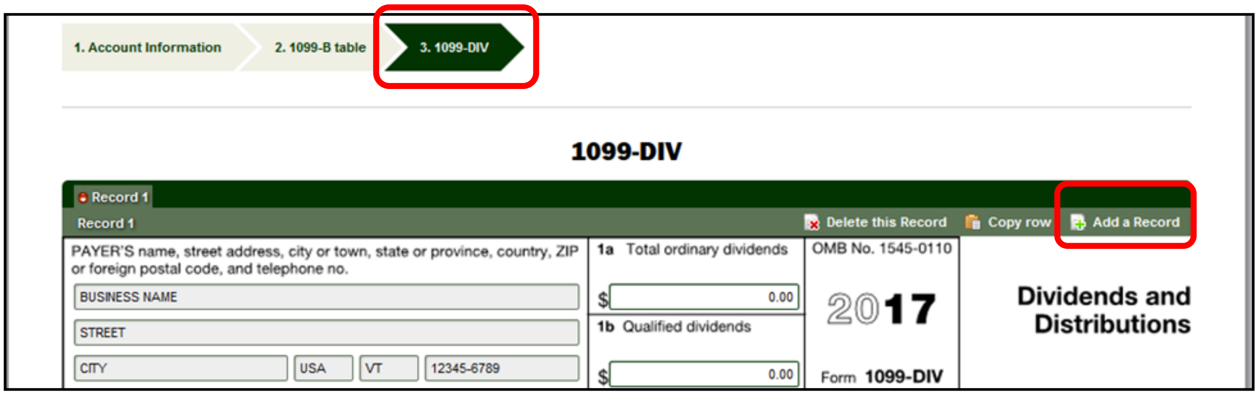
A. On the "Account Information" page, select the type(s) of 1099s you would like to enter and complete the required information. You may select more than one type of 1099 as needed. Click **Next**.



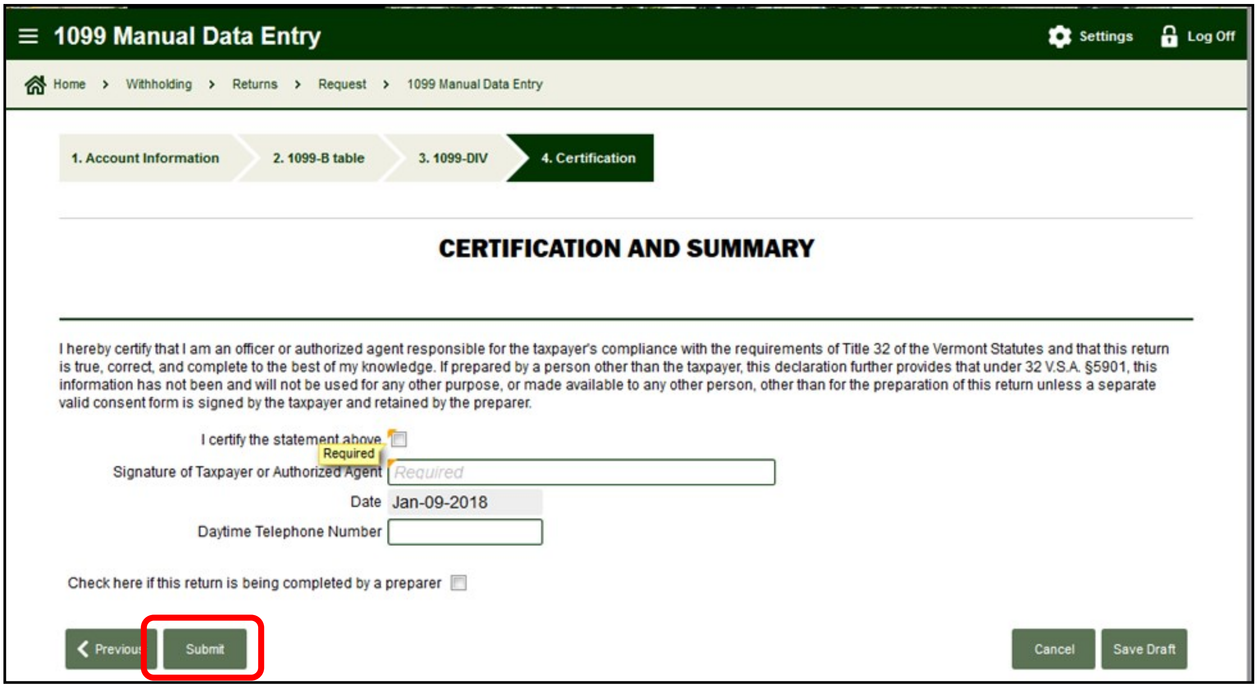
B. The example below is a 1099-B. Enter your data into the 1099s, filling in all required fields. To add more than one 1099 of the same type, click **Add a Record** located in the upper right corner of the form. Once you've added all 1099s and completed all required information for that 1099 type, click **Next**.



C. If you selected more than one 1099 type on the "Account Information" page, the next 1099 type will automatically display. Complete the requested information, adding more records if needed.



D. Fill in all required information on the "Certification and Summary" screen. Click **Submit**.



E. Once all 1099s are submitted, you will receive a confirmation that you have successfully submitted your 1099s. Click **OK** to return to the home page as shown in Step 3C on page 4.