

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

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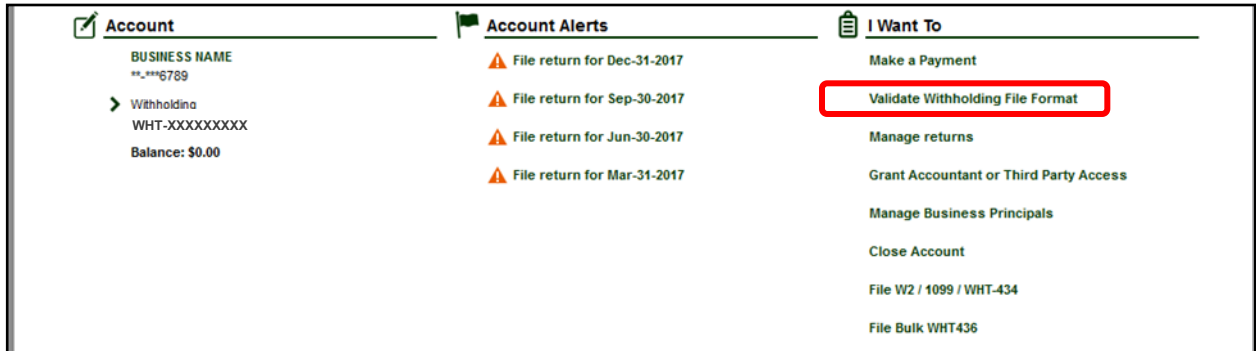
Step 1: Log in to your account

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.

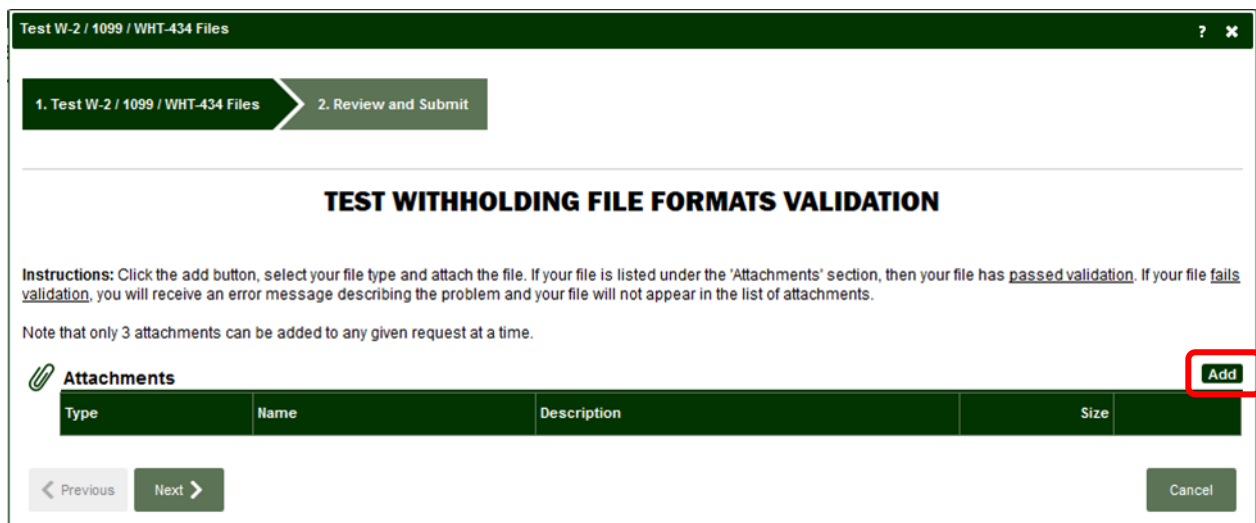
The screenshot displays the myVTax web application interface. At the top, there is a header for the Agency of Administration Department of Taxes. Below this is a navigation bar with a home icon, the myVTax logo, and links for Settings and Log Off. A main navigation bar contains tabs for Home, Accounts, Submissions, Correspondence, Names and Addresses, and Logons. The Accounts tab is currently selected and highlighted with a red box. Under the Accounts tab, there is a list of accounts. The first account is highlighted with a red box and shows a checkmark icon, the word 'Accounts', a filter input field, and a 'View Accounts' button. Below this, a specific account is listed with a warning icon, the label 'Withholding', the ID 'WHT-XXXXXXXX', the business name, and a balance of '\$0.00'. Other sections visible include a notification banner about account changes, a Logon section with user details, an Alerts section showing no alerts, and an 'I Want To' section with various action links.

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.

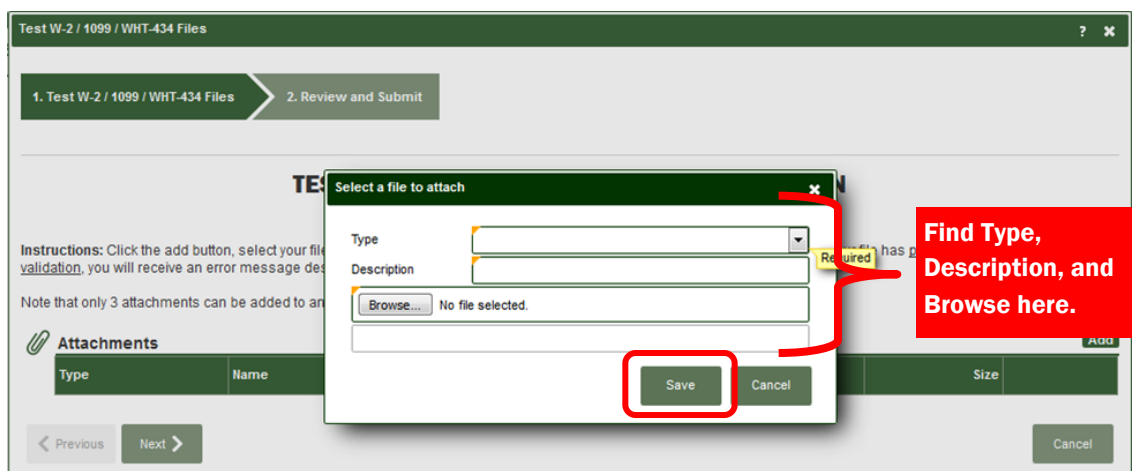


B. The next screen allows you to add and upload a test file to make sure the information you want to upload is in the correct format. To do this, click the **Add** button.

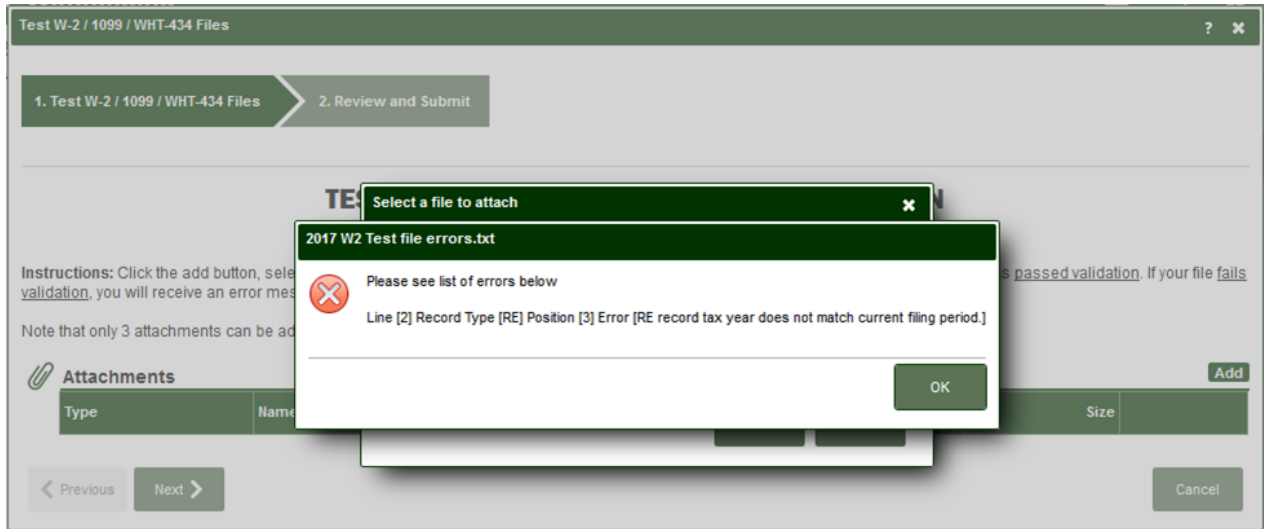


C. Then do the following:

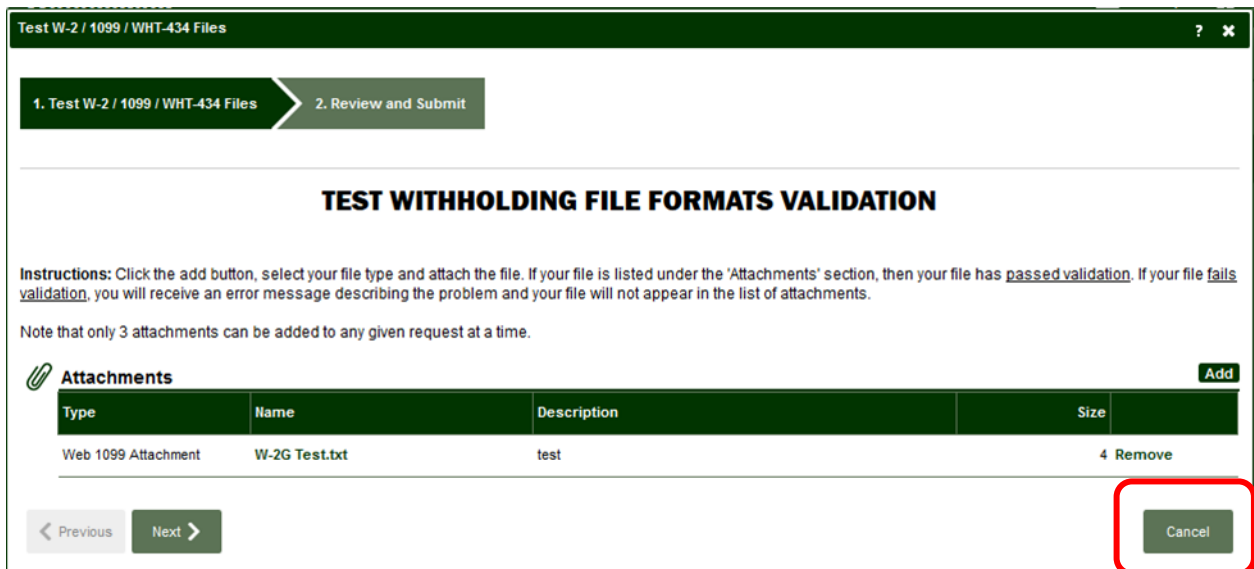
- Select the **Type** by choosing the appropriate option from the drop-down menu.
- Manually enter a **Description**.
- Click **Browse**. Then locate and open the file.
- Click **Save**.



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.



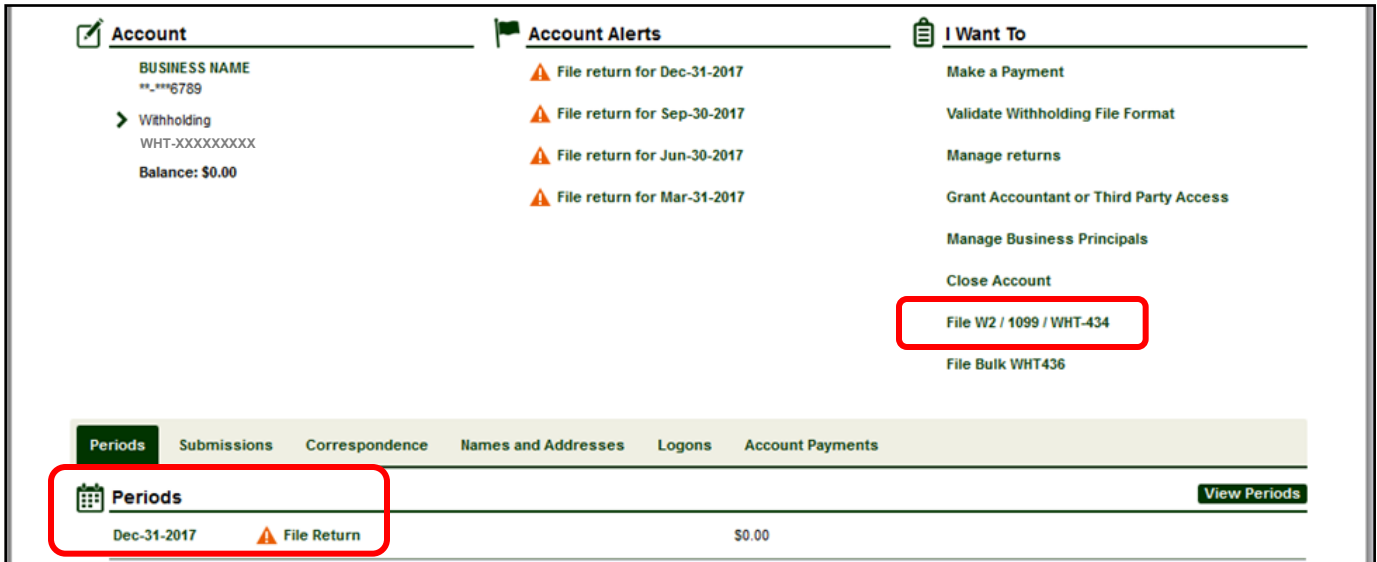
E. Once a file has been uploaded, it will appear as shown below. As this is only a test, you will **not** see a "Save" button. Instead, click **Cancel** to return to the previous page.



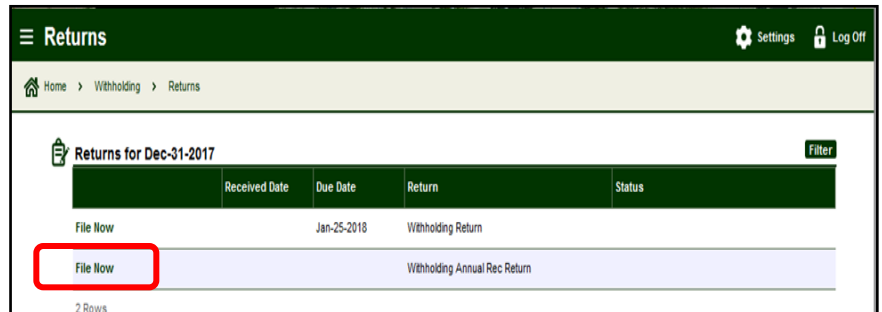
Step 3: Navigate to the W-2, 1099, and WHT-434 submission page

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**).



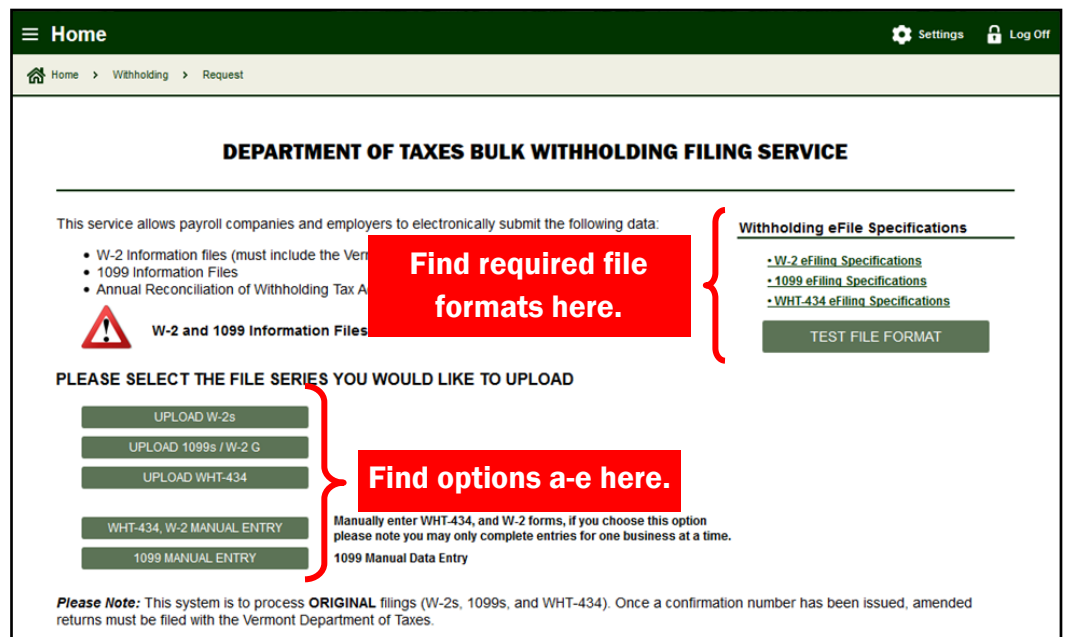
B. If you clicked “File Return” in the previous step, click the **File Now** hyperlink next to “Withholding Annual Rec Return.”



C. The next screen offers you several options:

- Upload W-2s
- Upload 1099s
- Upload WHT-434
- WHT-434, W-2 Manual Entry
- 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.

PLEASE SELECT THE FILE SERIES YOU WOULD LIKE TO UPLOAD

UPLOAD W-2s
UPLOAD 1099s / W-2 G
UPLOAD WHT-434

WHT-434, W-2 MANUAL ENTRY
1099 MANUAL ENTRY

Manually enter WHT-434, and W-2 forms, if you choose this option please note you may only complete entries for one business at a time.
1099 Manual Data Entry

Please Note: This system is to process **ORIGINAL** filings (W-2s, 1099s, and WHT-434). Once a confirmation number has been issued, amended returns must be filed with the Vermont Department of Taxes.

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

File 1099s / W-2Gs Settings Log Off

Home > Withholding > Returns > Request > File 1099s / W-2Gs

1. File 1099s / W-2Gs 2. Review and Submit

1099/W-2 G BULK FILE UPLOAD

Instructions: Click the add button, select your file type and attach the file. If your file is listed under the 'Attachments' section, then your file has passed validation. If your file fails validation, you will receive an error message describing the problem and your file will not appear in the list of attachments.

Note that only 3 attachments can be added to any given request at a time.

Attachments **Add**

Type	Name	Description	Size
------	------	-------------	------

< Previous Next > Cancel

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**.

1. File 1099s / W-2Gs 2. Review and Submit

Select a file to attach

Type: Web 1099 Attachment

Description: test

Browse... 1099 Test.txt

Save Cancel

Attachments **Add**

Type	Name	Description	Size
------	------	-------------	------

< Previous Next > Cancel

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

File 1099s / W-2Gs

Home > Withholding > Returns > Request > File 1099s / W-2Gs

1. File 1099s / W-2Gs 2. Review and Submit

1099/W-2 G BULK FILE UPLOAD

Instructions: Click the add button, select your file type and attach the file. If your file is listed under the 'Attachments' section, then your file has passed validation. If your file fails validation, you will receive an error message describing the problem and your file will not appear in the list of attachments.

Note that only 3 attachments can be added to any given request at a time.

Attachments Add

Type	Name	Description	Size
Web 1099 Attachment	1099 Test.txt	test	4 Remove

< Previous **Next >** Cancel

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

Confirmation

Home > Withholding > Returns > Request > File 1099s / W-2Gs > Confirmation

Confirmation

Your 1099 / W-2G file(s) have been successfully submitted.

Your Confirmation number is: x-xxx-xxx-xxx

Questions or concerns? Contact us:
Vermont Department of Taxes Call: (802) 828-6802
133 State Street Or Email: [myVTax Support](#)
Montpelier, VT 05602-3667

Click 'OK' to proceed.

Print **OK**

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.

The screenshot shows the 'DEPARTMENT OF TAXES BULK WITHHOLDING FILING SERVICE' interface. It includes a navigation bar with 'Home', 'Withholding', and 'Request' links. A warning icon indicates that W-2 and 1099 information files must be in the Federal Standard Format. A 'Withholding eFile Specifications' section lists links for W-2, 1099, and WHT-434 eFiling specifications, along with a 'TEST FILE FORMAT' button. The main area prompts the user to 'PLEASE SELECT THE FILE SERIES YOU WOULD LIKE TO UPLOAD' and provides five buttons: 'UPLOAD W-2s', 'UPLOAD 1099s / W-2 G', 'UPLOAD WHT-434', 'WHT-434, W-2 MANUAL ENTRY', and '1099 MANUAL ENTRY'. The 'WHT-434, W-2 MANUAL ENTRY' button is highlighted with a red box. A note states: 'Manually enter WHT-434, and W-2 forms, if you choose this option please note you may only complete entries for one business at a time. 1099 Manual Data Entry'.

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**.

The screenshot shows the 'Data Enter W-2 and WHT-434' form. It includes a navigation bar with 'Home', 'Withholding', 'Request', and 'Data Enter W-2 and WHT-434' links. A warning icon indicates that you can only complete manual entry of WHT-434 and W-2s for one business at a time. The form is titled 'ACCOUNT INFORMATION' and prompts the user to 'Enter information for the Withholding Tax account you are filing for'. It includes fields for FEIN, Account ID, Taxpayer Name, Taxpayer Address, Taxpayer Country, Taxpayer State, Taxpayer City, Taxpayer Zip, Filing Frequency, and a drop-down box for 'Have you already filed your W-2s or did you have zero Withholding for 2017 through our upload service on this site?'. A red callout bubble points to this drop-down box, stating: 'This drop-down will display “Yes” or “No.”'. The form also includes a 'Contact Information' section with fields for Contact Name, Phone Number, and Indicate who prepared this file. At the bottom, there are 'Previous', 'Next', 'Cancel', and 'Save Draft' buttons.

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**.

1. Account Info
2. W2Table

W-2 WAGE AND TAX STATEMENT

Record 1

✖ Delete this W-2
 📄 Copy row
➕ Add a W-2

a Employee's social security number <input type="text" value="Required"/>		3 Wages, tips, other compensation <input type="text" value="0.00"/>		2 Federal income tax withheld <input type="text" value="0.00"/>	
b Employer identification number (EIN) <input type="text" value="**-***6789"/>		4 Social security wages * <input type="text" value="0.00"/> <input type="checkbox"/>		4 Social security tax withheld <input type="text" value="0.00"/>	
c Employer's name, address, and ZIP code <input type="text" value="TEST BUSINESS"/> <input type="text" value="STREET CITY STATE ZIP"/>		5 Medicare wages and tips* <input type="text" value="0.00"/> <input type="checkbox"/>		6 Medicare tax withheld <input type="text" value="0.00"/> <input type="checkbox"/>	
d Control number <input type="text"/>		7 Social security tips <input type="text" value="0.00"/>		8 Allocated tips <input type="text" value="0.00"/>	
e Employee's first name and initial Last name Suff. <input type="text" value="Employee's first name"/> <input type="text" value="MI"/> <input type="text" value="Last name"/> <input type="text"/>		9		10 Dependent care benefits <input type="text" value="0.00"/>	
f Employee's address and ZIP code <input type="text" value="Employee's Location Address"/> <input type="text" value="City"/> <input type="text" value="State"/> <input type="text" value="Zip Code"/> <input type="text" value="Zip Ext."/>		11 Nonqualified plans <input type="text" value="0.00"/>		12a See instructions for box 12 <input type="text" value="0.00"/>	
15 State Employer's state ID number <input type="text" value="VT"/> <input type="text" value="WHT12345678"/>		13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		12b <input type="text" value="0.00"/>	
16 State wages, tips, etc.* <input type="text" value="0.00"/> <input type="checkbox"/>		14 Other <input type="text"/>		12c <input type="text" value="0.00"/>	
17 State income tax <input type="text" value="0.00"/>		18 Local wages, tips, etc.		12d <input type="text" value="0.00"/>	
19 Local income tax		20 Locality name			

Form **W-2** Wage and Tax Statement

* Checkboxes next to the field indicate the calculation can be overridden

✖ Delete this W-2
📄 Copy row
➕ Add a W-2


< Previous
Next >

Cancel
Save Draft

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**.

1. Account Info 2. W2Table **3. WHT434**

ACCOUNT INFORMATION

 **You can only complete manual entry of WHT-434 and W-2's for one business at a time.**

Enter information for the Withholding Tax account you are filing for

FEIN:

Account ID: Enter *without* hyphens

Taxpayer Name:

Taxpayer Address:

Filing Frequency:

WHT-434 ANNUAL RECONCILIATION

A. Check here if your business has ceased and you would like your account closed Cease Date:

B. Check here if you have Third-Party Sick Pay

C. Aggregate cost of applicable employer-sponsored health insurance coverage

Part I: VT W-2s

1. Number of W-2s submitted to Vermont

2. Total Vermont wages paid per W-2s

3. Total Vermont tax withheld per W-2s

Part II: VT 1099s

4. Number of 1099s submitted to Vermont

5. Total non-wage payments reported on 1099s

6. Total Vermont tax withheld per 1099s

Part III: Reconciliation

7. Total Vermont tax withheld [Sum: Line 3 and Line 6]

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

1. Account Info 2. W2Table 3. WHT434 4. Certification

CERTIFICATION AND SUMMARY

I hereby certify that I am an officer or authorized agent responsible for the taxpayer's compliance with the requirements of Title 32 of the Vermont Statutes and that this return is true, correct, and complete to the best of my knowledge. If prepared by a person other than the taxpayer, this declaration further provides that under 32 V.S.A. §5901, this information has not been and will not be used for any other purpose, or made available to any other person, other than for the preparation of this return unless a separate valid consent form is signed by the taxpayer and retained by the preparer.

I certify the statement above Required

Signature of Taxpayer or Authorized Agent Required

Date Jan-09-2018

Daytime Telephone Number

Check here if this return is being completed by a preparer

< Previous Submit Cancel Save Draft

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.

Confirmation Settings Log Off

Home > Withholding > Request > Data Enter W-2 and WHT-434 > Confirmation

Confirmation

Your Annual Reconciliation WHT-434 and/or W-2 have been successfully submitted.

Your Confirmation number is: x-xxx-xxx-xxx

Questions or concerns? Contact us:
Vermont Department of Taxes Call: (802) 828-6802
133 State Street Or Email: myVTax Support
Montpelier, VT 05602-3667

Click 'OK' to proceed.

Print OK

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**.

1. Account Information

ACCOUNT INFORMATION

Enter information for the Withholding Tax account you are filing for

ID Type:

Payer's Name:

Payer's Street: Payer's City:

Payer's Country: Payer's Zip:

Payer's State:

1099 CHOICES

You must select at least one option

- 1099-B - Proceeds From Broker and Barter Exchange Transactions
- 1099-DIV - Dividends and Distributions
- 1099-G - Certain Government Payments
- 1099-INT - Interest Income
- 1099-K - Payment Card and Third Party Network Transactions
- 1099-MISC - Miscellaneous Income
- 1099-OD - Original Issue Discount
- 1099-PATR - Taxable Distributions Received From Cooperatives
- 1099-R - Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

Contact information

Contact Name:

Phone Number:

Indicate who prepared this file:

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**.

1099-B

Record 1

Delete this Record Copy row Add a Record

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

BUSINESS NAME

STREET

CITY USA VERMONT 12345-6789

(444) 444-4444

Applicable check box on Form 8949 OMB No. 1545-0715

2017

Form **1099-B**

Proceeds From Broker and Barter Exchange Transactions

1a Description of property (Example 100 sh. XYZ Co.)

1b Date acquired 1c Date sold or disposed

1d Proceeds \$ 0.00 1e Cost or other basis \$ 0.00

Required 1f Wash sale loss disallowed \$ 0.00

2 Short-term gain or loss Long-term gain or loss Ordinary 3 If checked, basis reported to IRS

4 Federal income tax withheld \$ 0.00 5 If checked, noncovered security

6 Reported to IRS: Gross proceeds Net proceeds 7 If checked, loss is not allowed based on amount in 1d

8 Profit or (loss) realized in 2017 on closed contracts \$ 0.00 9 Unrealized profit or (loss) on open contracts—12/31/2016 \$ 0.00

10 Unrealized profit or (loss) on open contracts—12/31/2017 \$ 0.00 11 Aggregate profit or (loss) on contracts \$ 0.00

14 State name 15 State identification no. 16 State tax withheld \$ 0.00

12 Check if proceeds from collectibles 13 Bartering \$ 0.00

Form **1099-B** www.irs.gov/form1099b Department of the Treasury - Internal Revenue Service

Delete this Record Copy row Add a Record

Previous Next > Cancel Save Draft

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.

1. Account Information 2. 1099-B table 3. 1099-DIV

1099-DIV

Record 1

Record 1 Delete this Record Copy row Add a Record

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

BUSINESS NAME

STREET

CITY USA VT 12345-6789

1a Total ordinary dividends \$ 0.00

1b Qualified dividends \$ 0.00

OMB No. 1545-0110

2017

Form **1099-DIV**

Dividends and Distributions

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

1099 Manual Data Entry Settings Log Off

Home > Withholding > Returns > Request > 1099 Manual Data Entry

1. Account Information 2. 1099-B table 3. 1099-DIV 4. Certification

CERTIFICATION AND SUMMARY

I hereby certify that I am an officer or authorized agent responsible for the taxpayer's compliance with the requirements of Title 32 of the Vermont Statutes and that this return is true, correct, and complete to the best of my knowledge. If prepared by a person other than the taxpayer, this declaration further provides that under 32 V.S.A. §5901, this information has not been and will not be used for any other purpose, or made available to any other person, other than for the preparation of this return unless a separate valid consent form is signed by the taxpayer and retained by the preparer.

I certify the statement above Required

Signature of Taxpayer or Authorized Agent Required

Date Jan-09-2018

Daytime Telephone Number

Check here if this return is being completed by a preparer

Previous Submit Cancel Save Draft

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.

Confirmation Settings Log Off

Home > Withholding > Returns > Request > 1099 Manual Data Entry > Confirmation

Confirmation

Your 1099 file(s) have been successfully submitted.

Your Confirmation number is: x-xxx-xxx-xxx

Questions or concerns? Contact us:
Vermont Department of Taxes
133 State Street
Montpelier, VT 05602-3667
Call: (802) 828-6802
Or Email: myVTax Support

Click 'OK' to proceed.

Print OK