

**WEST SHORE TAX BUREAU**  
*3607 Rosemont Avenue*  
*PO Box 656*  
*Camp Hill, PA 17011*  
*Phone (717) 975-8965 Fax (717) 975-8955*  
*www.westab.org email: itservices@westab.org*

## **Form W-2 Electronic Transmittal**

Employers filing 250 or more W-2 forms with this bureau are required to submit form W-2 information to this bureau on acceptable magnetic media.

We will work with you to establish the correct, orderly reporting as this is a joint effort with you.

The acceptable magnetic media and record formats are described in detail on the following pages.

Technical questions concerning magnetic media reporting should be directed to Kristie at 717-975-8965.

The option for employers to file their W-2 records online is now available. Please visit our web site at [www.westab.org](http://www.westab.org) for information on how to register for online filing.

### **Changes Beginning With Tax Year 2005**

**9 track and/or cartridge tapes are NO LONGER acceptable. Please use diskettes, CD-ROM, DVD or other acceptable media as listed in the Technical Requirements**

**General**

**DO NOT DUPLICATE ON PAPER FORMS ANY INFORMATION FILED ELECTRONICALLY.**

W-2 forms on magnetic media, optical media, or filed online must be submitted on or before February 28th of the year following the tax year being reported. When submitting computer media remember to include the following information:

- \* The name and telephone number of a person to contact should questions arise.
- \* A return address for the magnetic media submitted.
- \* An annual reconciliation **Form 322** for each employer account represented on the magnetic media.

If you are submitting magnetic media to this bureau for the first time, please provide us with test media (labeled as such) for verification at least one month prior to sending live data.

**NOTE: Record formats are presented on pages 4 and 5. Two different record formats are presented; the Excel Spreadsheet Format and the Federal Government EFW2 Format. Choose the format that best accommodates your situation.**

## **Magnetic Media Technical Requirements**

It is acceptable to “zip” your files prior to submission. Please utilize standard PKZIP or WinZip technology to do so. Please maintain the standard .zip extension on “zipped” files so that it is obvious to us that the file needs to be unzipped.

**Note:** Records filed online may not be “zipped”.

Please submit your files using one of the acceptable transport methods or forms of media listed below.

### **Transport Methods / Forms of Media**

1. CD-ROM, DVD, CD-R, CD-RW, are acceptable.

All media must be formatted for and readable by a standard Microsoft Windows based PC.

2. E-Mail:

E-mail the W-2 data as a file attachment to [itservices@westab.org](mailto:itservices@westab.org). Please note that you will need to mail or Fax (717-975-8955) the Reconciliation Form to the Tax Bureau, Attention: Kristie.

#### **Notice to persons and entities who transmit e-mail or fax information or records to the West Shore Tax Bureau:**

This Bureau shall not be responsible or liable for the confidentiality of information or records which are or which may be read, accessed or received by another person or entity while the information or records are in transit to or from this Bureau by e-mail or fax.

3. Online Filing.

Please visit our web site at [www.westab.org](http://www.westab.org) for information on how to register for online filing.

**Excel Spreadsheet Format**

The table must include the following columns, at a minimum. The columns may appear in any order.

**Note:** We accept Microsoft Excel version 2003 or earlier.

| <b>Required Field</b>  | <b>Column Heading (Row 1) Contains the Text:</b>  |
|------------------------|---|
| Account Number         | ACCOUNT (West Shore Tax Bureau account number, Not federal EIN.)  |
| Social Security Number | SSN   |
| First Name             | FIRST NAME  |
| Last Name              | LAST NAME   |
| Street Address         | ADDRESS (The first column on which these characters are found will be treated as Address Line 1. If these characters are found on a subsequent column, it will be treated as Address Line 2.) |
| City                   | CITY  |
| State                  | STATE   |
| Zip Code               | ZIP   |
| Gross Wages            | GROSS WAGES   |
| Tax Withheld           | WITHHELD  |
| Tax Year               | YEAR  |
| Political Subdivision  | PSD   |

**Federal Government Format (EFW2)**

For detailed information regarding the federal magnetic media reporting of W-2 forms and the EFW2 format, please see the Social Security Administration Publication No. 42-007, Specifications for Filing Forms W2 Electronically (EFW2).

Listed below are this Bureau's **additional** requirements for the EFW2 format.

**The code "RE" (employer) record and code "RS" (state) record are the only two records required by this bureau.**

The code "RS" (state) record has provisions for local tax information. The following fields are to be used for local tax information.

Record Name: Code RS - State Record (**also include code RE record**)

| <u>Position</u> | <u>Length</u> | <u>Field Name</u>          | <u>Required Entry</u>                                       |
|-----------------|---------------|----------------------------|---|
| 5-9             | 5             | Taxing Entity Code         | "WSTB"  |
| 308-308         | 1             | Tax Type Code              | "F"   |
| 309-319         | 11            | Local Taxable Wages        | includes 2 decimal positions<br>right justify and zero fill |
| 320-330         | 11            | Local Income Tax Withheld  | includes 2 decimal positions<br>right justify and zero fill |
| 338-343         | 6             | Political Subdivision Code |   |

**Note: All fields in the "RS" record should be utilized, not only the ones referenced above.**