

**Overview:**

- Jackson Hewitt partners with **Automatic Data Processing, Inc. (ADP)** to enable tax preparers to download Form W-2 information from the Internet directly into a client's tax return via the File Transfer System (FTS).
- When a client's employer uses ADP to print their Form W-2s, employees may be able to download their Form W-2 to ProFiler, allowing them to have their returns prepared and filed before their W-2s arrive by mail.
- Clients can check to see if they are eligible for W-2 download by visiting www.jacksonhewitt.com. If eligible, they can authorize to have their W-2 information transmitted to a Jackson Hewitt office before they arrive to have their tax return prepared!
- Employers must participate in the download program in order for the client's W-2 to be available electronically. For example, if a client's employer uses ADP for payroll processing but does not choose to participate in the download program, that client will not be able to download the W-2 electronically.
- W-2s typically begin to become available online beginning early January.

Client Benefits:

- Form W-2 information can be downloaded directly to ProFiler, saving time and reducing the risk of data input errors.
- A client who uses W-2 Download has the ability to save time by eliminating the wait time until their Form W-2 arrives by mail.
- It's **FREE** with paid tax preparation.

Requirements:

You'll be able to check availability and use W-2 Download when clients provide the following information:

- ADP Final Pay Stub
- ADP Form W-2.



ADP

Clients with W-2s issued by ADP can use W-2 Download by providing you with either their last paystub or their Form W-2.

If clients are using their last ADP paystub, follow the prompts in ProFiler to enter the following:

1. ADP Company Code
2. ADP File #
3. Year-To-Date Federal Income Tax Withheld **-must include dollars and cents with the decimal point.**

1 CO. FILE DEPT. CLOCK VCHR. NO.
ABC 123456 12345 00000000 1

2 Earnings Statement
Period Ending: 12/23/2018
Pay Date: 12/30/2018

TIMELY BUILD
12 BUILDER DR.
GREENVILLE, SC 29601

Social Security Number: 400-00-4008
Taxable Marital Status: SINGLE
Exemptions/Allowances:
Federal: 2
State: 2
LOCAL: 2

RALPH BENSON
74 BUILDER DRIVE
GREENVILLE SC 29601

Earnings	rate	hours	this period	year to date	Other Benefits and Information	this period	total to date
Regular	\$10.00	40.00	\$400.00	\$21,400.00	Dependent Care Benefits	\$0.00	\$0.00
Overtime	\$15.00	3.50	\$52.50	\$3,000.00	Health Savings Account	\$0.00	\$0.00
Vacation			\$0.00	\$600.00	Health Insurance	\$0.00	2,402.37
Sick			\$0.00				
Gross Pay			\$452.50	\$25,000.00			
Deductions							
Federal Income Tax			\$39.95	\$500.00			
Social Security Tax			\$28.06	\$1,550.00			
Medicare Tax			\$6.56	\$362.50			
SC State Income Tax			\$19.69	\$250.00			
NY State Income Tax			\$46.15	\$600.00			
NYC Local Income Tax			\$3.07	\$120.00			
Other							
401(k)		66.28 *		\$1,000.00			
Net Pay			\$242.74				

* Excluded from federal taxable wages
Your federal taxable wages this period are \$386.22

Important Notes
We will be starting our United Fund drive soon and look forward to your participation

NOTE: ADP now supports an additional paystub format. The YTD Federal Income Tax has not changed, however, the ADP Company Code and File # looks different as seen below.

000003
Company Code Loc/Dept Number Page
K3 ABC00000000 01/4000 1234 1 of 1

Earnings Statement

TIMELY BUI
12 BUILDER
GREENVILLE, SC 29601

Company Code

ADP File Number

ding: 12/21/2018
12/28/2018



If clients are using their ADP Form W-2, you'll need to locate and enter the following:

1. Wage amount from Box 1 (include dollars and cents with decimal point).
2. Control number (include numbers, letters, and special characters/symbols, but no spaces).

1 Wages, tips, other comp. 24000.00		Federal income tax withheld 500.00	
2 Social security wages 25000.00		1 security tax withheld 1550.00	
5 Medicare wages and tips 25000.00		6 Medicare tax withheld 362.50	
d Control number 123456 20/ABC	Dept. 051221	Corp. ABC	Employer Use Only
c Employer's name, address TIMELY BUILDERS 12 BUILDER DR GREENVILLE SC 29601			
b Employer's FED ID number 57-2587950		a Employee's SSA number 400-00-4008	

Notes:

- When entering dollar amounts DO NOT ROUND UP THE NUMBER! These amounts must be entered exactly as they appear.
- When attempting to download a W-2 from ADP, it is critical to enter the information correctly. That's because ADP allows you only **three attempts for a successful download**, after which you are locked out from downloading the client's W-2 for the remainder of the year.
- If you have to download more than one W-2 from ADP, then each Form W-2 requires separate authentication information and a separate download.

Answers to Frequently Asked Questions:

Is there a way to find out when a company's W-2s will be released?

To provide excellent client service, check the Top 1000 EIN Report located on the Library Tab on JHnet. This report contains information on our top 1000 companies in our EIN listing across Jackson Hewitt. It includes the current year download date and the current year date that the paper W-2 will be released. You will also be able to see when the W-2 was released last year. This is a great service that helps the customer know when they can get us the missing paperwork and complete the return.

Why does the expected availability list show that W-2s are available for download but the client's data is not available?

The timeframe documented on the list is an estimate provided in December by the vendor and its clients. It is subject to change.

What if a client's W-2 is not available but they inform me that a co-worker's is available?

Inform the client that some companies issue W-2s for certain divisions or subsidiaries of the corporation at different times. Employees should check with their HR department. In the meantime, you can begin the tax return and put it on hold until the client brings in their W-2.

**The client is questioning the information contained on the W-2. What should you do?**

Instruct the taxpayer to contact their HR department for an explanation about the information contained on their W-2.

What if the client has more than one Form W-2?

If the client has more than one W-2, you must download each one separately.

What are the steps to follow if a customer wishes to use the W-2 Download process with a Sign and Save return?

1. Go to Return Management and Stop the return (must have Return Management permission)
2. Open the return using the Modify Selected Return option.
3. In the Sources of Income screen, uncheck the Paystubs and Earnings Statements box.
4. Delete the paystub.
5. Navigate to the W-2 download question and enter Yes. Proceed with the W-2 download process.
6. Save the return and have customer sign new paperwork.