

HOW TO EDIT W2 FORM BOX 12 AND/OR 14

Question

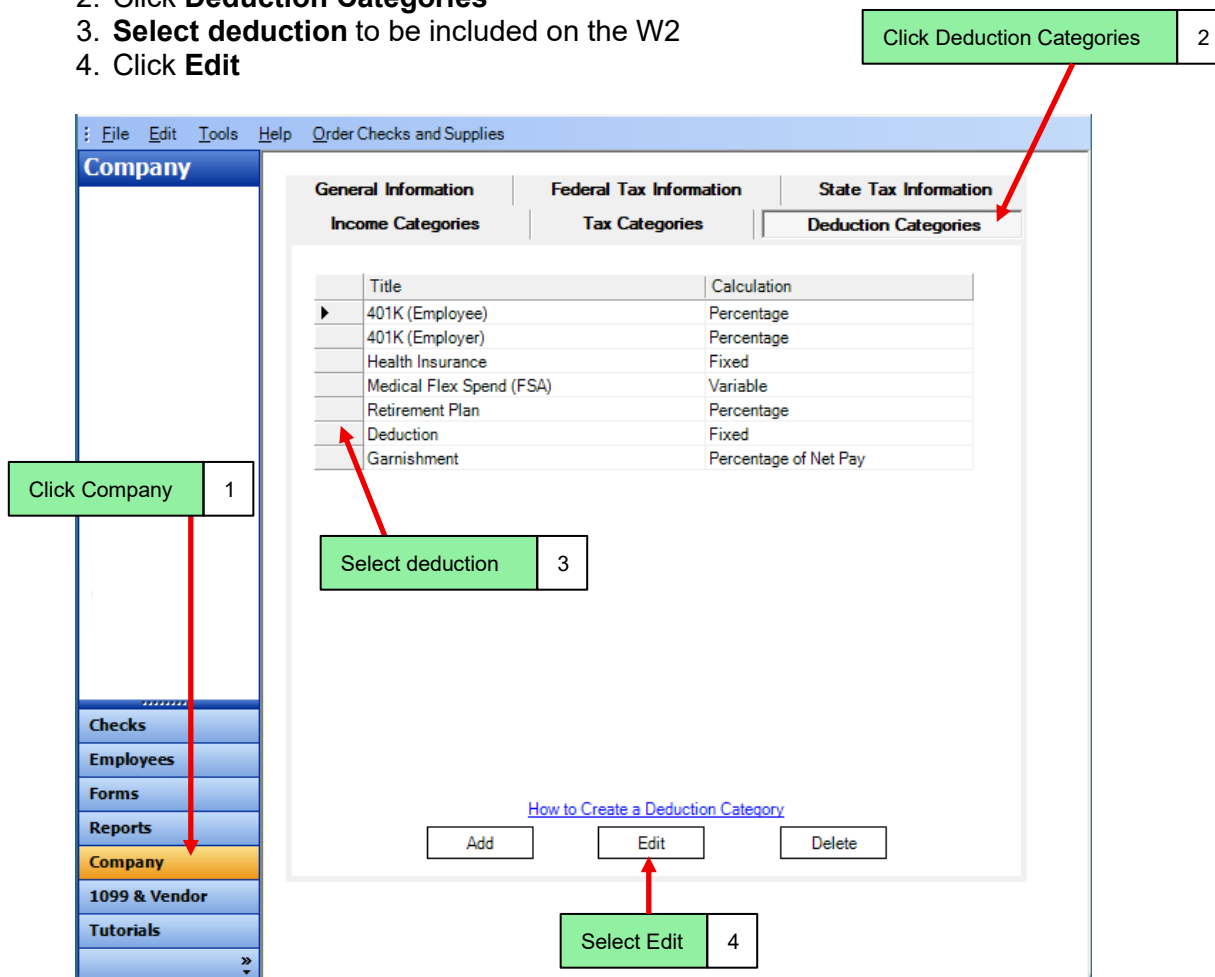
PLEASE REFER TO THE STEPS BELOW:

Answer

A deduction and/or tax category can be included on the W2 Form in Box 12 and/or Box 14. If this was not set up initially, follow the steps below to edit Box 12 and/or Box 14 on Form W2.

*Deduction Category

1. Click **Company**
2. Click **Deduction Categories**
3. **Select deduction** to be included on the W2
4. Click **Edit**



Click Deduction Categories 2

Click Company 1

General Information		Federal Tax Information	State Tax Information
Income Categories		Tax Categories	Deduction Categories
Title			Calculation
▶ 401K (Employee)			Percentage
401K (Employer)			Percentage
Health Insurance			Fixed
Medical Flex Spend (FSA)			Variable
Retirement Plan			Percentage
Deduction			Fixed
Garnishment			Percentage of Net Pay

Select deduction 3

[How to Create a Deduction Category](#)

Add Edit Delete

Select Edit 4

5. Select correct **W2 Option** as needed

Deduction Details ✕

Title: Calculation:

Abbreviation: Paid by:

Default Amount: Cutoff: Leave Blank for No Cutoff

Inactive

W-2 Options

Use on Box 10 (Dependent Care Benefits)

Use on Box 12

Use on Box 14 (Other)

Select W2 Option

Pre-tax payroll deductions are deductions that lower your employee's taxable wages.

When you check any of the taxes in the list below you are lowering the taxable wages for that tax by the amount of the deduction you are creating here.

Exemptions

6. Enter **W2 Code** (Box 12) or **Abbreviation** (Box 14)
7. Click **OK**

Deduction Details ✕

Title: Calculation:

Abbreviation: Paid by:

Default Amount: Cutoff: Leave Blank for No Cutoff

Inactive

W-2 Options

Use on Box 10 (Dependent Care Benefits)

Use on Box 12

Use on Box 14 (Other)

Enter Code

Pre-tax payroll deductions are deductions that lower your employee's taxable wages.

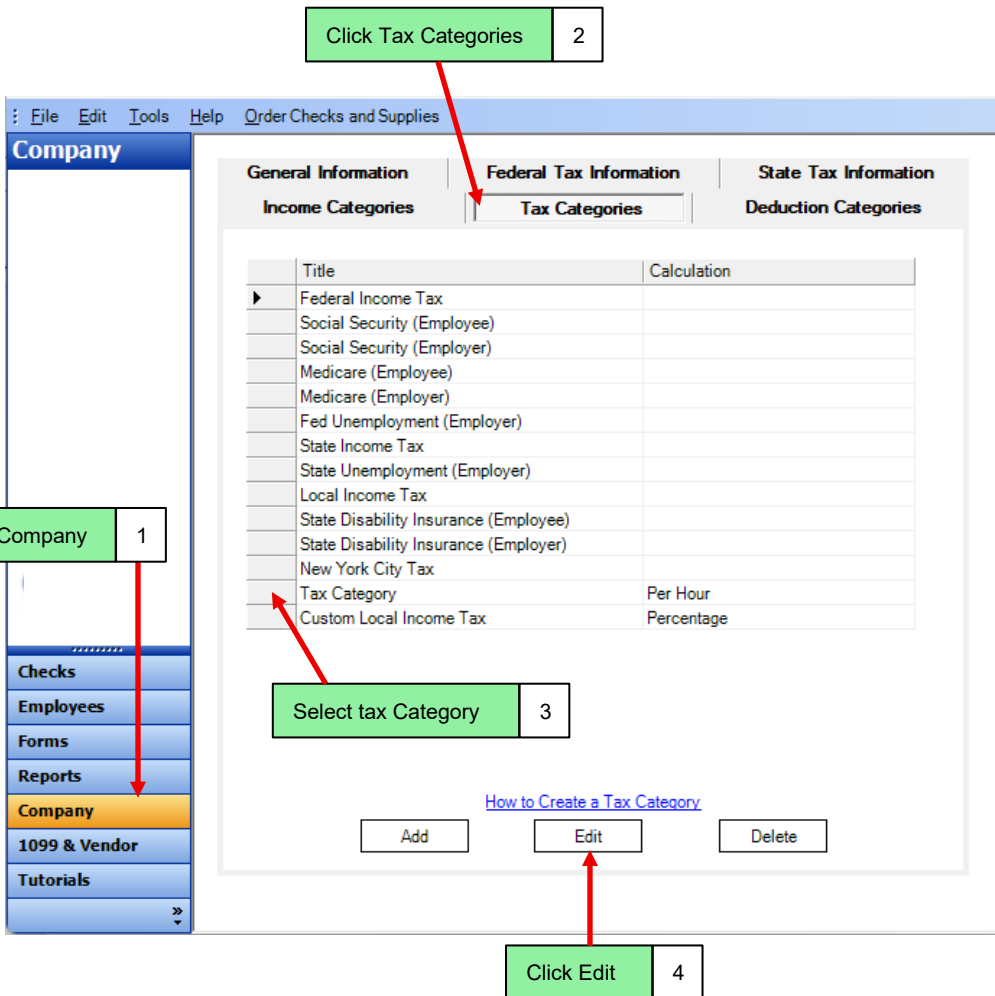
When you check any of the taxes in the list below you are lowering the taxable wages for that tax by the amount of the deduction you are creating here.

Exemptions

Click OK

*Tax Category

1. Click **Company** from Shortcuts
2. Click **Tax Categories**
3. **Select tax category** to be included on the W2
4. Click **Edit**



Click Tax Categories 2

Click Company 1

Select tax Category 3

Click Edit 4

File Edit Tools Help Order Checks and Supplies

Company

General Information Federal Tax Information State Tax Information

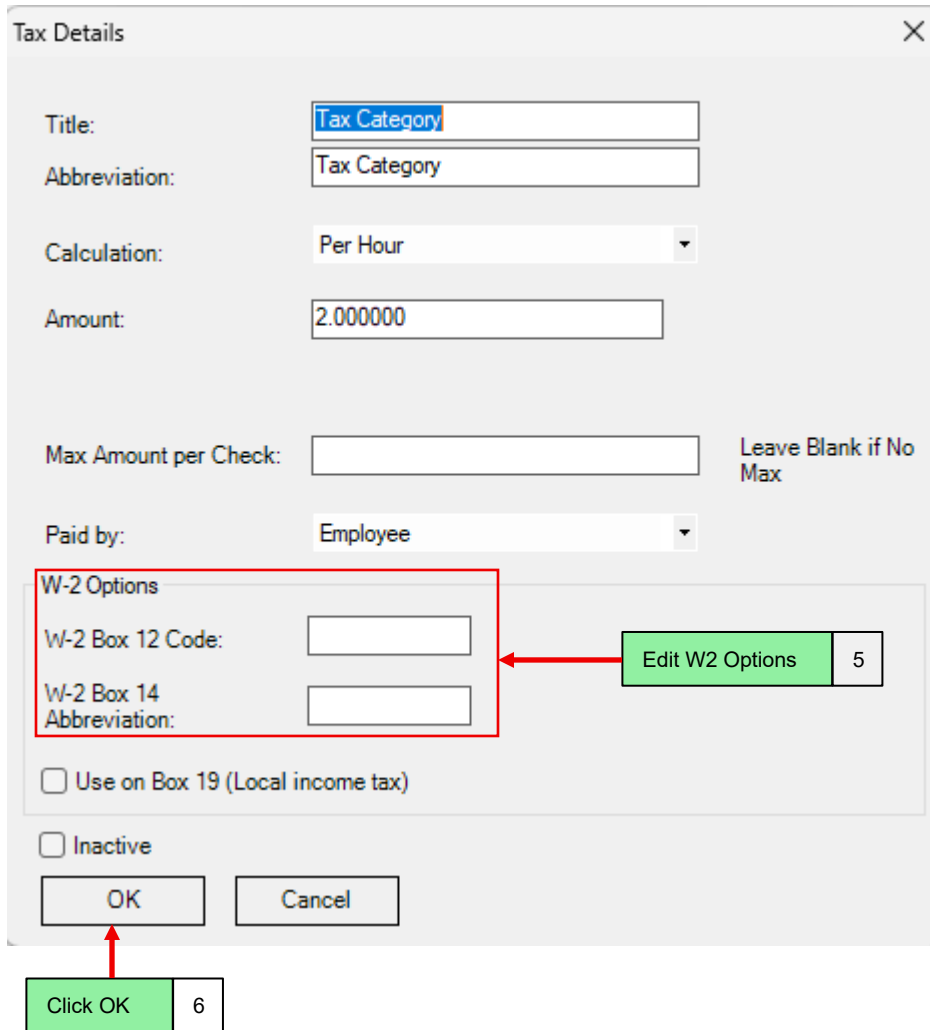
Income Categories Tax Categories Deduction Categories

Title	Calculation
▶ Federal Income Tax	
Social Security (Employee)	
Social Security (Employer)	
Medicare (Employee)	
Medicare (Employer)	
Fed Unemployment (Employer)	
State Income Tax	
State Unemployment (Employer)	
Local Income Tax	
State Disability Insurance (Employee)	
State Disability Insurance (Employer)	
New York City Tax	
Tax Category	Per Hour
Custom Local Income Tax	Percentage

How to Create a Tax Category

Add Edit Delete

5. **Edit W2 Options** as needed
6. Click **OK**



The screenshot shows a 'Tax Details' dialog box with the following fields and options:

- Title: Tax Category
- Abbreviation: Tax Category
- Calculation: Per Hour
- Amount: 2.000000
- Max Amount per Check: (empty field) Leave Blank if No Max
- Paid by: Employee
- W-2 Options section (highlighted with a red box):
 - W-2 Box 12 Code: (empty field)
 - W-2 Box 14 Abbreviation: (empty field)
- Use on Box 19 (Local income tax)
- Inactive
- Buttons: OK, Cancel

Annotations:

- A green box labeled 'Edit W2 Options' with the number '5' has a red arrow pointing to the W-2 Options section.
- A green box labeled 'Click OK' with the number '6' has a red arrow pointing to the OK button.