

W2 / W3 Data Entry Program

1. How to use the Data Entry Program to data enter W2s.....Page 2-15
2. How to use the Import Excel function in the data entry program.....Page 16-18
3. How to find the session you saved and want to return to.....Page 19

Instructions for using the Oklahoma Tax Commission W2 Data Entry Program

Use Internet Explorer 11; if you use Mozilla, Firefox, Safari or Chrome, make sure your program is up to date or it will cause data entry problems.

Go to the OkTap website: <https://oktap.tax.ok.gov/oktap/web/>

Use the Login box to log into OkTap

OKTAP Oklahoma Taxpayer Access Point

Home

Login

Username

Password

Logon








[Forgot Password?](#)
[Forgot Username?](#)

SIGN UP







Does your business need a username? [Click here.](#)

[Why create a username?](#)

Under the “I Want To” column click on W2/1099 filing center

-  **I Want To**
-  View my profile
-  Send us a message
-  Add access to another account
-  Add third party access
-  Make a payment
-  **W-2/1099/500-B filing center**

Click W-2 and W-3: Data Entry option

W2 Center	
 1099 and 500-B Data Entry	1099 and 500-B Data Entry
 Import Bulk 1099 Files	Attach Bulk 1099 files
 W-2 and W-3: Import files	W-2 and W-3: Import files
 W-2C and W-3C: Import Files	W-2C and W-3C: Import Files
 W-2 and W-3: Data Entry	W-2 and W-3: Data Entry
 W-2 Corrections Manual Entry	W-2 Corrections for previously submitted W-2s

Do not use the browser buttons for navigation. Use the buttons in the program circled below to navigate through the screens. If you want to use an Excel spreadsheet to import your company and W2 information see the instructions on the screen and use the Import button. Go to the bottom of these instructions for more information about how to use the Import function.

You can data enter or import as many W2s as you like, there is no limit.

The Submit button is used to submit the W2s when have completed all the screens. Use the Save button if you need to quit and come back later to finish your session. Use the Cancel button if you want to cancel your session without saving. Use the Previous and Next buttons to navigate through the data entry screens. While in a screen use the tab key to navigate through the screen, do not use the enter key. Click the Save draft button once in a while otherwise you can lose all the data you have entered. Click the “Next” button to continue on with the data entry.

The screenshot displays the 'OKTAP Help' interface. At the top, there is a blue header with 'OKTAP Help' and links for 'OKTAP FAQ' and 'Contact Us'. A yellow status bar indicates 'Last Saved: 1/3/2019 12:11:38 PM'. The main content area is titled '1. Start' and 'Start'. It contains instructions on how to import an Excel file, a numbered list of steps, and navigation instructions. At the bottom, there are four buttons: 'Save Draft', 'Cancel', '< Previous', and 'Next >'. Red boxes highlight the 'Import' and 'Submit' buttons at the top right, the 'Save Draft' and 'Cancel' buttons at the bottom left, and the '< Previous' and 'Next >' buttons at the bottom right.

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Last Saved: 1/3/2019 12:11:38 PM

1. Start

Start

The Excel import template can be found on the next page by clicking the blue "Download W2 Import sample" hyperlink after answering the question on the screen below. To import an Excel file:

1. Click the "Import" button
2. Browse to the spreadsheet location
3. Highlight the spreadsheet
4. Click "Open" button
5. Click "Import" button

Click "Next" button and go through each screen making sure all data is correct, fix any errors, then continue to click "Next" through the screens until you get to the W3. Validate the W3 then click the Submit button.

If you do not wish to import a file click "Next" and fill out all the screens.

Do not use the browser buttons for navigation.

Import Submit

Save Draft Cancel

< Previous Next >

When you see a little yellow or red tag in the corner of a box, it means you must enter information into that box. Use the drop down arrow button to pick a valid entry.

Enter the Employer Information on this screen.

1. Start 2. Interview

Interview

Interview Screen
Welcome to the OkTAP W2 data entry. [Download W2 Import sample](#)
Do not use the browser buttons for navigation. [Hide Developer Fields](#)

1. Enter Employer Information. Only one employer submitted at a time.
2. Enter Employer Address.
3. Enter Employer Additional Information.

Close Employer Information

Employer Name:

Employer Id Type:

Employer EIN:

Choose a tax year:

[View and Edit Employer Address](#)

[Click Here to Enter Employer Additional Info](#)

Enter the Oklahoma WTH Account number Required

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Continue to navigate through all the interview screens, answering questions as needed. If a box has a question mark in a little blue circle out to the right, click on the question mark to get more information about what should go in that box. To see the previous interview questions click on the white bar and the questions will be displayed.

Fill in the required information and the next Interview screen will display.

1. Start **2. Interview**

Interview

Interview Screen
 Welcome to the OKTAP W2 data entry. [Download W2 Import sample](#)
 Hide Developer Fields

Do not use the browser buttons for navigation.

1. Enter Employer Information. Only one employer submitted at a time.
2. Enter Employer Address.
3. Enter Employer Additional Information.

View and Edit Employer Information

Close Employer Address

Check if Employer address is foreign:

Employer Delivery Street: 123 MAIN STREET

Employer Location Street:

Employer City: OKLAHOMA CITY Employer Country: USA

Employer State: OK

Employer Zip + 4: 73159-0000

Enter either your WTH number or your companies FEIN or SSN. Then continue to answer the questions as they pop up.

1. Start **2. Interview**

Interview

Interview Screen
 Welcome to the OKTAP W2 data entry. [Download W2 Import sample](#)
 Hide Developer Fields

Do not use the browser buttons for navigation.

1. Enter Employer Information. Only one employer submitted at a time.
2. Enter Employer Address.
3. Enter Employer Additional Information.
4. Enter Employer Contact Information.

View and Edit Employer Information

View and Edit Employer Address

Close Employer Additional Info

Enter the Oklahoma WTH Account number: **WTH1234567801**

Third-party Sick Pay Indicator:

Will this be the last tax year that W2's will be filed under this EIN?

Number of W2's you will be entering:

Enter the contact information for the person you want OTC to contact if there is a question regarding the W2 Submission.

1. Start

2. Interview

Interview

Interview Screen

Welcome to the OkTAP W2 data entry.

[Download W2 Import sample](#)

Do not use the browser buttons for navigation.

Hide Developer Fields

1. Enter Employer Information. Only one employer submitted at a time.
2. Enter Employer Address.
3. Enter Employer Additional Information.
4. Enter Employer Contact Information.

<input type="checkbox"/>	View and Edit Employer Information	
<input type="checkbox"/>	View and Edit Employer Address	
<input type="checkbox"/>	View and Edit Employer Additional Info	
<input type="checkbox"/>	Click Here to Enter Employer Contact Information	

Employer Contact Name *Required*

Employer Contact Phone *Required* **Required**

Employer Contact Phone Extension

Employer Contact Fax Number

Employer Contact Email *Required*

Save Draft

Cancel

< Previous

Next >

The next screen is prepopulated from your OkTap login information. It may or may not be the same information you just entered for the Employer Interview Questions. Check it for accuracy and completeness. Make any changes that are necessary and click the Yes button.

Close Submitter Information

The following is submitter information pulled from your web logon. Please verify that the information is correct. If the information is not correct, edit the fields as necessary. Click "Yes" when finished editing.

Is the below submitter information correct?

Name	<input type="text" value="CONTACT NAME 1"/>		
Delivery Address	<input type="text" value="123 MAIN STREET"/>		
Location Street	<input type="text"/>		
City	<input type="text" value="OKLAHOMA CITY"/>		
Country Code	<input type="text" value="USA"/>		
State	<input type="text" value="OK"/>	Zip + 4	<input type="text" value="73159-0000"/>
Foreign State	<input type="text"/>	Foreign Postal Code	<input type="text"/>

The following is the company information you are employed by or own.

Company EIN	<input type="text" value="12-3456789"/>		
Company Name	<input type="text" value="TEST COMPANY"/>		
Delivery Address	<input type="text" value="123 MAIN STREET"/>		
Location Street	<input type="text"/>		
Company City	<input type="text" value="OKLAHOMA CITY"/>		
Country Code	<input type="text" value="USA"/>		
Company State	<input type="text" value="OK"/>	Company Zip + 4	<input type="text" value="73159-0000"/>
Foreign State	<input type="text"/>	Foreign Postal Code	<input type="text"/>

The following is the Submitter's Contact information.

Contact Name	<input type="text" value="CONTACT NAME 2"/>
Contact Email	<input type="text" value="r@test.net"/>
Contact Phone	<input type="text" value="(405) 123-4567"/>
Contact Phone Extension	<input type="text"/>
Contact Fax	<input type="text"/>

[Click "Next" to Add An Employee W2 Record](#)[Print](#)

If you want to print all the information you have entered so far click the “Expand all to print?” button and then click Print. You don’t have to print now; you can come back to this screen at any time prior to submitting your session. Only one screen can be printed at a time. If you want to print individual W2s, you will need to print each screen separately; we do not have any group print functions.

When everything is complete, click the Next button to take you to the W2 data entry screen.

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OKTAP FAQ Contact Us

Import Submit

1. Start 2. Interview

Interview

Interview Screen

Welcome to the OKTAP W2 data entry. [Download W2 Import sample](#)
Do not use the browser buttons for navigation. [Hide Developer Fields](#)

1. Enter Employer Information. Only one employer submitted at a time.
2. Enter Employer Address.
3. Enter Employer Additional Information.
4. Enter Employer Contact Information.
5. Click 'Next' to add W2's for all employees.

<input type="checkbox"/>	View and Edit Employer Information	<input checked="" type="checkbox"/>
<input type="checkbox"/>	View and Edit Employer Address	<input checked="" type="checkbox"/>
<input type="checkbox"/>	View and Edit Employer Additional Info	<input checked="" type="checkbox"/>
<input type="checkbox"/>	View and Edit Employer Contact Information	<input checked="" type="checkbox"/>
<input type="checkbox"/>	View and Edit Submitter Information	<input checked="" type="checkbox"/>

[Click "Next" to Add An Employee W2 Record](#) [Expand all to print?](#) [Print](#)

[Save Draft](#) [Cancel](#) [Previous](#) [Next](#)

Enter all the required information and tab through the boxes, then the Save button will pop up.

1. Start 2. Interview 3. Enter W2

Enter W2

W2 Entry Screen

- Enter employee SSN.

You will need to choose Yes or No to the 'is this the last employee to enter' question to continue to the review.

22222		a Employee's social security number <i>Required</i>		OMB No. 1545-0008	
b Employer identification number (EIN) 12-3456789		c Employee's name, address, and ZIP code TEST COMPANY 123 MAIN STREET OKLAHOMA CITY OK 73170-0000 US		1 Wages, tips, other compensation 0.00	
d Control number		e Employee's first name and initial <i>Required</i>		3 Social security wages 0.00	
e Employee's first name and initial <i>Required</i>		Last name <i>Required</i>		4 Federal income tax withheld 0.00	
Delivery Address <i>Required</i>		Location Address <i>Required</i>		5 Medicare wages and tips 0.00	
City <i>Required</i>		Country USA		6 Social security tax withheld 0.00	
State <i>Required</i>		Zip + 4 <i>Required</i>		7 Medicare tax withheld 0.00	
f Employee's address and ZIP code		15 State OK		8 Allocated tips 0.00	
Employer's state ID number WTH1234567802		16 State wages, tips, etc. 0.00		9	
		17 State income tax 0.00		10 Dependent care benefits 0.00	
		18 Local wages, tips, etc. 0.00		11 Nonqualified plans Not Required	
		19 Local income tax 0.00		12a 0.00	
		20 Locality name		12b 0.00	
				12c 0.00	
				12d 0.00	

The Interview screen indicates you have 2 employees to enter. There has been 0 entered. Is this the last employee W2 to enter?

No - Enter Next Employee Yes - Click Next

Save Draft Cancel Previous

Click the "Save – I'm finished with this W2" button

1. Start 2. Interview 3. Enter W2

Enter W2

W2 Entry Screen

- Enter Employee state wage information.
- Click 'Save-I'm finished with this W2' to add W2 for this employee.
Or clear SSN field.

You will need to choose Yes or No to the 'is this the last employee to enter' question to continue to the review.

22222	a Employee's social security number ***-**-9123	OMB No. 1545-0008
b Employer identification number (EIN) 12-3456789	c Employer's name, address, and ZIP code TEST COMPANY 123 MAIN STREET OKLAHOMA CITY OK 73159-0000 US	1 Wages, tips, other compensation 1.00
		2 Federal income tax withheld 1.00
		3 Social security wages 1.00
		4 Social security tax withheld 1.00
		5 Medicare wages and tips 1.00
		6 Medicare tax withheld 1.00
		7 Social security tips 1.00
		8 Allocated tips 1.00
d Control number		9
		10 Dependent care benefits 0.00
e Employee's first name and initial Last name Suff. EMPLOYEE FIRST G EMPLOYEE LAST NAME		11 Nonqualified plans Not Required
Delivery Address 1234 WILLOW WAY Location Address	<input type="checkbox"/> Check if Employee Address is foreign.	12a <input type="checkbox"/> 0.00
City Country OKLAHOMA CITY USA		12b <input type="checkbox"/> 0.00
State Zip + 4 OK 73170-0000		12c <input type="checkbox"/> 0.00
f Employee's address and ZIP code		12d <input type="checkbox"/> 0.00
15 State Employer's state ID number OK WTH1234567801	16 State wages, tips, etc. 0.00	17 State income tax 0.00
	18 Local wages, tips, etc. 0.00	19 Local income tax 0.00
		20 Locality name

The interview screen indicates you have 5 employees to enter. There has been 1 entered. Is this the last employee W2 to enter?

Save - I'm finished with this W2

Save Draft Cancel Previous

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A box will pop up and you will need to click "OK" to finish the save process.

Last Saved: 1/3/2019 12:11:38 PM

1. Start 2. Interview 3. Enter W2

Save

EMPLOYEE FIRST EMPLOYEE LAST NAME

***-**-9123

Employee state added. OK

OK Cancel

You will need to choose 'Yes or No to the 'is this the last employee to enter' question to continue to the re

22222	a Employee's social security number ***-**-9123	OMB No. 1545-0008
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To enter the next employee, click the “No – Enter Next Employee” button. Continue to enter W2s as instructed. When you are finished entering W2s click the “Yes-Click Next” button then click Next to navigate to the next screen.

The screenshot shows a form for entering employee information. At the bottom, there are two buttons: "No - Enter Next Employee" and "Yes - Click Next". Two red arrows point upwards from the text below to these two buttons. Other fields include "Location Address", "City" (OKLAHOMA CITY), "State" (OK), "Employer's state ID number" (WTH1234567801), and various tax-related fields (14-20).

The next screen is the Review screen where you can access the W2s you have already entered. The next screen is the W3 screen where you can submit your W2 session. You can access previous screens by clicking on the Arrow for the screen you want to go to. You can access a W2 to edit it, by either clicking on the blue SSN hyperlink or the little yellow pencil icon to the left of the delete icon. You can delete a W2 by clicking the red x icon.

The screenshot shows the "Review" screen. At the top, there is a progress bar with four steps: "1. Start", "2. Interview", "3. Enter W2", and "4. Review". The "4. Review" step is highlighted with a red box. Below the progress bar, there is a "Review Screen" section with instructions. A table lists W2s with columns for "Employee SSN", "Employee Name", "Last Name", "Wage, Tips, & Other", "Fed. tax Withheld", "Social Security Wages", "S.S. Tax Withheld", "Medicare Wages & Tips", "Medicare Tax Withheld", "State Taxable Wages", and "State Income Tax Withheld". A red box highlights the "Employee SSN" link in the first row, and a red arrow points to it. At the bottom, there are "Save Draft", "Cancel", "Previous", and "Next" buttons.

To Edit a W2 – Click on a W2 from the Review screen, click the “Edit Employee” button. When you have finished editing the W2 click the next button or click on the review tab to edit another employee.

Review Screen

1. Click on the tab with employee last name or click the SSN link on the review tab to review W2 information entered for employee
 2. If changes are needed for the W2 use the “Edit Employee” button.
 3. If additional employees are needed, go back to page 2 Enter W2, and answer “No” to “last employee W2 to enter” question.

Review **LAST NAME** Delete

W2 Review Delete

22222		a Employee's social security number ***-**-9456		OMB No. 1545-0008	
b Employer identification number (EIN) **-**6789		1 Wages, tips, other compensation 1.00		2 Federal income tax withheld 1.00	
c Employer's name, address, and ZIP code TEST COMPANY 123 MAIN STREET OKLAHOMA CITY OK 73159-0000		3 Social security wages 1.00		4 Social security tax withheld 1.00	
d Control number		5 Medicare wages and tips 1.00		6 Medicare tax withheld 1.00	
e Employee's first name and initial FIRST NAME LAST NAME Suff. Employee Delivery Address 1234 WILLOW WAY <input type="checkbox"/> Check if foreign address Employee Location Street Employee Country USA Employee City OKLAHOMA CITY Employee State OK Zip + 4 73170-0000		7 Social security tips 0.00		8 Allocated tips 0.00	
f Employee's address and ZIP code		9		10 Dependent care benefits 0.00	
15 State Employer's state ID number OK WTH1234567801		11 Nonqualified plans Not Required <input type="checkbox"/>		12a <input type="checkbox"/> 0.00	
16 State wages, tips, etc. 1.00		13 Statutory employee Retirement plan Third-party sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		12b <input type="checkbox"/> 0.00	
17 State income tax 1.00		14 Other 0.00		12c <input type="checkbox"/> 0.00	
18 Local wages, tips, etc. 1.00				12d <input type="checkbox"/> 0.00	
19 Local income tax 1.00				20 Locality name	

Edit Employee Delete

[Print](#)

Save Draft Cancel Previous Next

The W3 screen contains totals from all the W2s you have entered. On the W3 screen verify it matches your paper copy of the W3. If it does, click then click the Yes button, then click the Submit button to submit your session. If your W3 does not match, you will need to go back to the review tab and find the W2 with the error and correct it. If you want to review or print your W2s, you can click on the Review arrow and it will take you to the review screen. There are some reasons the W3 will not match, if you have amounts in box 12 or 14 they will not compute correctly on our copy. If you have out of state employees, the wage amounts will be different. It is ok to click the "Yes" button in these cases.

Import Submit

Last Saved: 1/3/2019 12:11:38 PM

1. Start 2. Interview 3. Enter W2 4. Review 5. W3

W3

Is the W3 correct? Kind of Employer and Kind of Payer not utilized by OTC. No Yes Required

33333		a Control number		For Official Use Only ▶ OMB No. 1545-0008	
b Kind of Payer (Check one)	941 <input type="checkbox"/>	Military <input type="checkbox"/>	943 <input type="checkbox"/>	944 <input type="checkbox"/>	Kind of Employer (Check one)
	CT-1 <input type="checkbox"/>	Hshld. emp. <input type="checkbox"/>	Medicare govt. emp. <input type="checkbox"/>		
				State/local non-501c <input type="checkbox"/>	501c non-govt. <input type="checkbox"/>
				State/local 501c <input type="checkbox"/>	Federal govt. <input type="checkbox"/>
				Third-party sick pay (Check if applicable) <input type="checkbox"/>	
c Total number of Forms W-2	d Establishment number		1 Wages, tips, other compensation		2 Federal income tax withheld
1			1.00		1.00
e Employer identification number (EIN)		3 Social security wages		4 Social security tax withheld	
12-3456789		1.00		1.00	
f Employer's name		5 Medicare wages and tips		6 Medicare tax withheld	
TEST COMPANY		1.00		1.00	
123 MAIN STREET		7 Social security tips		8 Allocated tips	
		0.00		0.00	
OKLAHOMA CITY 73159-0000		9		10 Dependent care benefits	
				0.00	
g Employer's address and ZIP code		11 Nonqualified plans		12a Deferred compensation	
				0.00	
h Other EIN used this year		13 For third-party sick pay use only		12b	
15 State	Employer's state ID number		14 Income tax withheld by payer of third-party sick pay		
OK	WTH1234567801		0.00		
16 State wages, tips, etc.		17 State income tax		18 Local wages, tips, etc.	
1.00		1.00		1.00	
Employer's contact person		Employer's telephone number		For Official Use Only	
CONTACT NAME		(123) 456-7891 Ext. <input type="text"/>			
Employer's fax number		Employer's email address			
		1@test.net			

Print

Save Draft Cancel
← Previous

You will get a confirmation screen showing that you submitted your W2 session. If you want a copy of this screen you must print it now because you cannot go back to this screen. Click the “Print Confirmation” hyperlink to print the screen.

[OK](#)

Confirmation

 **Confirmation**

Thank you for submitting your W2 web request for 2017 tax year.

Your confirmation number is **0-481-463-168**.
Submitted on: **August 31, 2017**
Employer name: **TEST EMPLOYER**.
Employer EIN: **12-3456789**

If you have questions or concerns, many of these answers can be found in our helpful [OkTAP FAQs](#).

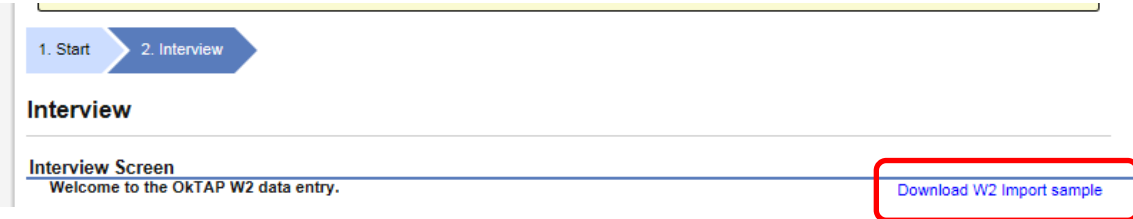
You can also contact the Oklahoma Tax Commission by clicking on the **Notices** tab, then on **Outbox**, and [Click Here to Send Notice](#).

For additional contact information [Contact Us](#)

Print Confirmation

To use the Import function:

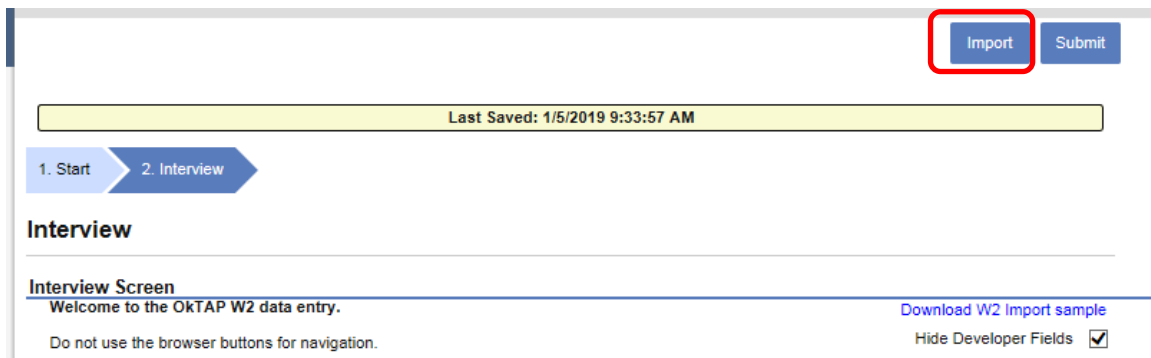
Navigate to the second screen in the program and download the Excel Template.



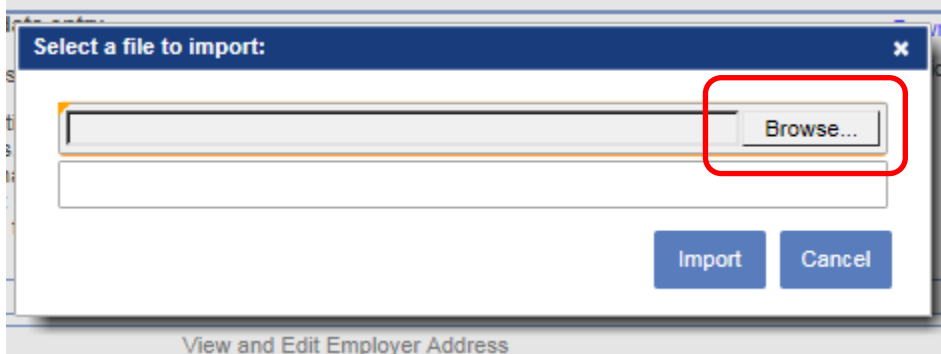
There are 3 tabs in the Excel file, the first tab “RW” is where you will enter the employer and submitter information, enter all data into row 2. Don’t worry if you do not know what to enter or enter the wrong information because you will have a chance to correct it in the program when you review the screens. The second tab is where you will enter your employee W2s, start in row 2 and enter as many W2s as you like. Also don’t worry if you don’t know what to enter or miss some columns because you will have a chance to fix the errors when you review the screens. The W3 will be created automatically by the program. Tab 3 is unused.

- **Don’t enter any dashes in the social security numbers.**
- **Enter USA in the employee country column.**
- **Names and addresses can only be 15 characters long.**

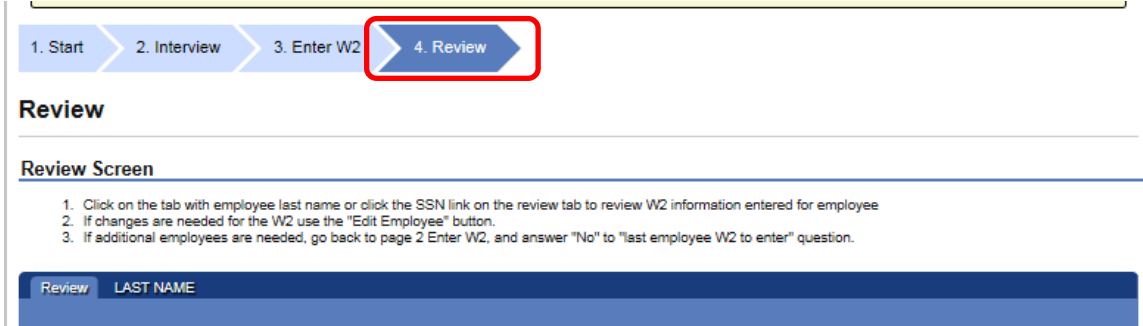
After entering all the information save the file someplace you will be able to find it. Inside the W2 program click the Import button. Please note importing information will overwrite everything you have entered into the W2 data entry screens.



Browse to the W2 file location, click on the W2 file and click Open, then click Import



All the data in your Excel file has now been imported into the program. Move through each screen and make sure there are not any errors or missing information. (You will have to click the “Yes – Click Next” button on the W2 screen. If there is an error you may see a red dot next to the screen name where the error is located, if there are a large number of W2s you will need to scroll through the review list looking for the red exclamation mark next to the record in error.



Review LAST NAME				
	Employee SSN	Employee Name	Last Name	Wage, Tips, & Other
	***-**-9456	FIRST NAME	LAST NAME	1.00
				1.00

When you get to the W3 screen verify it matches your paper W3. If it does not match, look through the above instruction about how to edit mistakes. Then answer Yes on the W3 screen and click Submit.

To find the session you have saved

Go to the Home page of OkTap.

Under the “Alerts” column you will find your session.

Click the blue hyperlink that says “1 draft submission”

Alerts

- There are 7 unread messages
- There are 3 unread letters
- 1 draft submission**

I Want To

- View my profile
- Send us a message
- Add access to another account
- Add third party access
- Make a payment
- W-2/1099/500-B filing center

Click on the blue draft number.

Confirmation #	Submitted	Status	Processed	Account Id	Account Type	Period	Title	Logon
0-259-098-176	05-Jan-2019	Not Submitted					OkTAP W2 Data Entry	

Under the “I want to” column click “Change Submission”

Status

Not Submitted

Confirmation #0-259-098-176

Saved 05-Jan-2019 09:39:01

I Want To

- View Submission
- Change Submission**
- Withdraw Submission

You will have to navigate through the screens using the next button to where you left off and resume data entry.