

Paycor[®]

TurboTax Import

“ Tax Import Benefits – Page 2

Employee Access – Page 3

Credentials – Page 4

TurboTax Authentication – Page 5

Technical Support – Page 6



TurboTax Import is here!

Paycor works hard to offer solutions that work best for everyone, including you. That's why we've created the Third Party Tax Import service, Paycor's free and simple solution to assist employees when filing 2016 taxes with TurboTax.

As a Paycor client you can enjoy all the benefits of the service right at your fingertips. This new service offers free integration with TurboTax system and will allow our customers' employees to import W-2 data from Paycor into Intuit's TurboTax system. After purchasing the TurboTax package, Paycor customers will be able to self-file with just a few easy clicks.

Getting Started

This toolkit is here to answer your most common questions. We'll tell you how to authenticate your account, and what you'll need to process your W-2 information right away.

- You'll first need to purchase the TurboTax software. You can visit [TurboTax](#) website to find out which option works best for you.
- Be sure to save all instructions provided by TurboTax. You'll follow those specific instructions to authenticate your account and begin the process.
- You'll also need to make sure that your W-2 Form is handy. Users will enter in a few fields from this form to authenticate the account with TurboTax.
- Remember to download your W-2 Form from Paycor.com

We're excited to offer you a better way to file - one that's hassle-free, secure, and 100% accurate. Throughout this toolkit you'll see an array of screenshots used for demonstration. If you have any questions during the process, see page 6 for support and resource information.

Employee Access

Once you've purchased TurboTax software you'll be ready to begin. Users can quickly import W-2 information by following a few easy steps. The first step is to access your W-2 Form by logging into Paycor.com. Follow the steps below to access your W-2 (Depending on your Employee Access with Paycor, these steps may vary):

- 1 Login at **Paycor.com**.
- 2 On the **Payroll** menu, click **My Information**.
- 3 On the left hand side, click **Compensation**, then **Compensation History**.
- 4 Click **Tax Documents**.
- 5 Select the W-2 for 2016.
You may click on the W-2 text to view directly in your browser or choose to Print as a PDF.

The image shows two screenshots of the Paycor PERFORM web interface. The top screenshot shows the 'Payroll' menu with 'My Information' highlighted. The bottom screenshot shows the 'Compensation History' page with 'Tax Documents' selected in the sub-menu. A table lists W-2 documents for 2014 and 2015, with the 2015 entry selected. A 'Print' button is also visible.

	Document	Year
<input type="checkbox"/>	W2	2014
<input checked="" type="checkbox"/>	W2	2015

Obtain your credentials

Once you have your W-2 Form, you must reference the following information found near the top of the form:

- Box B – Employer’s Identification Number
- Box A – Employee’s Social Security Number
- Box 1 – Wages, tips, other compensation
- Box D – Control Number

This information is the credentials you’ll enter in order to authenticate your account with TurboTax.

2014 W2 & EARNINGS SUMMARY			Federal Filing Copy 2014 W2 Wage and Tax Statement			
POST PARTY TRAYS 15 LICK ROAD CINCINNATI, OH 45251			1 Wages, tips, other compensation 9891.67		2 Federal income tax 966.83	
MARVIN POST 8794 BLUE MOOD RD COLDWATER, OH 45828			3 Social security wages 9891.67		4 Social security tax 613.28	
MARVIN POST 8794 BLUE MOOD RD COLDWATER, OH 45828			5 Medicare wages and tips 9891.67		6 Medicare tax withheld 143.43	
MARVIN POST 8794 BLUE MOOD RD COLDWATER, OH 45828			7 Social security tips		8 Allocated tips	
MARVIN POST 8794 BLUE MOOD RD COLDWATER, OH 45828			9 Advanced EIC payment		10 Dependent care benefits	
MARVIN POST 8794 BLUE MOOD RD COLDWATER, OH 45828			11 Nonqualified plans		12 See instructions for box 12	
MARVIN POST 8794 BLUE MOOD RD COLDWATER, OH 45828			13 State emp. Ret. Plan 3 Party Stk			
MARVIN POST 8794 BLUE MOOD RD COLDWATER, OH 45828			14 Other			
15 State & Employer's state ID OH APPLIED FOR			16 State wages, tips, etc. 9891.67	17 State income tax 301.20	18 Local wages, tips, etc.	19 Local income tax
20 Locality name						
Filing Status Exemptions FITW/M M 2 OH M 2						
WAGES						
TOTAL GROSS WAGES 9891.67						
Description Amount Box						
SOC. SECURITY WAGES						
SOC. SECURITY TAX 9891.67 3						
MEDICARE WAGES 9891.67 5						
MEDICARE TAX 9891.67 1						
OH TAXABLE WAGES 9891.67 16						
WITHHOLDINGS						
Description Amount Box						
FED. INCOME TAX 966.83 2						
SOC. SECURITY TAX 613.28 4						
MEDICARE TAX 143.43 6						
OH INCOME TAX 301.20 17						
15 State & Employer's state ID OH APPLIED FOR			16 State wages, tips, etc. 9891.67	17 State income tax 301.20	18 Local wages, tips, etc.	19 Local income tax
20 Locality name						
State Filing Copy 2014 W2 Wage and Tax Statement						

TurboTax Authentication

The Authentication process may vary depending on how you purchased TurboTax software (in-store or online). Follow the instructions provided with your TurboTax purchase in order access the authentication screens. You'll first enter in the **Employer's Identification Number** and click next to arrive at the below screen:

The screenshot shows the TurboTax Deluxe interface. At the top right, it displays "Federal Refund \$0". The navigation menu includes "Home", "Personal Info", "Federal Taxes", "State Taxes", "Wrap-Up", and "Print & File". Below the menu, there are tabs for "Wages & Income", "Deductions & Credits", "Other Tax Situations", "Federal Review", and "Error Check".

The main heading is "Great News! We Can Enter Your W-2 for You". Below this, it says: "Instead of filling up to 20 boxes yourself, let us import your W-2 into your return. You'll save time and finish your taxes faster." An illustration shows a W-2 form being imported into a laptop.

The form contains the following fields:

- A blank input field at the top.
- A note: "All fields required."
- A field for "Social Security Number" (highlighted with an orange box).
- A field for "W-2 Box D - Control # (as it appears on W-2 form)" (highlighted with an orange box).
- A field for "W-2 Box 1 Wages (as it appears on W-2 form)" (highlighted with an orange box).
- A checkbox for "Hide Password" which is checked.

To the right of the form, there is a security message: "We keep your information completely secure. [Learn more about our security](#)". Below this, it says "provided By: Paycor".

Below the form, it says: "Please enter your, Social Security Number, W-2 Box D - Control # (note: only 1 space is necessary between the 2 numbers), and W-2 Box 1 Wages."

At the bottom, it says: "Access Paycor on the go. [click here](#) to download Paycor's mobile app!"

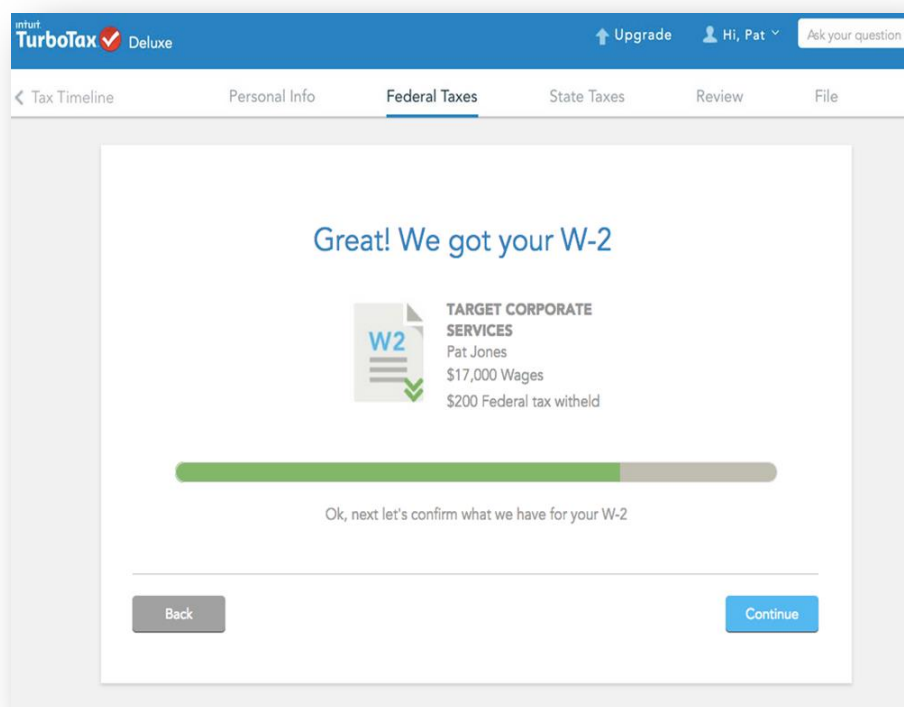
At the bottom of the screen, there are three buttons: "Back", "Skip Import", and "Continue".

On this screen users will enter the remaining credentials:

- Box A – Employee's Social Security Number
- Box 1 – Wages, tips, other compensation
- Box D – Control Number

Import W-2 information

You're almost there! The last step is to Continue to Import. Selecting **Import my W-2** will begin the import process. You may also click the **Skip Import** to enter information manually. Once selected, your information will process and TurboTax will confirm that your W-2 information has been received.



Upon successful W-2 submission, it is important that you verify that the information has been imported correctly.

Technical Support

If you have any questions or issues with TurboTax system, you may contact your Employer or TurboTax directly. In addition to information available on TurboTax's website, you may also use the following information below to contact TurboTax:

- Answer Exchange: <https://ttlc.intuit.com/>
- Toll free number: 800-624-9066
- To initiate support: <https://support.turbotax.intuit.com/contact/>