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State of Hawaii
Department of Taxation

Hawaii Tax Online
W-2 Simple File Import
Handbook

Release Date 10/2022 (V1.0)

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Introduction

The State of Hawaii Department of Taxation (DOTAX) supports a Simple File Import (SFI) method that allows for the submission of employer's W-2 using a spreadsheet program. SFI was made available through Hawaii Tax Online (HTO) January 2020. This handbook provides step by step instructions for SFI only.

The three (3) W-2 submission methods are:

1) Simple File Import
2) Manual Entry
3) SSA File Format Upload – See Pub EF-10 for details

Contact Information

For general information and inquiries relating to submitting W-2s through SFI, contact us at **808-587-4242** or **taxpayer.services@hawaii.gov.**

For technical information and inquiries, email Electronic Processing at **tax.efile@hawaii.gov.**

Our contact hours are Monday through Friday 7:45 a.m. to 4:00 p.m. Hawaii Standard Time (HST). Our office is closed on weekends and all Hawaii State holidays. Holidays which fall on Saturdays are observed on the preceding Friday; holidays which fall on Sundays are observed on the following Monday.

Hawaii State Holidays	
New Year's Day	The first day in January
Dr. Martin Luther King, Jr. Day	The third Monday in January
Presidents' Day	The third Monday in February
Prince Jonah Kuhio Kalanianaole Day	The twenty-sixth day in March
Good Friday	The Friday preceding Easter Sunday
Memorial Day	The last Monday in May
King Kamehameha Day	The eleventh day in June
Independence Day	The fourth day in July
Statehood Day	The third Friday in August
Labor Day	The first Monday in September
General Election Day	The first Tuesday in Nov. following the first Monday of even numbered years
Veterans' Day	The eleventh day in November
Thanksgiving	The fourth Thursday in November
Christmas	The twenty-fifth day in December

General Information

1) If you are filing for a 2019 period and prior, an annual withholding HW-3 must be filed with your W-2s.
2) If you are filing for a 2020 period and forward, the annual withholding HW-3 will not be required. Instead, use the Submit W-2 Forms link which will be available under the periodic HW-14, 4th quarter filing period.
    (a) If the withholding account is cancelled any time before the 4th quarter, the submit W-2 forms link will be available under the last active quarter. The Submit W-2 Forms link will become available the next business day after the withholding account is cancelled via HTO. Account cancellation(s) requested via paper submission may take up to 9-10 weeks to process.
3) A maximum of 1,000 W-2s may be imported through the SFI.
4) Multiple file imports per day are accepted.

Simple File Import Specifications

To submit W-2s using SFI on HTO, you are required to import a file created using a spreadsheet program, such as Microsoft Excel or download a copy of the W-2 Worksheet for SFI at https://tax.hawaii.gov/eservices/sfi/. Your file must adhere to the following specifications:

1) File type must be Microsoft Excel (.xlsx).
2) The title of the workbook spreadsheet tab must be named **"Main"**.
3) File must contain all required information. Each row should represent one payee and each column should represent one piece of required information outlined in the Simple File Import Layout Section of this handbook.
4) Do not enter W-2 information in the first row. The first row is for column headings.
5) Do not include blank rows within your data set. A blank row is interpreted as the end of your file.
6) If there is no dollar amount to enter, the dollar field must be filled with a zero. All dollar amounts must be positive.
7) All dollar fields must contain a decimal if there are cents.
8) Do not include "$" or commas in any field.
9) Do not include dashes in Social Security Numbers (SSN).
10) If you are using Microsoft Excel to create your file and have an SSN that begins with a zero, place an apostrophe before the zero.
11) Zip (column N) must be in 12345-1234 format. If you do not have the last 4 digits of the zip code, four zeros may be entered.

Simple File Import Layout

The following layout defines how the simple file should be structured:

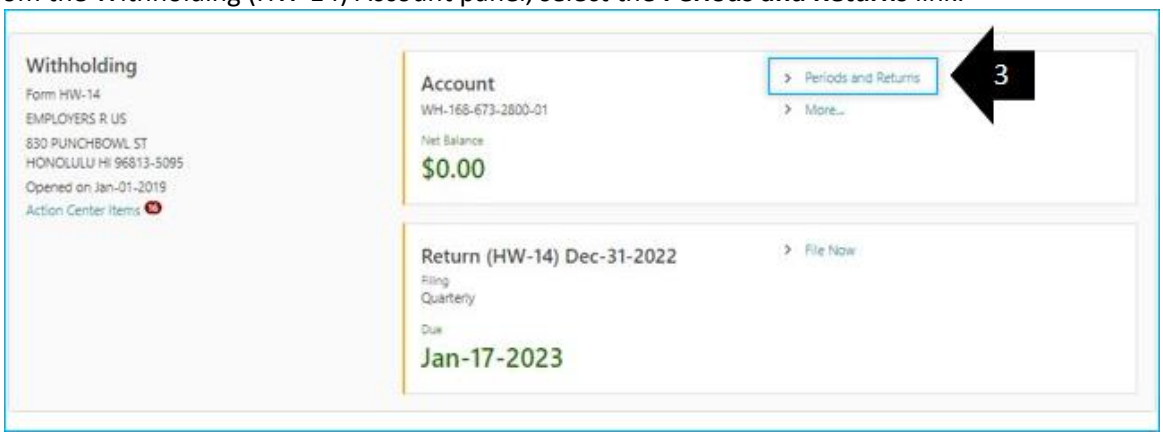
Column	Field
A	Social Security Number
B	Corrected (True/False)
C	Corrected Social Security Number
D	Last Name
E	First Name
F	Middle Name
G	Suffix
H	Street
I	Street 2
J	Unit Type
K	Unit
L	City
M	State
N	Zip
O	County
P	Total Wages
Q	Hawaii Income Tax Withheld
R	Payments Not Included in Total Wages
S	Payment Nature

NOTE: (S) Payment Nature - Noncash remuneration, and advances or reimbursements for expenses and the like, must be separately stated on Form HW-2. These amounts should be reported in the "Payments Not Included in Total Wages" column and explained in the "Payment Nature" column. If there are multiple noncash remunerations, they may be combined on one line. Multiple entries may be created on the worksheet if applicable. (See Booklet A, Employer's Tax Guide for additional information)

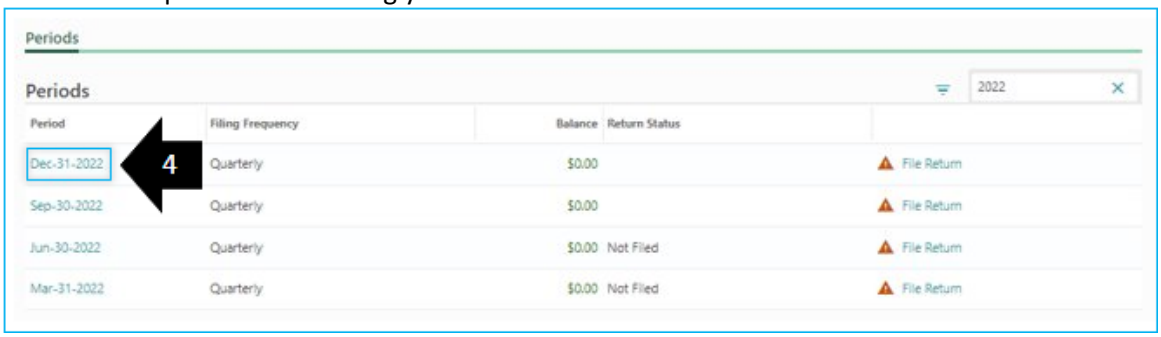
Uploading SFI on HTO

SFI Instructions for Tax Years **2020** to Current

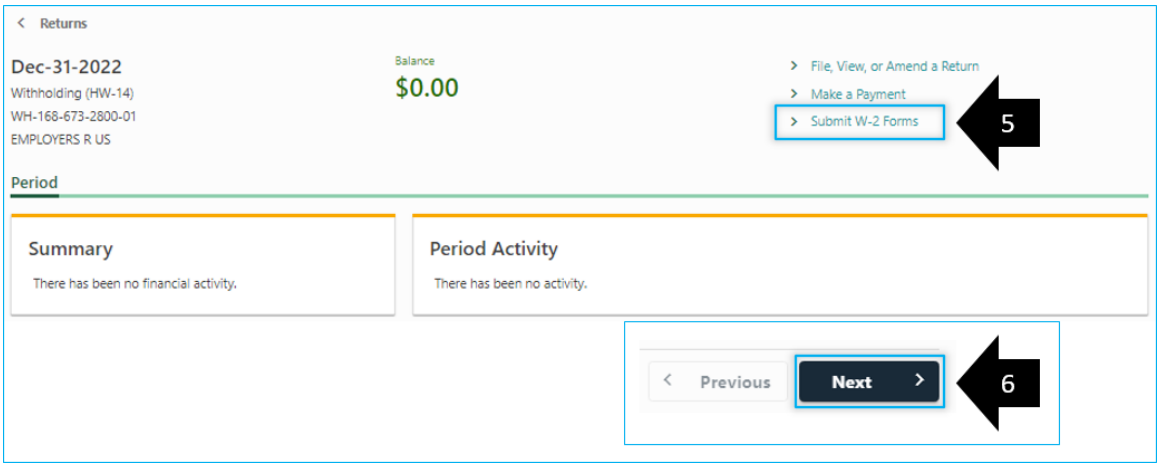
1) Create a .xlsx file for import.
2) Access the HTO account you are filing for.
3) From the Withholding (HW-14) Account panel, select the **Periods and Returns** link.



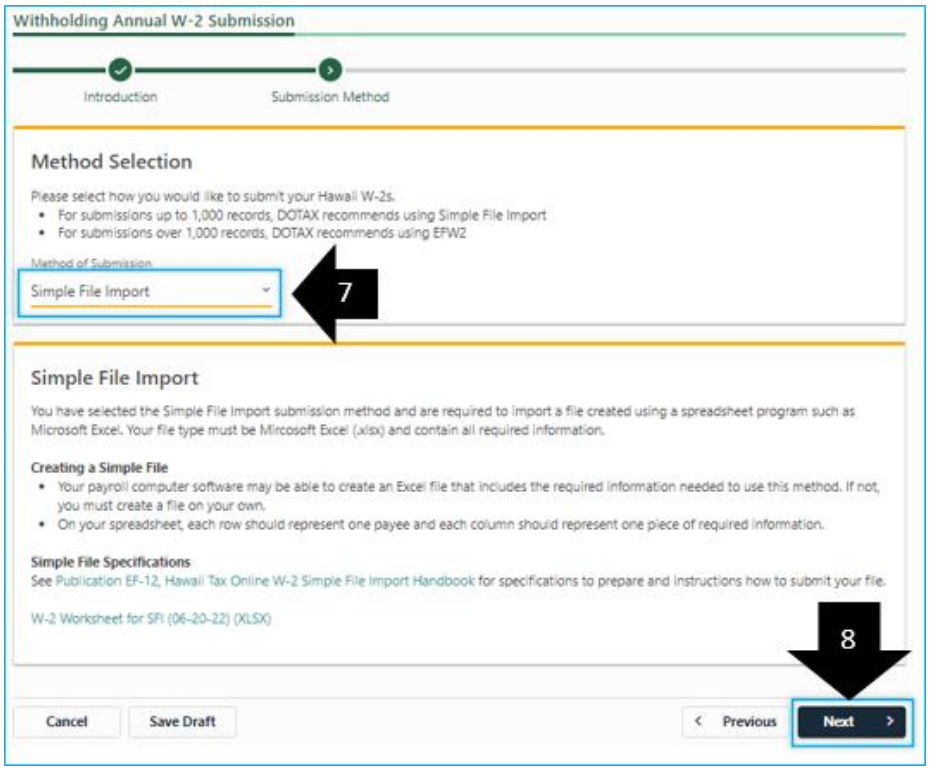
4) Select the Last quarter for the filing year.



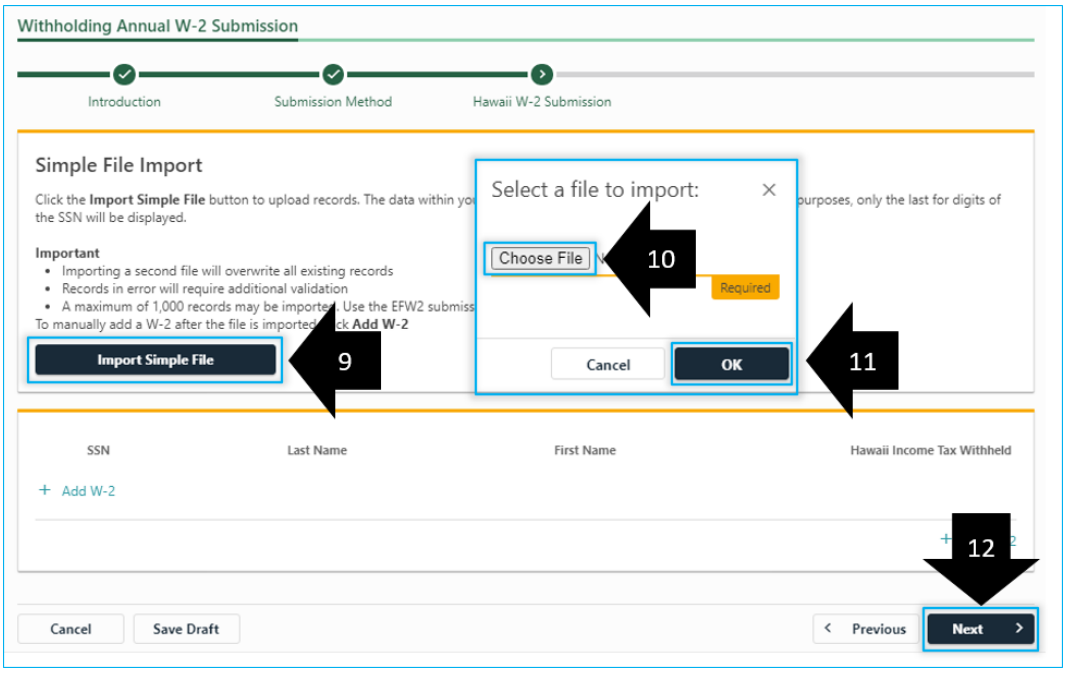
5) Select **Submit W-2 Forms**.
6) On the following screen select **Next**.



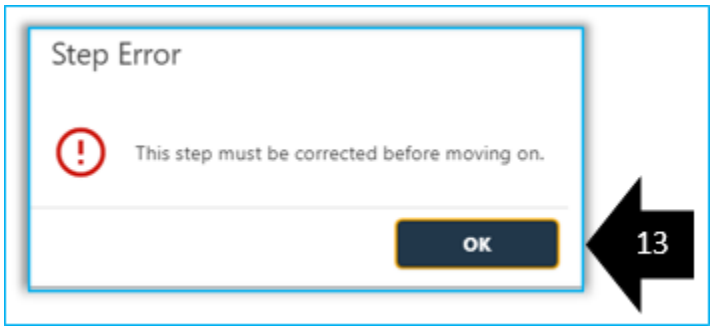
7) Method of Submission, select **Simple File Import**.
8) Select **Next**.



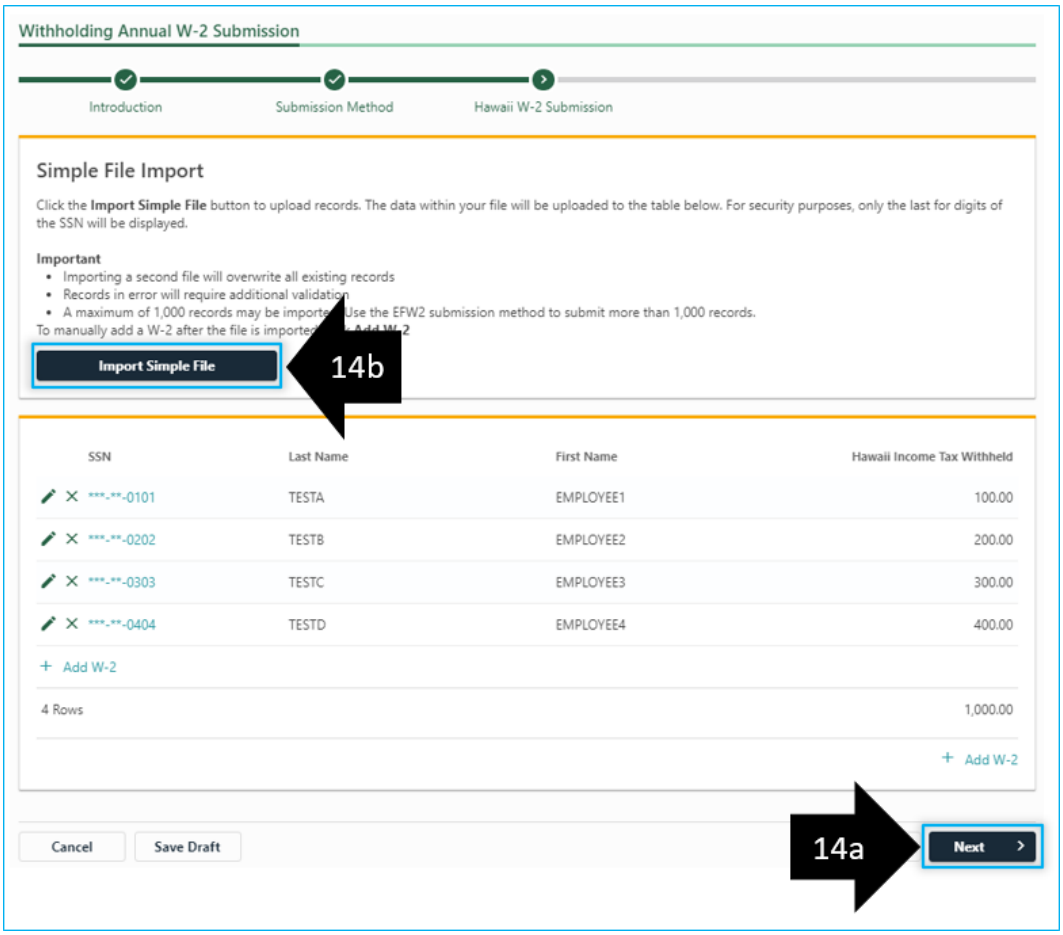
9) Select **Import Simple File**.
10) Select **Choose File**.
11) Select **OK** to import.
12) Select **Next** if no errors are identified.



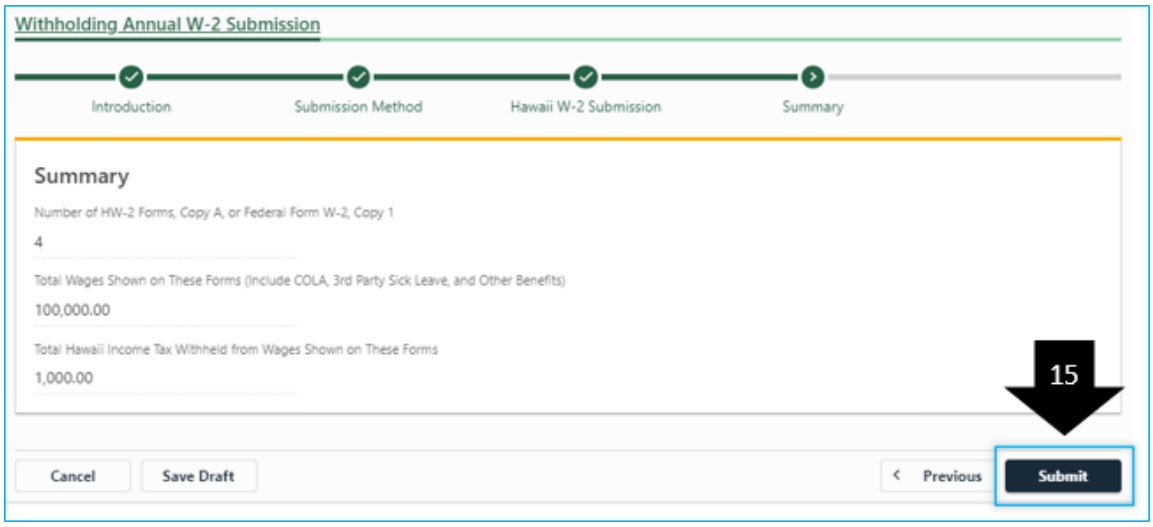
13) If errors are identified in your Import file, the following step error will be presented. See Errors After File Import for additional information. Select **OK**.



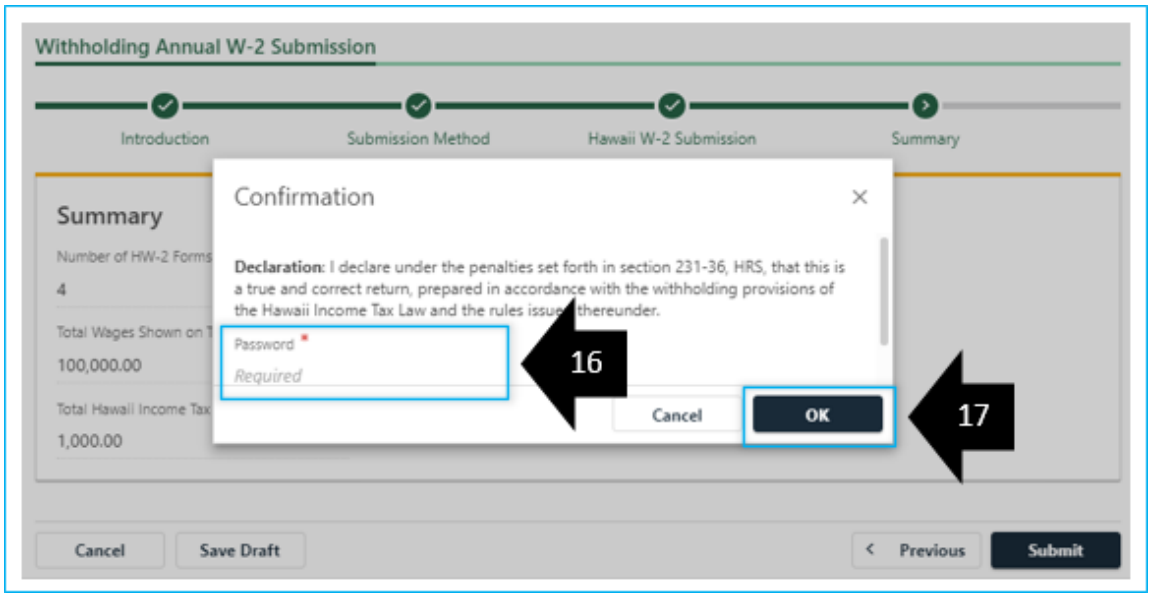
14) Review the imported data populated on the submission.
   a) No errors, select **Next**.
   b) Errors identified, **correct the file**. Reimport the corrected file, select **Import Simple File**. The previously imported data will be overridden.



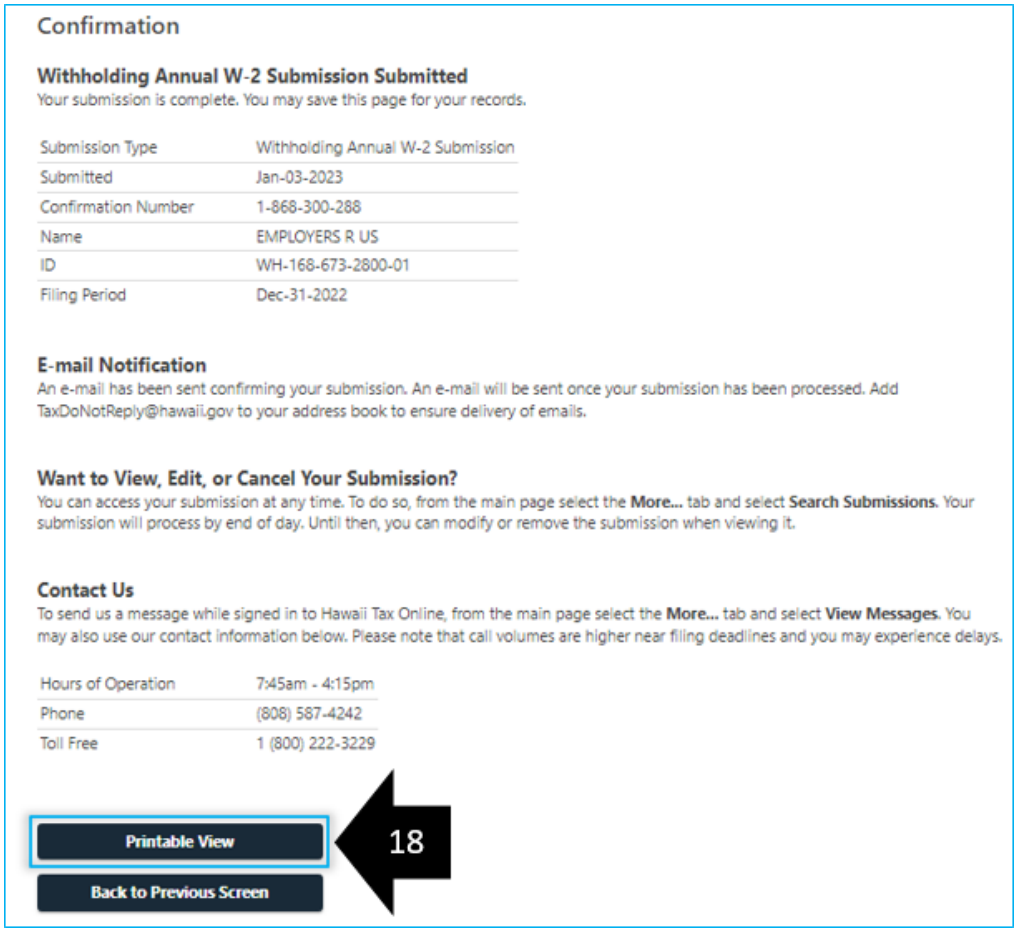
15) Review the Summary step. If the presented is correct, select **Submit**. Note: if additional updates are needed, select **Previous**.



16) Enter your HTO **Password**.
17) Select **OK**.



18) To print a summary of your submission for your records, scroll down and select **Printable View**.



Confirmation

Withholding Annual W-2 Submission Submitted

Your submission is complete. You may save this page for your records.

Submission Type	Withholding Annual W-2 Submission
Submitted	Jan-03-2023
Confirmation Number	1-868-300-288
Name	EMPLOYERS R US
ID	WH-168-673-2800-01
Filing Period	Dec-31-2022

E-mail Notification

An e-mail has been sent confirming your submission. An e-mail will be sent once your submission has been processed. Add TaxDoNotReply@hawaii.gov to your address book to ensure delivery of emails.

Want to View, Edit, or Cancel Your Submission?

You can access your submission at any time. To do so, from the main page select the **More...** tab and select **Search Submissions**. Your submission will process by end of day. Until then, you can modify or remove the submission when viewing it.

Contact Us

To send us a message while signed in to Hawaii Tax Online, from the main page select the **More...** tab and select **View Messages**. You may also use our contact information below. Please note that call volumes are higher near filing deadlines and you may experience delays.

Hours of Operation	7:45am - 4:15pm
Phone	(808) 587-4242
Toll Free	1 (800) 222-3229

Printable View

Back to Previous Screen

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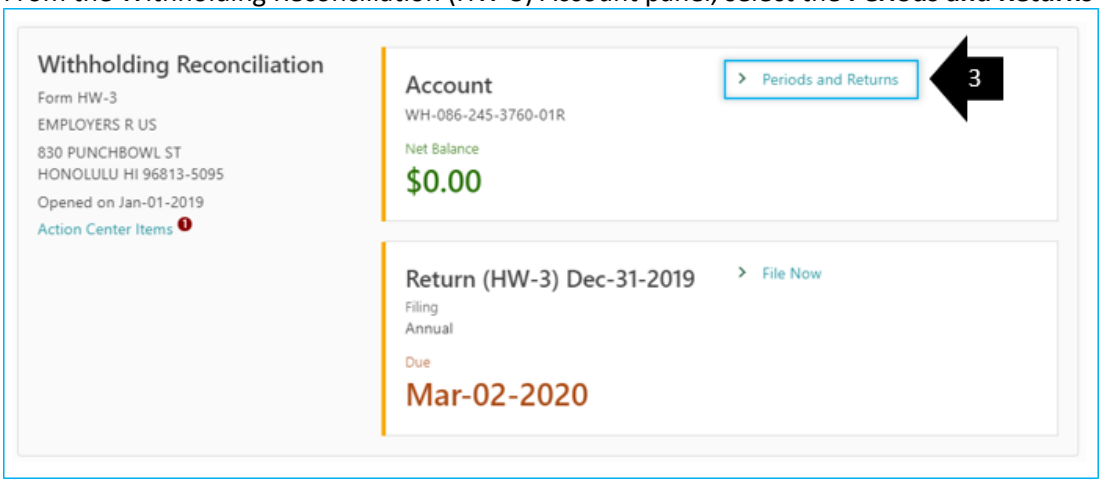
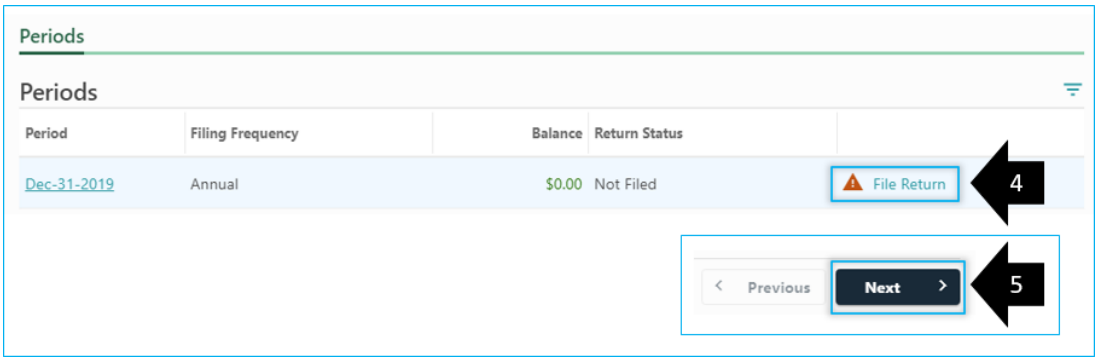
SFI Instructions for Tax Years **2019** and Prior

Submit W-2 via HW-3

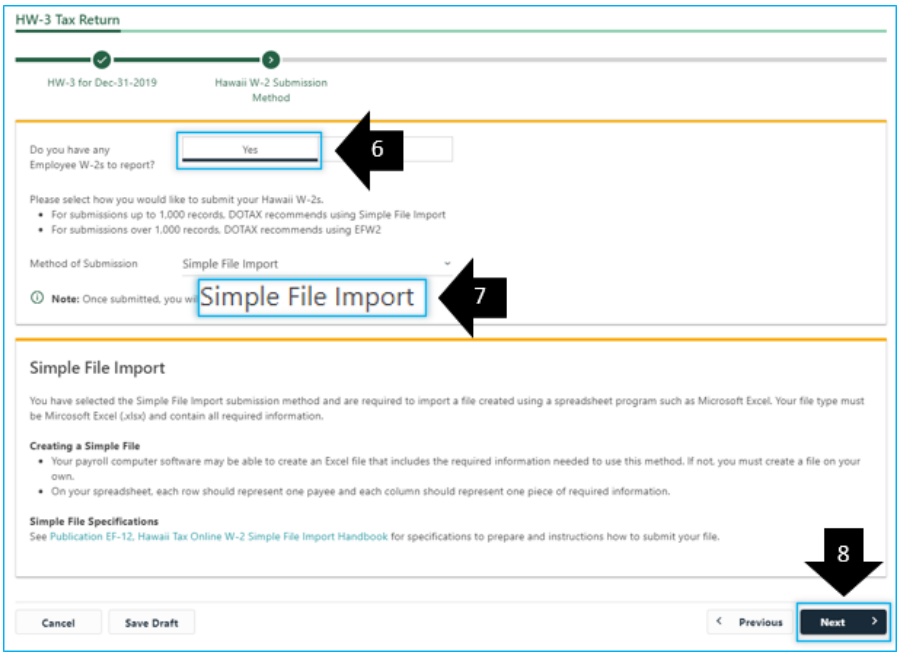
1) Create a .xlsx for upload.
2) Access the HTO Withholding Reconciliation account.
3) From the Withholding Reconciliation (HW-3) Account panel, select the **Periods and Returns** link.



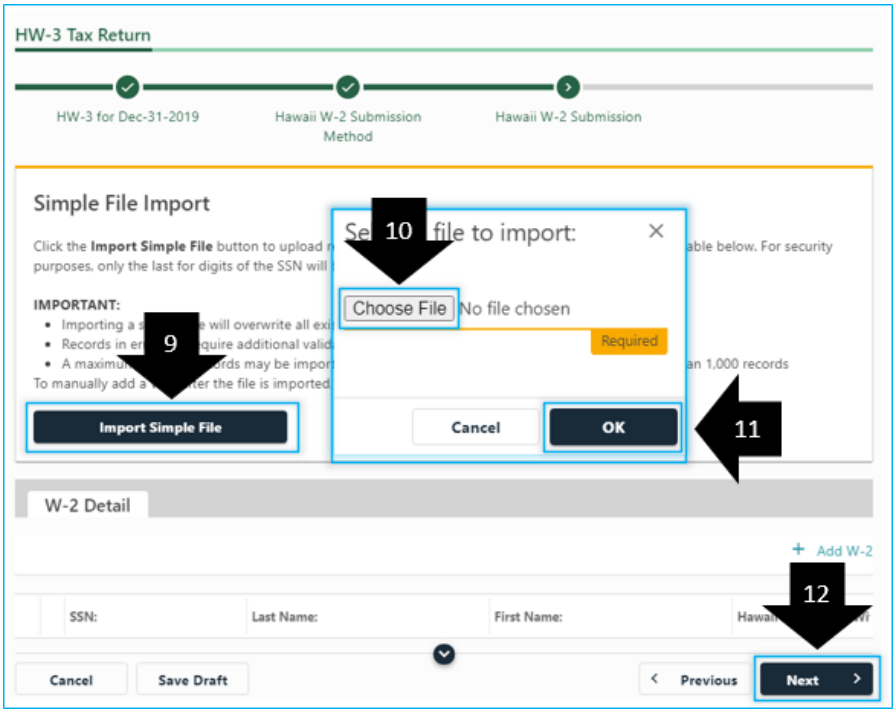
4) Select **File Return**.
5) On the following screen select **Next**.



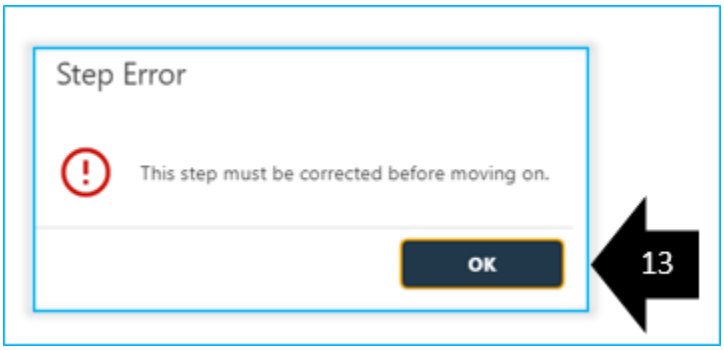
6) Select **Yes** for Do you have any employee W-2's to report?
7) Method of Submission, select **Simple File Import**.
8) Select **Next**.



9) Select **Import Simple File**.
10) Select **Choose File**, Select the file to import.
11) Select **OK** to import the file.
12) Select **Next** if no errors are identified.

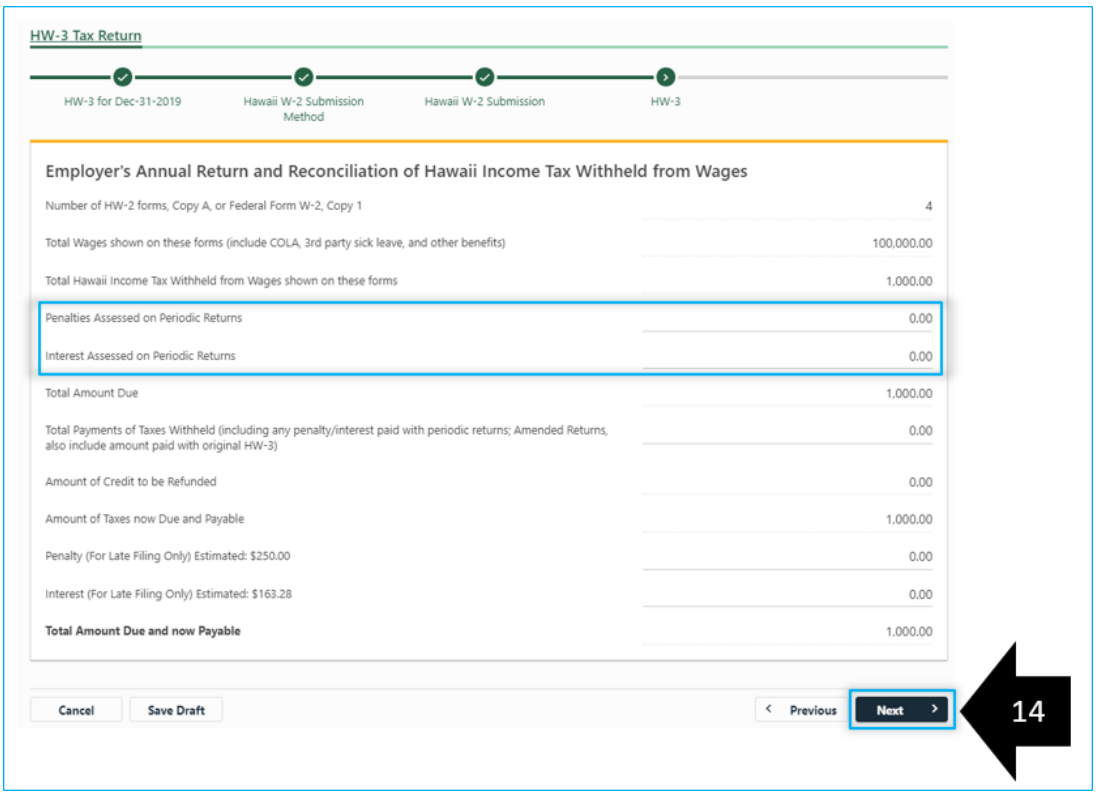


13) When errors are identified in the imported file, the followed step error will be presented. See Errors After File Import for additional information on error correction. Select **OK**.

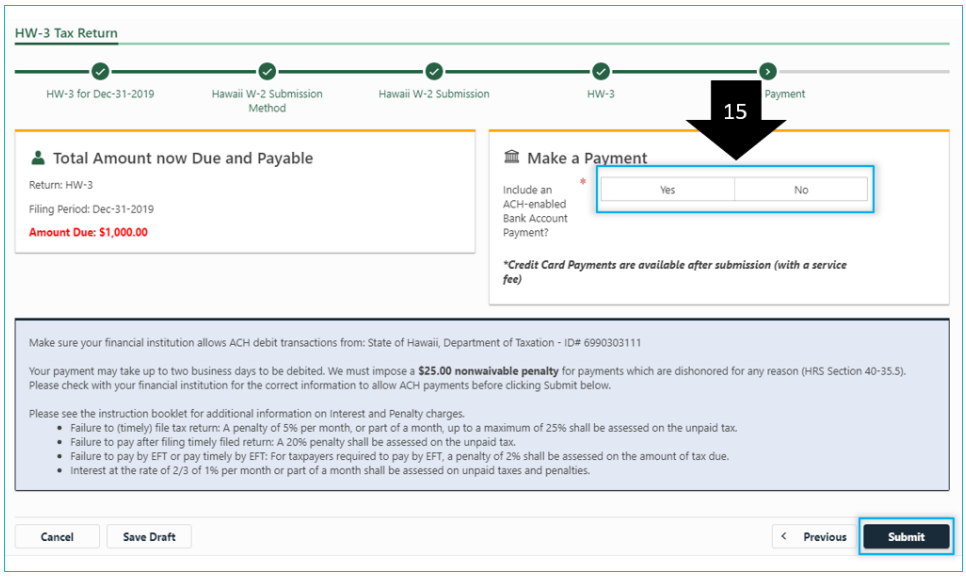


14) Review the data populated on the HW-3 step. Complete the lines pertinent to filing the HW-3.
- Select **Next** or
- Select **Previous** if corrections to the data are needed.

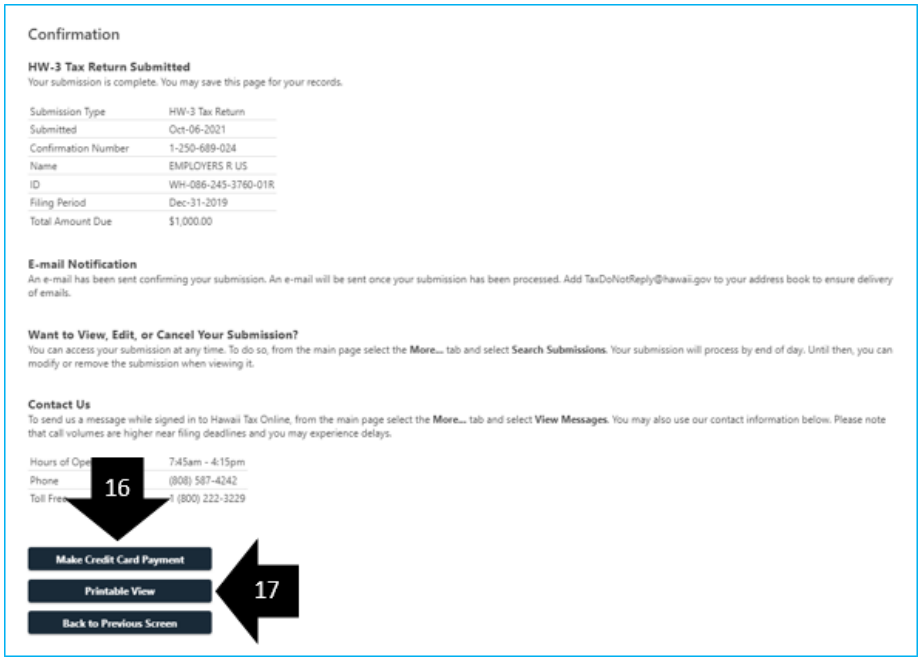
If applicable, enter penalty and interest assessed on periodic returns and include the amounts on the Total Payment of Taxes Withheld line.



15) If a payment is due (total amount due and payable is greater than zero), the Return Payment step will be presented.
   a) Select **Yes** to make a bank account payment.
   b) Payment by credit card, select **No**. Payment by credit card is available on the confirmation page, after the return is submitted.



16) To make a credit card payment, scroll down and select **Make Credit Card Payment**. You will be directed to a third-party site to enter your Credit/Debit Card payment information. A nonrefundable convenience fee will be automatically added to the credit card payment. Credit Card payments cannot be cancelled once submitted. Cancellations need to be handled with the Credit Card Provider.
17) To print a summary of your submission for your records, scroll down and select **Printable View**.



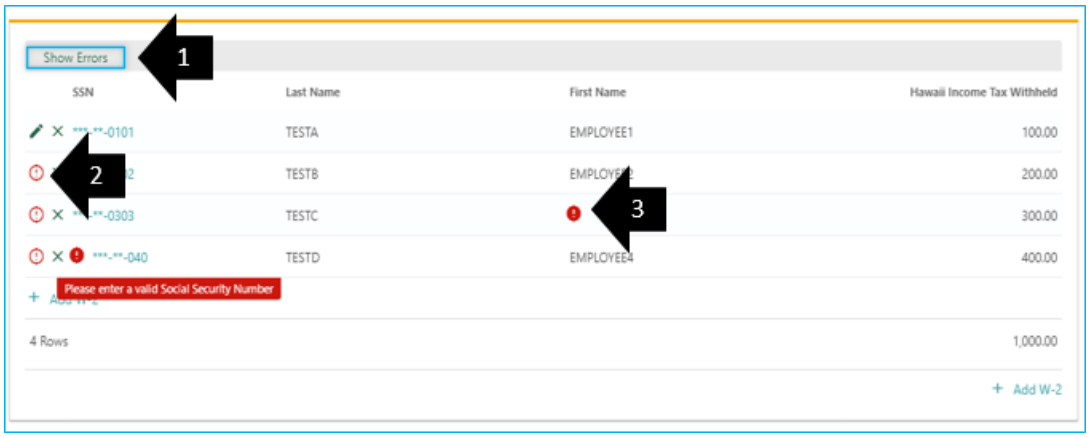
Errors After File Import

W-2s needing additional attention are indicated in various ways.

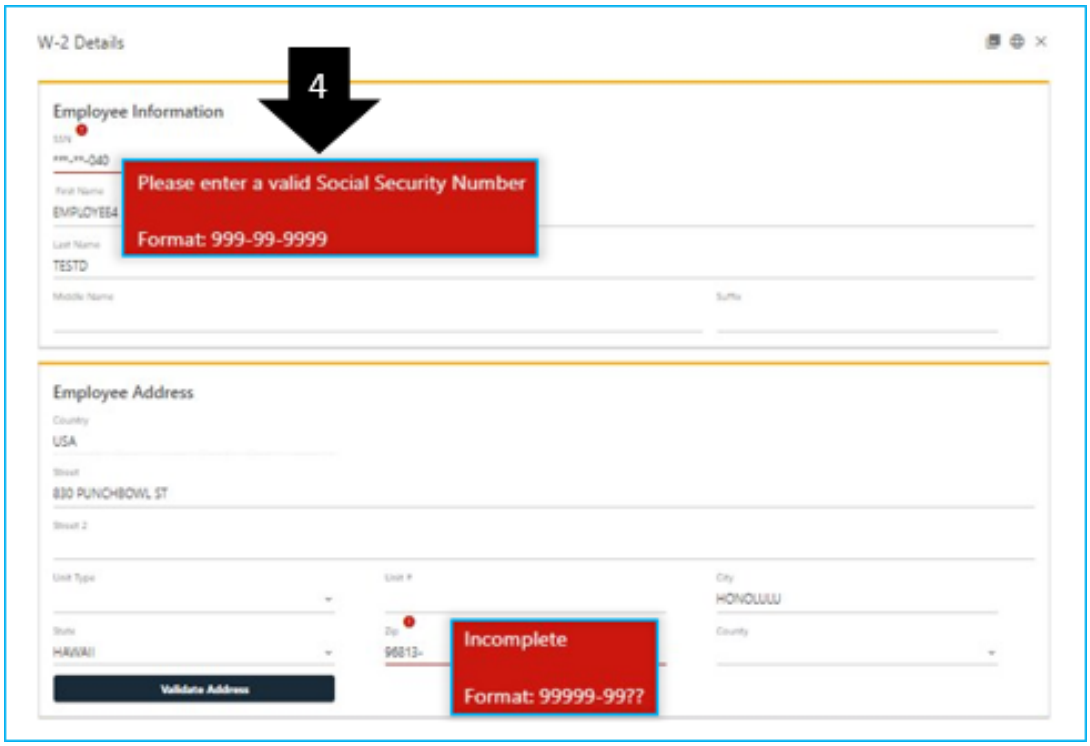
1) Select **Show Errors** to see only errored rows. (Select **Show All** to return to complete list)

2) The errored row is identified with !

3) The specific field is identified with !



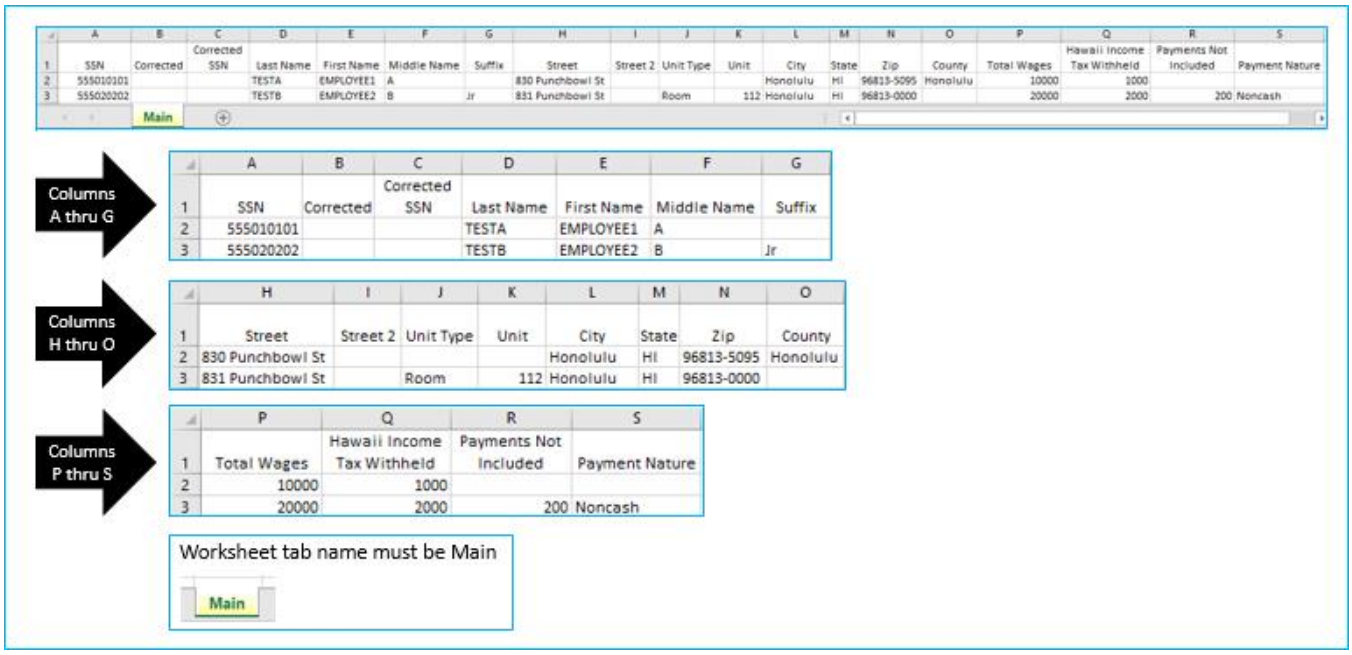
4) After selecting an errored W-2; the detail screen will be presented. Until all errors are corrected, continue selecting the errored W-2s. **Do not** select next until all errors have been corrected.



Helpful Tips to Prevent Errors

To prevent records from going into error, here are helpful tips when creating your simple upload spreadsheet file:

1) Do not include dashes in Social Security Numbers.
2) A full zip code is required (e.g., 12345-1234). If you do not have the last 4 digits of the zip code, four zeros may be entered.
3) If the value in Total Wages (column P) equals zero, then Payments Not Included in Total Wages (column R) and Nature of Payment (column S) must be present.
4) Do not include blank rows within your data set. A blank row is interpreted as the end of your file.
5) If there is no dollar amount to enter, the dollar field must be filled with a zero. All dollar amounts must be positive.
6) All dollar fields must contain a decimal if there are cents.
7) Do not include "$" or commas in any field.
8) If you loaded a file and did not submit it, do not load another file. The new file will override the existing information.



	A	B	C	D	E	F	G
1	SSN	Corrected	Corrected SSN	Last Name	First Name	Middle Name	Suffix
2	555010101			TESTA	EMPLOYEE1	A	
3	555020202			TESTB	EMPLOYEE2	B	Jr

	H	I	J	K	L	M	N	O
1	Street	Street 2	Unit Type	Unit	City	State	Zip	County
2	830 Punchbowl St				Honolulu	HI	96813-5095	Honolulu
3	831 Punchbowl St		Room	112	Honolulu	HI	96813-0000	

	P	Q	R	S
1	Total Wages	Hawaii Income Tax Withheld	Payments Not Included	Payment Nature
2	10000	1000		
3	20000	2000	200	Noncash