W2 OTC Working Data File Instructions

**This guidance is based on 2024 OTC OKTap website parameters and is only applicable to importing data submission for W2s in the OKTap portal.**

Use the _W2 OTC Working Data File_ to collect information on W2 recipients as needed. Add records of any employee(s) who separate(s) from the district at the time of their departure or at the end of the year after completing current employees' earnings records. When it comes time to file W2 forms in OKTap in January, you can use the information on this sheet to easily transfer data into the OKTap template and system. Using this process will reduce the need to individually enter each W2 form in the OKTap portal!

Tips and tricks for using the data file:

There are three tabs in the workbook. The first tab labeled "RW" is for the employee information. The second tab, labeled "RE" is for the employer (i.e. district's) information. The 3rd tab is blank.

Do not change the names of the tabs. Do not delete any tabs.

Columns can be hidden, but do not delete any columns.

> Not all columns in the file are needed for the district's use. Many items will be left blank because they do not apply or are not required by OTC.

> To make the data entry easier, columns that the district will not use have already been hidden on both tabs.

The file must be saved as an ".xls" file, not ".xlsx" file.

Each line/row of data on tab "RW" represents a W2 to be generated. You must enter the district's information in the same number of rows on tab "RE."

> To reduce errors, enter the district's information once, verify it is correct, then copy the information into subsequent rows.

> Verify that you have a matching number of rows in each tab (i.e. 2 employees listed on tab "RW" means you should have two rows listing the district's information on tab "RE."

Be sure to follow all formatting requirement guidelines listed in row 1 in the file; if you do not format data correctly, your import within OKTap may not be successful.

Maximum characters per line/blank includes spaces between words.

Do not add any extra/unneeded spaces in any cell; no entry can contain leading, trailing, or adjacent spaces.

If you have questions about how to use the *W2 OTC Working Data File* to collect W2 information, please reach out to your ADC or the District Services Division.

At year-end (late December/early January):

Before finalizing the *W2 OTC Working Date File*, any hidden columns must be unhidden. Verify that you have entered the district's information on tab "RE" and that you have a matching number of rows in this tab for the number of rows on tab "RW."

When the 2025 template is released by OKTap (December 2025-January 2026), we will determine if any changes are necessary for compatibility. Additional instructions for downloading the most current W2 OTC template, if needed, and importing information from the *W2 OTC Working Data File* will be provided. Based on the current template, this will likely include saving a copy of your data file with an appropriate file name and then removing the instructional/example rows before import into OKTap. However, more instructions and assistance on completing the import into OKTap will be provided later.