

Form W-2 Instructions

W-2

a Control Number
 Not needed for e-filing
 This is a standard W-2
 This is a corrected W-2
 This is a substitute W-2

IRS Verification Code (if provided)

Employee
 Whose W-2 is this?
 Mr Taxpayer
 Check here if foreign address
 Address (Number and Street)
 123 Main St
 Zip Code
 55010
 City, Town, or Post Office
 st paul
 State
 Minnesota

Employer
 b EIN
 - -
 c Employer Name

 Check here if foreign address
 Address (Number and Street)

 Zip Code
 -
 City, Town, or Post Office

 State
 - Please Select

Note: Information entered above must match the IRS Master File. Please Verify.

Wages

| | | | | | |
|------------------|----|----------------------|--------------------------|----|----------------------|
| 1 Wages, Tips | \$ | <input type="text"/> | 2 Federal Tax Withheld | \$ | <input type="text"/> |
| 3 SS Wages | \$ | <input type="text"/> | 4 Soc. Sec. Tax Withheld | \$ | <input type="text"/> |
| 5 Medicare Wages | \$ | <input type="text"/> | 6 Medicare Tax | \$ | <input type="text"/> |
| 7 SS Tips | \$ | <input type="text"/> | 8 Allocated Tips | \$ | <input type="text"/> |
| 9 | | RESERVED | 10 Dependent Care | \$ | <input type="text"/> |
| 11 NonQual Plan | \$ | <input type="text"/> | Unreported Tips | \$ | <input type="text"/> |

If a Form W-2 can't be obtained from the employer, check the box to indicate this is a substitute W-2. Tax Slayer will generate a Form 4852, Substitute for W-2

Indicate if W-2 is for Taxpayer or Spouse

If the taxpayer has an ITIN, you will be prompted to enter the ITIN or SSN as shown on the original W-2.

ITIN SSN:
 - -

Compare this address to Form W-2 address. If the address on the W-2 is different, correct the W-2 address here to match the original Form W-2. This won't change the tax return address.

Review box 2 and box 17 to ensure tax withheld was entered and is correct

The entries in boxes 3, 4, 5, 6 and 16 will auto-populate based on the Box 1 entry. If the figures don't match taxpayer's Form W-2, correct the data so that it matches the information on Form W-2.

If there is an entry in Box 10, Form 2441 must be completed.

Be sure to complete Box 11 if there is an entry on the original Form W-2. An entry here may indicate that the taxpayer is receiving deferred compensation earned in a prior year.

Form W-2 ALERT!
 IRS requires that information on electronically filed Form(s) W-2 match the printed Form(s) W-2 exactly.
 A taxpayer with multiple Forms W-2 could possibly have a different address on several, if not all, of the Forms W-2.
 Check them carefully; the change must be made on every Form W-2 that is different from the current address
 Be sure to enter every item from the taxpayer's original W-2 – **key what you see**

CAUTION: If the taxpayer earned tips that weren't reported to the employer, enter in the Unreported Tips box. This will add Form 4137 to the return.
 If the taxpayer received tips that weren't reported to the employer because they were less than \$20 a month, go to other taxes, select Form 4137 and enter the amount there.