

Form W-2 Instructions (continued)

Wages

<p>1 Wages, Tips</p> <input type="text" value="\$"/>	<p><i>Review box 2 and box 17 to ensure tax withheld was entered and is correct</i></p>	<p>2 Federal Tax Withheld</p> <input type="text" value="\$"/>
<p>3 SS Wages</p> <input type="text" value="\$"/>	<p><i>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.</i></p>	<p>4 Soc. Sec. Tax Withheld</p> <input type="text" value="\$"/>
<p>5 Medicare Wages</p> <input type="text" value="\$"/>	<p><i>If there is an entry in Box 10, Form 2441 must be completed.</i></p>	<p>6 Medicare Tax</p> <input type="text" value="\$"/>
<p>7 SS Tips</p> <input type="text" value="\$"/>		<p>8 Allocated Tips</p> <input type="text" value="\$"/>
<p>9</p> <p>Reserved</p>		<p>10 Dependent Care</p> <input type="text" value="\$"/>
<p>11 NonQual Plan</p> <input type="text" value="\$"/>	<p><i>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.</i></p>	<p>Unreported Tips</p> <input type="text" value="\$"/>

<p>12</p> <p>a Code <input type="text"/> Amount <input type="text" value="\$"/></p> <p>+ add another row</p>	<p>13</p> <p><input type="checkbox"/> Statutory Employee</p> <p><input type="checkbox"/> Retirement Plan</p> <p><input type="checkbox"/> Third Party Pay</p>
<p>14</p> <p>Code <input type="text"/> Amount <input type="text" value="\$"/></p> <p>+ add another row</p>	
<p>State Information</p> <p>State Information <input type="button" value="Clear"/></p>	
<p>15 State Name</p> <p><input type="text" value="- Please Select -"/></p>	<p>State EIN</p> <input type="text"/>
<p>16 St Wages</p> <input type="text" value="\$"/>	<p>17 St Tax Paid</p> <input type="text" value="\$"/>
<p>18 Local Wages</p> <input type="text" value="\$"/>	<p>19 Local Tax Paid</p> <input type="text" value="\$"/>
	<p>20 Local Name</p> <input type="text"/>
<p><input type="button" value="Add State"/> <input type="button" value="Cancel"/> <input type="button" value="Continue"/></p>	

Form W-2 ALERT!

IRS requires that information on electronically filed Form(s) W-2 match the printed Form(s) W-2 exactly if possible. For example, the the name cannot be changed, and the software will not accept special characters.

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***

TIP on Tips: *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 also enter the amount there. If a taxpayer wishes to use their tip log instead of allocated tips in box 8, leave box 8 blank and report it as unreported tips within the W-2.*