

Form W-2 Instructions

US W-2 Wage and Tax Statement

This W-2 statement is for the: Taxpayer Spouse

Employee's name: [REDACTED] Employee's SSN: 222-22-2222

Check if this W-2 is handwritten, altered, or appears not to be a true W-2.
 Check if this is the taxpayer's address shown on the W-2 or
 Check and make changes to the U.S. address or foreign address below.

U.S. address [REDACTED]
 Zip code, city, and state [REDACTED]
 Foreign street address [REDACTED]
 Foreign city [REDACTED]
 Foreign province / state [REDACTED]
 Foreign Zip code [REDACTED]
 Foreign country code [REDACTED]

Check if employer was contacted to verify W-2 Employer phone: [REDACTED]
 Check to take calculations off of lines 3, 4, 5, and 6.
 Check to take calculations off of line 16, state wages.
 The taxpayer / spouse ID number listed on the Main Information Sheet is an ITIN. Enter the ID number (SSN or ITIN) as it is shown on the actual W-2 [REDACTED]

a Control number: [REDACTED] Corrected W2 (W-2C):

b Employer ID: [REDACTED] Name code: [REDACTED]	1 Wages, tips, etc. [REDACTED] 0.	2 Federal tax withheld [REDACTED] 0.
	3 Social security wages [REDACTED] 0.	4 Social security tax withheld [REDACTED] 0.
c Employer's name [REDACTED] Employer's U.S. address [REDACTED] Employer's Zip code, city, and state [REDACTED]	5 Medicare wages [REDACTED] 0.	6 Medicare tax withheld [REDACTED] 0.
	7 Social security tips [REDACTED] 0.	8 Allocated tips [REDACTED] 0.
Employer's foreign address [REDACTED] Employer's foreign city [REDACTED] Employer's foreign province / state [REDACTED] Employer's Zip code and country code [REDACTED]	9	10 Dependent care benefits [REDACTED] 0.
	11 Nonqualified plans [REDACTED] 0.	

Tip: If there is more than one Form W-2, select the Copy W-2 tab. In TWO, click on the sign beside last completed W-2 in Tree.

Select W-2 for Taxpayer or Spouse

Compare this address to Form W-2 address. If same, check second box. If different, check third box and enter address exactly as it appears on Form W-2.

If boxes 3, 4, 5, 6, or 16 do not match taxpayer's Form W-2, check fifth or sixth box and enter data exactly as it appears on Form W-2.

If taxpayer has an ITIN, enter invalid SSN shown on original W-2.

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

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

Form W-2 Instructions (cont.)

12 Code Amount YY ->Year . 0. . for prior . 0. . year . 0. . USERRA . 0. . contribution			14 Other Type Amount Qualifies for . 0. Form 8880 . 0. <input type="checkbox"/> . 0. <input type="checkbox"/> . 0. <input type="checkbox"/>									
13 Statutory Retirement Third party employee plan sick pay <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			RR = Railroad; T = Tier RRT1: 0. RRT2: 0. RRTM: 0.									
15	State	State ID number	16	State wages	17	State tax	18	Local wages	19	Local tax	20	Local name
. . .	. . . . .	. . . . .	. . .	0.	. . .	0.	. . .	0.	. . .	0.	. . . . .	. . . . .
. . .	. . . . .	. . . . .	. . .	0.	. . .	0.	. . .	0.	. . .	0.	. . . . .	. . . . .
. . .	. . . . .	. . . . .	. . .	0.	. . .	0.	. . .	0.	. . .	0.	. . . . .	. . . . .
. . .	. . . . .	. . . . .	. . .	0.	. . .	0.	. . .	0.	. . .	0.	. . . . .	. . . . .

Instructions for W2

Nontaxable combat pay
Amount excluded from income by reason of section 112 0.

Statutory employees
 Check if you are going to use Schedules C or CEZ to report this income. This will prevent this W2 from adding in to line 7 of page 1 of any 1040 form. You must go to Schedule C or CEZ and insert the amount.

State exclusion: See state instructions, included with each state, before checking these boxes. Instructions vary by state. Example: Some states will only allow an exclusion for military pay if the employee is stationed out of state.
Check if this W2 is from: Military National Guard

Ministerial income
 Check if this W2 is ministerial income and Schedule SE will be used.

California W2s only
See CA instructions. SDI literal: SDI amount: 0.

Enter codes and amounts in boxes 12 and 14 exactly as they appear on the taxpayer provided W-2.

Be sure to check box 13 as indicated on Forms W-2. This is important in calculating the deductibility of IRA contributions.

IMPORTANT!

The most current address entered in MAIN INFO will not be affected and will remain the current address for the taxpayer(s).

Form W-2 ALERT!

IRS requires that information on electronically filed Form(s) W-2 match the printed Form(s) W-2 exactly. Verify tax year, taxpayer name/SSN, and employer carry forward information.

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.