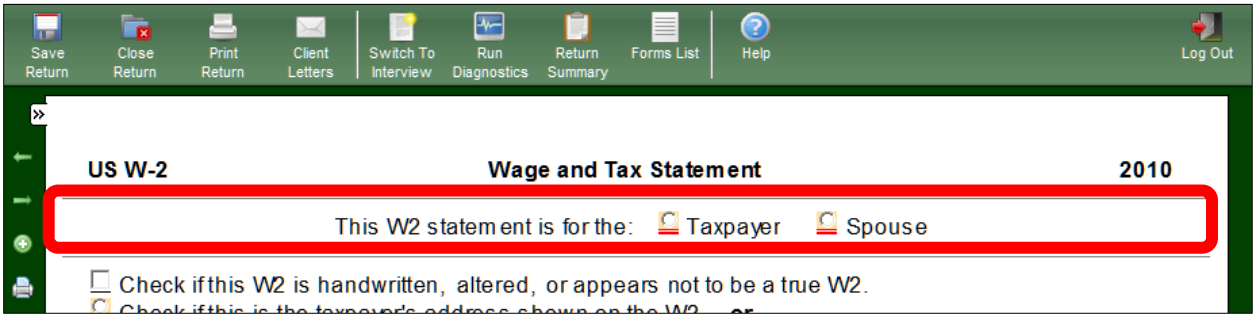
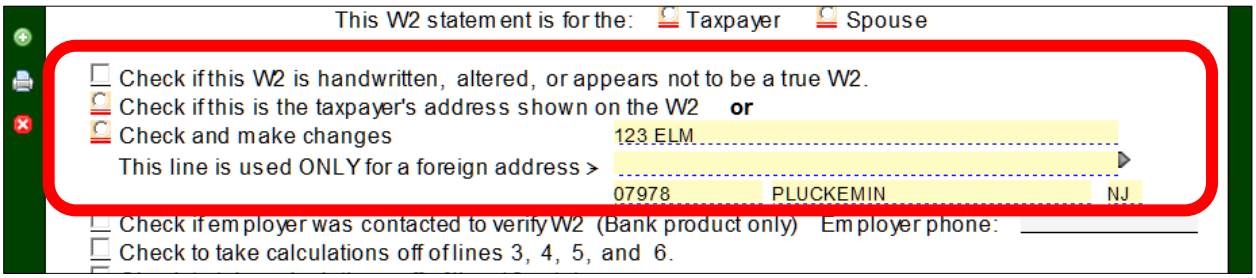
W-2 Job Aid



Select Taxpayer or Spouse

Note: Only strictly required if filing status is married filing jointly

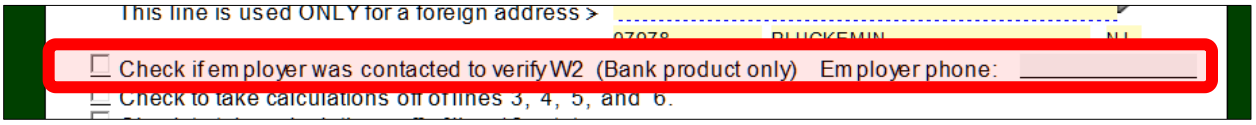


Taxpayer address from paper W-2, box e

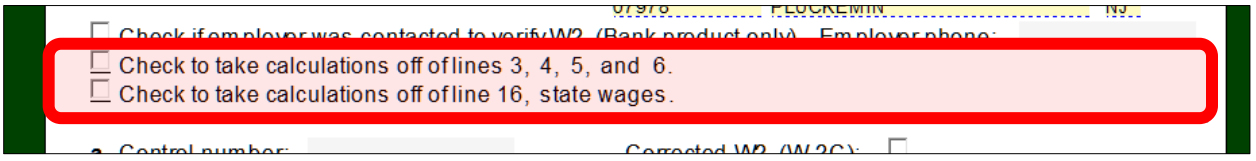
Note: Address is automatically carried to here from address info supplied on Main Info
If address on paper W-2 is exactly the same, then check "*Check if this is the taxpayer's address shown on the W2*"; otherwise, check "*Check and make changes*" at which point you will be able to make corrections so info here exactly matches paper W-2.

Note: One (and only one) of the above must be checked

Note: It is perfectly ok if this address is different – Address given to employer and address where TP wants future correspondence from the IRS can be different for many reasons.

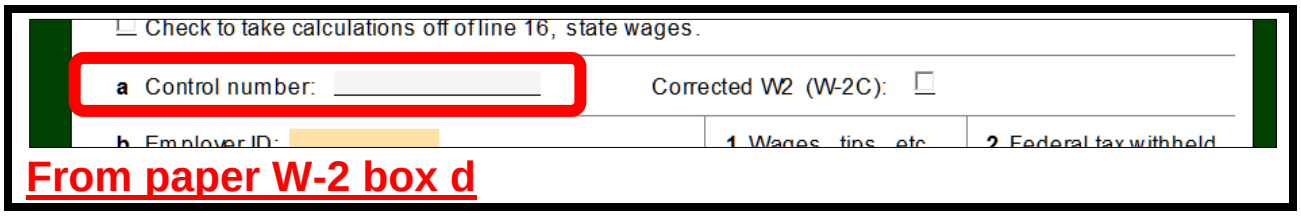


This is Out of Scope

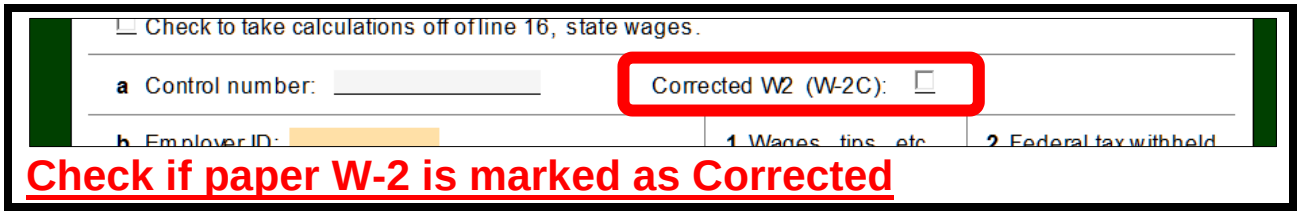


Don't do anything here now, we'll take care of these later

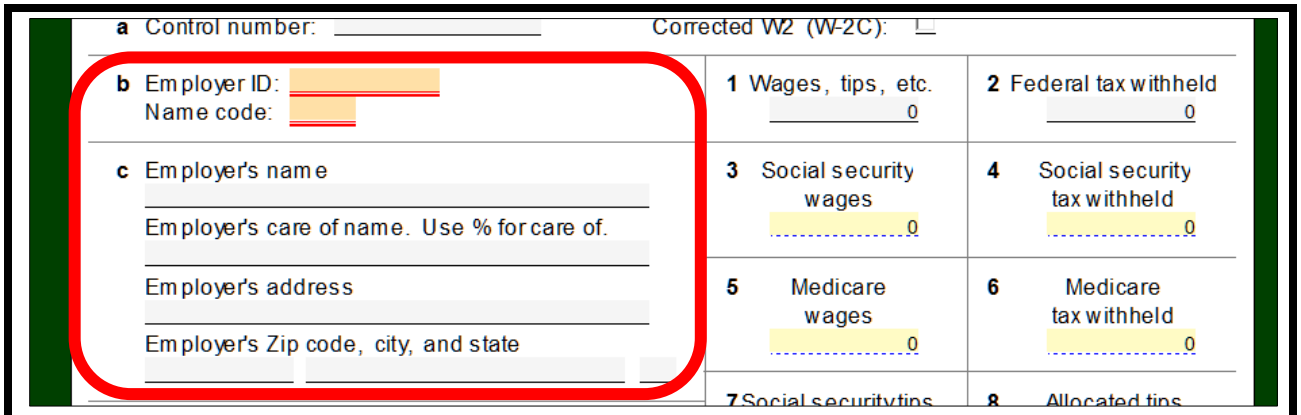
W-2 Job Aid



From paper W-2 box d



Check if paper W-2 is marked as Corrected



Enter from paper W-2 boxes b and c

Note: Enter only numbers in Employer ID (EIN) box – TWO will add dash

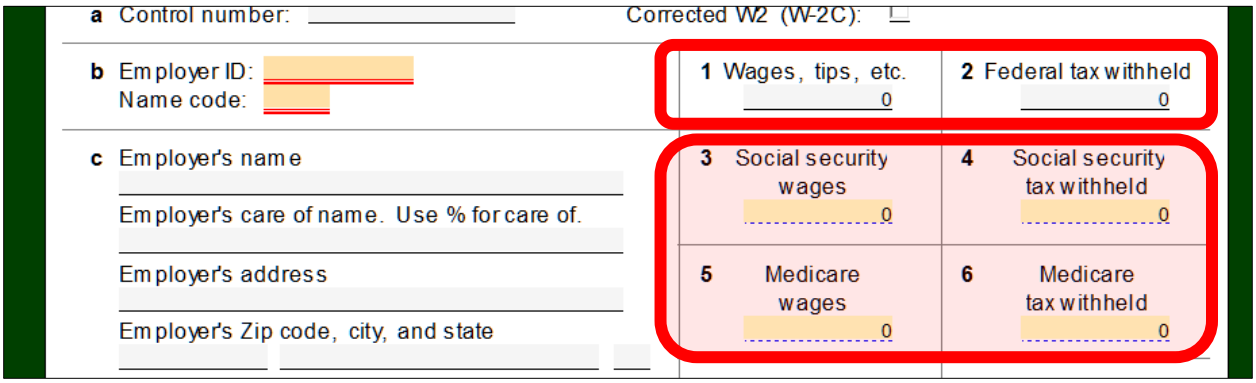
Note: TWO builds a database of EINs and addresses from previous entries from all Users under this same Client ID. If the EIN you enter is in this database, the remainder of the Employer info will be filled in automatically; nevertheless, be sure to validate and make any necessary corrections to match your paper W-2

Note: Do NOT fill in anything in the "Name code" box – this will be calculated automatically

Note: Do NOT use any punctuation when entering Employer's name and address (e.g. use "PO BOX 78223" instead of "P.O. Box 78223" or "MAIL STOP 23 101" instead of "Mail Stop #23/101")

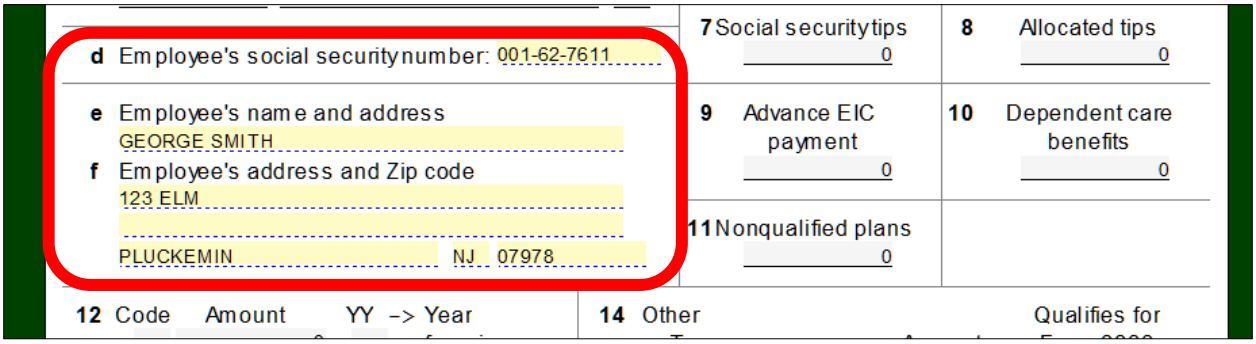
Note: Usual convention for city, state, zip – enter zip code first and correct city if necessary

W-2 Job Aid



Enter values from paper W-2 boxes 1 and 2

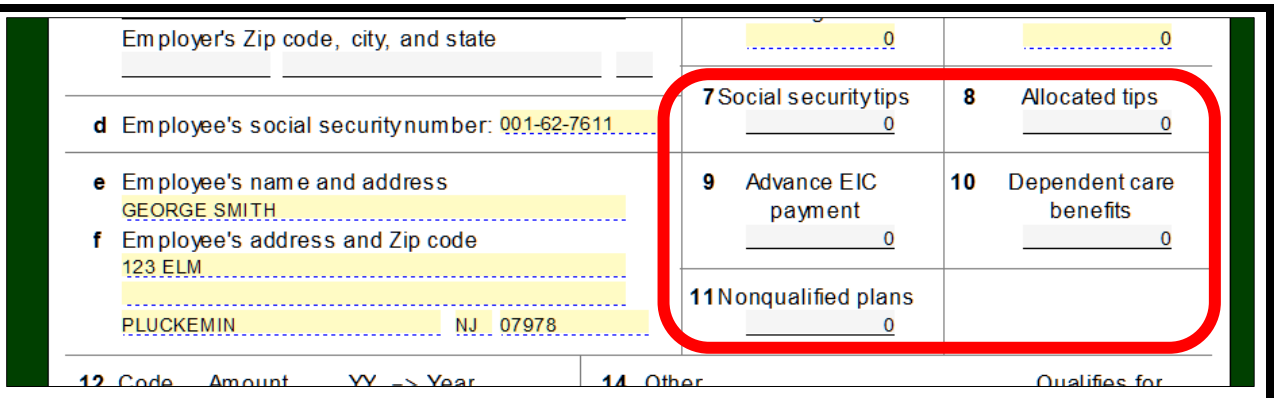
Note: Worksheet boxes 3, 4, 5, and 6 will fill in automatically. Do NOT worry if values in these calculated boxes do not agree with paper W-2 at this point – They may change as a result of later entries.



Do nothing in thes area – all values are calculated

Note: social security number and name will be filled in differently depending on whether you selected Taxpayer or Spouse at the top of the worksheet

Note: The address is copied from the top section of the worksheet – make any corrections there.

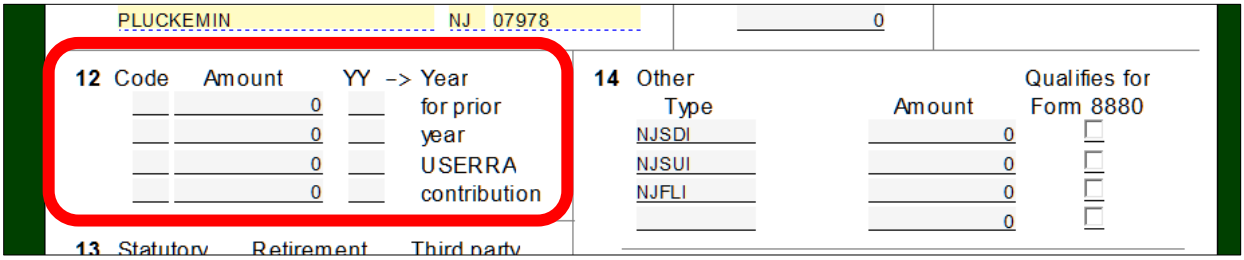


Enter values from paper W-2 boxes 7, 8, 9, 10, and 11

Note: Values in boxes 3-6 may change

Note: If there is an entry in box 8, form 2441 will automatically be added to the tree (and you will need to complete it before you're done)

W-2 Job Aid



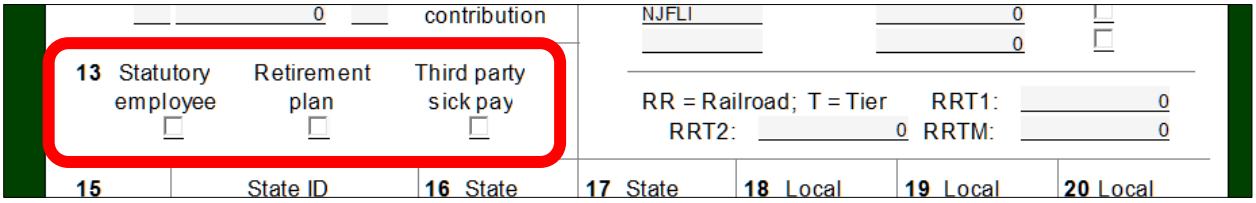
Enter values from paper W-2 box 12

Note: For each line, enter the 1 or 2 character code in the first box and the amount in the second box. Do not put anything the the third (YY) box.

Note: Depending on the code, TWO may use the amount for calculations on other forms and/or add additional forms to the tree.

Note: Some codes (e.g. K, Q, R, T, V and W) are out of scope – ask for assistance if you're not sure

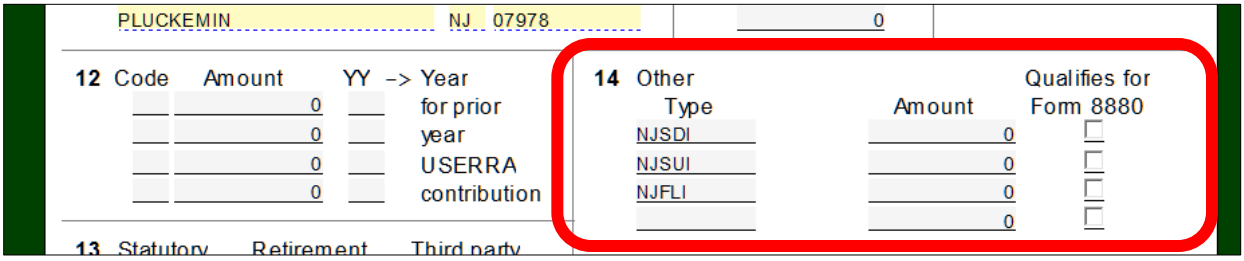
Note: The codes for box 12 are usually explained on the back side of the paper W-2



Check worksheet boxes based on paper W-2 box 13

Note: It is ok if none of these boxes are checked

W-2 Job Aid



Enter values from paper W-2 box 14

Note: Each line contains a Type code (first box), and an Amount (second box). [Ignore the third box]

Note: The special codes recognized by TWO are pre-filled in the first three Type boxes from the Template:

NJSDI – Disability insurance

NJSUI – Unemployment insurance / Workforce development partnership fund / Supplemental workforce fund

NJFLI – Family leave insurance

Note: The codes used on your paper W-2 may be different (e.g. SWF for Supplemental workforce fund) – you must use the above 3 codes for amounts that belong to one of those categories. Don't hesitate to ask for help if you're not sure whether an amount should be treated as one of the above special categories.

Note: There may be other categories (e.g. 414H) which show up on your paper W-2 – they should be included in your worksheet box 14 entries, but TWO will not do anything special with the corresponding amounts

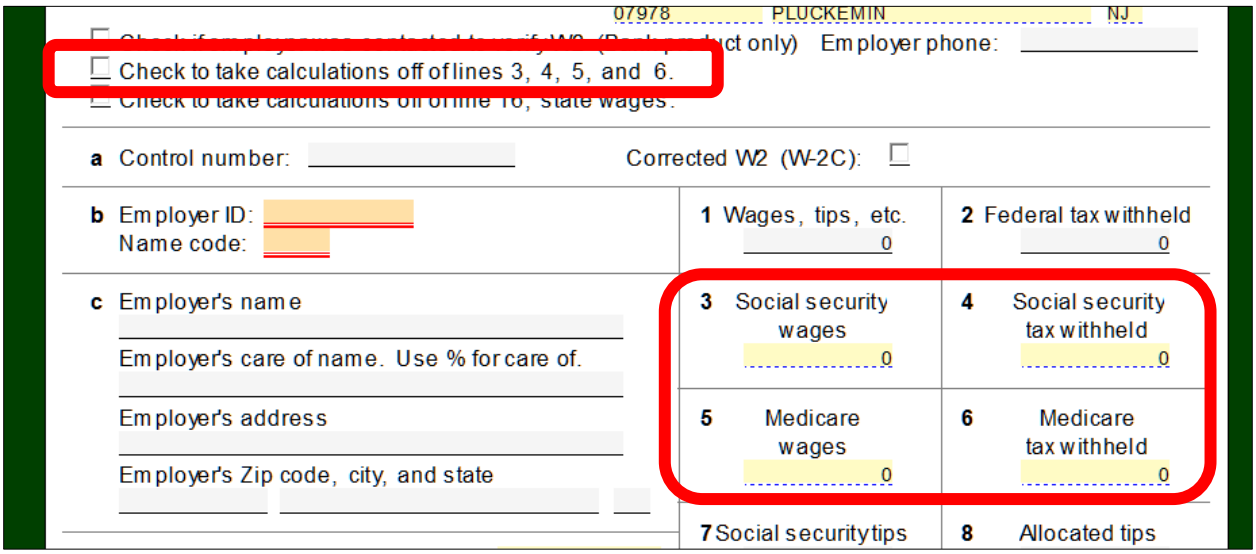
Note: Amounts in the NJSUI category are sometimes broken down into more than one amount – it is ok to add the amounts on one line or use the same special code on multiple lines

Note: Some employers do not use the NJ programs – the have private plans for disability or unemployment (you will see a private plan number (PP#) if this is the case). These amounts are not treated the same way for tax calculations and should not use the special codes recognized by TWO

Note: These amounts are sometimes shown on the paper W-2 at the bottom of the form or in boxes 18-20 instead of in box 14

Note: If there is not corresponding amount on the paper W-2 you may need to manually "Toggle Estimated" (make un-red) the Amount box – use Ctrol-Space

W-2 Job Aid

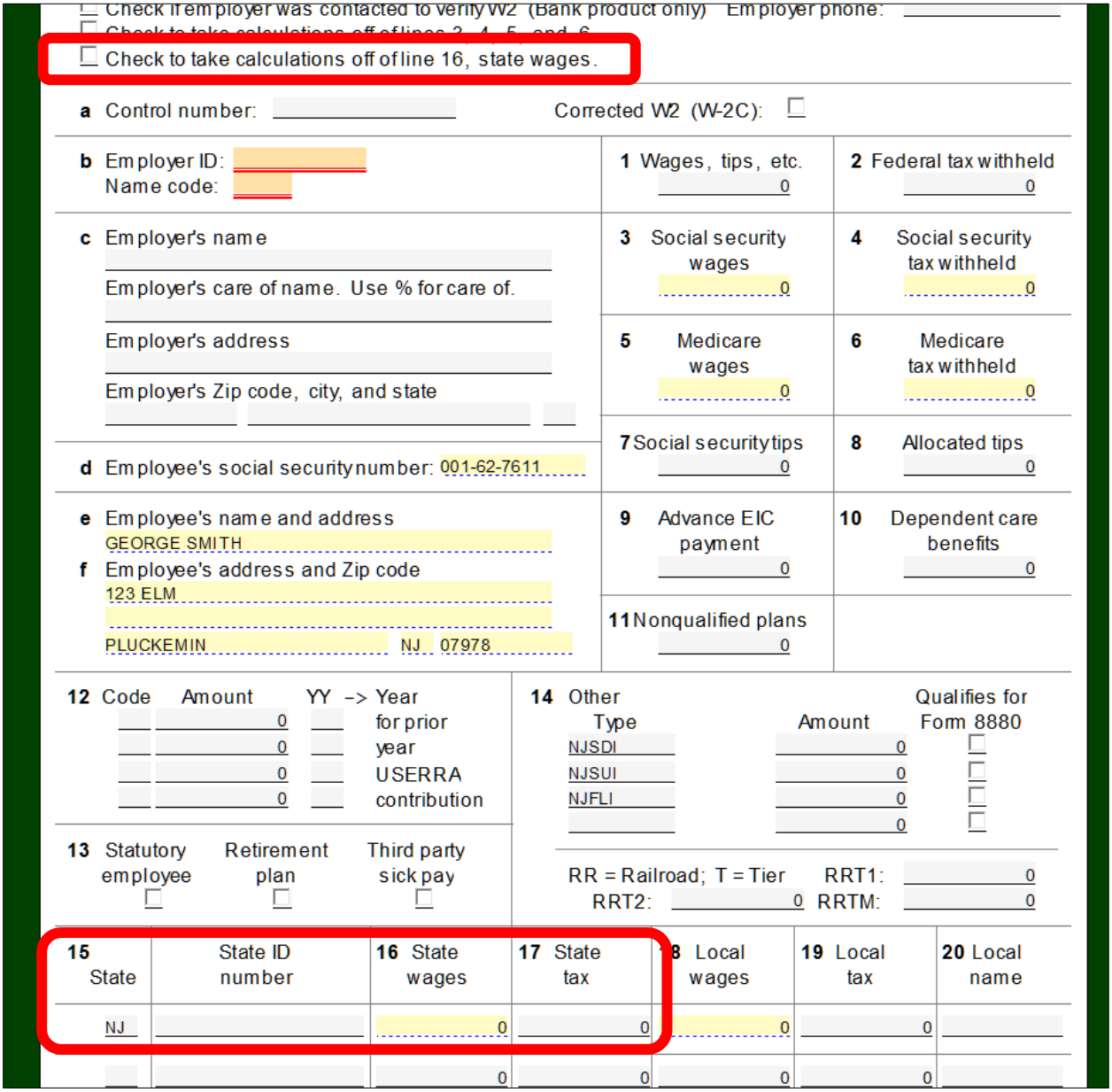


Go back and check the amounts in boxes 3, 4, 5, and 6

Note: If the calculated amounts in boxes 3, 4, 5, and 6 all agree with the paper W-2, then do nothing

Note: If any of the calculated amounts in boxes 3, 4, 5, or 6 disagree with the amount on the paper W-2, then check the box next to "*Check to take calculations off of lines 3, 4, 5, and 6*" and then make any necessary corrections

W-2 Job Aid



Boxes 15, 16, and 17

Note: The state code (NJ) is filled in on the worksheet by the Template

Note: Make sure that your paper W-2 is showing NJ in box 15; if any state other than NJ, then it is either Out of Scope or requires special training.

Note: The State ID number should be filled in exactly as given on the paper W-2

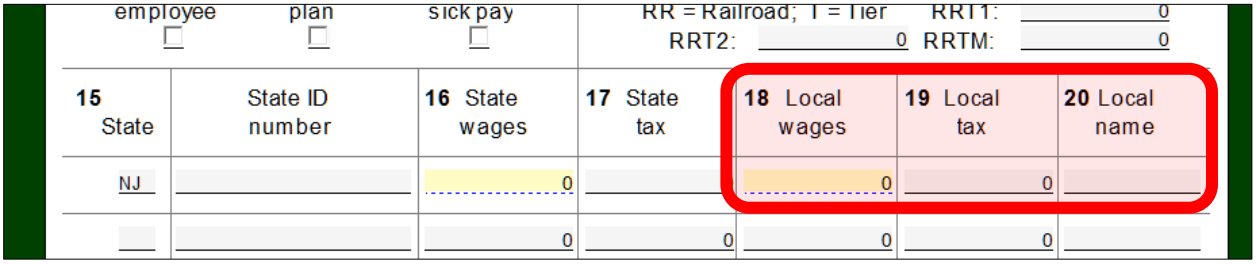
Note: By default, box 16 is calculated from box 1

If the calculated amount agrees with the paper W-2 then proceed;

If the calculated amount is not the same as the paper W-2 box 16 amount, then go back up and check the box next to "*Check to take calculations off of line 16, State wages*" and you will then be able to enter the correct amount from the paper W-2 box 16

Note: Don't forget to enter any amount from the paper W-2 box 17 (State tax) into the worksheet

W-2 Job Aid



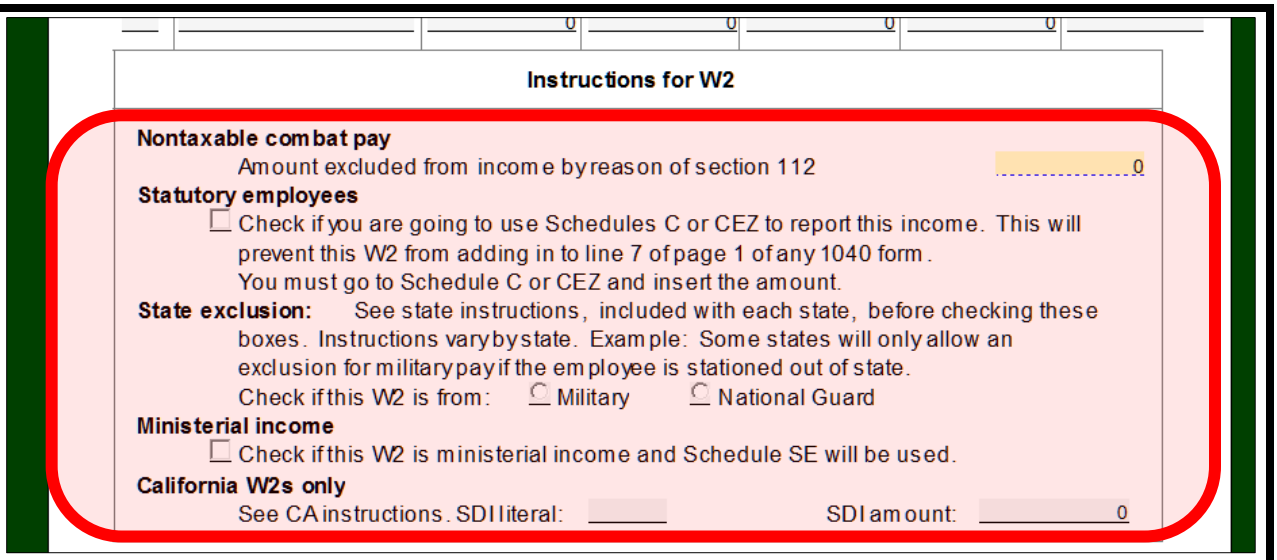
employee ☐ plan ☐ sick pay ☐ RR = Railroad; T = Tier RRT1: 0
RRT2: 0 RRTM: 0

15 State	State ID number	16 State wages	17 State tax	18 Local wages	19 Local tax	20 Local name
NJ		0		0	0	
		0	0	0	0	

Boxes 18, 19, and 20

Note: We should never see anything in these boxes in NJ

Note: If there is something in these boxes on the paper W-2, it may actually belong in box 14 – ask for help if you're not sure



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

Do nothing in this area - Out of Scope

W-2 Job Aid

Sample paper W-2: