

# Entering W-2 Data from a Paystub or Transcript in TaxSlayer

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The Tax Help Program will prepare a tax return using a last paystub an employee receives only under these circumstances:

- the tax return being prepared is for the current year;
- the taxpayer has been unable to obtain a reissued W-2 from the employer by March of the tax season; and
- the paystub includes Year-To-Date information about wages and withheld taxes.

For prior year returns and other circumstances, the taxpayer should request an IRS transcript to assist with return preparation. For more information about the Tax Help Program policy and suggested steps, see:

- [Haven't Received W-2 or 1099?](#)
- [How Can I Order A Transcript?](#) [client handout] [\[English\]](#) [\[Spanish\]](#)
- [Guide to Ordering a Transcript By Mail](#) [handout w/screenshots in Spanish]

## Entering W-2 Information from a Last Paystub

1. In TaxSlayer, navigate to the **Federal→Income→W-2** screen.
2. Select **This is a substitute W-2**. This will add Form 4852 to the return, which serves as a substitute for the W-2.

### W-2

CANCEL

- This is a standard W-2
- This is a corrected W-2
- This is a substitute W-2
- This is a railroad W-2

Control Number is not needed for e-filing

3. Using the paystub as your source, enter as much information as possible into the W-2 entry screen.
4. If any employer information is unknown, use this “placeholder” information:

**Company EIN:** 74-5555555

**Company name:** FC Dummy Corp.

**Company address:** 123 Main St., Austin, TX 78745

5. Complete the **Substitute W-2 Questions** if appropriate before clicking on **Continue**.

### Substitute W-2 Questions

How did you determine the amounts on the Substitute W-2?

Explain your efforts to obtain Form W-2.

**RETURN TYPE NOTE:** Returns prepared using the last paystub as a substitute W-2 cannot be e-filed and must be **PAPER** that is mailed to the IRS.

## Entering W-2 Information from a Transcript

If the taxpayer presents an IRS transcript in place of a missing W-2, the return can be prepared using information from the transcript. Whether the return can be e-filed will depend on these circumstances:

If...	And...	Then the Return Type will Be:
the IRS transcript is <b>redacted</b> and critical information like employer EIN is masked or hidden	the missing information can be retrieved from a <b>prior year tax return, tax documents, paystubs or any other documents</b>	<b>E-File</b>
	you can contact the company issuing the W-2 and <b>verify</b> the company name, EIN, and address	<b>E-File</b>
	you are <b>unable to verify</b> the missing EIN or other information	<b>Paper</b>
the IRS transcript is a <b>complete</b> (not redacted) wage and income transcript	it contains all information to complete W-2 entry in TaxSlayer	<b>E-File</b>

## Using a Redacted Transcript and UNKNOWN OR UNVERIFIED Employer EIN, Name or Address or State Wages Information

1. In TaxSlayer, navigate to the **Federal→Income→W-2** screen.
2. Do not select **This is a substitute W-2**.

**Note:** Entering data from a transcript, even if you are replacing redacted information with placeholder information, is **not** considered a Substitute W-2.

3. Using the transcript as your source, enter as much information as possible into the W-2 entry screen. For the missing or unverified employer information, use these “placeholder” entries:

**Company EIN:** 74-5555555

**Company name:** FC Dummy Corp.

**Company address:** 123 Main St., Austin, TX 78745

**RETURN TYPE NOTE:** Returns prepared using a redacted transcript and unknown employer information cannot be e-filed and must be **PAPER** that is mailed to the IRS.

## Using Any Transcript Type with VERIFIED Employer Information

In these cases, the W-2 information is entered as if the original Form W-2 was presented by the taxpayer.

1. In TaxSlayer, navigate to the **Federal→Income→W-2** screen.
2. Do **NOT** select **This is a Substitute W-2**.
3. Enter the W-2 information using the transcript and the verified employer information.

**RETURN TYPE NOTE:** Returns prepared using a transcript and verified employer information can be e-filed.