



We are very excited to announce that you can choose to give your employees the option to receive their W-2 electronically.

An electronic version of a W-2 creates some great benefits which include:

- **Early Delivery-** employees get their W-2 as soon as it's ready without having to wait for it to be processed, mailed and then delivered to them.
- **Safe & Secure-** there is less possibility of the W-2 getting lost, stolen, or misplaced. (*So, less calls asking for another copy*)
- **Anytime Access-** employees can view their W-2 from anywhere (home or work) 24/7 whenever they need it.
- **Tax Time Ready-** compensation and tax withholding information may be easily downloaded into many tax preparation software programs.
- **Automated Distribution-** W-2's are sent electronically, eliminating the need to get the paper version out to each employee.

So how do you get started?

Just send us an email or notify your payroll specialist that you would like us to turn on this option in your account. It's as easy as that.

We know that change is hard and that you and your employees are going to have some questions. Therefore, we put together this guide to help with that.

As always, if you have questions or need assistance with the process, do not hesitate to reach out to your payroll specialist or email us at payrollgroup@payservpayroll.com

Electronic Year-End Forms FAQ

As a default, when employees log in to Employee Self-Service (ESS) for the first time, they will be asked if they would like to opt-out of receiving paper W-2s. If they click “ACCEPT”, a paper W-2 will not be printed.

Instead, they will receive an automatic email in January of the following year, informing them that their W-2 is ready for download.

They can then login, view, and print at their convenience.

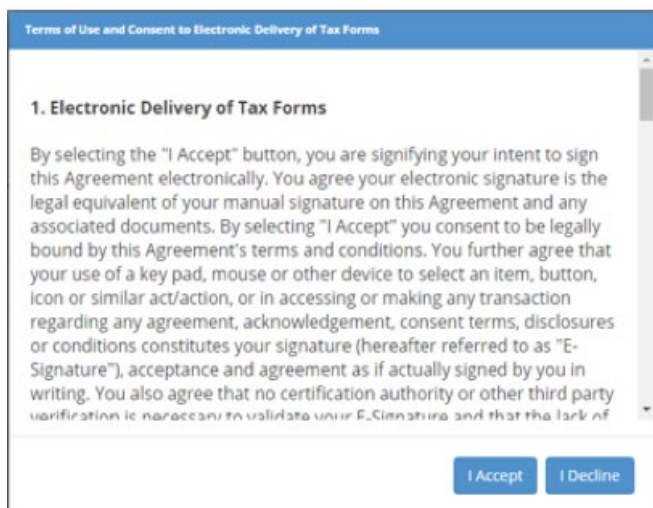
What do I need to do?

To ensure a smooth year-end season, let your employees know about this great feature ahead of time. This will answer all their questions and they won't be surprised when they don't get a paper W-2.

To help inform your staff, we have created a sample email you can send out now which has answers to any questions your employees might have.

[Sample Employee Letter - Electronic W-2](#)

What exactly do my employees need to do to opt out of receiving paper W-2s? The first time they log in to their ESS portal, the pop-up message below will immediately appear:



The screenshot shows a pop-up window titled "Terms of Use and Consent to Electronic Delivery of Tax Forms". The main heading is "1. Electronic Delivery of Tax Forms". The text explains that by clicking "I Accept", the user agrees to sign electronically and consent to be legally bound by the agreement's terms. It also states that using a key pad, mouse, or other device to select an item constitutes a signature. At the bottom, there are two buttons: "I Accept" and "I Decline".

Employees must respond to this to proceed to the portal. Once they click “ACCEPT”, their job is done, and they will no longer receive paper W-2s.

If my employees have trouble logging in, how can I help them?

[Employee Self-Service Login Troubleshooting](#)

Review this document linked above. Common issues are also addressed in the Sample Email in Question #1, so be sure to send that out to your staff.

My employee still can't login to get their W-2; where can I find a copy to give them?

If an employee who elected to receive their W-2 electronically simply cannot login to their ESS portal, you can provide them with a paper copy by going to *Employee Self-Service>W2/ACA/1099 Forms* and printing from there.

Where can I see the employees that are getting a paper W-2 versus an electronic W-2?

Reporting>Client Reports>Electronic Tax Form Delivery Status> (Select appropriate year)

This report shows all the employees who are getting a W-2 for the year selected. You will use Columns A, B, and C to determine who is getting paper versus electronic:

Column A – If a date is populated in Column A, the employee consented to receive only an electronic W-2. As long as that date is before the end of the year and column B & C are blank, that employee will receive only an electronic W-2. If there is no date populated in Column A, the employee will receive a paper W-2.

Column B – If a date is populated in Column B, it means the employee chose to receive a paper W-2.

Column C – If a date is populated in Column C, it either means they were terminated or specifically requested to withdraw their consent. They will receive a paper W-2.

If an employee who elected to receive their W-2 electronically decides they'd like a printed copy after all, the easiest way to provide them with one is by going to *Employee Self-Service>W2/ACA/1099 Forms* and printing from there.

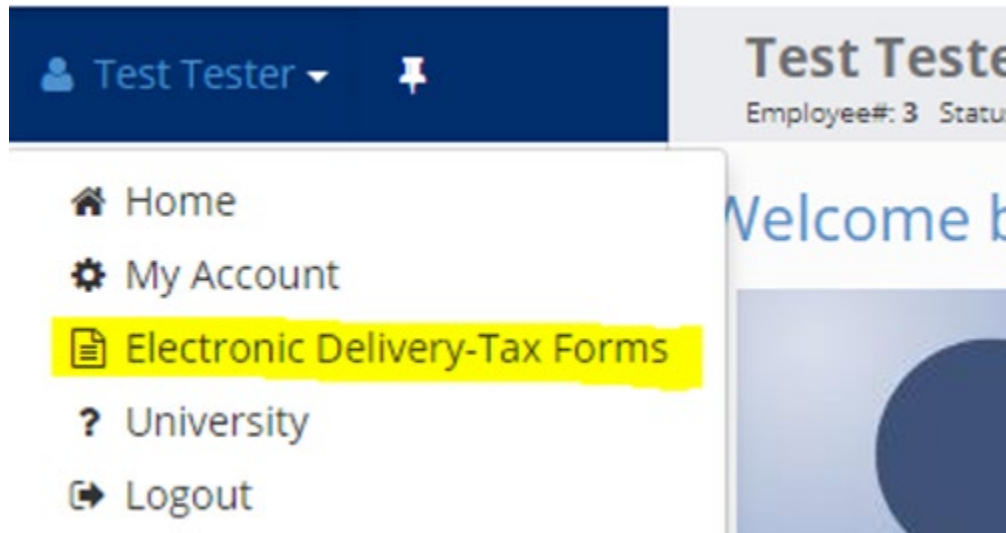
If you have multiple employees in this situation, you can advise them to download and print directly by logging into their iSolved portal. They will select *W2/ACA/1099 Forms* on the left-hand side to access their forms.

What if my employee doesn't see a message box when they login?

This means they must have already responded to the message. If they don't remember what they chose, check out the next question.

What if my employee doesn't remember if they Accepted or Declined?

They can double check by logging in to their employee portal, clicking on their name in the top left of the screen and choose *Electronic Consent/Electronic Delivery – Tax Forms*:



When employees click on *Electronic Delivery – Tax Forms*, they will see one of two messages:

1. If the employee originally clicked **Accept**, the system will tell you that “You have already agreed...” If the employee sees this message box they're all set up for electronic W2's:

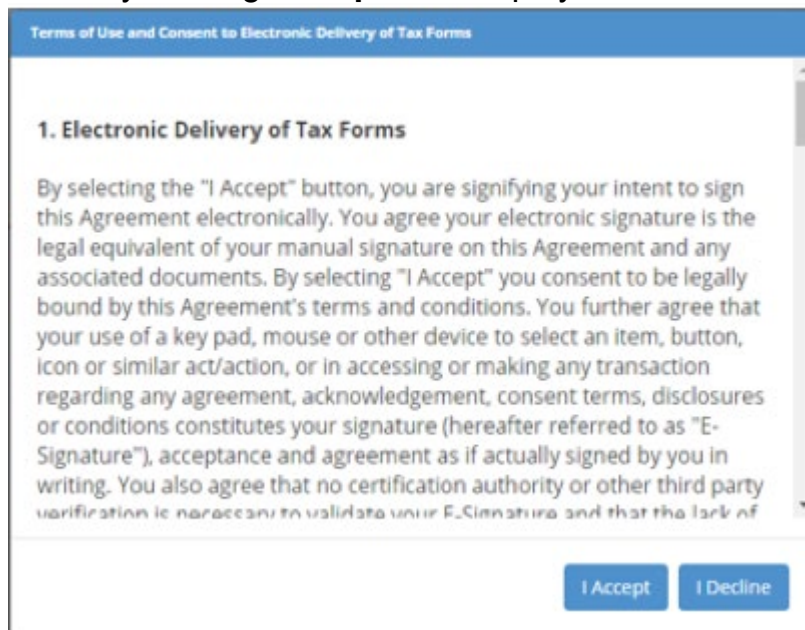
payserv.myisolved.com says

You have already agreed to the Terms of Use and Consent to Electronic Signature. A copy of your agreement is available in Employee Documents

OK

2. If the employee originally clicked Decline, the initial message box will appear again. The employee can then elect to **Accept** or **Decline**.

Note: by clicking **Accept**, the employee will receive an electronic W-2.



Terms of Use and Consent to Electronic Delivery of Tax Forms

1. Electronic Delivery of Tax Forms

By selecting the "I Accept" button, you are signifying your intent to sign this Agreement electronically. You agree your electronic signature is the legal equivalent of your manual signature on this Agreement and any associated documents. By selecting "I Accept" you consent to be legally bound by this Agreement's terms and conditions. You further agree that your use of a key pad, mouse or other device to select an item, button, icon or similar act/action, or in accessing or making any transaction regarding any agreement, acknowledgement, consent terms, disclosures or conditions constitutes your signature (hereafter referred to as "E-Signature"), acceptance and agreement as if actually signed by you in writing. You also agree that no certification authority or other third party verification is necessary to validate your E-Signature and that the lack of

I Accept I Decline

My employee originally Declined, but now they want to change their choice and receive an electronic W-2

Just like in the question above, if the employee logs in to their iSolved Employee Self-Service portal, they can click on "*Electronic Delivery-Tax Forms*" and the original message box will reappear. They can now choose to **Accept**.

My employee originally Accepted, but now they want to decline and receive a paper W-2

In this case, the payroll admin will need to get involved and withdraw the original consent. To do that, go into *Employee Maintenance>General*, and enter a date in the "*YE Consent Withdrawn*" field.

What happens if my employee opts out after the last payroll of the year has been run?

The employee will receive a paper W-2 this year. This setting will take effect the following year

Does this apply to Terminated employees? What about Inactive employees?

Once an employee is marked "Terminated" in the system, they will automatically receive a paper W-2 (even if they had previously granted consent). However, employees marked as "Inactive" can still consent to electronic only.

Do my employees need to Accept to this consent every year?

No, this setting will save for future years.

Which specific forms does this apply to?

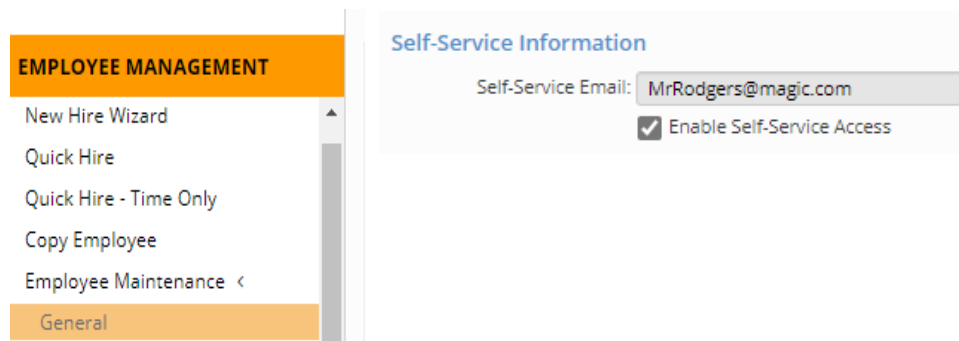
This applies to all year end forms: W-2s, 1099s, and 1095 ACA Forms.

I'm not ready for all this. I just want all my employees to receive paper W-2's.

That's fine! Just send us an email at payrollgroup@payservpayroll.com and we'll take care of the rest.

How do I ensure that my employees are set up with Employee Self Service and can login?

1. If you are not sure if you signed up for ESS, reach out to your payroll specialist, sales consultant or email us at payrollgroup@payservpayroll.com to see how you can sign your company up for the service.
2. If you are already signed up for the service, make sure a valid email address is populated in the Self-Service Information section of the Employee Maintenance/General screen. And make sure the Enable Self Service Access box is checked.



3. View an ESS status summary for all employees by going to *Employee Management>Employee Management Tools>Self Service Management*. Check the appropriate boxes to enable, unlock, and resend activation emails. Remember, don't worry about the Terminated Employee Counts as they will automatically receive paper W-2s.

ESS ACTIVE EMPLOYEE COUNTS (INCLUDES INACTIVE)

Total Active Employees not enabled for ESS service: 0

Active Employees without self service email: 0

Active Employees with self service email: 0 Enable and Email

Imported Employees or Enabled Employees not yet authorized: 2 Send/Resend Email

Active ESS Accounts Disabled Due to Non-Usage: 0 Resend Email

Active ESS Employee accounts locked: 0 Unlock

Total Active ESS accounts: 2

What if my employees do not use ESS?

If you have not already signed up for the service reach out to your sales consultant or payroll specialist to get more information. If your employee has a valid email address, they can use Employee Self Service. To get a list of employees who do not use ESS or do not have ESS enabled, refer to same Self-Service Management screen from above. Once you have obtained their email addresses, enter them in the Self-Service Information section of the Employee Maintenance/General screen and check the Enable Self Service Access box. Once you hit Save, an activation email will be sent to the employee.

ESS ACTIVE EMPLOYEE COUNTS (INCLUDES INACTIVE)

Total Active Employees not enabled for ESS service: 20

Active Employees without self service email: 20

If you need assistance troubleshooting ESS login. This document can help:

[Employee Self-Service Login Troubleshooting](#)