

Utilizing Electronic W-2s

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Electronic W-2 Overview

During year end processes, you can offer to make an employee's W-2 available electronically via WebCenter™. Employees who opt in will be able to see their W-2 as soon as it becomes available and download or print as many copies as they need. They will continue to have access to old W-2s as long as they have a log in with you.

Some Benefits of Electronic W-2s:

- Can give employee's access to W-2 faster than mail.
- Easy to find and reprint or download if they lose a copy.
- Don't have to worry about updating their address to ensure W-2 goes to the correct place.
- Easy to find W-2 in WebCenter where the employee can log in to enter time, see paystubs, and more!

Currently the IRS requires employee's consent to file their W-2 electronically. We have two ways of doing this in our system.

Opting in Via WebCenter

Employees can opt in or out from WebCenter at any time once they are given access to their WebCenter portal.

In order for this option to be available for employees, you must make sure to have the config in WebCenter set to True:

1. In WebCenter admin, navigate to the Config tab.
2. Select the Employee category.
3. Find the rule for Show W-2 Link:

Show W-2 Links

Allows an employee to manage their W-2 options

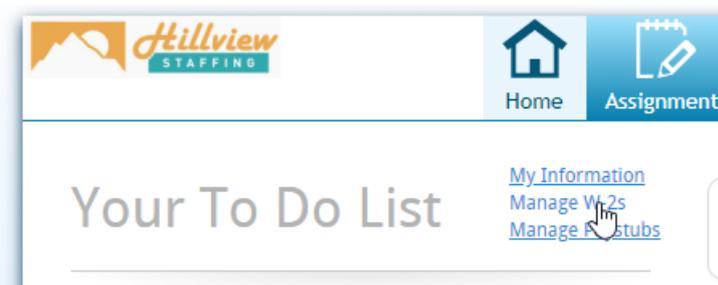
Default: true

Show Rules (4) ▶

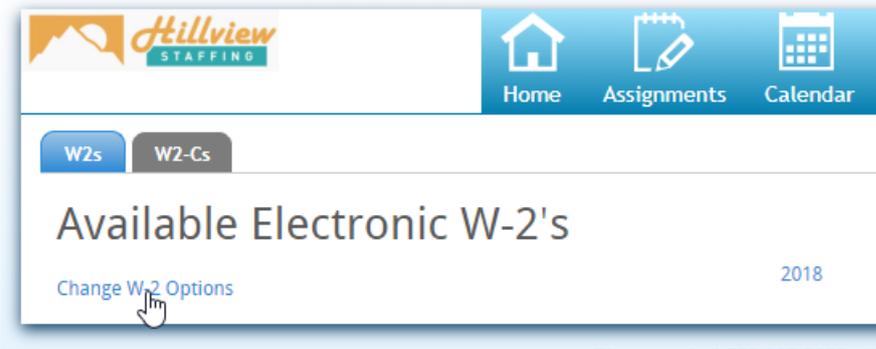
You can create rules to restrict W-2 options if some employee's must receive a paper copy only. By default the rule should be set to true allowing employees to manage their W-2 options.

To Manage W-2s in WebCenter:

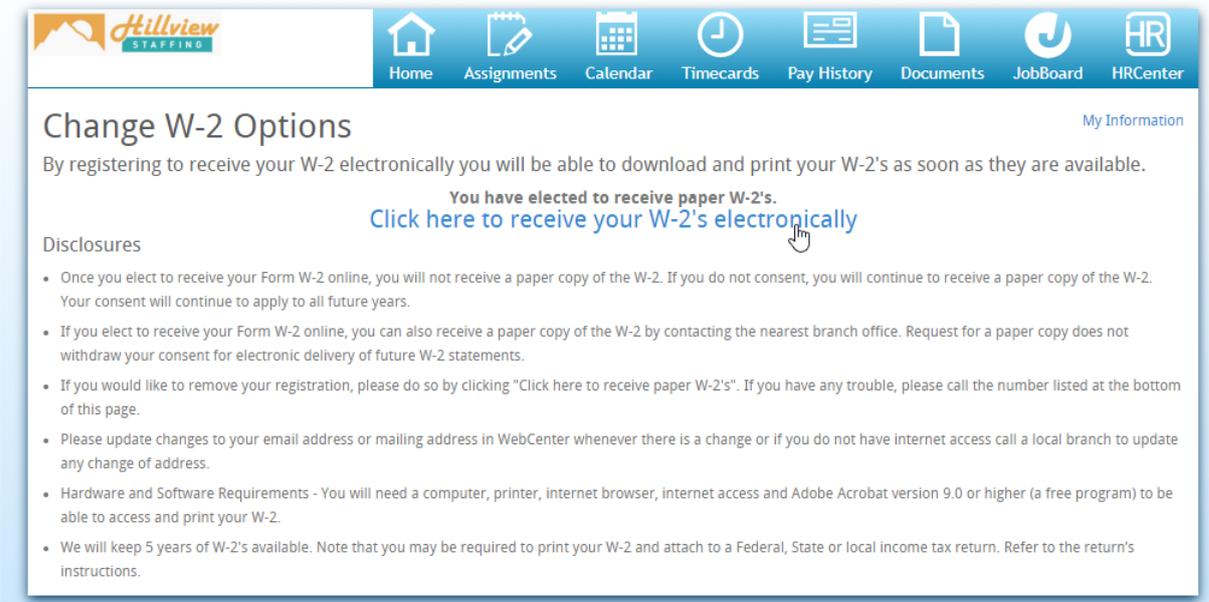
1. From the employee home page, select Manage W-2s



2. Here they will see each years W-2 if they have opted-in - Click change W-2 option to change status



3. Click the blue receive your W-2s electronically to agree to the disclosures and receive an electronic W-2



Opting in Via HRCenter™

This is a great option if you are utilizing HRCenter for your onboarding documents.

HRCenter has a standard Survey page titled: **Electronic W-2 Enrollment - Default**

This page can be assigned individually or added to an existing Workflow for employees to fill out.

Disclosures

INFO

By registering to receive your W-2 electronically you will be able to download and print your W-2's as soon as they are available.

INFO

If you elect to receive your Form W-2 online, you can also receive a paper copy of the W-2 by contacting the nearest branch office. Request for a paper copy does not withdraw your consent for electronic delivery of future W-2 statements.

INFO

If you would like to remove your registration, please do so by clicking "Click here to receive paper W-2's" in the Change W-2 Options under Pay History in Web Center. If you have any trouble, please call the nearest branch office.

INFO

Please update changes to your email address or mailing address in WebCenter whenever there is a change or if you do not have internet access call a local branch to update any change of address.

INFO

Hardware and Software Requirements - You will need a computer, printer, internet browser, internet access and Adobe Acrobat version 9.0 or higher (a free program) to be able to access and print your W-2.

INFO

We will keep 5 years of W-2's available. Note that you may be required to print your W-2 and attach to a Federal, State or local income tax return. Refer to the return's instructions.

#1

I have read the above disclosures and WOULD like to receive my W-2 electronically.

REQUIRED

Yes

No

If an employee selects "Yes" and submits the page or workflow, they will receive an Electronic W-2. Keep in mind, their confirmation status can be changed in WebCenter later or if you reassign this page.

Reviewing Employee's Electronic W-2 Status

Want to make sure your employees are ready for their W-2s before year end? You can review their Opt-in/out status by running the Electronic W2 Report in Enterprise™ or Beyond™.

You'll need to select the year and decide if you want to see who is enrolled, revoked, or has not taken any action yet.

Uncheck the Hide Email option to show emails for all the employees.

Year* 2018 Status Enrolled in Electronic W2 Hide Email*

VIEW REPORT

Electronic W2

High Tech Staffing

Displays employees who have Enrolled in Electronic W2

Entity Level (HierId 2)



Emp. ID	Last Name	First Name	Enrolled On
5759	Aardson	Steve	5/21/2014
4295003612	Allan	Dean	11/16/2016
4295015070	Amett	Julie	9/17/2019
4295003726	Austen	Kate	9/24/2018
4295014375	Bellamy	Davin	12/5/2014
4295004010	Berston	Nora	6/12/2018
4295049034	Boxes	Bryan	2/5/2019
4295014315	Falcon	Maltese	9/9/2014

To Find the Report in Beyond:

1. Navigate to the  menu in the upper left
2. Select Reports
3. Type in Electronic W2 in the Report Name search field
4. Click on the All Reports tab option

Reports

Report Group Report Name Or Description RESET

▼ Electronic W2

FAVORITES ALL REPORTS

SHOWING 1 OF 1



Electronic W2

Tax Administration

Displays a list of employees who have opted in for electronic W2's, who have opted out and who have not had taken any action. Shows employee's email as well.

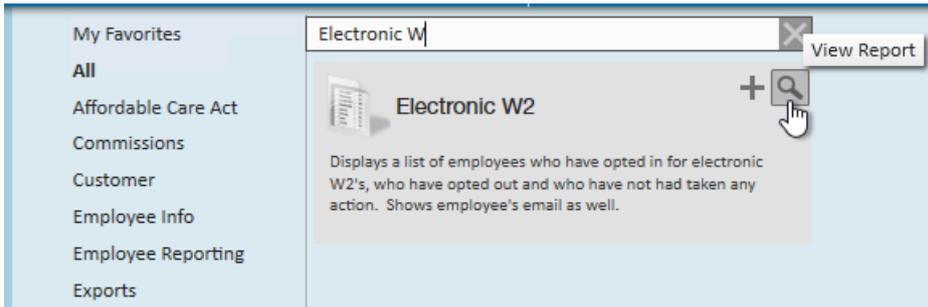
☆

To Find the Report in Enterprise:

1. Navigate to All Options > Reports



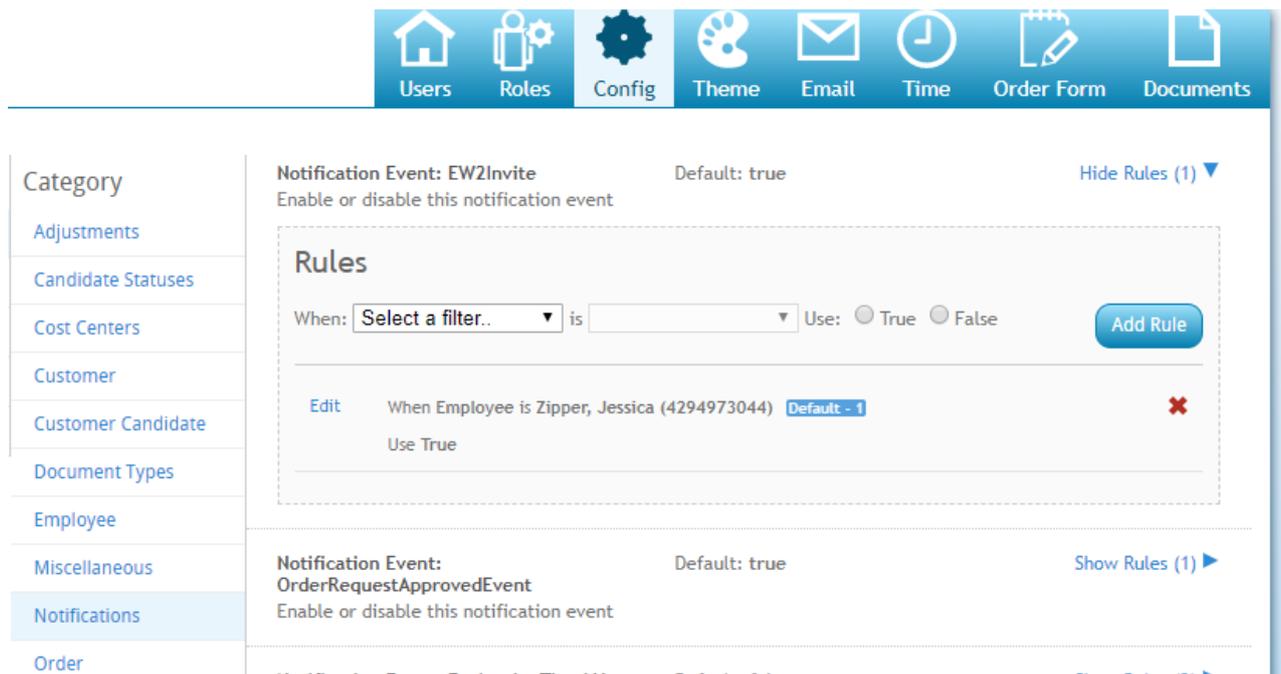
2. Click on the "All" category option on the left
3. Search for Electronic W2 in the search bar
4. Click the Magnifying Glass icon next to the report to run it



WebCenter Electronic W-2 Notifications

In WebCenter there is a notification configuration for Electronic W-2 Invites. This option will send out a mass notification to a select group of employees to notify them that they can electronically receive their W-2s by navigating to WebCenter.

In order to utilize this option, you will need to work with our support team to determine who you want to receive the notification and when.



There is also a notification event option for when W-2 has been posted. Check out [WebCenter Admin - Setting Up](#)

Notifications for more information.

Notification Event: W2Posted Default: true Hide Rules (0) ▼
Enable or disable this notification event

Rules

When: is Use: True False Add Rule

Searching for Electronic W-2 Enrollment in Beyond

The "Electronic W-2 Enrollment" field has been added within the searchable fields within Beyond.

Example 1:

The following example will show you active employee records within your system that have not made a selection for electronic W-2 enrollment:

☰ Click to select a saved search...

NOT AND OR

☰ > Is Active Show in results

NOT AND OR

☰ > Electronic W-2 Enrollment

+ RULE / GROUP

+ RULE / GROUP

SAVE...

Example 2:

The following search example will provide you the employees that have a US income tax juris with Year-to-Date taxable > 0 (meaning they had wages this year) and they either opted out of electronic W-2s or haven't yet made a selection:

NOT **AND** OR

> Tax Juris STARTS WITH US

> Taxable Amount IS GREATER THAN 0

NOT AND **OR**

> Electronic W-2 Enrollment IS FALSE

> Electronic W-2 Enrollment HAS NO VALUE

+ RULE / GROUP

Once the search has been completed, select all of the employees from the results, and, from the drop down of "# Selected Employees", you can assign ad-hoc pages and then select the Electronic W-2 Survey to assign:

Search returned 252 results
 Electronic W-2 Enrollment, Tax Juris, Taxable Amount

20 selected employees Select all 252 results?

<input checked="" type="checkbox"/>	Employee Id	Last Name ↑	First Name ↑	Branch	Ph
<input checked="" type="checkbox"/>	5339	This 8d is a te'st-n&ot--su	This 8d is a te'st-n&ot--su	High Tech SE	(65
<input checked="" type="checkbox"/>	4296211411	--- 40350 --- sdvf	--- 40350 ---23	TworksQAHR_Staff	
<input checked="" type="checkbox"/>	4296211410	-- 40596 --	-- 40596 --	TworksQAHR_Staff	
<input checked="" type="checkbox"/>	4296211745	--- 40704 ---	--- 40704 ---	TworksQAHR_Staff	
<input checked="" type="checkbox"/>	4296211413	--- 40725 ---	--- 40725 ---	TworksQAHR_Staff	
<input checked="" type="checkbox"/>	4296211471	--- 40924 ---	--- 40924 ---	TworksQAHR_Staff	
<input checked="" type="checkbox"/>	4296211468	--- 40932 ---	--- 40932 ---	TworksQAHR_Staff	

Assign Onboarding Pages Ad Hoc



Select a tenant



Choose Pages



Assign

Choose pages to assign to the 20 selected employees. These pages will be separate from any previously-assigned workflows.

* Language

English



Show all



elec



1 SELECTED PAGE



Electronic W-2 Enrollment

Survey Blocks

Related Articles
