Utilizing Electronic W-2s

Last Modified on 10/03/2023 2:31 pm CDT

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	Default: true	Show Rules (4) 🕨
Allows an employee to manage their W-2		
options		

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

STAFFING	Home	Assignments	Calendar	J Timecards	Pay History	Documents	JobBoard	HR HRCenter
Change W-2 Options							M	y Information
By registering to receive your W-2 elec	tronically	you will be a	ble to dowr	load and pri	nt your W-2's	s as soon as t	hey are avai	ilable.
	Click bo	You have elect	ed to receiv	e paper W-2's	onically			
Disclosures	CIICK HE	re to receiv	le your w	-2 S electi				
 Once you elect to receive your Form W-2 online, Your consent will continue to apply to all future 	you will not years.	receive a paper co	opy of the W-2.	If you do not cor	nsent, you will cor	ntinue to receive a	a paper copy of	the W-2.
 If you elect to receive your Form W-2 online, you withdraw your consent for electronic delivery of 	u can also re future W-2	ceive a paper copy statements.	of the W-2 by	contacting the ne	earest branch offi	ce. Request for a	paper copy doe	es not
 If you would like to remove your registration, ploof this page. 	ease do so b	y clicking "Click he	re to receive pa	aper W-2's". If yo	u have any troubl	e, please call the	number listed a	at the bottom
 Please update changes to your email address or any change of address. 	mailing add	ress in WebCenter	whenever the	re is a change or	if you do not hav	e internet access (call a local bran	ich to update
 Hardware and Software Requirements - You will able to access and print your W-2. 	need a com	puter, printer, inte	ernet browser, i	nternet access a	nd Adobe Acroba	t version 9.0 or hi	gher (a free pro	ogram) to be
 We will keep 5 years of W-2's available. Note tha instructions. 	t you may b	e required to print	your W-2 and	attach to a Feder	al, State or local i	ncome tax return	. Refer to the re	eturn's

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.

Previou	S Page 1 of 2 Save and Continue
Disc	losures
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	O Yes
	O 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.

ar* 118		Status Enrol	lled in Electro	onic W2	Ţ	~	Hide	Email*
∢	<	PAGE 1 OF 1	>	M		ē	Ŧ	VIEW REPORT
Electron High Tech S Displays emplo	ic W2 taffing oyees who have	Enrolled in Electronic W2		Entity Level	(Hierld 2)	Þ	tem	
Electron High Tech S Displays emplo	ic W2 taffing yyees who have Last Name	Enrolled in Electronic W2 First Name	Enrolled On	Entity Level	(Hierld 2)	Þ	tem	Pworks
Electron High Tech S Displays emplo Emp. ID 5759	ic W2 taffing oyees who have Last Name Aardson	Enrolled in Electronic W2 First Name Steve	Enrolled On 5/21/2014	Entity Level	(Hierld 2)	¢	tem	Pworks
Electron High Tech S Displays emplo Emp. ID 5759 4295003612	ic W2 taffing oyees who have Last Name Aardson Allan	Enrolled in Electronic W2 First Name Steve Dean	Enrolled On 5/21/2014 11/16/2016	Entity Level	(Hierld 2)	Þ	tem	Pworks
Electron High Tech S Displays emplo Emp. ID 5759 4295003612 4295015070	ic W2 taffing oyees who have Last Name Aardson Allan Arnett	Enrolled in Electronic W2 First Name Steve Dean Julie	Enrolled On 5/21/2014 11/16/2016 9/17/2019	Entity Level	(Hierld 2)	¢	tem	Pworks
Electron High Tech S Displays emplo 5759 4295003612 4295015070 4295003726	ic W2 taffing wyees who have Last Name Aardson Allan Arnett Austen	Enrolled in Electronic W2 First Name Steve Dean Julie Kate	Enrolled On 5/21/2014 11/16/2016 9/17/2019 9/24/2018	Entity Level	(Hierld 2)	¢	tem	PWORKS
Electron High Tech S Displays emplo 5759 4295003612 4295015070 4295003726 4295014375	ic W2 taffing wees who have Last Name Aardson Allan Arnett Austen Bellamy	Enrolled in Electronic W2 First Name Steve Dean Julie Kate Davin	Enrolled On 5/21/2014 11/16/2016 9/17/2019 9/24/2018 12/5/2014	Entity Level	(Hierld 2)	¢\$	tem	Pworks
Electron High Tech S Displays emplo Emp. ID 5759 4295003612 4295015070 4295003726 4295014375 4295004010	ic W2 taffing wees who have Last Name Aardson Allan Arnett Austen Bellamy Berston	Enrolled in Electronic W2 First Name Steve Dean Julie Kate Davin Nora	Enrolled On 5/21/2014 11/16/2016 9/17/2019 9/24/2018 12/5/2014 6/12/2018	Entity Level	(Hierld 2)	¢¢	tem	PWORKS
Electron High Tech S Displays emplo Emp. ID 5759 4295003612 4295015070 4295003726 42950014375 4295004010 42950049034	ic W2 taffing wees who have Last Name Aardson Allan Arnett Austen Bellamy Berston Boxes	Enrolled in Electronic W2 First Name Steve Dean Julie Kate Davin Nora Bryan	Enrolled On 5/21/2014 11/16/2016 9/17/2019 9/24/2018 12/5/2014 6/12/2018 2/5/2019	Entity Level	(Hierld 2)	₽\$¢	tem	PWORKS

To Find the Report in Beyond:

1. Navigate to the **B** 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 Electronic W	RESET	
	FAVORITES	ALL REPORTS		
SHOWING	1 OF 1			
Ð	Electronic W2 Tax Administration Displays a list of employees who have o have not had taken any action. Shows e	pted in for electronic W2's, who have opted out a mployee's email as well.	nd who 🛣	

To Find the Report in Enterprise:

1. Navigate to All Options > Reports

assignment	paycards rate sheet
contact	reports
contact	resume parser
pay / bill	task manager
calendar	vendors
	webvisit
all options •	worker comp

- 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.

	Users Roles Config Theme Email Time Order Form Documents
Category Adjustments	Notification Event: EW2Invite Default: true Hide Rules (1) ▼ Enable or disable this notification event
Candidate Statuses	Rules
Cost Centers	When: Select a filter Vis Use: True False Add Rule Add Rule
Customer	
Customer Candidate	Edit When Employee is Zipper, Jessica (4294973044) Default - 1
Document Types	
Employee	
Miscellaneous	Notification Event: Default: true Show Rules (1) > OrderRequestApprovedEvent
Notifications	Enable or disable this notification event
Order	

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

Notifications for more information.

ct a filter	is	Ŧ	Use: 🔘 True	🔍 False	Add Rule
	ct a filter •	ct a filter ▼ is	ct a filter ▼ is ▼	ct a filter 🔻 is 🔹 Vse: O True	ct a filter ▼ is ▼ Use: ○ True ○ False

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:

E Click to select a saved search		
Is Active	~	IS TRUE V Show in results
NOT AND OR		
Electronic W-2 Enrollment		HAS A VALUE V
T + RULE / GROUP		
T 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 VUS
 = 	> Taxable Am	ount 🗸	IS GREATER THAN - 0
		OR	
_		tronic W-2 Enrollment	IS FALSE -
		tronic W-2 Enrollment	HAS NO VALUE -
	I + RULE / GRC	DUP	

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 Electron	Search returned 252 results Electronic W-2 Enrollment, Tax Juris, Taxable Amount							
20 sel	ellied employees 🗸	Select all 252 results?						
	Employee Id	Last Name 个	First Name 个	Branch	Ph			
	5339	This 8d is a te'st-n&otsu	This 8d is a te'st-n&otsu	High Tech SE	(65			
	4296211411	40350 sdvf	4035023	TworksQAHr_Staff				
	4296211410	40596	40596	TworksQAHr_Staff				
	4296211745	40704	40704	TworksQAHr_Staff				
	4296211413	40725	40725	TworksQAHr_Staff				
	4296211471	40924	40924	TworksQAHr_Staff				
	4296211468	40932	40932	TworksQAHr_Staff				

Assign Onboarding Pages Ad Hoc

 Select a tenant
 2
 Choose Pages

3 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 SELECTE	ED PAGE		
Selectronic W-2 Enrollment			Survey Blocks

Related Articles