

## Introduction

Employers can offer their employees the choice of either paper or electronic Year-end forms. The advantages of electronic Year-end forms are:

- Fewer W-2s to distribute
- The Electronic consent is for all Year-end forms, including W-2s, 1099s and ACA forms
- No paper form(s) will be sent for the employees who accept the Terms of Use and Consent of Electronic Delivery of Year-end Tax Forms.
- Automated email to alert the employee when the electronic tax form is available
- Automated consent withdrawn date will populate for any employees terminated in isolved prior to or with the last payroll of the year and will receive a printed W2 for that tax year
- Terminated employees who Accept the Terms of Use and Consent of Electronic Delivery of Year End Forms in Employee Self-Service after their termination will not receive a printed W2

Due to IRS guidelines, the employee will need to sign an electronic consent.

### **Employee Self-Service**

Upon initial Employee Self-Service login (after your Service Bureau turns on the Year-end Tax Forms Electronic Signature Consent), all employees will be presented with the following "Terms of Use and Consent of Electronic Delivery of Year-end Tax Forms."

Terms of Use and Consent to Electronic Delivery of Tax Forms	
1. Electronic Delivery of Tax Forms	
By selecting "I accept", you are signifying your intent to sign the Terms of Use and Consent to Electronic Delivery of Tax Forms electronically (hereinafter referred to as "Consent"). You agree your electronic signature is the legal equivalent of your manual signature on this Consent and any associated documents. By selecting "I accept", you consent to be legally bound by this Consent's terms and conditions. You further agree that your use of a keypad, mouse or other device to select an item, button, icon or similar act/action, or in accessing or making any transaction regarding any agreement, acknowledgment 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 such certification or third party verification will not in any way affect the enforceability of your E-Signature or any resulting contract between you and Ski Connect Training (hereafter referred to as "Company".)	c u t, n re
Under this Consent, Company will provide all year end tax forms including but not limited to W-2s, 1095s, and 1099s to you in an electronic format. If you do not grant consent, you will receive all applicable year end tax forms in paper format. Acceptance of electronic delivery is applicable for year end tax forms issued after the date of acceptance and every year thereafter unless consent is subsequently withdrawn.	ar
2. System Requirements	
To access and retain the electronic delivery of tax forms, you will need the following:	
<ul> <li>A computer or mobile device with internet or mobile connectivity;</li> <li>For website-based communications, a current web browser. Minimum recommended browser standards are Microsoft Edge current version (see microsoft.com/en-us/edge for current version), Mozillia Firefox current version (see mozilla.com for current version), Apple Safari current version (see apple.com/safari for current version), or Google Chrome current version (see google.com/chrome for current version);</li> </ul>	a or
Subn	mit

At the bottom of the Terms and Conditions, employees are able to choose from the following options:

 I Accept: If accepted, a PDF copy of this acceptance titled "Electronic Delivery – Tax Forms – Accepted" will be available under Employee Documents.

If accepted, no Year-end forms will be printed but will be available under the **W2/ACA/1099 Forms** section of Employee Self-Service. The employee will receive an email when they are available for viewing/printing.

# -solved

#### Help Docs

#### Year-end Electronic Tax Form Consent

• I Decline: If selected, the employee will receive the following pop-up:

# Confirm You have chosen to decline the Terms of Use and Consent to Electronic Signature. By selecting OK, your choice to decline will be confirmed and you acknowledge that employment documents, enrollments, and other notices will not be available for electronic signature. By selecting Cancel, you will be given the opportunity to view and accept or decline the Terms of Use and Electronic Consent again. Ok Cancel

- If the employee clicks **Cancel**, they will be taken to the "Electronic Delivery of Communication and Use of Electronic Signatures" to accept.
- If the employee clicks on **OK**, a PDF copy of the decline titled "Electronic Delivery Tax Forms Declined" will be available under **Employee Documents**.
- If declined, a paper copy of all Year-end forms will be sent to the employer and will also be available under W2/ACA /1099 Forms in Employee Self-Service. However, the employee will not receive an email when it is available.

If an employee changes their mind after their initial decline, or if they had withdrawn their acceptance, they are able to change their decision by clicking on the arrow next to their name in **Employee Self-Service**.

1	🔓 Home
	🛆 Change Employee or User
;	鉸 My Account
	🛆 User Preferences
	Electronic Consent
	Electronic Delivery-Tax Forms
	🟦 University
	Terms and Conditions
	[→ Logout

Once they click on **Electronic Delivery – Tax Forms**, the pop-up with the "Terms of Use and Consent to Electronic Delivery of Year-end Forms" will appear again. The employee can then click on **I Accept**.

If they click on Electronic Delivery – Tax Forms once they have accepted the Electronic Delivery of Tax Forms, a pop up will appear indicating they have already accepted.

You have already agreed to the Terms of Use and Consent to Electronic Delivery of Year End Tax Forms. A copy of your agreemen available in Employee Documents	ıt is
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Help Docs

#### **General Screen**

Once "Electronic Consent" and "Electronic Consent for Tax Forms" are activated by your Service Bureau, a menu item titled **Electronic Consent** will appear on the employee's **General** Screen. Navigate to **Employee Management > Employee Maintenance > General**.

Electronic Consent	
Electronic Consent Date:	4/22/2025 3:55:47 PM
Consent Withdrawn:	
YE Delivery Consent Date:	4/22/2025 4:00:07 PM
YE Consent Withdrawn:	

If the employee changes their mind after consenting and wants to withdraw this election, they must notify their employer in writing, per the agreement they signed.

#### 4. Withdrawal of Consent to Electronic Delivery

You may withdraw your consent to receive electronic delivery of year end tax forms at any time, by submitting a request in writing to the Company Address. Any withdrawal of your consent will be effective after a reasonable period of time for processing your request and confirmed by Company in writing or via email. Withdrawal does not apply to previously issued year end tax forms.

The employer will enter the date under **YE Consent Withdrawn** on the **General** screen for the employee. This will stop any future electronic W2, ACA and 1099 Year-end forms.

#### **Email Notification**

Any employees that have accepted electronic Year-end forms consent will receive an email when the forms are available. Please check with your Service Bureau for the availability date.

The employer may use the system defaulted email for notification. Here is an example:



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Help Docs

#### Year-end Electronic Tax Form Consent

The employer may also create an Email Template in their own wording to be sent to employees who have accepted electronic delivery when the Year-end forms are available. Use the following instructions to customize the email:

- 1. Navigate to **Client Management > Workflow Setup > Client Email Templates** and enter the following.
- 2. Email Subject Line: Must read "IMPORTANT TAX DOCUMENT AVAILABLE" (in all caps).
- 3. **Email Text:** The employer can customize, but should contain information on how to access and print Year-end tax documents. Refer to the email Text Placeholders.
- 4. Email Type: Select "YE Tax Form Notification."

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Normal text	Corrective Actions	$\diamond$	"												
	Employee Messages														
	Employee Notices														
	Employee Self Service Activation														
	Mass Email														
	Paystub Alerts														
	Performance Reviews														
	Qualifying Life Events														
	Workflow														
	YE Tax Form Notification														

Employee Year-end forms will appear in Employee Self-Service under **W2/ACA/1099 Forms**. The employee will be able to view or print the Year-end form by clicking on "View Document." They are also able to see instructions by clicking on "View Instructions."

W2/ACA/1099 Forms [isolved University]													
+ Add a	+ Add a New Document												
¢ Tax Ye	Document Description	Document Type	Document Name	View Document	Edit	Delete							
2023	W-2	YE Tax Form	2023 W-2.pdf	View Document									

## **Year-end Report Archive**

An employer can navigate to **Reporting > Year-end Report Archive** to see copies of their employees' Year-end forms. Employees that are not receiving a printed W-2 will not appear in the "W-2 Pressure Sealed" report in the **Year-end Report Archive**. The employer will only see W-2s for the employees receiving printed W-2s.

The employer "W-2 Copy D" will include all W-2s. However, for those employees that have consented to electronic delivery, the W-2 copy will have a watermark identifying it as an ESS (Employee Self-Service) copy.

The ACA form for those employees that have consented to electronic delivery will also have a watermark that will appear in the upper left corner.