

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- Automated consent withdrawn date will populate for any employees terminated in iSolved prior to or with the last payroll of the year and will receive a printed W2 for that tax year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 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 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 Sheila's Benefits

I Accept I Decline

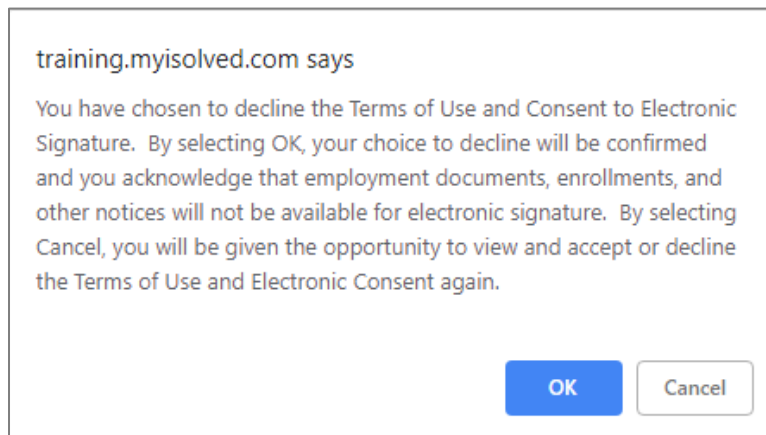
The window will open as a pop-up, allowing your employees the following options:

- **I Accept:** If accepted, a PDF copy of this acceptance titled “Electronic Delivery – TaxForms – 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.

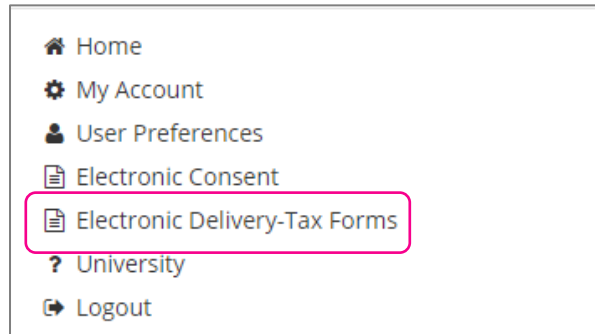
Documents					
Document Type: All Upload Date: []					
Document Type	Document Description	Document Name	Document Upload Date	View Document	
Electronic Consent	Accepted	ElectronicSignatureConsent.pdf	5/24/2021	View Document	
Electronic Delivery	Accepted	ElectronicTaxFormDeliveryConsent.pdf	5/24/2021	View Document	

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



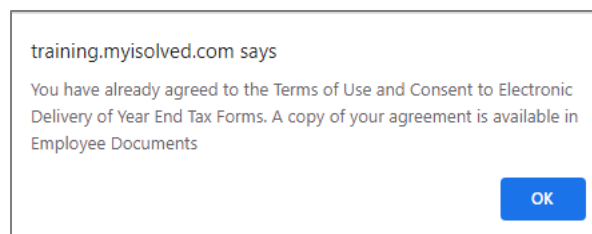
- If the employee clicks **Cancel**, they will be taken to the “Electronic Delivery of Communication and Use of Electronic Signatures” to accept.
- If the employee clicks on **OK**, a PDF copy of the decline titled “Electronic Delivery – TaxForms – Declined” will be available under **Employee Documents**.
- 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**.



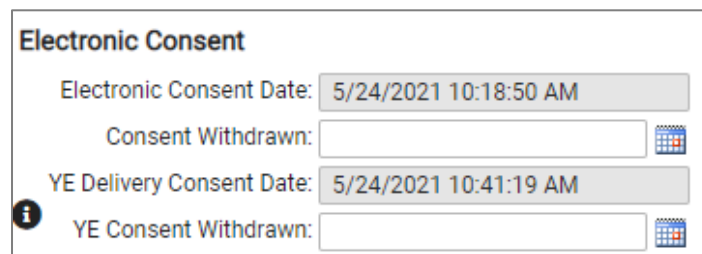
Once they click on **Electronic Delivery – Tax Forms**, the pop-up with the “Terms of Use and Consent to Electronic Delivery of Year-End Forms” will appear again. The employee can then click on **I Accept**.

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.



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**.



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

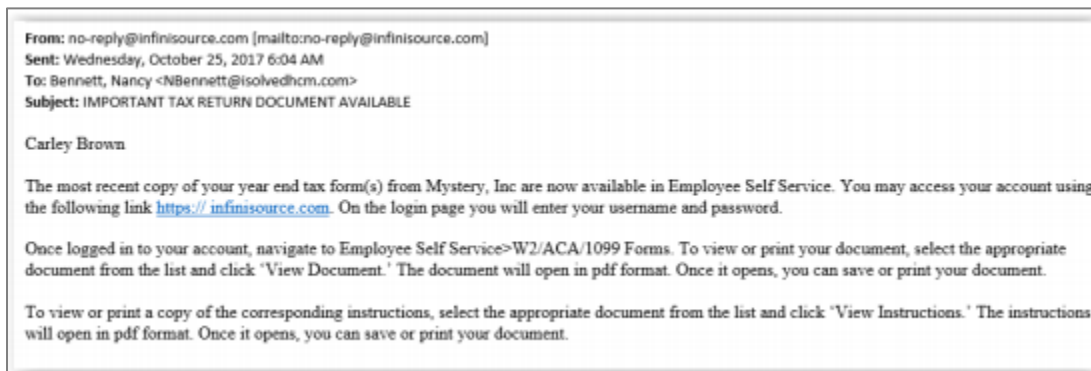
You may withdraw your consent to receive electronic delivery of year end tax forms at any time, by submitting a request in writing to the Company Address. Any withdrawal of your consent will be effective after a reasonable period of time for processing your request and confirmed by Company in writing 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

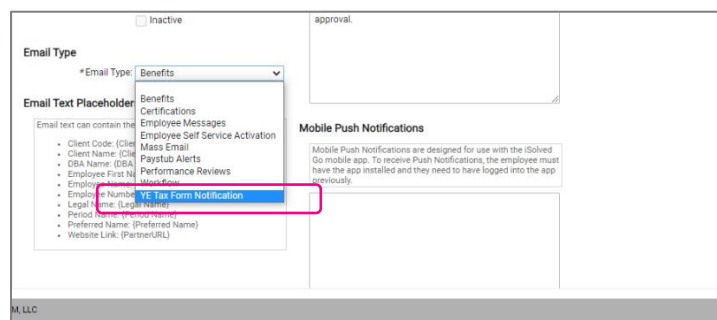
Any employees that have accepted electronic Year-End forms consent will receive an email when the forms are available. Please check with your Service Bureau for the availability date.

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



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 > 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."



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."

☞ Tax Year	☞ Document Description	☞ Document Type	☞ Document Name	View Document	View Instructions
2017	W-2	YE Tax Form	2017 W-2.pdf	View Document	View Instructions
2017	ACA-1095	YE Tax Form	2017 1095.pdf	View Document	View Instructions

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.

Void <input type="checkbox"/>		Employer's social security number 321-13-2321		OMB No. 1545-0048	
b Employer identification number (EIN) 47-1787054		1 Wages, tips, other compensation 1515.50		2 Federal income tax withheld 156.15	
c Employer's name, address, and ZIP code Measurements, INC 100 S Main Winston Salem, NC 27104		3 Social security wages 765.70		4 Social security tax withheld 93.96	
		5 Medicare wages and tips 1515.50		6 Medicare tax withheld 21.97	
		7 Social security tips 749.80		8 Allocated tips	
d Control number aeVMP - 55		9		10 Dependent care benefits	
e Employer's first name and initial Abbie		Last name Aastor		11 Nonqualified plans DD 435.00	
f Employer's address and ZIP code 123 Elm CHICAGO, IL 60615		12a See instructions for box 12 DD 435.00		12b	
		13		14	
g State IL		16 State wages, tips, etc. 1515.50		17 State income tax 62.11	
h Locality name		18 Local wages, tips, etc.		19 Local income tax	

Form **W-2** Wage and Tax Statement **2017** Department of the Treasury - Internal Revenue Service
Copy D - For Employer For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

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.

Form 1095-C		Employer-Provided Health Insurance Offer and Coverage		600117	
Department of the Treasury Internal Revenue Service		VOID		OMB No. 1545-0051	
ESS Copy Only		CORRECTED		2017	

1 Name of employee Abbie Aastor		2 Social security number (SSN) 321-13-2321		7 Name of employer Measurements, INC		8 Employer identification number (EIN) 47-1787054	
3 Street address (including apartment no.) 123 Elm		9 City or town CHICAGO, IL		10 State or province IL		11 Country and ZIP or foreign postal code US 60615	
4 City or town CHICAGO		5 State or province IL		6 Country and ZIP or foreign postal code US 27104		12 State or province NC	

14 Offer of Coverage (enter required cover)		15 Employee Required Contribution (see instructions)											
TH													
\$													

17 Aastor, Abbie		321-13-2321		X		X X X X X X X X X X X X X X X X											
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