ESS – Payroll – Update W-2 Election

1. *Update W-2 Election* – The IRS requires employers to document the employee’s request for electronic W-2’s. Therefore, on an annual basis, there will be an open enrollment period for employees to elect the option of receiving their W-2 in electronic format versus paper. If the employee makes no election during the open enrollment period, the default format will always be paper.

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**Update W-2 Election**

Starting with tax year 2012, PASSHE employees will have the option to view and print their W-2 form via the Self-Service Portal. If you wish to have access to an online copy (decline receiving your W-2 form in the mail), click the option below to receive it electronically. If you wish to receive a mailed paper W-2 form, click the “Receive in Paper Form” option below.

*If you elect the electronic option, you will not receive a paper copy of your W-2 via the U.S. Mail.*

Your current W-2 election is to receive in paper format.

[I Wish to Receive My W-2 Form Electronically] [I Wish to Receive My W-2 in Paper Form]
Choosing to Receive W-2 in Electronic Form

1.1. When choosing *I Wish to Receive My W-2 Form Electronically*, employees understand and acknowledge that they will *not* receive a paper copy of the W-2 via U.S. Mail.

1.1.1. After clicking the button for *I Wish to Receive My W-2 Form Electronically*:

1.1.1.1. The *Electronic Form W-2 Disclosure Notice* will appear.

1.1.1.1.1. After reading the disclosure notice, check the box to indicate you have read the notice and agree to receive the W-2 form only in electronic format.

1.1.1.1.2. Next, select the *Continue with Electronic Enrollment* button.
1.2. You will now see the following two messages:

1.2.1. Your current W-2 election is to receive in electronic format.

1.2.2. Your W-2 election has been saved. You will receive your W-2 form in electronic format via the Self-Service Portal.

1.3. The next time the Update W-2 Election screen is accessed by an employee who previously selected I Wish to Receive My W-2 Form Electronically, there will be a note stating Your current W-2 election is to receive in electronic format.

1.4. To change the format of the W-2 from electronic to paper, simply click the I Wish to Receive My W-2 in Paper Form.
Choosing to Receive W-2 in Paper Form

1.5. When choosing *I Wish to Receive My W-2 in Paper Form*, employees understand and acknowledge that they will *only* be receiving a paper copy of the W-2 via U.S. Mail. An electronic copy will not be available to the employee.

1.5.1. After clicking the button for *I Wish to Receive My W-2 in Paper Form*, the screen will update with two messages:

1.5.1.1. A message stating *Your current W-2 election is to receive paper format.*

1.5.1.2. A message stating *Your W-2 election has been saved. You will receive your W-2 form in paper format via the U.S. Mail.*
1.5.2. The next time the Update W-2 Election screen is accessed by the employee, there will be a note stating Your current W-2 election is to receive paper format.

1.5.3. To change the format of the W-2 from paper to electronic, simply click the I Wish to Receive My W-2 Form Electronically.