

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.

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.

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.

Electronic Form W-2 Disclosure Notice

Internal Revenue Service (IRS) regulations require PASSHE to obtain your consent before delivering your W-2 only on-line and not mailing you a paper W-2. The Disclosure Notice below explains in detail what it means to consent ("I accept") to electronic-only delivery. Please contact your university's HR/Payroll department if you have any questions.

1. If you do not consent to electronic-only delivery of your W-2, PASSHE will send you a paper form via U.S. mail.
2. If you do consent to electronic-only delivery of your W-2, PASSHE will not mail you a paper W-2. You will need to use the Employee Self-Service (ESS) web site to view, print and, if you wish, save a copy of your W-2.
3. The hardware and software required to access your electronic W-2 includes a computer with an Internet connection and a web browser. An ESS username and password are required.
4. Your electronic W-2 will be available on Employee Self-Service for at least 5 years after its posting date.
5. Your consent is effective for W-2s issued for the current calendar year until (a) you withdraw your consent or (b) you are no longer employed by PASSHE (faculty and staff).
6. If you have consented to electronic-only delivery of your W-2, you may change your mind and withdraw consent at any time by either using the ESS tool during the enrollment period or, after the enrollment period, submitting a "Withdrawal of Consent to Electronic W-2" form to your HR/Payroll Office. This form can be obtained at your payroll office.
7. Withdrawal of consent will be effective on the date received by HR/Payroll will be confirmed in writing or by email. If consent is withdrawn, it will only be effective for W-2s not yet issued.
8. When you leave PASSHE (terminate employment) you will no longer have access to electronic W-2s. If you consent to electronic-only delivery of your W-2 but leave PASSHE before the electronic W-2 is available, you will receive a paper copy via U.S. mail.
9. You should be aware you may be required to attach a printed copy of your W-2 to your annual tax return documents, even when you only receive an electronic version from PASSHE.
10. Even if you have consented to electronic-only delivery of your W-2, you may still receive a paper copy of the W-2 by contacting your HR/Payroll department. Request for a paper copy does not withdraw your consent for electronic-only delivery.

Copies of W-2s for years not available via electronic W-2s (calendar year 2012 or earlier) may be requested from the HR/Payroll department.

I have read the above notice and agree to receive my W-2 form only in electronic format.

[Cancel Election](#) [Continue with Electronic Enrollment](#)

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.*

Update W-2 Election

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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 electronic format.

I Wish to Receive My W-2 Form Electronically I Wish to Receive My W-2 in Paper Form

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

The screenshot shows a green oval around the message "Your current W-2 election is to receive in electronic format." and another green oval around the message "Your W-2 election has been saved. You will receive your W-2 form in electronic format via the Self-Service Portal." A green arrow points from the second oval to the first.

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.*

Update W-2 Election

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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 electronic format.

I Wish to Receive My W-2 Form Electronically I Wish to Receive My W-2 in Paper Form

The screenshot shows a green oval around the message "Your current W-2 election is to receive in electronic format." and a green arrow pointing to it from the right.

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.*

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.

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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

Your W-2 election has been saved. You will receive your W-2 form in paper format via the U.S. mail.

The screenshot shows a web interface for updating a W-2 election. It features a title, explanatory text, a warning message in a yellow box, a status message, two radio button options, and a confirmation message with a checked checkbox. Green annotations include circles around the status and confirmation messages, and arrows pointing from the 'I Wish to Receive My W-2 in Paper Form' radio button to these messages.

- 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.*

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.

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Your current W-2 election is to receive in 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.*