

DO THE ELECTRONIC SLIDE: Go Paperless with W-2s!

WHY?

- Easy Access-it's now easier than ever with our new employee user interface!
- Less Administrative Work-no hassle of distributing the forms
- Save Paper & Save on Postage/Shipping Fees
- Secure: No paper floating around
- Safe: Reduce the risk of exposure to illnesses with electronic distribution

HOW?

An employee consents when they initially log in to their Employee Self-Service Portal. Each employee must consent but the setting saves for future years. This also applies to 1099 & ACA Forms! Terminated employees automatically receive paper W-2s.

What do I need to do?

*If you have Employee Self Service but you are unsure of whether you currently have this feature activated for your employees, navigate to Reporting>Client Reports>Electronic Tax Form Delivery Status. If the date field is empty for all employees, this means you are not offering this service or no employees have opted out of receiving paper copies. If you want to enable this feature for your employees, contact your support representative to have this feature turned on. **If the feature is turned on, this report will show which employees opted in for electronic delivery.***

If you do not currently offer Employee Self-Service and would like to implement this for your employees, e-mail training@ctrhcm.com so we can schedule a call with you to implement this FREE service for you.

Please note: Employees MUST accept before the last payroll of the year is processed.

How do I communicate this to employees?

To ensure a smooth year-end season, let your employees know about this great feature ahead of time. This will answer all their questions (so you don't have to) and they won't be surprised when they don't get a paper W2. To help inform your staff, we've created a sample email you can send which has answers to any questions your employees might have. We have included the sample e-mail on the next page.

If you have any questions, please reach out to your customer support representative.

Thank you,

CTR Payroll Services

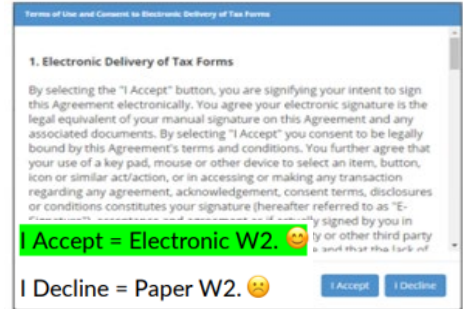
GO PAPERLESS with W-2s!

Dear Employees,

We are very excited to announce that you can choose to receive your W2 electronically! Simply login to your Employee Self Service portal and ensure that you have accepted Electronic Delivery of Tax Forms. By clicking "I Accept", you will be able to securely retrieve your W2 any time you wish. You can look forward to an email in January letting you know that your W2 is ready for download and you'll have any previous year W2s as well that can be accessed whenever you need them. See below for more details: If you are having trouble logging in, please scroll to the bottom section titled "Login Issues".

First Time logging in to Employee Self Service?

If this is your first time logging in to iSolved Employee Self Service (ESS), you will be greeted with this message box below. By clicking "I Accept", you will be able to access your W2 on your ESS portal and securely retrieve your W2. You can look forward to an email in January letting you know that your W2 is ready for download.



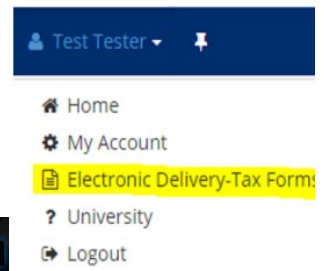
Why don't I see any message box when I login?

This means you must have already responded to the message box. If you don't remember what you chose, refer to the next question.

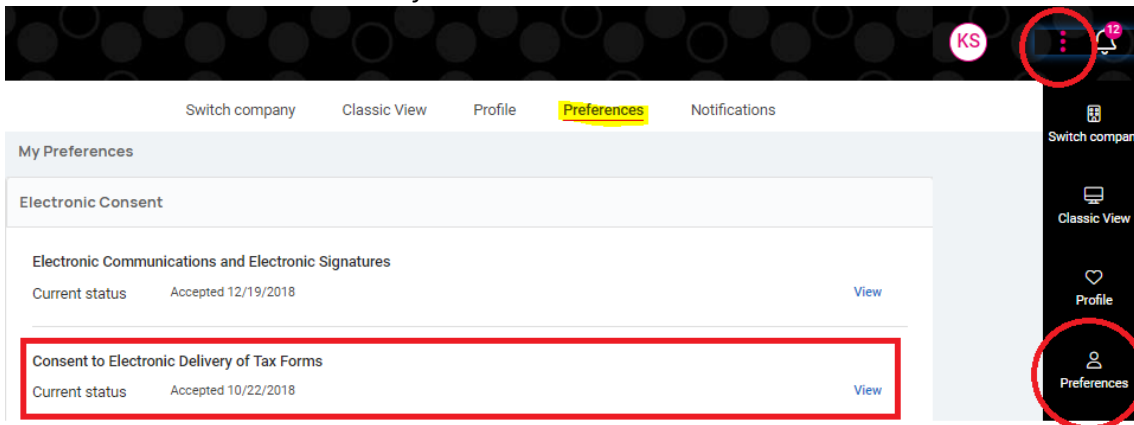
What if I don't remember if I Accepted or Declined?

Don't worry! I don't remember what I ate for lunch yesterday. You can double check by logging in to your employee portal! For Core ESS Users, click on your name in the top left of your screen and choose "Electronic Delivery – Tax Forms. For AEE ESS Users, click the 3 dots in the upper right corner and click "Preferences"

CORE Self-Service



AEE Self-Service



If you originally clicked Accept, the system will tell you that "You have already agreed..." If you see this message box, you will not receive a paper W2. Instead, you can look forward to an email in January letting you know that your electronic W2 is ready for download.

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

OK

GO PAPERLESS with W-2s!

If you originally clicked Decline, the initial message box will appear again. You can now choose to Accept or Decline. Remember, by clicking Accept, you will receive an electronic W2.

I originally Declined, but now I want to change and receive an electronic W2.

No problem-just like in the question above, you will login to your iSolved portal, click on "Electronic Delivery-Tax Forms" in CORE ESS or "Preferences" in AEE ESS and the original message box will reappear. You can now choose to Accept.

I originally Accepted, but now I want to Decline and receive a paper W2.

For this, you will need to contact your payroll administrator; only they can withdraw your original consent. To do this, they will go to Employee Maintenance>General and enter a date in the "YE Consent Withdrawn" field.

Does this also apply to 1099 and ACA Forms in addition to W2s?

Yes, the electronic consent is for all three year-end forms if you have them: W2, 1099, and 1095

Login Issues?

I've previously logged in, but I forgot my username.

Your username is your e-mail address. If you do not know the exact email address, contact your Company Administrator for this information.

I've previously logged in, but I forgot my password.

You have 5 chances to get it correct. The system will then disable you for 10 minutes before you can try again. If you need a new password, click the "Forgot Password" link.

I'm getting this message: "This user account is currently disabled. Please contact your account administrator for assistance."

If you haven't logged in for 90 days or never activated the account to begin with, your account may be disabled. You'll need to contact your Company Administrator so they can reset your access.

My Company Administrator says they sent me an activation email, but I'm not getting it.

First, check your junk mail. The email is sent from ctr@mysolved.com. If you do not see it, check with the administrator to ensure they are using the correct email address.