

Electronic Form W-2 / 1099 - Online via ADP website

CCRES is required by the Internal Revenue Service (IRS) to furnish all staff with a Form W-2 (also called the W-2 statement) or Form 1099 for each calendar year to be used in completing the staff's annual tax return. The Form W-2 or Form 1099 details the staff's compensation and tax withholding amounts for the calendar year, and must be furnished (properly addressed and postmarked) by January 31 of the following calendar year. In the past, staff have received paper copies of the Form W-2 or Form 1099. Additionally, those with access to the ADP website could view and/or print an electronic copy of the Form W-2 or Form 1099.

Staff have the option to stop receiving the paper copies of the W-2 / 1099 statement in the mail, and instead may consent to receive their W-2 / 1099 statement electronically via the ADP website. *Note this option is only available to staff with access to ADP iPay (<https://paystatements.adp.com>). If you do not have access to ADP iPay you will continue to receive a paper W-2/ 1099 statement in the mail and no action is required on your part.*

Benefits of receiving an electronic W-2 / 1099 statement:

- Staff who do not provide consent will no longer be able to retrieve an online W-2 / 1099 statement (the W-2 / 1099 statement for those not providing consent will be available in paper form only).
- Earlier access (it will be available earlier than the paper mailed version).
- Once received electronically, significantly less possibility that the W-2 / 1099 statement may be lost, stolen, damaged, or misplaced by the U.S. mail service or by the staff, once received.
- Access is available at the same easy-to-use, secure ADP website at which staff can access his/her bi-weekly pay stub.
- Access can be attained even if the staff is not present at his/her residence.
- Cost savings for CCRES.

The IRS has approved the use of electronic W-2 / 1099 statements; however, **staff must provide their consent to receive their W-2 / 1099 in electronic format in lieu of paper format.** The following information provides the required IRS disclosure information and instructions for you to consent to receiving your W-2 / 1099 statement electronically.

Please read this entire disclosure notice and follow the instructions to provide consent to receive all future W-2 / 1099 statements in electronic format only. Providing consent also indicates consent to receive any W-2c (corrected) statements electronically rather than a paper copy. Questions regarding this notice or your W-2 / 1099 statement should be directed to CCRES Payroll (payroll@ccres.org).

Disclosure Notice

- A staff who consents to receiving his/her Form W-2 / 1099 online will not receive a paper copy.
- If a staff does not consent, he/she will continue to receive a paper copy of the W-2 / 1099.
- The deadline to provide consent to receive the electronic W-2 / 1099 statement is December 31, 2013.
- Staff providing consent by December 31, 2013 will be able to access the electronic version of the W-2 / 1099 statement no later than January 31, 2014. Staff providing consent after that date will receive a paper copy of the W-2 / 1099 statement postmarked no later than January 31, 2014; however, the consent will then be applicable for all future tax years unless one of the conditions in the next bullet point is met.
- A staff's consent to receive his/her W-2 / 1099 form online will be valid for all subsequent tax years unless consent is revoked by the staff, employment or contract is terminated, or this service is not supported in a future tax year.
- A staff who chooses to receive his/her W-2 / 1099 statement electronically may withdraw consent at any time electronically via the ADP website. The staff's withdrawal of consent will be effective on the date it is received. If consent is withdrawn, it will only be effective for those W-2 / 1099

statements not yet issued. Staff are required to promptly update any personal address or status changes by contacting hr@ccres.org.

- Terminated staff will receive a paper copy of the W-2 / 1099 statement at the current mailing address available. Terminated staff are required to notify hr@ccres.org of any change in mailing address for W-2 / 1099 statement purposes.
- The hardware and software requirements needed to access the W-2 / 1099 statement electronically include an internet connection, web browser, and Adobe Acrobat reader or similar PDF reader software.
- Electronic W-2 / 1099 statements will be accessible for three years.
- If a staff consents to electronic W-2 / 1099 delivery and the delivery is unable to be made due to a technical problem, incorrect login or password, or incorrect email address the staff should contact hr@ccres.org for guidance. If there is any change in the electronic delivery process, staff will be notified immediately via email or written notice.

Consent to receive Form W-2 / 1099 electronically

As required by the IRS, this consent must be made electronically in a manner that reasonably demonstrates that the staff can access the W-2 / 1099 in the electronic format in which it will be provided. Therefore, electronic W-2 / 1099 consent will be completed via the ADP website (<https://paystatements.adp.com>) and staff will be able to retrieve the W-2 / 1099 statement from the ADP website once it is available.

To provide consent electronically, staff should follow these steps:

1. Log-in to ADP iPay (<https://paystatements.adp.com>).
2. Access the *W-2/ 1099 Consent page* by clicking the "Go Paperless" link on the right side of the screen under "Resource Center, Things You Can Do" link.
3. Read the Go Paperless screen statement.
4. If you agree with the statement, click inside the checkbox labeled "Access my W-2s and 1099s online only", then click on "Next".
5. This will take you to "Step 1. Agreement". Read the statements on your screen.
6. If you accept the terms listed, click the checkbox labeled "Accept".
7. This will take you to "Step 2. Confirmation". Enter the Confirmation Number provided and then click on "Save".
8. This will take you to "Step 3. Thank You".
9. Check to be sure your email address is correct. You may edit if necessary by clicking "Edit".
10. Click on "Done".
11. A system generated confirmation email will be sent to the email address listed on the "Thank You" page.

Withdraw consent to receive Form W-2 / 1099 electronically

Staff may withdraw consent electronically.

To withdraw consent electronically, staff should follow these steps:

1. Log-in to ADP iPay (<https://paystatements.adp.com>).
2. Access the *W-2/ 1099 Consent page* by clicking the "Go Paperless" link on the right side of the screen under "Resource Center, Things You Can Do" link.
3. Read the Go Paperless screen statement.
4. To **withdraw your consent** to receive electronic W-2 / 1099 forms click the checkbox labeled "Access my W-2s and 1099s online only" to remove the check mark.
5. Click on "Next".
6. This will bring you to "Start Paper Annual Forms" screen.
7. Click on "Get Paper".