



PAYSERV
PAYROLL SOLUTIONS

Switching to Electronic W-2s

A step-by-step guide for PayServ clients

An electronic version of a W-2 creates some great benefits, which include:

- **Early Delivery** – employees get their W-2 as soon as it's ready, without having to wait for it to be processed, mailed and then delivered to them.
- **Safe & Secure** – there is less possibility of the W-2 getting lost, stolen, or misplaced. (So, fewer calls asking for another copy.)
- **Anytime Access** – employees can view their W-2 from anywhere (home or work) 24/7, whenever they need it.
- **Tax Time Ready** – compensation and tax withholding information may be easily downloaded into many tax preparation software programs.
- **Automated Distribution** – W-2s are sent electronically, eliminating the need to get the paper version out to each employee.

The switch at a glance

Step	What happens
1	Tell PayServ you would like electronic W-2s turned on.
2	Make sure every employee can log in to Employee Self-Service (ESS).
3	Let your employees know what's coming.
4	Employees log in and click I Accept .
5	Check who is getting electronic vs. paper, before your last payroll of the year.
6	In January, employees get an email and download their W-2.

If you have questions or need assistance at any point, reach out to your payroll specialist or email us at payrollgroup@payservpayroll.com.

Step 1 Tell us to turn it on

Just send us an email or notify your payroll specialist that you would like us to turn on this option in your account. It's as easy as that.

Not sure whether your company is signed up for Employee Self-Service? Ask your payroll specialist or sales consultant, or email payrollgroup@payservpayroll.com and we'll check for you.

Step 2 Make sure every employee can log in

Employees make their choice inside their ESS portal, so each one needs a working login first. If an employee has a valid email address, they can use Employee Self-Service.

See everyone's status at once

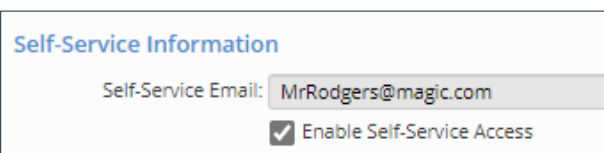
1. Go to **Employee Admin Tools > Employee Administration > Self Service Management**.
2. Review the **ESS Active Employee Counts**. The first two lines show who still needs to be set up.
3. Check the appropriate boxes to enable, unlock, and resend activation emails.

Don't worry about the Terminated Employee Counts.

Terminated employees automatically receive a paper W-2.

Set up or fix one employee

1. Go to **Employee Management > Employee Maintenance > General** and select the employee.
2. In the **Self-Service Information** section, enter a valid email address in **Self-Service Email**.
3. Check **Enable Self-Service Access** and click **Save**. An activation email is sent to the employee.



The screenshot shows a form titled "Self-Service Information". It contains a text input field labeled "Self-Service Email:" with the value "MrRodgers@magic.com". Below this field is a checkbox labeled "Enable Self-Service Access" which is checked.

What the employee does: they open the activation email, click the link, create a password, and choose a security question. If they add a mobile number, they'll also enter a code sent by text. Only the link in the most recent activation email will work, so if you resend it, have them use the newest one.

Login trouble? See [Employee Self-Service Login Troubleshooting](#).

Step 3 Let your employees know

To ensure a smooth year-end season, let your employees know about this feature ahead of time. This will answer their questions, and they won't be surprised when they don't get a paper W-2.

We've created a sample you can send to your staff: [Sample Employee Letter – Electronic W-2](#).

The key points to share:

- Log in to Employee Self-Service at **payserv.myisolved.com** and click **I Accept** when asked about electronic delivery of tax forms.
- In January, they'll get an email when their W-2 is ready to view, download and print.
- They only need to do this once. The choice carries over to future years.

Step 4 Employees log in and click “I Accept”

The first time an employee logs in to ESS after this option is turned on, the pop-up below appears: **Terms of Use and Consent to Electronic Delivery of Tax Forms**.

Employees must respond to this before they can continue to the portal.

- **I Accept** – their job is done. A copy of their agreement is saved in their Employee Documents.
- **I Decline** – they will continue to receive a paper W-2.

The pop-up only appears once.

If an employee doesn't see it, they have already responded.

Terms of Use and Consent to Electronic Delivery of Tax Forms

1. Electronic Delivery of Tax Forms

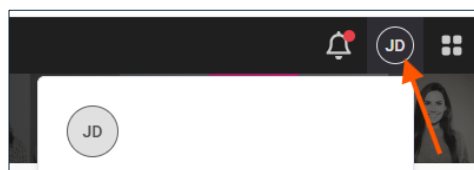
By selecting the "I Accept" button, you are signifying your intent to sign this Agreement electronically. You agree your electronic signature is the legal equivalent of your manual signature on this Agreement and any associated documents. By selecting "I Accept" you consent to be legally bound by this 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

I Accept **I Decline**

How an employee can check what they chose

Click the initials at the top right of the screen. What they see next depends on their view.

Adaptive view: choose **User Preferences**. Under Electronic Consent, **Consent to Electronic Delivery of Tax Forms** shows Accepted and the date.



My Preferences

Electronic Consent

Electronic Communications and Electronic Signatures
Accepted 09/02/2025

Consent to Electronic Delivery of Tax Forms
Accepted 09/02/2025

Terms and Conditions

CLOSE

Classic / Administrative view: choose **Electronic Delivery-Tax Forms**. If they accepted, a message says they have already agreed. If they declined, the original pop-up appears again.

OPTIONS

- User Preferences
- Switch User
- Electronic Consent
- Electronic Delivery-Tax Forms**
- Terms and Conditions

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

Step 5 Check who is getting electronic vs. paper

Go to **Reporting > Client Reports > Electronic Tax Form Delivery Status** and select the appropriate year.

This report shows all the employees who are getting a W-2 for the year selected.

Use Columns A, B, and C to see who is getting paper versus electronic:

- **Column A** – a date here means the employee consented to receive only an electronic W-2. As long as that date is before the end of the year and Columns B and C are blank, they will receive only an electronic W-2. No date in Column A means they will receive a paper W-2.
- **Column B** – a date here means the employee chose to receive a paper W-2.
- **Column C** – a date here means they were terminated or specifically asked to withdraw their consent. They will receive a paper W-2.

Timing matters: run this report before your last payroll of the year and follow up with anyone who hasn't responded. A choice made after the last payroll of the year has been run takes effect the following year.

Step 6 In January, employees download their W-2

Employees who accepted, receive an automatic email in January letting them know their W-2 is ready. They can then log in, view, and print at their convenience.

- **Adaptive view:** **Pay & Tax > Year-end Tax Forms**, then click the W-2.
- **Classic / Administrative view:** **Employee Self-Service > W2/ACA/1099 Forms**, then click View Document.

Adaptive view:

The screenshot shows the 'isolved' interface. On the left is a sidebar menu with categories: Time and Attendance, Pay and Tax (selected), Personal, and Benefits. Under 'Pay and Tax', the following options are listed: Direct Deposit, Pay History, Year-end Tax Forms (selected), and Tax Updates. The main content area is titled 'Summary' and contains a table with the following data:

Name TL	Year TL	Instructions
W-2	2025	View
W-2	2024	View
W-2	2023	View
W-2	2022	View
W-2	2021	View
W-2	2020	View
W-2	2019	View

Classic view:

The screenshot shows the 'Classic view' interface. At the top, it says 'Jennifer...' with a home icon. Below is a search bar labeled 'Search the menu'. A list of menu items follows: Employee Management, Employee Admin Tools, Employee Self-Service (highlighted with a pink bar), Employee Messages, Employee Profile Picture, Employee Profile, Contact Information, Employee Contacts (with a right arrow), Benefit Enrollment, Life Events Wizard, Life Events History, Benefits Summary, Benefit Updates, Benefit Plan Details, Documents, Pay History, W2/ACA/1099 Forms (highlighted with a blue arrow), Employee Contacts, Training, and Certifications.

Common questions

My employee originally declined, but now wants an electronic W-2.

They can change this themselves by clicking their initials at the top right:

- **Adaptive view:** [User Preferences](#), click Change next to Consent to Electronic Delivery of Tax Forms, select **I Accept**, then Save.
- **Classic / Administrative view:** [Electronic Delivery-Tax Forms](#). The original message box reappears and they can choose **I Accept**.

My employee originally accepted, but now wants a paper W-2.

In this case the payroll admin needs to withdraw the original consent. Go to [Employee Management > Employee Maintenance > General](#) and enter a date in the **YE Consent Withdrawn** field.

What if an employee makes their choice after the last payroll of the year has been run?

The employee will receive a paper W-2 this year. Their choice takes effect the following year.

Does this apply to terminated employees? What about inactive employees?

Once an employee is marked Terminated in the system, they automatically receive a paper W-2, even if they had previously granted consent. Employees marked Inactive can still consent to electronic only.

Do my employees need to accept every year?

No, this setting is saved for future years.

Which forms does this apply to?

All year-end forms: W-2s, 1099s, and 1095 ACA forms.

My employee can't log in to get their W-2. Where can I find a copy to give them?

You can print a copy for them by going to [Employee Self-Service > W2/ACA/1099 Forms](#). The same works for an employee who chose electronic but would like a printed copy after all.

What if my employees do not use ESS?

If you have not signed up for the service, reach out to your sales consultant or payroll specialist for more information. If you have, use the Self Service Management screen in Step 2 to see who is not enabled, collect their email addresses, and enter them on the [Employee Maintenance > General](#) screen.

I'm not ready for all this. I just want all my employees to receive paper W-2s.

That's fine! Just send us an email at payrollgroup@payservpayroll.com when you're ready.