

## 2009 Form W-2's Will Be Available Online By January 2010

Texas State University is required by the IRS to furnish all employees with a form W-2 for each calendar year worked. The form W-2 is used to complete the annual tax return. This form details the employee's compensation and tax withholding amounts for the calendar year, January 1 – December 31.

Texas State University-San Marcos employees may elect to receive their W-2 Statement online through the university's main web site using the SAP Portal at: <https://ibis.sap.txstate.edu:50001/irj/portal> . Under the Employee Self Service (ESS) tab, you will see a W-2 Menu which enables all active employees to consent to receive their W-2 electronically and then print the form W-2 and instructions.

All "Active Employees" are eligible for this new program. To sign-up for this new program, you must login to the SAP Portal and click on the Employee Self-Serve tab, then the W-2 Menu and finally, the W-2 Consent Agreement. You must provide your consent and be an active employee to receive your W-2 online. In January 2010, you will receive an email communication announcing the availability of 2009 form W-2's for viewing and printing. The online W-2 will display the same information in the same format as the current paper statements including all required copies (employee copy, SSA copy and state/local copy). The electronic version will be available online through October 15 of each year. The W-2 can be printed and attached to a federal, state, or local income tax return.

### **Benefits of Receiving Form W-2 Electronically**

- Access from anywhere at any convenient time.
- Online delivery provides access to the W-2 statement earlier than the traditional mail process.
- Online delivery eliminates the chance that the W-2 Statement will get lost, misdirected or delayed during delivery or after receipt.
- Access is available via the same easy-to-use, secure web site employees use to access direct deposit information and print remuneration statements.
- Employees may print multiple copies.
- Employees are contributing to university cost savings (forms, printing and postage expenses).

The process only takes a few minutes to access the ESS Menu, click on the W-2 tab, and review the important disclosure and consent information that explains how you can benefit from the new option.

**IRS regulations require that employees give their consent to receive the W-2 in an electronic format. This process does not need to be repeated every calendar year.**

E-mail will be used to notify you when your Form W-2 is available and also to send confirmation if you should withdraw your consent to receive your form electronically. No additional paperwork is needed for those employees who elect to continue receiving a paper form W-2. These forms will continue to be mailed no later than January 31<sup>st</sup> of the following calendar year, to the permanent mailing address, as indicated in your SAP Employee Personnel Records.

**To consent to the electronic W-2 format, please follow these steps:**

Logon on to Texas State Website at the SAP Portal: <https://ibis.sap.txstate.edu:50001/irj/portal>

Enter your **Net ID and password**

Select **Logon**

Select **Employee Self Service**

Select **W-2 menu**

Select **W-2 Agreement**

Select **"I Agree" on the W-2 Agreement**

**An email will be sent to your official campus email address indicating you have consented to receive your form W-2 electronically.**

### **Disclosure Notice**

An employee who consents to receiving the Form W-2 electronically will not receive a paper form of the W-2. If an employee does not consent, the employee will continue to receive a paper copy of the W-2. The form will continue to be mailed no later than January 31<sup>st</sup> of the following calendar year, to the permanent mailing address as indicated in your SAP Personnel Records. **For employees on a PC, the free Adobe Reader is required to download the electronic W-2.**

An employee can also request a paper copy of the W-2, as well as electronically by contacting the Office of Payroll and Tax Compliance at (512) 245-2543, or by e-mail at [payroll@txstate.edu](mailto:payroll@txstate.edu). Requesting a paper copy does not withdraw the employee's consent for future W-2's.

An employee who chooses to receive the Form W-2 electronically can change their mind and withdraw consent to electronic delivery. It would be in the best interest of the employee to call or e-mail to verify the deadline to make changes. An employee's withdrawal of consent will be effective on the date received and the Office of Payroll and Tax Compliance will confirm in writing or by e-mail with the employee the effective date of withdrawal of consent. If consent is withdrawn, it will only be effective for those W-2 statements not yet issued. Consent may also be withdrawn by sending an e-mail or written notice to:

Texas State University-San Marcos  
Attn: Office of Payroll and Tax Compliance  
601 University Drive, JCK 582  
San Marcos, Texas 78666  
E-mail: [payroll@txstate.edu](mailto:payroll@txstate.edu).

**The provision of an employee's form W-2 by electronic format will automatically cease upon the employee's termination of employment with Texas State.**

For questions regarding the electronic form W-2, please contact the Office of Payroll and Tax Compliance via email at [payroll@txstate.edu](mailto:payroll@txstate.edu) or at (512) 245-2543.