HUMAN RESOURCES

HR-575 ELECTRONIC W2, 1099R AND 1095C FORMS

This document explains how to prepare for sending electronic **W2**, **1099R** and **1095C** forms to employees. For regulations regarding this process, read page four of **Publication 15-A (2019)**, **Employer's Supplemental Tax Guide**, available on the web at <u>https://www.irs.gov/pub/irs-pdf/p15a.pdf</u> for a PDF document or <u>https://www.irs.gov/publications/p15a</u> for an HTML format.

To participate in the process, employees must provide explicit affirmative consent. **ADMINS** has a process to solicit this consent via email. Only employees that provided consent and are marked on the employee maintenance record will receive emailed year-end forms.

1. PROCESS STEPS

- 1. Mark up the sample email and send it to support@admins.com
- 2. Enter the employee email addresses
- 3. Send request for consent email to employees
- 4. Update the employee record when consent arrives
- 5. Run the step in the W2, 1099R or 1095C menu to email the forms



2. MARK UP AND RETURN TO SUPPORT@ADMINS.COM

ADMINS has installed a standard email form for use when soliciting consent from employees. Please print the form below, mark it up and email it to <u>support@admins.com</u> so that site-specific customizations many be installed. While the six areas highlighted on the image in **Figure 1** are apparent points of customization, if there are other changes please include them.



December 2019

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File Message	?
You forwarded this message on 12/9/2019 4:48 PM. From: theresa@admins.com Sent: Mon 12/9/2019 4:47 PM. Subject: Email from the Town of Admins for employee 071343-JONES, KAREN R	PM
The City of ADMINS is now offering an optional program for the distribution of IRS forms W2s, 1099-Rs and 1095C by email.	
To participate in this program, please forward this email to payroll@admins.com.	
If you do not want to participate, you do not need to take any action. You will continue to receive your printed form in the same manner you have received them in the past.	
About this program:	
All forms are in PDF format, encrypted and password protected in the same manner as the emailed direct deposit forms.	
Your consent will continue for all future annual electronic forms.	≡
To request a paper copy of a form, you can contact payroll at 617-494-5100. A request for a paper statement is not a withdrawal of consent in the electronic program.	
To withdraw from the program and to have all future forms issued on paper, send an email to payroll@admins.com with your employee number and the words "ELECTRONIC FORMS WITHDRAWAL" in the subject. You will receive a confirming email. Withdrawal of consent does not apply to previously issued forms.	
To update your contact information, phone payroll at 617-4945100 or email payroll@admins.com	
Electronic forms will not be provided for any year that you do not have reportable information.	

Figure 1

3. EMPLOYEE EMAIL ADDRESS UPDATES

To begin, enter the email addresses for all employees. The employee address will be used for **W2**, **1099R**, and **1095C** forms (as well as any **Direct Deposit** advices). Use either the:

- Human Resources Maintenance Employee Maintenance Contact or
- Human Resources Maintenance Employee Email / Electronic Form Update Screen.

Whichever method is used, the employee record will be updated. Currently, only active employees are eligible to participate in this program.

3.1. Employee Maintenance Contact Tab

The **Electronic Form Sent Date** will be updated when the email solicitation for consent is produced either by

			Employee N	laintenance	No picture on File
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P Add Position	Y Employee Notes	No text available		Current Positions S012TEASST5-01 BMS TEACHER 0 All Positions 000 -00	1,0000
1 Contact 2 Perso	nal 3 Ded/Ben	4 Add Wages 5 Payr	oll 6 Accounting	7 Salary 8 Dates/Class 9 Degrees 0 Custom	U Accidents VACA
First Name	Middle Name M	Last Name POWERS	Suffix Ge	nder Birth Date SS# Previou Male © Female 08-Aug-1962 001-10-1009 BLANCH	IS Name IETTE
Residential Address House# 275 Address 275 MA	Street MAIN ST R IN ST REAR	EAR	Unit	Employee Contact Phone #1 (000) 000-0000 Type H Home Phone #2 (000) 000-0000 Type P Phone #2 (000) 000-0000 Type P Phone #2 (000) 000-0000 Type P	
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City CAMBRII	DGE	State	Zip 02138-0000		

clicking **[Send]** on the Employee Maintenance screen or by running the **TAX FORM BATCH EMAIL PROCESS**.

On receipt of the consent, update the **Consent Date** on the employee record on the **Employee Maintenance** ► **Contact** tab or the **Maintenance** ► **Employee Email/Electronic Form Update Screen.**

Figure 2 Employee Maintenance > Contact tab

3.2. Employee Email/Electronic Form Update

Update multiple employee emails using the Employee Email / Electronic Form Update Screen.



Note – on this screen, if the employee has held multiple positions their name will appear once for each position.

Enter the email address on the current position; the system will propagate the email address to all positions for the employee.

Figure 3 Employee Email Update Screen

The **[Send EF]** button on this screen sends the consent solicitation email to a single employee. – Use this if an email address is updated or someone comes on board after the <u>batch email</u> was sent.

4. TAX FORM BATCH EMAIL PROCESS



The system will present a report of the active employees who will be sent the email. Review the list and click [Yes] to send the email; click [No] to return to AUC without sending the email.

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Figure 4 The list of employees and email addresses that will be sent the "Opt In" email

The system will only send the solicitation for consent if the employee email address exists and there is no date entered in the consent date field for the employee. (That prevents sending duplicate requests to the employees that have already responded).

Proceed with processing for Year End, using the new [Email *] button available on each steps menu.

Email 1099 - R Forms	
Email W2 Forms	
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Email 1095 Forms	