



HUMAN RESOURCES

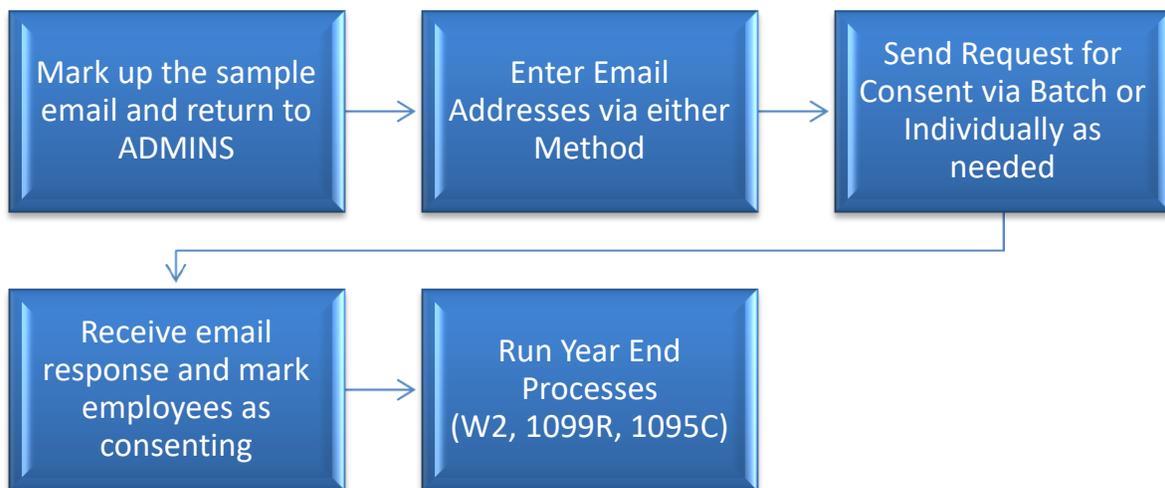
HR-575 ELECTRONIC W2, 1099R AND 1095C FORMS

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 <https://www.irs.gov/pub/irs-pdf/p15a.pdf> for a PDF document or <https://www.irs.gov/publications/p15a> 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](mailto: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 support@admins.com so that site-specific customizations may 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.

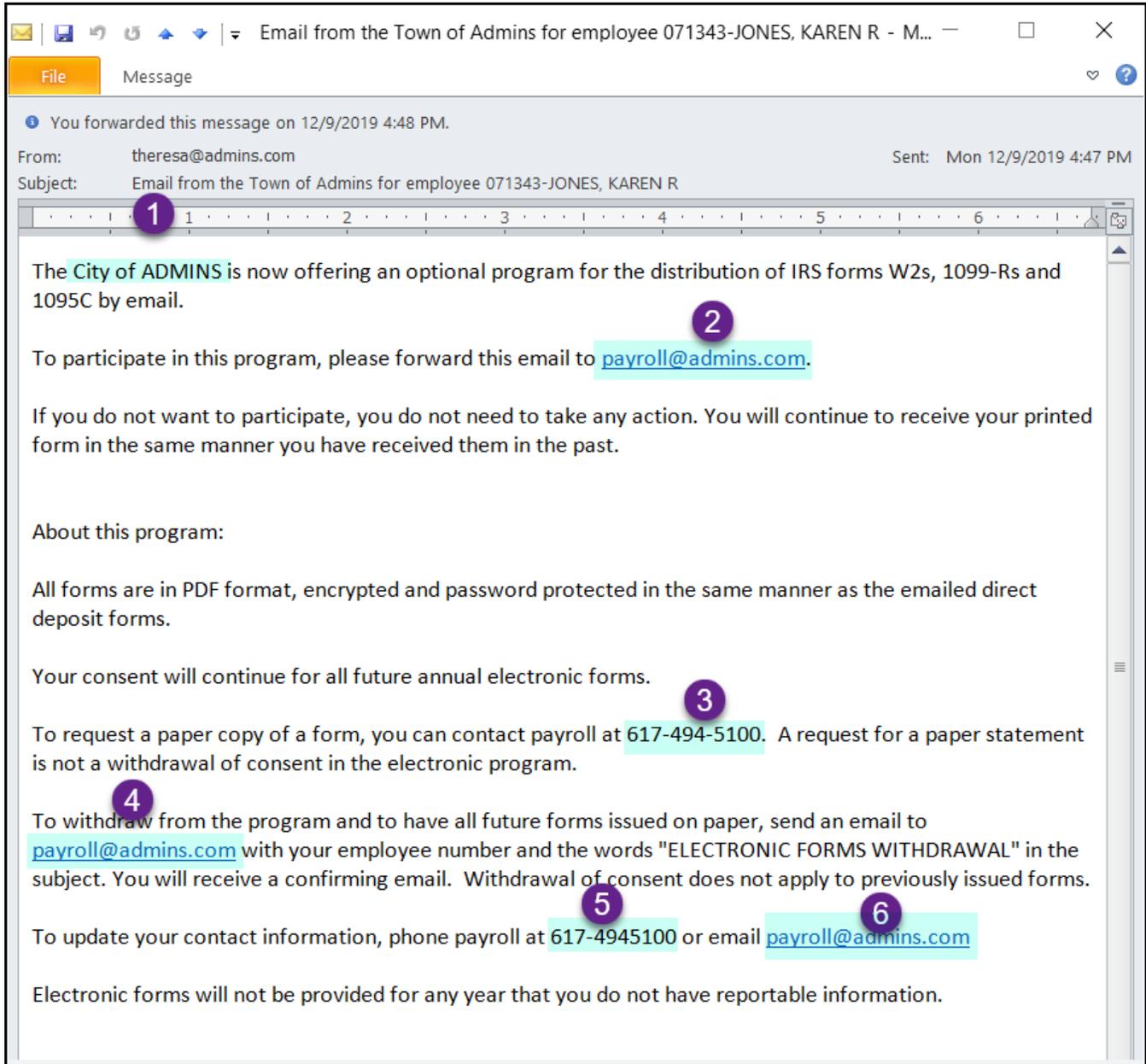


Figure 1

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

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

The screenshot shows the 'Employee Maintenance' form for LYNN M POWERS. The 'Contact' tab is selected. The 'Employee Contact' section includes fields for Phone #1, Phone #2, Email, DD Email, and Electronic Form. The 'Electronic Form' section has 'Send Date' (09-Dec-2019) and 'Consent Date' (09-Dec-2019) fields. Callout 1 points to the 'Send Date' field, and callout 2 points to the 'Consent Date' field.

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**.

The screenshot shows the 'Active w/Direct Deposit Employee Email / Electronic Form Update Screen'. It features a table with columns: 1 Employee, 2 Name, 3 Timesheet Group, Position, Term Date, Email Address, DD Email, and Electronic Consent Date. Annotations include: 'No email will be sent if consent date is filled in or if no email is present' pointing to the 'Consent Date' column; 'This group will be sent email' pointing to a group of rows; and arrows pointing from the 'Email Address' column to the 'Send EF' button.

1 Employee	2 Name	3 Timesheet Group	Position	Term Date	Email Address	DD Email	Electronic Consent Date
000020	POWERS, LYNN M	SCHOOL-BMS	S012TERAST5-01		campbellt189@gmail.com		09-Dec-2019
000003			T801POLDET-05		wendy@adms.com		08-Dec-2019
000004			T421BPMDIR-01		wendy@adms.com		08-Dec-2019
000005			T992RET1096-01				
000006			T210POLDET-01				
000059			T210POLDET-01				
000152	GRIEPPY, KEITH C	TOWN -TOWN	T123THHDMN-01		support@adms.com		10-Dec-2019
000206	MENCHILLO, MICHAEL J	TOWN -POL	T210POLOFF-14		anthea@adms.com		
000296	MORSE, MICHAEL J	TOWN -POL	T801POLDET-05		luann@adms.com		
000307			T210POLSGT-05		theresa@adms.com		
000311			T210POLSGT-05		wendy@adms.com		
001001			T135FINCONS-01		support@adms.com		
001148			T154MISMS-01				
001248	PLUFFE, LAWRENCE	TOWN -TOWN	T253INSPLMB-01				
001255	CREASIA, KAREN	TOWN -TOWN	T135HR OFCR-01				

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.

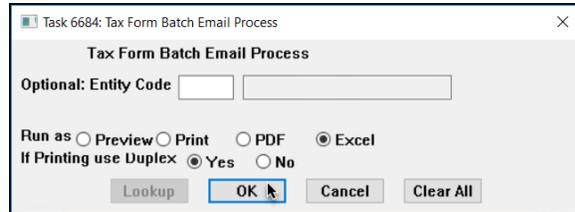
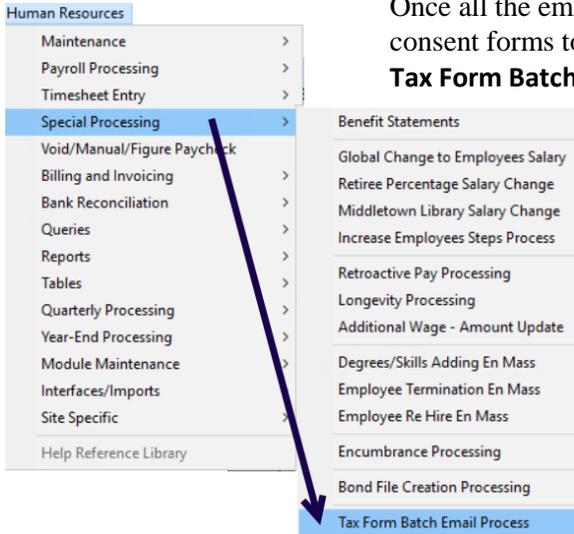
Figure 3 Employee Email Update Screen

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 **batch email** was sent.



4. TAX FORM BATCH EMAIL PROCESS

Once all the email addresses are entered, run the process to send the email consent forms to the employees. Select **Human Resources** ▶ **Special Processing** ▶ **Tax Form Batch Email Process**. The system will prompt for an optional Entity Code. Select the “Run as” option and click on **[OK]**.



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.

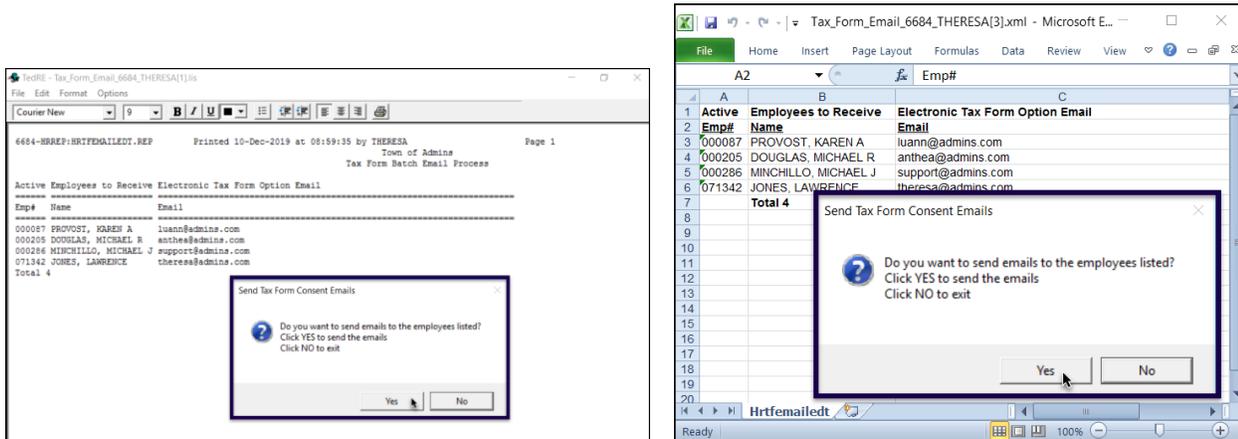


Figure 4 The list of employees and email addresses that will be sent the “Opt In” email

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.

