


Requesting Electronic Delivery for Tax Forms

 You must change your tax forms printing elections to receive electronic forms that you can print at home from Workday.

On this job aid:

- [How to request electronic delivery for your W2](#)
- [How to request electronic delivery for your 1095-C](#)

How to request electronic delivery for your W2

1. Log into Workday
2. On your Home Page under Your Top Apps, click View all Apps,

 [View All Apps](#)

3. Select the Pay App



Pay

4. From the right hand column, select Tax Documents.

The screenshot shows a sidebar menu with the following items:

- Payroll Calendars
 - 2020 Payroll Schedule
 - 2020-2021 Adjunct/Overload Activity Payment Schedule
- Voluntary Deductions
 - Voluntary Deductions
- My Statements
 - Payslips
 - Tax Documents** (highlighted with a yellow box)
- My Time
 - Time Off Balance
- View/Update Elections
 - Withholding Elections
 - Payment Elections

5. On the Tax Forms Printing Elections, click on the Edit button

The screenshot shows the 'My Tax Documents' page with a table titled 'Tax Forms Printing Elections'. The table has three columns: 'Company', 'Current Year End Tax Document Printing Election', and 'Printing Election'. The 'Company' column contains 'Lynn University'. The 'Current Year End Tax Document Printing Election' column contains 'You are currently receiving both electronic and paper copies of your Year End Tax Documents'. The 'Printing Election' column contains 'Edit' (highlighted with a yellow box).

6. Your current Year End Form Printing Election will be displayed. Click on the New Election to change your preference.

The screenshot shows the 'Change Year End Tax Documents Printing Elections' page. It displays the following information:

- Worker: [Redacted]
- Company: Lynn University
- Last Updated: (empty)
- Current Year End Form Printing Election: You are currently receiving both electronic and paper copies of your Year End Tax Documents.
- New Election:
 - ☒ Receive electronic copy of my Year End Tax Documents (highlighted with a yellow box)
 - ☐ Receive both electronic and paper copies of my Year End Tax Documents

Important Note : If you select the option to "Receive electronic copy of my Year End Tax Documents" :

Disclaimer Text : Online Statements require a computer with Internet access and Adobe Reader to view and print the tax document. After you submit your consent, it will remain valid for all future tax years or until you revoke your consent (as this process does not need to be repeated). If you do not submit your consent, the Payroll Department will provide you with a paper copy of your Year End Forms (Original/Corrected) although you will still be able to access the electronic version as well. If you have any questions, please contact the Payroll Office.

7. Click OK to save your changes

The screenshot shows two buttons: 'OK' (highlighted with a yellow box) and 'Cancel'.

8. Your new election will be displayed. Click on Done. This will return you to the Tax Forms Printing Elections Page. Click Done.

Change Year End Tax Documents Printing Elections

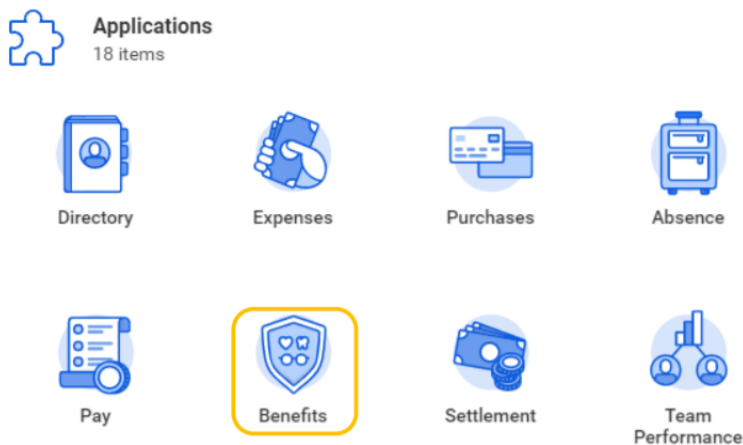
Worker: [Redacted]
 Company: Lynn University
 Last Updated: 12/10/2020
 Current Year End Form Printing Election: You are currently not receiving a paper copy of your Year End Tax Documents.
 New Election: Receive electronic copy of my Year End Tax Documents

Important Note : If you select the option to "Receive electronic copy of my Year End Tax Documents" :

Disclaimer Text: Online Statements require a computer with Internet access and Adobe Reader to view and print the tax document. After you submit your consent, it will remain valid for all future tax years or until you revoke your consent (so this process does not need to be repeated). If you do not submit your consent, the Payroll Department will provide you with a paper copy of your Year End Forms (Original/Corrected) although you will still be able to access the electronic version as well. If you have any questions, please contact the Payroll Office.

How to request electronic delivery for your 1095-C

1. From the Workday homepage, select the Benefits icon



2. From the left hand column, select 1095-C Printing Election.

The screenshot shows two columns of options. The left column, titled 'Change', contains buttons for Benefits, Beneficiaries, Dependents, Retirement Savings, and 1095-C Printing Election. The right column, titled 'View', contains buttons for My ACA Forms, Benefit Elections, and Benefit Elections as of Date. The '1095-C Printing Election' button in the left column is highlighted with a yellow border.

3. On the Change 1095-C Printing Elections, click on the circle to change your printing elections. Click on OK to save your changes.

Change 1095-C Printing Election

Worker

Last Updated

12/16/2020

Current 1095-C Printing Election

You are currently not receiving a paper copy of your 1095-C Tax Document

New Election

☐ Receive both electronic and paper copies of 1095-C
☒ Receive electronic copy of 1095-C

Important Note : If you select the option to "Receive electronic copy of my 1095-C Tax Documents" :

Disclaimer Text

Online Statements require a computer with Internet access and Adobe Reader to view and print the tax document. After you submit your consent, it will remain valid for all future tax years or until you revoke your consent (so this process does not need to be repeated). If you do not submit your consent, the Benefits Department will provide you with a paper copy of your 1095-C (Original/Corrected) although you will still be able to access the electronic version as well. If you have any questions, please contact the Benefits Department.

OK

Cancel

4. Your new election will be displayed. Click on Done.

Change 1095-C Printing Election

Worker

Last Updated

12/10/2020

Current 1095-C Printing Election

You are currently not receiving a paper copy of your 1095-C Tax Document

New Election

Receive electronic copy of 1095-C

Important Note : If you select the option to "Receive electronic copy of my 1095-C Tax Documents" :

Disclaimer Text

Online Statements require a computer with Internet access and Adobe Reader to view and print the tax document. After you submit your consent, it will remain valid for all future tax years or until you revoke your consent (so this process does not need to be repeated). If you do not submit your consent, the Benefits Department will provide you with a paper copy of your 1095-C (Original/Corrected) although you will still be able to access the electronic version as well. If you have any questions, please contact the Benefits Department.

Done