

W2 OPT IN Instructions

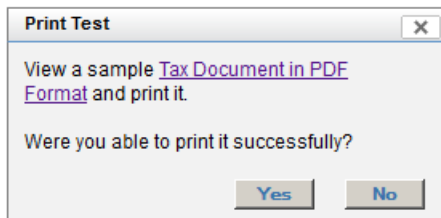
Once you log into Tax Documents you will see the following screens. We are providing step by step instructions to make your opt in process as easy as possible.

The screenshot shows the St. Olaf College Employees Self-Service Documents interface. At the top left is the St. Olaf College logo. The page title is "St. Olaf College Employees Self-Service Documents". In the top right corner, there is a "Logout ausland" link and a "Welcome Lacie Ausland!" message. A left-hand navigation menu includes links for Home, My Delivery Settings, W2 (with a sub-link for "Authorization Required"), View My Documents, My W2, and Logout. Below the menu, it says "Document Self-Service powered by: MHC SOFTWARE, INC. © 2013 MHC Software, Inc." The main content area is titled "Welcome" and contains a message: "Welcome to St. Olaf College's Document Self-Service! St. Olaf College is giving you the opportunity to receive your documents via the web. You will receive emails notifying you of when new information is available on our website. You can choose any of the delivery settings displayed on the side menu. Click on 'My Delivery Settings' or a specific group to select your personal delivery settings at any time. Your personal settings will be indicated with a green checkmark on the side menu. After choosing your delivery settings, you can view any of the documents within the groups displayed on the side menu. Click on 'View My Documents' and/or specific group. Then click on the document title to view the document. Thanks for using Document Self-Service."

On the welcome screen click on the **Authorization Required** link.

The screenshot shows the "My Delivery Settings - W-2s - Authorization" screen. The navigation menu is the same as in the previous screenshot, but the "W2" link is now highlighted with a green checkmark, and the "Authorization Required" sub-link is visible. The main content area contains the following text: "I wish to receive my W-2 electronically via the St Olaf College Employee Self-Service Web Site. I understand that I could receive my W-2 form as a printed document at no charge. I understand that the W-2 form needs to be attached to my tax returns, and I need to print my W-2. My W-2 will be delivered as a PDF and I will use Adobe Reader (available at no charge) to print it. I was able to print the sample W-2 successfully." Below this, it states: "I understand that I may revoke my consent to receive my W-2 electronically with 30 days advance notice anytime through December 1 of the current year. Otherwise, my consent will carry forward from year to year." Further down, it says: "It is anticipated that the electronic W-2s will be available by January 15th, but in no case later than January 31. I will be notified via email when my W-2 is available on line. Once published to Self-Service, my W-2 will be available for re-print through October 15th." At the bottom, there is a statement: "You must successfully print a test page before you agree." followed by a "Print Test" button.

Even though this screen states you must print a test page, you do not need access to a printer at this time. Click Print Test.



Click on **Tax Document in PDF Format** to view a test document. Once you verify that you can see the test document click the Yes button.

Logout ausland

St. Olaf College Employees Self-Service Documents

Welcome Lacie Ausland!

Home

My Delivery Settings

W2

Authorization Started

View My Documents

My W2

Logout

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My Delivery Settings - W-2s - Authorization

I wish to receive my W-2 electronically via the St Olaf College Employee Self-Service Web Site. I understand that I could receive my W-2 form as a printed document at no charge. I understand that the W-2 form needs to be attached to my tax returns, and I need to print my W-2. My W-2 will be delivered as a PDF and I will use Adobe Reader (available at no charge) to print it. I was able to print the sample W-2 successfully.

I understand that I may revoke my consent to receive my W-2 electronically with 30 days advance notice anytime through December 1 of the current year. Otherwise, my consent will carry forward from year to year.

It is anticipated that the electronic W-2s will be available by January 15th, but in no case later than January 31. I will be notified via email when my W-2 is available on line. Once published to Self-Service, my W-2 will be available for re-print through October 15th.

You must successfully print a test page before you agree.

Note on the left above that you have started the authorization process. Click on I Agree to continue.

Logout ausland

St. Olaf College Employees Self-Service Documents

Welcome Lacie Ausland!

Home

My Delivery Settings

W2

Authorization Started

View My Documents

My W2

Logout

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My Delivery Settings

[Home](#) > [My Delivery Settings](#)

W2

Please choose your delivery options for your W2 documents.

You will receive emails at your primary email address:

Authorization Started - clicking Submit completes your authorization

Yes	No	<u>Web Delivery</u>
<input checked="" type="radio"/>	<input type="radio"/>	Deliver my W2 document(s) via web access.
Settings controlled by your system administrator dictate whether you will receive an email notification when information is available via the web.		

Click the submit button to complete the opt in process. You will be notified by email when your W2 is available online.

Logout ausland

St. Olaf College Employees Self-Service Documents

Welcome Lacie Ausland!

Home

My Delivery Settings

W2

✔ Authorized

View My Documents

My W2

Logout

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My Delivery Settings

[Home](#) > [My Delivery Settings](#)

W2

Please choose your delivery options for your W2 documents.

You will receive emails at your primary email address:

✔ Authorized

Yes	No	<u>Web Delivery</u>
<input checked="" type="radio"/>	<input type="radio"/>	Deliver my W2 document(s) via web access.
Settings controlled by your system administrator dictate whether you will receive an email notification when information is available via the web.		

You will know the process is complete when you see the green check mark.