



## Year End for Employees

Version 1.0

2/16/2023

Company Confidential

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## 1. Purpose

This user guide is for the employee user role in the Paperless Employee site. It includes most of the functionality that you will use as an employee user such as completing, updating, and retrieving copies of your tax forms among other services your company has contracted with Experian Employer Services (EES).

If you have further questions regarding the Paperless Employee site and the services provided to your company, please contact your employer.

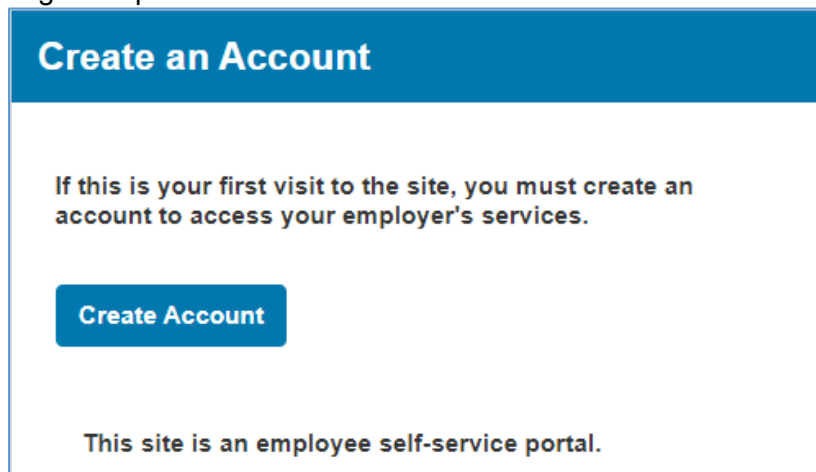
## 2. Account Creation

You will need to create an account in the Paperless Employee site for access. If your company has enabled single sign on (SSO) you will automatically be logged in from your company site and do not need to create an account.

### 2.1 Create an Account

Begin by accessing your company's Paperless Employee site. If you need further assistance with your company's link to Paperless Employee, please contact your employer.

If this is your first time accessing the Paperless Employee site, on the right click **Create Account** to begin the process.



For the safety of your account, your employer will require you to verify your identity.

- ☞ **NOTE:** These settings will vary by company. Your screen may not match the images below. Please contact your employer if you are unable to create an account.

1. Enter your information in the fields provided.
2. Select the checkbox next to **I'm not a robot**.
3. Click **Authenticate & Create Account** at the bottom of your screen.

**Create a New Account**


**Account Authentication**

Your **Employee ID, Social Security Number and Date of Birth** are required to validate your secure account access.

**Employee ID**  
 Show  
 Please enter your 6 digit employee ID, starting with "T"

**Social Security Number**  
 Show  
 Your 9 digit SSN cannot begin with '000' or '666'

**Date of Birth**  
 Show  
 Your DOB should be in the format of mm-dd-yyyy

I'm not a robot  reCAPTCHA  
 Privacy - Terms

Authenticate & Create Account

### 2.1.1. User ID and Password

1. Enter your **First Name, Middle Name (optional) and Last Name.**

**Create a New Account**

**Account Name**

The name entered here is only used as your user name. To make any legal or permanent name changes, please contact your employer.

**First Name \***                      **Middle Name**                      **Last Name \***

2. Create a **User ID** of your own choosing in the field provided. User IDs should be 6-15 characters long using only numbers and letters.
3. Create a **Password** in the field provided following the password rules on your screen.
4. Enter the password you created again in the **Confirm New Password** field.

**Create Your User ID**

**Enter a User ID \***

User ID must be 6-15 characters using only letters and/or numbers.

**Create a Password**

- Is case sensitive
- May not contain your User ID
- Must be 8-100 characters in length

Your password must contain 3 of the 4 items:

- Uppercase characters
- Lowercase characters
- Numbers
- Symbols

**Enter a New Password \***

Password Strength:

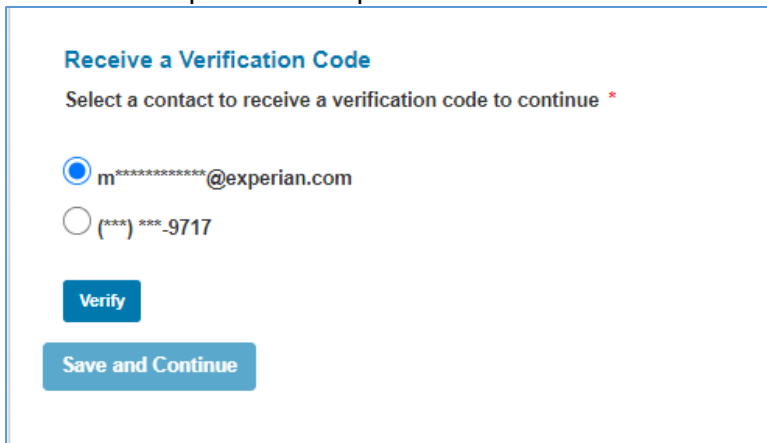
**Confirm New Password \***

### 2.1.2. Trusted Contacts

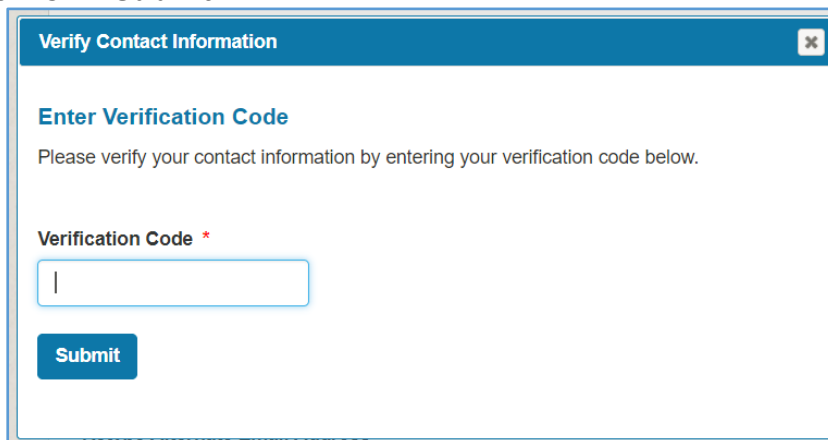
Since your account contains personal identifiable information about you, keeping your account safe is of the utmost importance. Your employer may send your Trusted Contacts information to EES. This information is used to verify the person creating the account is you.

You will see a section at the bottom of the **Create a New Account** screen called **Receive a Verification Code**. The contact information provided by your employer will appear and is masked for your security.

You will be required to complete this one-time verification step.



1. Select which contact method you prefer to receive your verification code.
  - If you select the radio button by your email address, you can click **Verify**. Please open your email message to retrieve the verification code. (From no-reply@paperlessemmployee.com)
  - If you prefer a text, choose the radio button next to **Text Me** to receive your verification in a text message.
  - If you prefer a phone call, choose the radio button next to **Call Me** to receive your verification code via a phone call.
2. Enter your code in the **Verification Code** field in the pop-up window.
3. Click **Submit**.

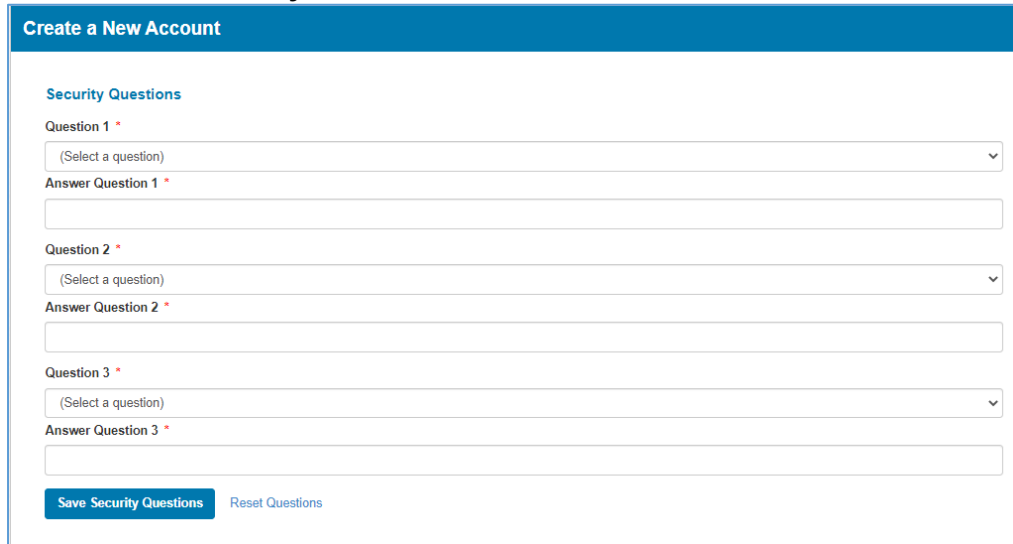


4. Click **Save and Continue** at the bottom of your screen to activate your account.

### 2.1.3. Security Questions

If you forget your user ID or password, security questions are used to retrieve your login information. If your company has elected to use security questions, you will be required to choose three (3) during the account creation process.

1. Click to choose the question you wish to answer, using the drop-down arrows to the right of each question.
2. Type your answer to the question under the corresponding answer row.
3. Continue until you have completed all three questions.
4. Click **Save Security Questions** at the bottom of the screen.

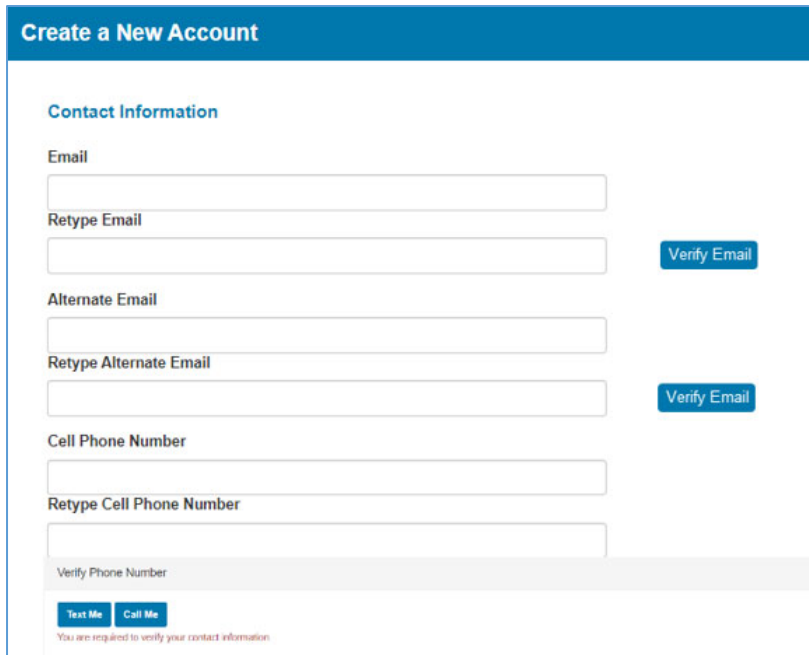


The screenshot shows a web form titled "Create a New Account" with a sub-section "Security Questions". It contains three identical question sets. Each set includes a dropdown menu for selecting a question (with the placeholder text "(Select a question)"), a text input field for the answer, and a red asterisk indicating a required field. At the bottom of the form, there is a blue button labeled "Save Security Questions" and a link labeled "Reset Questions".

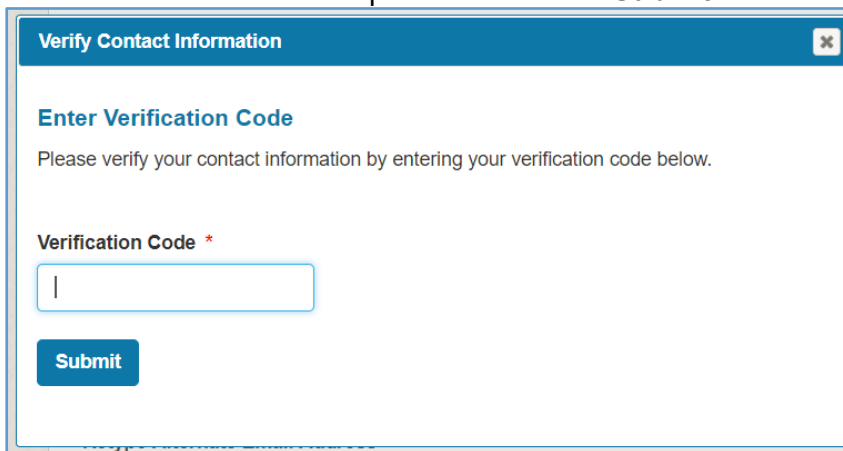
### 2.1.4. Contact Information

Contact information is where notifications regarding your account and tax form statuses will be sent.

1. Enter your preferred email, alternate email, and phone number. At minimum, you must enter your preferred email address.
  - If email verification is required, you will click on the **Verify Email** button. A code will be sent to your email address. Enter the code in the field provided and click **Submit**.
  - If phone verification is required, click the **Text Me** or **Call Me** button. A code will be sent to your phone, or you will receive a phone call.



2. Enter the code in the field provided and click **Submit**.



### 2.1.5. Electronic Statement Notification Options

1. Scroll down to the **Electronic Statement Notification Options**, within the same window.
2. Select the **Yes** radio button to receive your statements electronically in the Paperless Employee site. Select the **No** radio button if you prefer to have them mailed.
3. Check the box for how you want to be notified that your tax statement(s) are ready.  
Your tax statement(s) will not be delivered via email or text message for security reasons. You will need to log into the Paperless Employee site to retrieve you documents.
4. Click **Save Notification Option Settings**.

If you elect electronic delivery, you will receive your tax statement(s) in the Paperless Employee site until you change your delivery method.

<p><b>Would you like to register to receive your 2022 tax statement(s) electronically?</b></p> <p> <input type="radio"/> Yes  <input type="radio"/> No         </p> <p>By choosing <b>YES</b>, you agree to the following:</p> <ol style="list-style-type: none"> <li>1. You will be notified when your form is available.</li> <li>2. You will need to download a pdf file and print your form; it will not be emailed to you.</li> <li>3. You will <b>not</b> receive a paper/postal copy.</li> <li>4. This registration will be carried over from year to year unless you choose to withdraw your consent.</li> <li>5. You may opt out at any time by returning to this site and selecting the "Account Settings" menu option.</li> </ol> <p>If you do not have software installed on your computer for viewing PDF documents, you can download the free <a href="#">Adobe® Reader®</a>.</p>	<p>Email</p> <input type="checkbox"/>	<p>Alternate Email</p> <input type="checkbox"/>	<p>Cell Phone Number</p> <input type="checkbox"/>
<p><b>Would you like to receive lockout alert notifications?</b></p> <p> <input checked="" type="radio"/> Yes  <input type="radio"/> No         </p>	<p>Email</p> <input type="checkbox"/>	<p>Alternate Email</p> <input type="checkbox"/>	<p>Cell Phone Number</p> <input type="checkbox"/>
<p> <input type="button" value="Save Notification Option Settings"/> <input type="button" value="Cancel"/> </p>			

## 2.2 Fix Forgotten User ID or Password

If you cannot remember either your user ID or password to access your Paperless Employee account, click the blue link for either **User ID** or **Password**, depending on what information you need.

Login

User ID:

Password:

[Help](#)

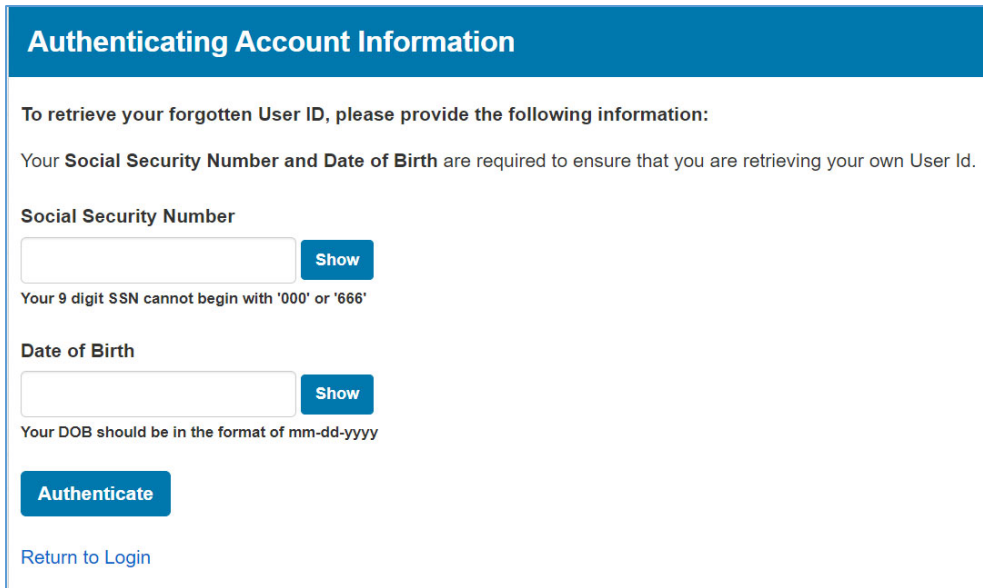
[Forgot User ID or Password](#)

### 2.2.1. Forgotten User ID

You will need to enter the values originally used to set up your account. If you cannot remember these values, please contact your employer.

1. Enter your information in the fields provided.
2. Click the **Authenticate** button at the bottom of the screen.
3. Your user ID will be displayed. Make sure to remember this information.
4. Click the blue **Return to Login** link and enter your user ID and password in the fields provided to login.

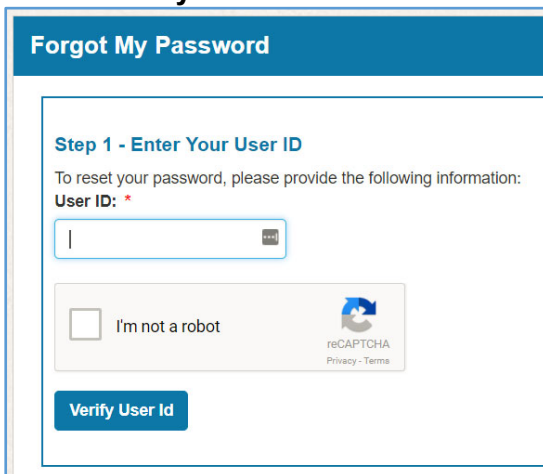




### 2.2.2. Forgotten Password

If you have forgotten your password, you will need to enter your User ID that was set-up during initial account creation.

1. Enter your **User ID**.
2. Select the checkbox next to **I'm not a robot**.
3. Click **Verify User ID**.



4. Select the radio button based on how you want to confirm your identity. These options will vary based on what information was provided when the account was created.

### Step 2 - How Will You Confirm Your Identity?

- Answer your three security questions
- Receive a verification code via email
- Receive a reset link via email
- Receive a verification code via text message to your mobile phone

Next

5. Click **Next**.
6. Follow the prompts in **Step 3** screen to confirm identity.
7. Set up a new password then click the link to return to the login screen.

## 3. Year-End Tax Statements

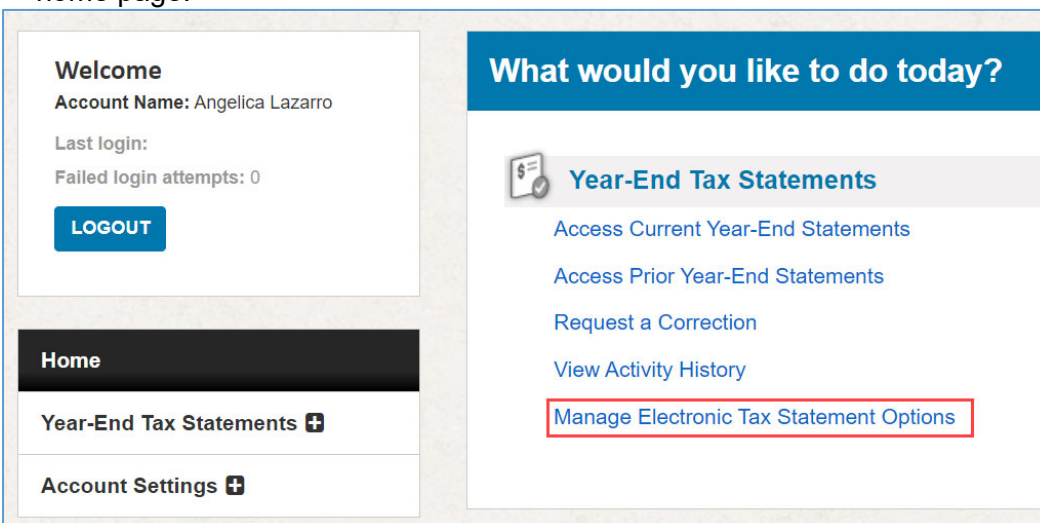
If you registered to receive your tax statements electronically in the Paperless Employee site during your account setup, you can access these in your Paperless Employee account as your employer makes them available. A notification of form availability will be sent to via the contact methods you selected when you opted in for an electronic original.

You can download these forms as often as you like until October 15<sup>th</sup>. After this date, tax forms are considered reissues and may include a cost depending on options set by your employer.

### 3.1 Register to Receive Tax Statements Electronically

If you didn't elect to receive your tax statement(s) electronically during your account setup, you can change your delivery method under **Account Settings** in the Paperless Employee site. Your employer cannot choose electronic delivery for you per IRS regulations.

1. Click **Account Settings** from the left side navigation.
2. Click **Manage Electronic Tax Statement Options**. You can also select this option from your home page.



The screenshot shows the user interface of the Paperless Employee account. On the left, there is a navigation menu with 'Home' selected, and 'Year-End Tax Statements' and 'Account Settings' listed below it. The main content area has a blue header 'What would you like to do today?' and a section for 'Year-End Tax Statements' with a list of options: 'Access Current Year-End Statements', 'Access Prior Year-End Statements', 'Request a Correction', 'View Activity History', and 'Manage Electronic Tax Statement Options'. The 'Manage Electronic Tax Statement Options' link is highlighted with a red rectangular box.

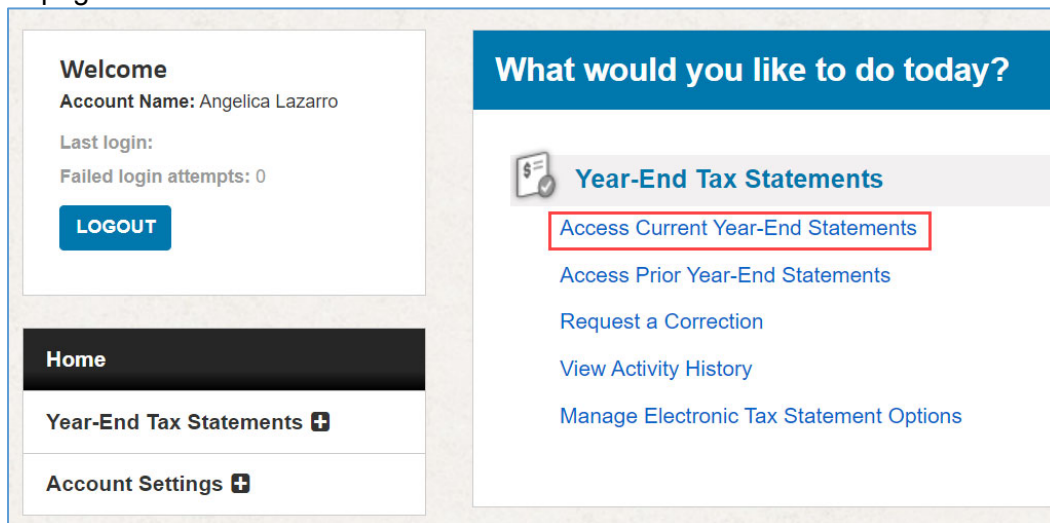
3. Scroll down to the **Electronic Statement Notification Options**.

4. Select the **Yes** radio button to receive your statements electronically in the Paperless Employee site. Select the **No** radio button if you prefer to have them mailed.
5. Check the box for how you want to be notified that your tax statement(s) are ready.  
Your tax statement(s) will not be delivered via email or text message for security reasons. You will need to log into the Paperless Employee site to retrieve you documents.
6. Click **Save Notification Option Settings**.  
If you elect electronic delivery, you will receive your tax statement(s) in the Paperless Employee site until you change your delivery method.

### 3.2 Retrieve Original Electronic Tax Statements

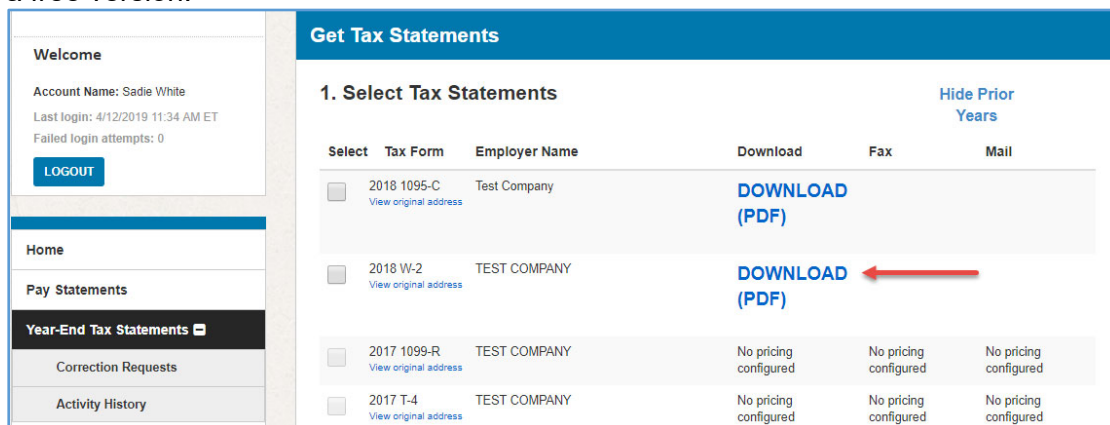
If you registered to receive your tax statement(s) electronically you can retrieve them in the Paperless Employee site after you have been notified of the form availability.

1. Click **Year-End Tax Statements** in the left-hand navigation.
2. Click **Access Current Year-End Statements**. You can also select this option from the home page.



3. Click the **Download PDF** link to access the statement.

You will need a PDF reader on your computer to view the documents. If you don't have a PDF reader on your computer, click the **Get Adobe Reader** icon on the left side of the page to download a free version.

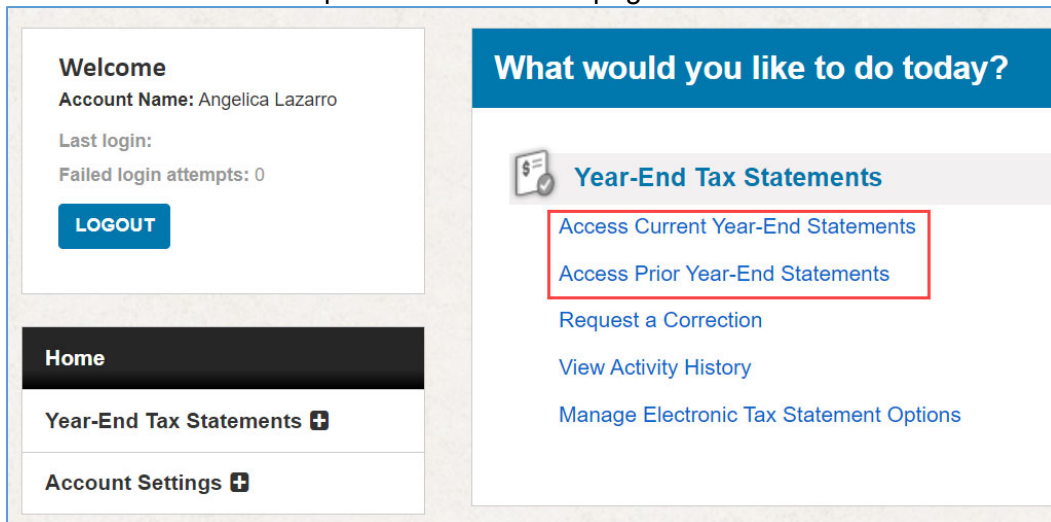


The document will appear in a new tab in your browser. You can view, print, and/or save the PDF document based on your needs.

### 3.3 Request a Reissued Copy of Tax Statements

If you lose your tax statement, you can request a reissue of the statement from the current or previous years in the Paperless Employee site.

1. Click **Year-End Tax Statements** in the left-hand navigation.
2. Click on **Access Current Year-End Statements** or **Access Prior Year-End Statements**. You can also select this option from the home page.



Employers have the option to charge employees for reissued tax statements. If your employer is charging for reissued tax statements, the price will appear next to each form on the **Get Tax Statements** page.

In the **Get Tax Statements** page follow the steps to request a reissue:

1. In the **Select** column, check the box for the tax statement you need reissued.

<input type="checkbox"/>	2016 T-4 <a href="#">View original address</a>	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
<input type="checkbox"/>	2016 T-4 <a href="#">View original address</a>	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
<input checked="" type="checkbox"/>	2016 W-2 <a href="#">View original address</a>	TEST COMPANY	\$10.00	\$10.00	\$10.00
<input type="checkbox"/>	2015 1095-C <a href="#">View original address</a>	Test Company			
<input type="checkbox"/>	2015 1099-R <a href="#">View original address</a>	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
<input type="checkbox"/>	2015 T-4 <a href="#">View original address</a>	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured

2. Select the desired delivery method for the reissued form. Employers have the option to determine the delivery methods; therefore, depending on the employer, the delivery options may vary from what's shown below.

- **Download (PDF)** – view the PDF immediately and download, print, or save. A free resend is available for 30 days.

**Delivery Method:**

**DOWNLOAD (PDF)**       Fax       Mail

Forms will NOT be emailed to you.

- **Fax** - Enter the fax number where you want the statement(s) sent. Statements are faxed within 5 minutes. If the first attempt is unsuccessful, the site will reattempt to send every 5 minutes for 30 minutes. The site will stop after this time if these attempts are unsuccessful. If you do not receive the document, please confirm your fax number. Faxes reissues are free for 30 days.

**Delivery Method:**

DOWNLOAD (PDF)       **Fax**       Mail

Fax Number \*

Example: (555) 555-5555

- **Mail** - Enter the mailing address where you would like the document(s) sent. This will not change the address on your tax statement, only the postal address where the statement is being mailed. Please allow up to 10 business days for the requested reissued statements to be delivered. You may place another request after a 7-day delivery hold has expired.

**Delivery Method:**

DOWNLOAD (PDF)       Fax       **Mail**

Enter the mailing address where you would like your forms delivered:

The address you provide will only be used to deliver this order. To permanently change your address, please contact your employer.

Address (line 1)

Address (line 2)

City

State/Province/Region

Zip/Postal Code

Country

3. Click on the **Review & Complete Order** button.

**1. Select Tax Statements** [Show All Years](#)

Select	Tax Form	Employer Name	Download	Fax	Mail
<input type="checkbox"/>	2021 1099-NEC <a href="#">View original address</a>	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
<input checked="" type="checkbox"/>	2021 W-2 <a href="#">View original address</a>	TEST COMPANY			

To View PDF documents you need the free [Adobe Reader](#)

**2. Select Delivery Method**

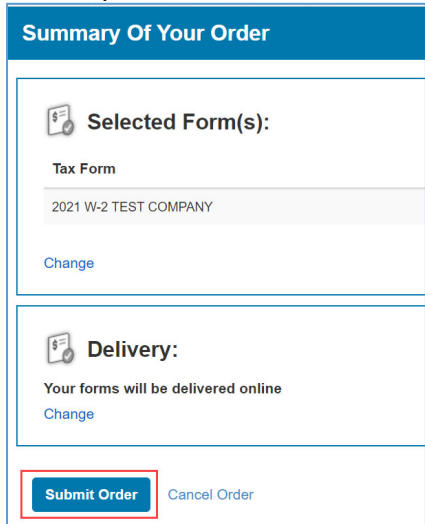
**DOWNLOAD (PDF)**       Fax       Mail

Forms will NOT be emailed to you.

[Reset All](#)

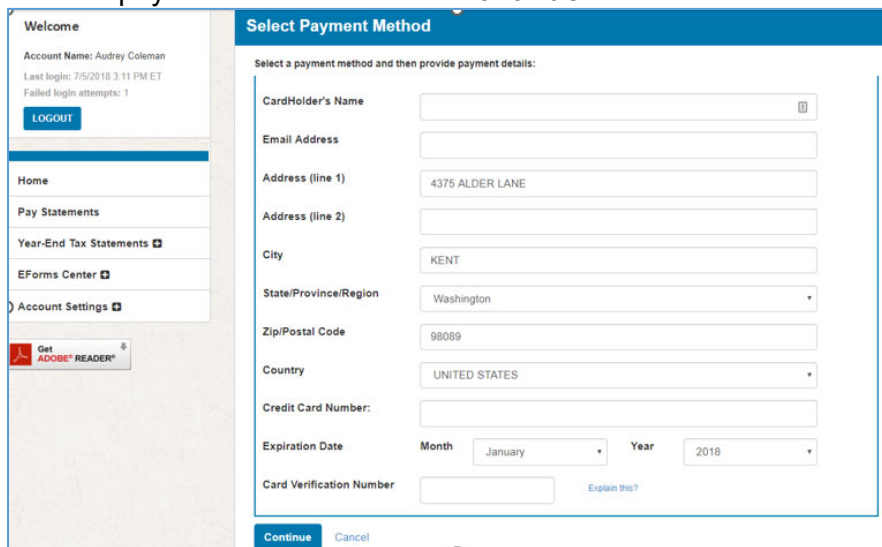
If your employer does not charge for reissued tax statements, the **Summary of Your Order** page will appear with a summary of your order.

To complete the order, click **Submit Order**.



If your employer charges for reissued tax statements, the **Select Payment Method** screen will appear.

1. Fill in the payment details and click **Continue**.

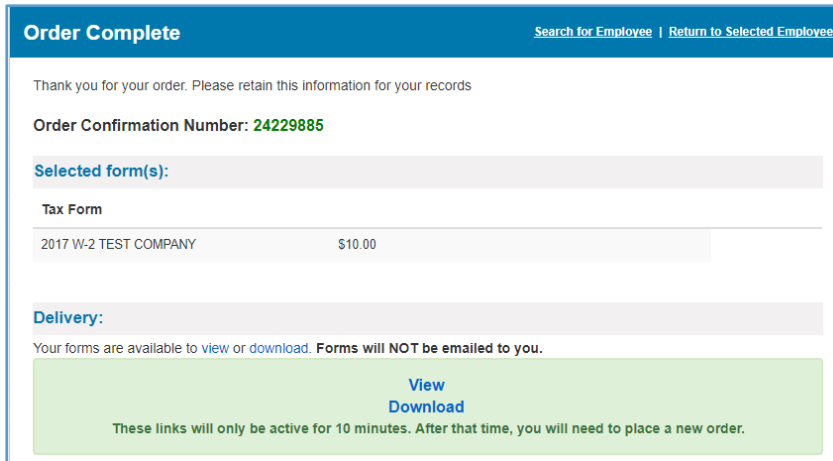


2. The **Summary of Your Order** page will appear detailing your order. The forms selected, and the delivery method can be changed prior to completing the order by clicking **Change** under **Selected Forms** and **Delivery**.

3. To complete the order, click **Submit Order**.

Once the Tax order has been submitted, the **Order Complete** page will appear with a confirmation that your order was processed and complete. Retain this information for your records.

If you selected online delivery, your documents will be available to **View** or **Download** for 10 minutes. After 10 minutes, you will need to submit a new order.

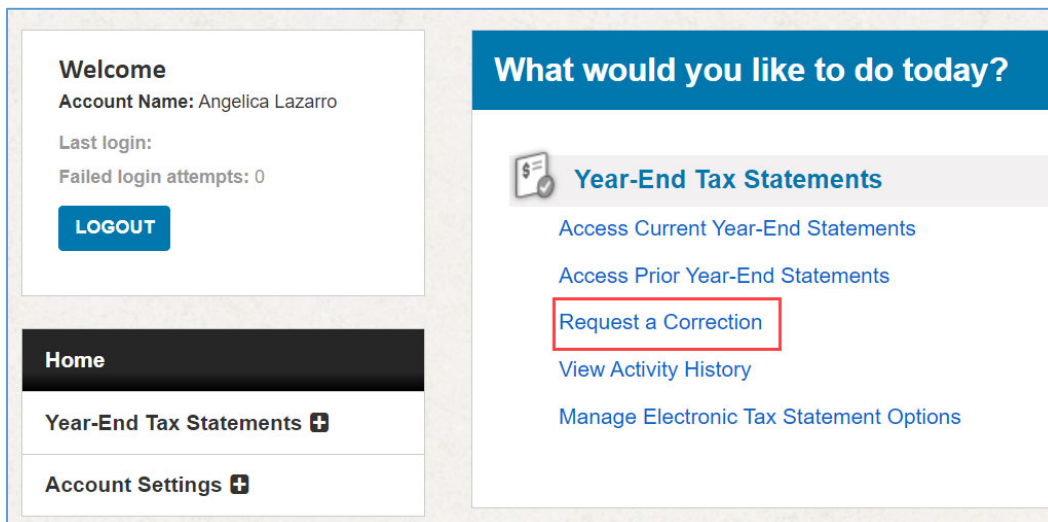


### 3.4 Request a Correction to a Tax Statement

If you need a correction to your tax statement(s), you can request a correction in the Paperless Employee site. The correction request will be sent to your employer for review.

Note: This is an optional service and not all clients subscribe to use it. If you do not see an option through the site to “Request a Correction to a Tax Statement”, please reach out to your employer to find out what process you should follow.

From the home page, click **Correction Request** in the left-hand navigation or click **Request a Correction** form your home page.



On the **Correction Request** page, complete the following information:

1. Use the **Select** drop-down arrow to choose the document you want corrected.
2. Provide your contact information in the fields provided.
3. Select the checkbox next to the items that need correction and enter the new information. If there is any additional information that may be helpful to your employer when reviewing the correction request, enter it in the **Comments** section.
4. Click **Submit**.

Correction Request by Admin
✕

Correction requested for: **2022 W-2 TEST COMPANY**

**Provide customer contact information so that their employer may follow up with them.**

Customer Phone Number:  Extension:

Customer Email Address:

**Choose the items that need to be corrected and specify any additional details.**

Name  First:  Middle:  Last:  Suffix:

SSN or SIN  Correct SSN or SIN:

Form details  Item to be corrected:

Comments (optional)

SUBMIT
Clear

After clicking **Submit**, the **Correction Request** page will appear with the correction details. Retain the confirmation number for your records. Once the request has been submitted, the employer will be notified and can review the request.

### 3.5 View Correction Request History and Status

If you have requested a correction and want to review the status or history, you can access this information in the Paperless Employee site.

Under the Year-End Tax Statements click **Activity History** in the left-hand navigation or **View Activity History** from the home page.

**Welcome**

Account Name: Angelica Lazarro

Last login:

Failed login attempts: 0

LOGOUT

Home

[Year-End Tax Statements +](#)

[Account Settings +](#)

What would you like to do today?

**Year-End Tax Statements**

[Access Current Year-End Statements](#)

[Access Prior Year-End Statements](#)

[Request a Correction](#)

View Activity History

[Manage Electronic Tax Statement Options](#)

You will be able to view **Previous Tax Form Orders**, which lists any reissue requests you have submitted, and **Previous Correction Requests**, which lists any correction requests you have submitted.



To view the details and status of your request, click on the blue **Order Number** or the **Correction Confirmation Number** and the **Correction Request Details** page will appear.

Pop-ups must be enabled in the browser to see the **Correction Request Details** page.

**Welcome**

Account Name: Audrey Coleman  
 Last login: 7/5/2018 5:00 PM ET  
 Failed login attempts: 0

[LOGOUT](#)

---

**Home**

**Pay Statements**

**Year-End Tax Statements**


**Correction Requests**

**Activity History**

---

**EForms Center**

**Account Settings**

 Get ADOBE® READER®

**Previous Tax Form Orders**

Order Number	Order Date	Tax Forms
<a href="#">24192569</a>	7/5/2018 5:31:23 PM	2015 W-2 - TEST COMPANY
<a href="#">24192364</a>	7/5/2018 3:52:47 PM	2017 T-4 - TEST COMPANY
<a href="#">24182970</a>	6/28/2018 12:01:52 PM	2017 W-2 - TEST COMPANY 2017 W-2 PR - TEST COMPANY
<a href="#">20359783</a>	10/13/2017 10:38:58 AM	2016 1095-C - Test Company

**Previous Correction Requests**

Correction Confirmation Number	Date Requested	Form Name	Company Name	Status	Details
<a href="#">131772</a>	7/6/2018 2:45:40 PM	2015 W-2	TEST COMPANY	Pending	

Your request will have one of the following statuses:

- **Pending** – needs to be reviewed by your employer.
- **Processed** – the correction has been made and the new form will be mailed or available online, depending on your selected delivery method.
- **Denied** – your employer has denied the correction. If your request has been denied, click on the blue **Correction Confirmation Number** to view the **Correction Request Details** page.

**Correction Request Details**

**Correction Request Details**

Correction Confirmation Number: 130899  
 Date Correction Reported: 3/8/2018 2:37 PM

**Contact Information**

Phone Number: 555-555-5555  
 Email Address: jkmarks@cicplus.com

**Form Details**

Form: 2016 W-2  
 Correction Type(s): Form Details,  
 Correction Description:  
 Comments:

**Employer Response**

Status: Processed  
 Comments:

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## 4. Revision History

Date	Description
10/22/2018	Initial version
01/19/2019	Adjust example paperlessemployee.com URL
02/13/2019	Updated Correction Request Screen
04/12/2019	Updated Get Tax Statements screen shot with Download PDF Link
08/02/2019	Formatting Updates
09/27/2019	Added section for EITC Letters
11/08/2019	Removed hyperlinks within the document
03/13/2020	Updated Requesting a Reissued Copy of Tax Statements-Mailed Reissue Details
04/10/2020	Updated Requesting a Reissued Copy of Tax Statements-Mailed Reissue Details
02/19/2021	Updated screenshot for Summary of Your Order when requesting a Reissue
02/18/2022	Updated Copyright date
2/16/2023	Updated branding, images, section tiles and order, features