



ELECTRONIC W-2 FORM INSTRUCTIONS

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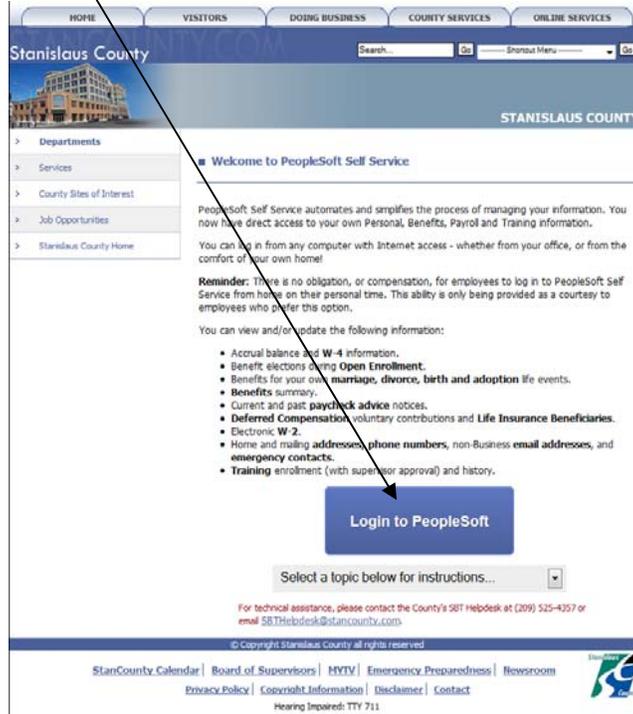
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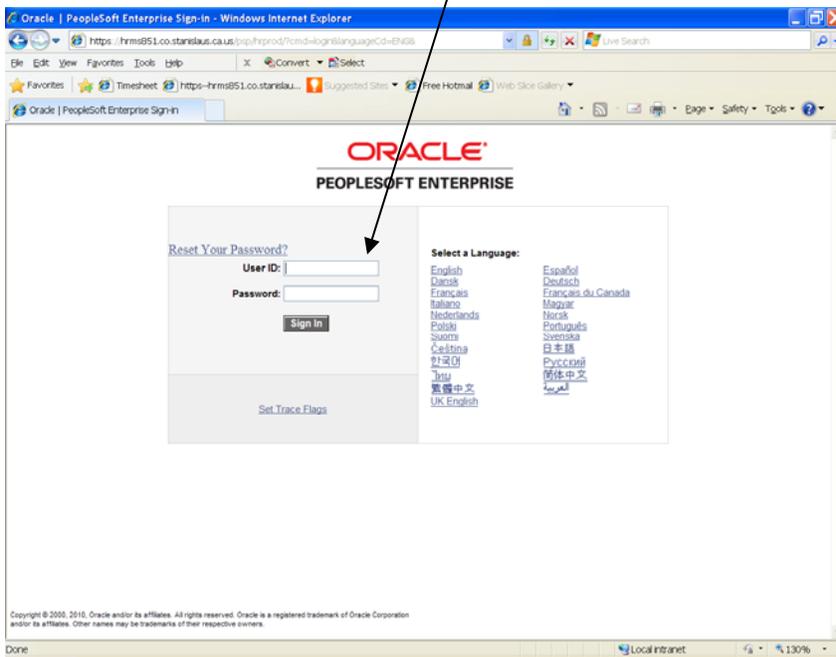
Calendar Year End 14

LOGGING INTO PEOPLESOFT

SINGLE CLICK "Login to PeopleSoft"



Enter your User ID and password.



VIEWING YOUR ELECTRONIC W-2 FORM

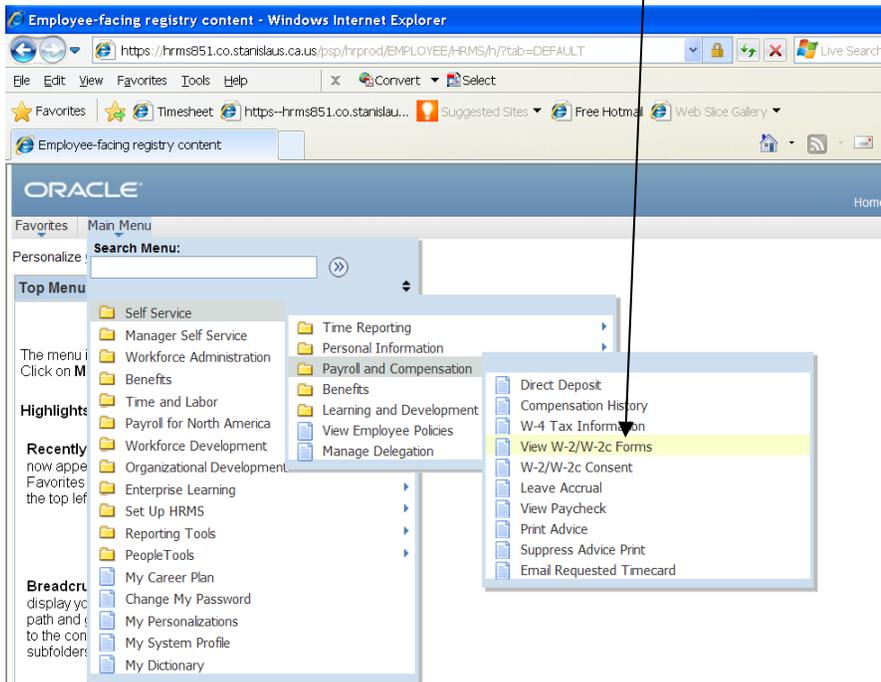
Currently, your W-2 form, if available for viewing, is accessible through Self Service.

Follow the path:

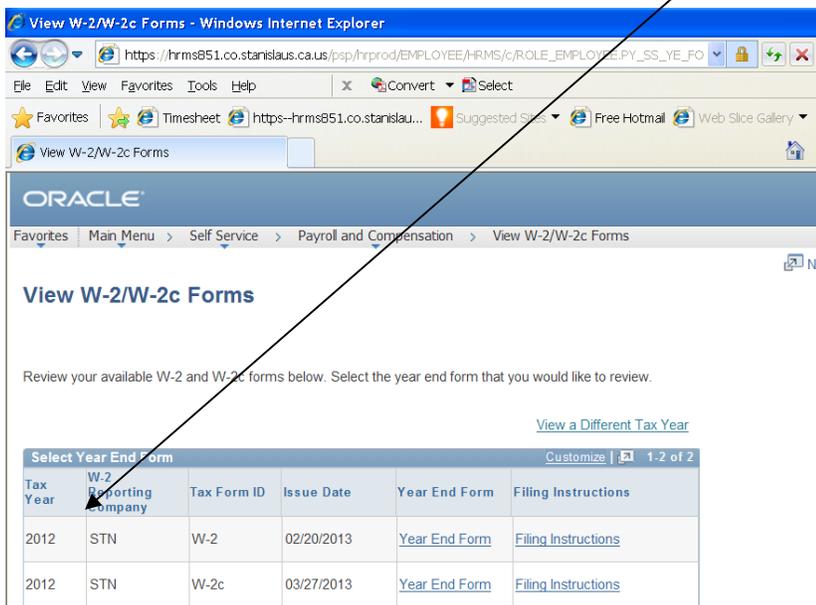
Main Menu > Self Service > **Payroll and Compensation**

From here you can view both your 2013 W-2 and W-2c forms

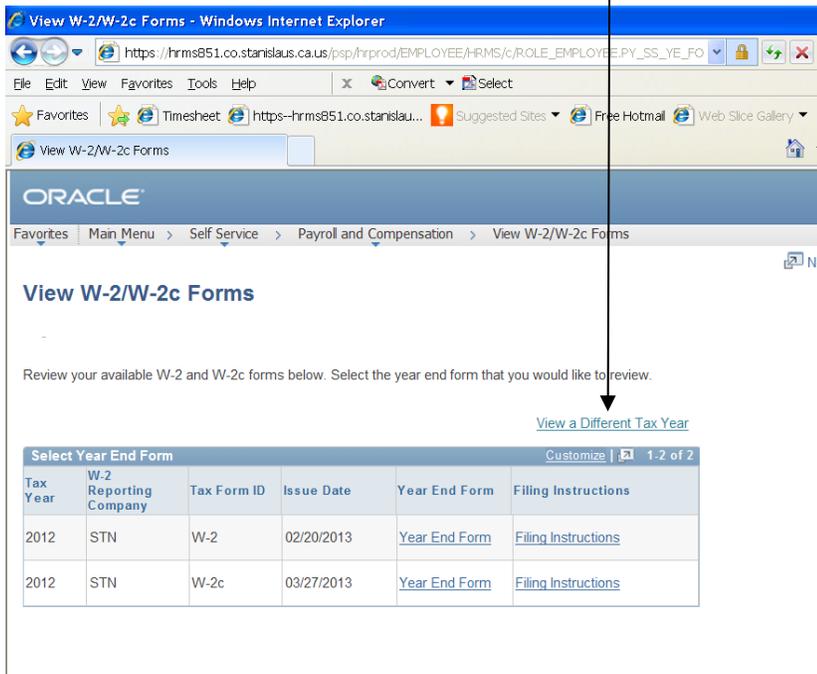
NOTE: If you did not have a prior year correction, you will not see the W-2c form option



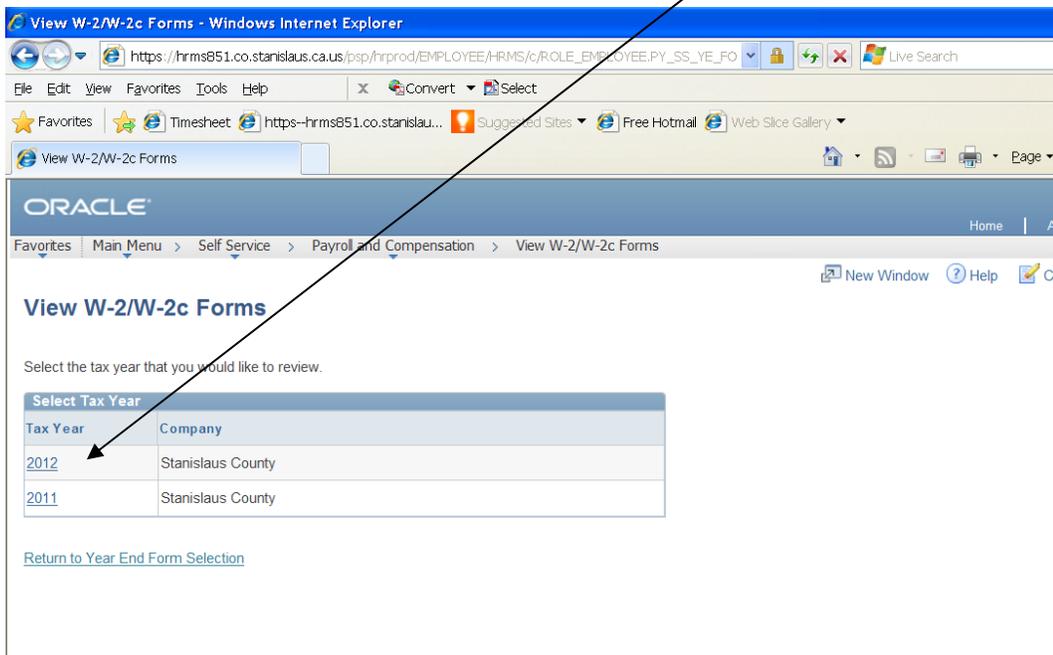
SINGLE CLICK the link and you should see the appropriate tax year.



To view a different year, **SINGLE CLICK** the link

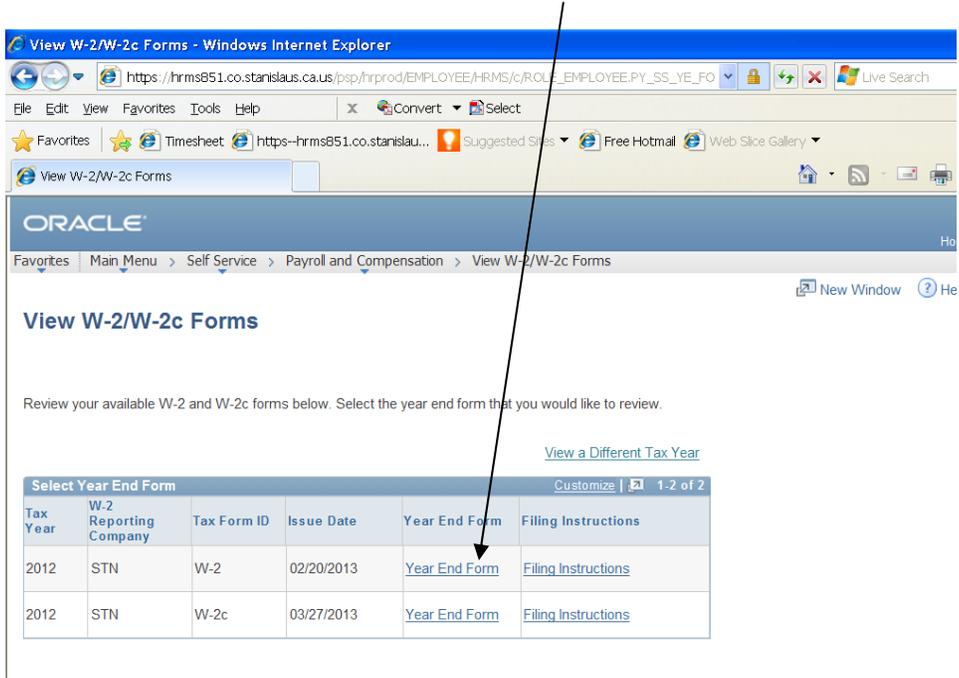


SINGLE CLICK the link and you will see the tax year you wish to view

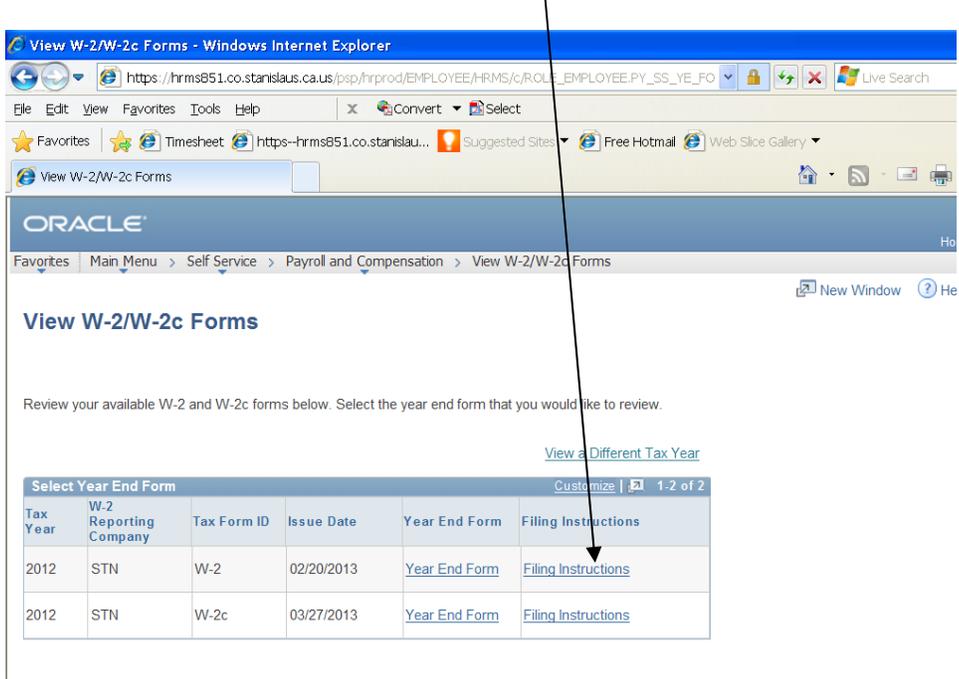


SINGLE CLICK the year you wish to view and you will see this screen.

SINGLE CLICK the link for Year End Form and PeopleSoft will take you to the W-2 form for that year. You can print or save the form from this screen.



SINGLE CLICK the link for Filing Instructions and PeopleSoft will take you to a link with instructions for filing your tax return (see next page).



Filing Instructions

stanislaus.ca.us/cs/hrprod/psfileproc/V_bc2c00d6-3f33-41cf-ade1-e3fa31d084b7 - Windows Internet Explorer

hrms851.co.stanislaus.ca.us/cs/hrprod/psfileproc/V_bc2c00d6-3f33-41cf-ade1-e3fa31d084b7

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1 / 1 100% Collaborate Sign Find

Notice to Employee

Refund. Even if you do not have to file a tax return, you should file to get a refund if box 2 shows federal income tax withheld or if you can take the earned income credit.

Earned income credit (EIC). You may be able to take the EIC for 2012 if (a) you do not have a qualifying child and you earned less than \$13,980 (\$19,190 if married filing jointly), (b) you have one qualifying child and you earned less than \$36,920 (\$42,130 if married filing jointly), (c) you have two qualifying children and you earned less than \$41,952 (\$47,162 if married filing jointly), or (d) you have three or more qualifying children and you earned less than \$45,060 (\$50,270 if married filing jointly). You and any qualifying children must have valid social security numbers (SSNs). You cannot take the EIC if your investment income is more than \$3,200, or if income is earned for services provided while you were an inmate at a penal institution. **Any EIC that is more than your tax liability is refunded to you, but only if you file a tax return.**

Clergy and religious workers. If you are not subject to social security and Medicare taxes, see Pub. 517, Social Security and Other Information for Members of the Clergy and Religious Workers.

Corrections. If your name, SSN, or address is incorrect, correct Copies B, C, and 2 and ask your employer to correct your employment record. Be sure to ask the employer to file Form W-2c, Corrected Wage and Tax Statement, with the Social Security Administration (SSA) to correct any name, SSN, or money amount error reported to the SSA on Form W-2. If your name and SSN are correct but are not the same as shown on your social security card, you should ask for a new card that displays your correct name at any SSA office or by calling 1-800-772-1213. You also may visit the SSA at www.socialsecurity.gov.

Cost of employer-sponsored health coverage (if such cost is provided by the employer). The reporting in Box 12, using Code DD, of the cost of employer-sponsored health coverage is for your information only. **The amount reported with Code DD is not taxable.**

Credit for excess taxes. If you had more than one employer in 2012 and more than \$4,624.20 in social security and/or Tier I railroad retirement (RRITA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. If you had more than one railroad employer and more than \$3,192.90 in Tier II RRITA tax was withheld, you also may be able to claim a credit. See your Form 1040 or Form 1040A instructions and Pub. 505, Tax Withholding and Estimated Tax.

Instructions (continued from the back of Copy B)

Note. If a year follows code D through H, S, Y, AA, BB, or EE, you made a make-up pension contribution for a prior year(s) when you were in military service. To figure whether you made excess deferrals, consider these amounts for the year shown, not the current year. If no year is shown, the contributions are for the current year.

- A**—Uncollected social security or RRITA tax on tips. Include this tax on Form 1040. See "Other Taxes" in the Form 1040 instructions.
- B**—Uncollected Medicare tax on tips. Include this tax on Form 1040. See "Other Taxes" in the Form 1040 instructions.
- C**—Taxable cost of group-term life insurance over \$50,000 (included in boxes 1, 3 (up to social security wage base), and 5).
- D**—Elective deferrals to a section 401(k) cash or deferred arrangement. Also includes deferrals under a SIMPLE retirement account that is part of a section 401(k) arrangement.
- E**—Elective deferrals under a section 403(b) salary reduction agreement.
- F**—Elective deferrals under a section 408(k)(6) salary reduction SEP.
- G**—Elective deferrals and employer contributions (including nonelective deferrals) to a section 457(b) deferred compensation plan.
- H**—Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan. See "Adjusted Gross Income" in the Form 1040 instructions for how to deduct.
- J**—Nontaxable sick pay (information only, not included in boxes 1, 3, or 5).
- K**—20% excise tax on excess golden parachute payments. See "Other Taxes" in the Form 1040 instructions.
- L**—Substantiated employee business reimbursements (nontaxable).
- M**—Uncollected social security or RRITA tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See "Other Taxes" in the Form 1040 instructions.
- N**—Uncollected Medicare tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See "Other Taxes" in the Form 1040 instructions.

Instructions for Employee

Box 1. Enter this amount on the wages line of your tax return.

Box 2. Enter this amount on the federal income tax withheld line of your tax return.

Box 8. This amount is not included in boxes 1, 3, 5, or 7. For information on how to report tips on your tax return, see your Form 1040 instructions.

Unless you have records that show you did not receive the amount reported in box 8 as allocated tips, you must file Form 4137, Social Security and Medicare Tax on Unreported Tip Income, with your income tax return to report the allocated tip amount. On Form 4137 you will figure the social security and Medicare tax owed on the allocated tips shown on your Form(s) W-2 that must report as income and on other tips you did not report to your employer. By filing Form 4137, your social security tips will be credited to your social security record (used to figure your benefits).

Box 10. This amount is the total dependent care benefits that your employer paid to you or incurred on your behalf (including amounts from a section 125 (cafeteria) plan). Any amount over \$5,000 is also included in box 1. Complete Form 2441, Child and Dependent Care Expenses, to compute any taxable and nontaxable amounts.

Box 11. This amount is (a) reported in box 1 if it is a distribution made to you from a nonqualified deferred compensation or nongovernmental section 457(b) plan or (b) included in box 3 and/or 5 if it is a prior year deferral under a nonqualified or section 457(b) plan that became taxable for social security and Medicare taxes this year because there is no longer a substantial risk of forfeiture of your right to the deferred amount.

Box 12. The following list explains the codes shown in box 12. You may need this information to complete your tax return. Elective deferrals (codes D, E, F, and S) and designated Roth contributions (codes AA, BB, and EE) under all plans are generally limited to a total of \$17,000 (\$11,500 if you only have SIMPLE plans, \$20,000 for section 403(b) plans if you qualify for the 15-year rule explained in Pub. 571). Deferrals under code G are limited to \$17,000. Deferrals under code H are limited to \$7,000.

However, if you were at least age 50 in 2012, your employer may have allowed an additional deferral of up to \$5,500 (\$2,500 for section 401(k)(11) and 408(p) SIMPLE plans). This additional deferral amount is not subject to the overall limit on elective deferrals. For code G, the limit on elective deferrals may be higher for the last 3 years before you reach retirement age. Contact your plan administrator for more information. Amounts in excess of the overall elective deferral limit must be included in income. See the "Wages, Salaries, Tips, etc." line instructions for Form 1040.

(Instructions for Employee continued on the back of Copy C.)

- P**—Excludable moving expense reimbursements paid directly to employee (not included in boxes 1, 3, or 5)
- Q**—Nontaxable combat pay. See the instructions for Form 1040 or Form 1040A for details on reporting this amount.
- R**—Employer contributions to your Archer MSA. Report on Form 8853, Archer MSAs and Long-Term Care Insurance Contracts.
- S**—Employee salary reduction contributions under a section 408(p) SIMPLE plan (not included in box 1)
- T**—Adoption benefits (not included in box 1). Complete Form 8839, Qualified Adoption Expenses, to compute any taxable and nontaxable amounts.
- V**—Income from exercise of nonstatutory stock option(s) (included in boxes 1, 3 (up to social security wage base), and 5). See Pub. 525 and instructions for Schedule D (Form 1040) for reporting requirements.
- W**—Employer contributions (including amounts the employee elected to contribute using a section 125 (cafeteria) plan) to your health savings account. Report on Form 8889, Health Savings Accounts (HSAs).
- Y**—Deferrals under a section 409A nonqualified deferred compensation plan.
- Z**—Income under section 409A on a nonqualified deferred compensation plan. This amount is also included in box 1. It is subject to an additional 20% tax plus interest. See "Other Taxes" in the Form 1040 instructions.
- AA**—Designated Roth contributions under a section 401(k) plan.
- BB**—Designated Roth contributions under a section 403(b) plan.
- DD**—Cost of employer-sponsored health coverage. **The amount reported with Code DD is not taxable.**
- EE**—Designated Roth contributions under a governmental section 457(b) plan. This amount does not apply to contributions under a tax-exempt organization section 457(b) plan.

Box 13. If the "Retirement plan" box is checked, special limits may apply to the amount of traditional IRA contributions you may deduct.

Note. Keep Copy C of Form W-2 for at least 3 years after the due date for filing your income tax return. However, to help protect your social security benefits, keep Copy C until you begin receiving social security benefits, just in case there is a question about your work record and/or earnings in a particular year.

(Also see Notice to Employee, on back of Copy B.)

VIEWING YOUR W-2C FORM

Occasionally corrections need to be made to an employee's taxable income. When corrections are made, a W-2c form is generated. These forms can be accessed from the same page and in the same manner as your W-2 form. If you have a correction you will see the W-2c form listed under the Tax Form ID.

The screenshot shows the Oracle HRMS interface for viewing tax forms. The browser title is "View W-2/W-2c Forms - Windows Internet Explorer". The URL is "https://hrms851.co.stanislous.ca.us/bsp/hrprod/EMPLOYEE/HRMS/c/ROLE_EMPLOYEE.PY_SS_YE_FO". The page title is "View W-2/W-2c Forms". Below the title, there is a navigation breadcrumb: "Main Menu > Self Service > Payroll and Compensation > View W-2/W-2c Forms". The main content area says "Review your available W-2 and W-2c forms below. Select the year end form that you would like to review." and includes a link "View a Different Tax Year". Below this is a table with the following data:

Select Year End Form					
Tax Year	W-2 Reporting Company	Tax Form ID	Issue Date	Year End Form	Filing Instructions
2012	STN	W-2	02/20/2013	Year End Form	Filing Instructions
2012	STN	W-2c	03/27/2013	Year End Form	Filing Instructions

You can see the form and the filing instructions by **SINGLE CLICKING** on the link.

This screenshot is identical to the one above, showing the Oracle HRMS interface. A black arrow points from the text above to the "Filing Instructions" link in the second row of the table, which corresponds to the W-2c form.

Select Year End Form					
Tax Year	W-2 Reporting Company	Tax Form ID	Issue Date	Year End Form	Filing Instructions
2012	STN	W-2	02/20/2013	Year End Form	Filing Instructions
2012	STN	W-2c	03/27/2013	Year End Form	Filing Instructions

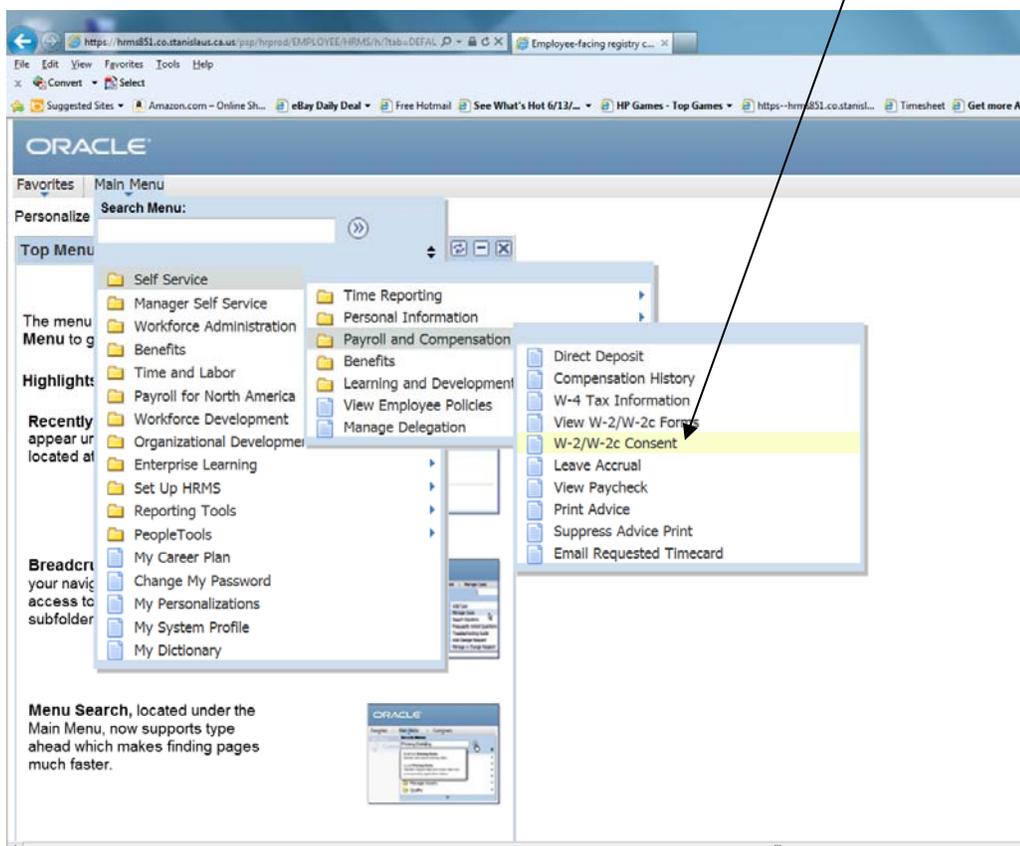
CONSENTING TO AN ELECTRONIC W-2/W-2C FORMS

IRS Regulations require that employees must consent to receiving an electronic copy of their W-2 form. PeopleSoft provides a process to activate this option. Employees are encouraged to exercise this option but are not required to do so if a W-2 form hard copy is preferred.

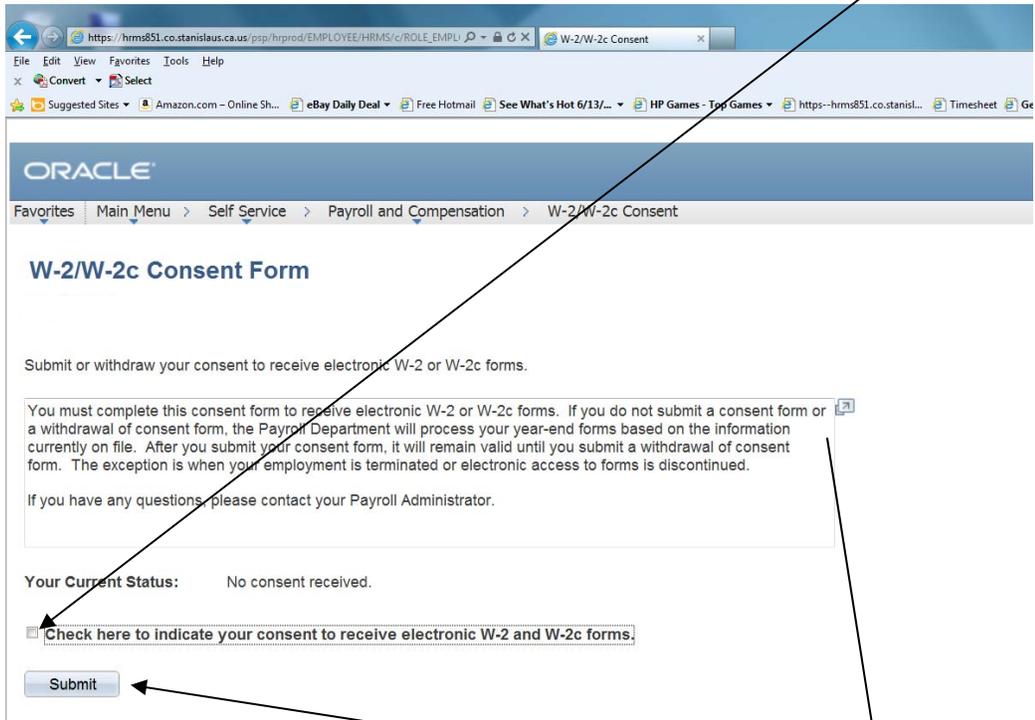
Employees can view their W-2 form and print their own copy or save a copy for use when filing their taxes. Since this option will be available at any time after the issuance of the W-2 form, if an employee needs an additional copy at a later time, the employee can print their own without having to contact the Auditor-Controller's Office Payroll Division and pay the \$5.00 fee for a duplicate.

To consent to receive an electronic copy, follow the path:

Main Menu > Self Service > Payroll and Compensation > **W-2/W-2c Consent**



You will receive the following message.
To choose to receive an electronic W-2 or W-2c form, you should **check the box** next to the consent.



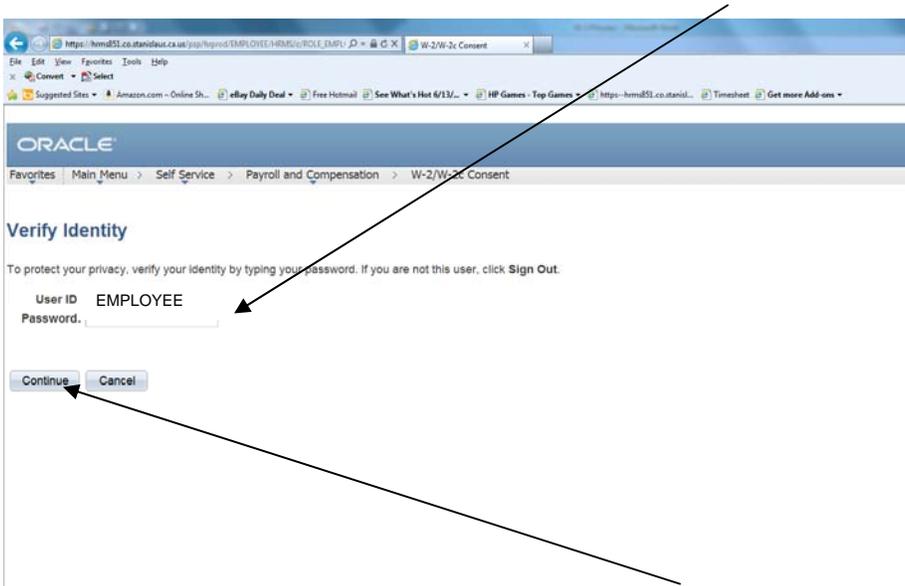
After you check the box, **SINGLE CLICK** the Submit button.

The message states:

You must complete this consent form to receive electronic W-2 or W-2c forms. If you do not submit a consent form or a withdrawal of consent form, the Auditor-Controller's Office Payroll Division will process your year-end forms based on the information currently on file. **After you submit your consent form, it will remain valid until you submit a withdrawal of consent form.** The exception is when your employment is terminated or electronic access to forms is discontinued.

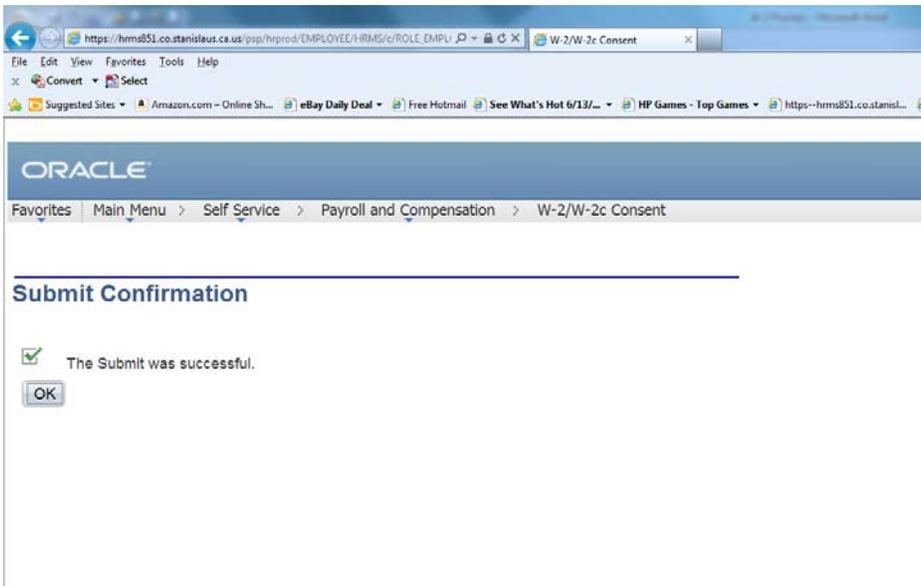
If you have any questions, please contact the Auditor-Controller's Office Payroll Division.

You will be asked to verify your identity by entering your password.

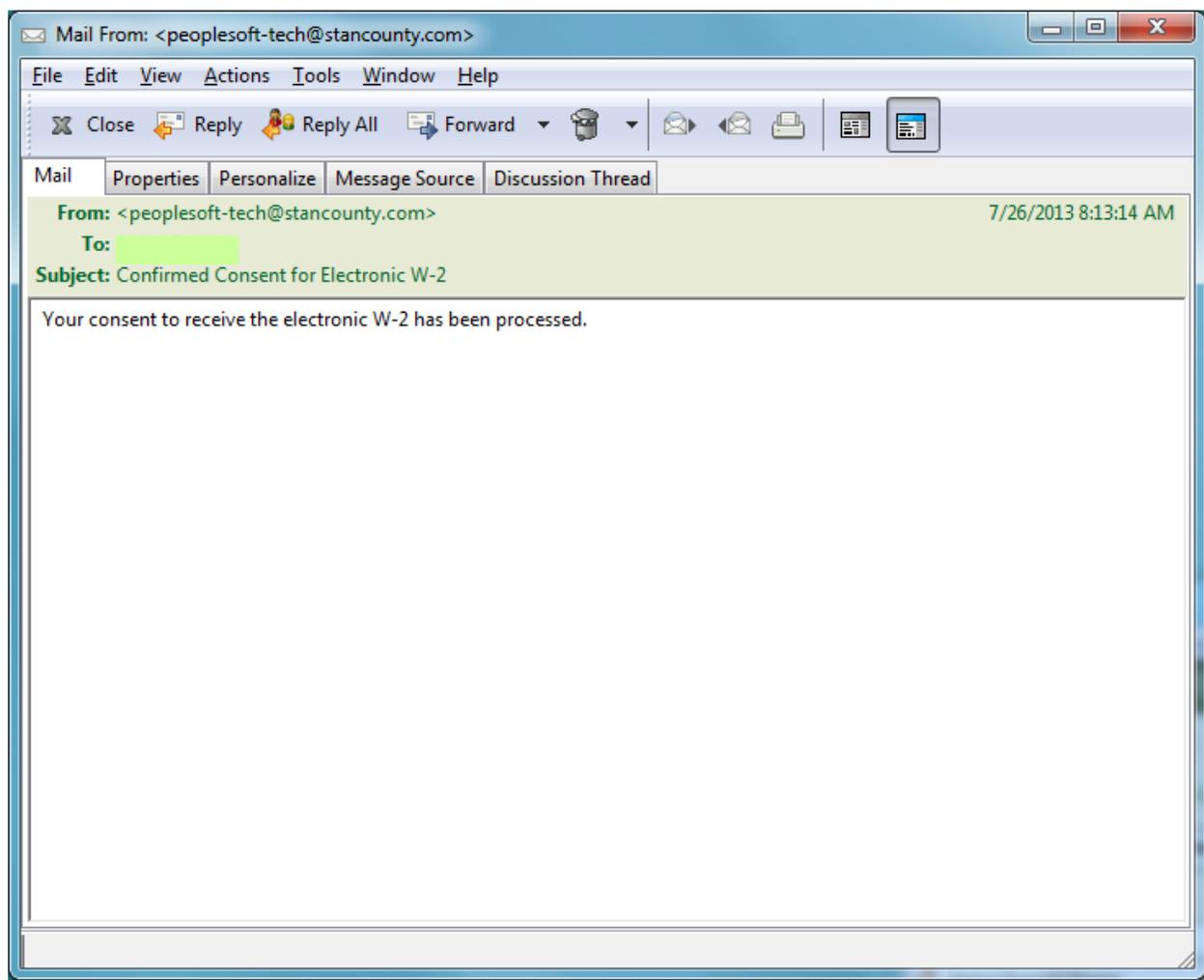


After entering your password, **SINGLE CLICK** the Continue button.

You will receive confirmation that you have submitted your request successfully.



You will receive an e-mail confirming your consent has been processed.



Once you have submitted your request, you will not receive a hard copy W-2 form when processed.

WITHDRAWING YOUR CONSENT

If you should decide to withdraw consent and receive a hard copy of the W-2 form, follow the same path and you will now see the option to withdraw your consent.

SINGLE CLICK on the check box.

ORACLE

Favorites Main Menu Self Service > Payroll and Compensation > W-2/W-2c Consent

W-2/W-2c Consent Form

Submit or withdraw your consent to receive electronic W-2 or W-2c forms.

You have consented to receive electronic W-2 and W-2c forms. If you prefer to receive paper W-2 and W-2c forms, you must submit a withdrawal of consent form. After you submit the withdrawal of consent form, it is valid until you submit a new consent form.

Your Current Status: Consent received.

Check here to withdraw your consent to receive electronic W-2 and W-2c forms.

Submit

SINGLE CLICK the submit button.

The message states:

You have consented to receive electronic W-2 and W-2c forms. If you prefer to receive paper W-2 and W-2c forms, you must submit a withdrawal of consent form. After you submit the withdrawal of consent form, it is valid until you submit a new consent form.

Enter your password

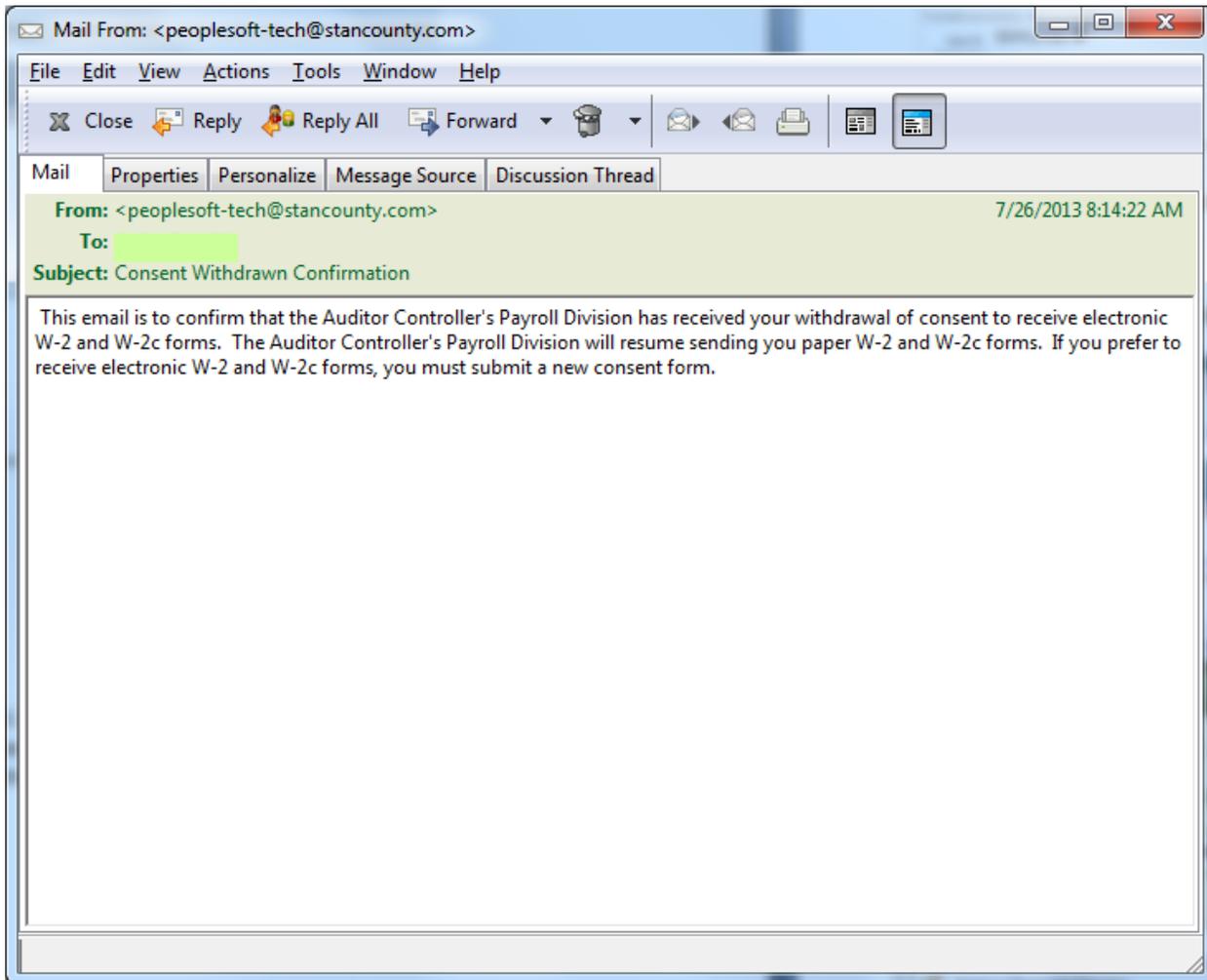


SINGLE CLICK the Continue button.

You will receive confirmation that you have submitted your request successfully.



You will receive an e-mail confirming your consent has been withdrawn.



Once you have completed this process, you will once again receive a hard copy of your W-2 form when processed.

CALENDAR YEAR END

When the W-2's are completed by the Auditor-Controller's Payroll Division, an e-mail notification will be sent to all "Consented" employees informing them of the availability of their W-2 through Self Service.