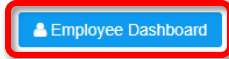


# How to Access Tax Forms (W-2, W-4)

Please follow the below instructions on how to view your tax forms and enroll in electronic delivery.

## Step 1: Go to the Employee Dashboard

### Employee Dashboard



Pay Advice, Benefits, Self-Service Update for D  
Add'l Fed taxes), Employment Summary and V  
Update addresses, contact information or marit  
information.

Login into **Portal** and go to the **Staff** tab. Then click on the **Employee Dashboard** button at the top of the screen.

## Step 2: Go to Taxes

Click on the **Taxes** menu to expand the view within **Pay Information**:

The screenshot shows a 'Pay Information' menu with several options. The 'Taxes' option is highlighted with a red box. Below the menu, there are links for 'W-4 Employee's Withholding Allowance Certificate', 'W-2 Wage and Tax Statement', 'W-2c Corrected Wage and Tax Statement', and 'Electronic Tax Forms Consent'.

**PLEASE NOTE:** Upon clicking on each link it will bring you back to the **Banner 8** screen. This is correct. To return back to the **Employee Dashboard** use the back button.

## Step 3: Viewing W-4 Information

Click on **W-4 Employee's Withholding Allowance Certificate** link in the Taxes menu to be brought to a view of your W-4 allowances in Banner 8:

### W4 Tax Exemptions or Allowances

**Federal Income Tax for U.S. Citizens**  
As of Date: Apr 16, 2020  
Name: Minnie Mouse  
Address: 111 Main St.  
Apt. 1A  
White Plains NY 10603  
Last Name differs from SSN card: No  
Deduction Status: Active  
Start Date: Jan 01, 2013  
End Date:  
Filing Status: Single  
Number of Allowances: 1  
Additional Withholdings: .00  
Note: Additional amount, if any, you want withheld from each paycheck.

## Step 4: Viewing W-2 Statement

### W-2 Wage and Tax Statement

You may adjust the display size by selecting View in the menu at the top of your browser.

**Tax Year:**

**Employer or Institution:**

1. Click on the **W-2 Wage and Tax Statement** link in the Taxes menu to be brought to a view of your W-2 in Banner 8.
2. Select the **Tax Year** from the dropdown that you would like to view.
3. Click the **Display** button to view your W-2

## Step 4: Enrolling in Electronic Consent

Enroll in electronic consent to receive your W-2 and 1095-C via the Employee Dashboard by clicking on the **Electronic Regulatory Consent** link on the Employee Dashboard page. Then check off your consent and click on **Submit**.

### Electronic Regulatory Consent

Select the check box to consent to receive your tax statement electronically, or uncheck to revoke consent.

By consenting to receive your tax statement(s) electronically, you agree to return to this site between January 31 and O You may be required to print and attach your tax forms to Federal, State, or local income tax return and it is your respo Help on the specific statement page.

Your consent for each electronic statement will be valid for all subsequent tax years unless revoked by you, upon termin revoke your consent and receive paper forms by accessing this site and unchecking the, My Choice consent box, or prov

A paper copy of your tax statement(s) may be obtained by contacting the Human Resources or Payroll office. Updating c providing correct up-to-date information to the Human Resources or Payroll office.

#### Selection Criteria

	My Choice
Consent to receive W-2 electronically:	<input checked="" type="checkbox"/>
Consent to receive 1095-C electronically:	<input checked="" type="checkbox"/>

**I understand the instructions provided to me for accessing and printing my electronic tax forms.**

**\*\*\*\*You will now be able to access your W-2 and 1095-C via the Taxes section of the Employee Dashboard.\*\*\*\***