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**

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:

**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:
**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.

<table>
<thead>
<tr>
<th>Tax Year</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employer or Institution</td>
<td>Pace University</td>
</tr>
</tbody>
</table>

Display

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 February 28 to print and attach your tax forms to Federal, State, or local income tax return and it is your responsibility to verify the accuracy of data. 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 termination of employment. You may print paper copies of your electronic statement(s) by accessing this site and unchecking the My Choice consent box, or providing correct up-to-date information to the Human Resources or Payroll office.

**Selection Criteria**

<table>
<thead>
<tr>
<th>Consent to receive W-2 electronically:</th>
<th>My Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consent to receive 1095-C electronically:</td>
<td>✔️</td>
</tr>
</tbody>
</table>

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

**Submit**

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