

Client Training HQ

Assisting Employees in the Tax Form Management Portal

Purpose/Summary

This article explains how to search for employees, help employees log in, and view tax forms inside the Employee Search tab within the Tax Form Management Portal.

Note: The reports shown may vary depending on your configurations and level of access.

Searching for an Employee

1. To view an Employee Profile, log in to www.mytaxform.com.
2. Click the **Employee Search** tab.
3. Search for the employee you need to locate.

Note: At least one of the following is required: employee last name, employee first name, or Employee ID number/SSN (located in the drop-down menu).

4. Click on the employee's name to open the individual employee's profile. A dashboard will then appear with all the employee's general information which includes their name, address, email, and phone number.

Helping an Employee Log into Tax Form Management

Once inside the Employee Profile dashboard, do the following:

1. From the Login Status column, verify if the account is locked. If the account is locked, the account must be unlocked in order for the employee to successfully log in.
2. Click **Login Status** to change the status from locked to unlocked.

Note: While most employees should be able to authenticate via a One-Time Passcode (OTP) with little issue, others may have more difficulty with the verification process due to a variety of factors.

If an employee needs assistance with the One-Time Passcode (OTP), take the following actions:

1. Click on **Employee Login Assistance** in the upper left corner. Enter an employee-provided, updated phone number and/or email address in order for the employee to receive an OTP for authentication purposes.
2. After entering the Employee Contact Information, click **Save**.
3. Instruct the employee to attempt to log in again. In order to complete the process, when prompted, the employee should select their preferred method for receiving the OTP.

Note: If the employee has forgotten their ID (UID), please provide it.

Viewing Tax Forms

To view an employee's tax form, return to the Employee Search dashboard, and take the following actions:

1. Either locate the employee (instructions located above) or, if already in their profile, click **Back** on top of the Employee Profile screen.
2. From the dashboard, select the employee by clicking on the Employee Name or radio button located next to the name.

Notes

The radio button allows quick actions such as: Download Tax Form, View Tax Form, and Correct Tax Form. You can do these same actions by clicking into the Employee Profile.

The options displayed under the radio button are role-driven and not all webManagers will have access to the complete list of actions.

Need Technical Support?

Contact ACA Product Support Monday - Friday 8 a.m. - 8 p.m. EST at: customersupport@equifax.com and/or 888.833.3596.

More Training Available!

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The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.
