

Client Training HQ

How to Consent for Online Delivery of Your Tax Form

In order to receive an electronic copy of your tax form instead of a paper copy, you must provide your consent through Tax Form Management. Complete the following steps to consent to online delivery of your tax form.

Enabling Online Delivery

Access Tax Form Management

Log in to mytaxform.com.

Update Delivery Selections

There are three ways to update your delivery selections:

- On the left navigation menu, select **My Account**.
- On the top right of the home screen, locate the **Delivery Selections** tile.
- At the top of the screen, click the **person** icon by your name, then select **My Account**.

1. Scroll down to the **Delivery Selections** tile.

The screenshot displays the Equifax Tax Form Management web application. On the left is a dark navigation menu with options: 'Home', 'Tax Forms', 'My Account' (highlighted with a red box), 'Paperless Pay', and 'Help Center'. The main content area is titled 'TAX FORM MANAGEMENT' and includes a warning: 'Please note - You will be logged out if you refresh the browser'. Below this is a 'RECENT TAX FORMS' section with a message: 'Information! No tax forms are currently available.' At the bottom, there is a section titled 'Ready to file your taxes?' with a brief description and a link for more information. On the right side of the interface, there is a 'DELIVERY SELECTIONS' tile. This tile contains two options: 'W-2 Online Delivery' (represented by a green monitor icon) and '1095-C Paper Copy By Mail' (represented by a red envelope icon). A red box highlights the 'DELIVERY SELECTIONS' tile, and a red arrow points to the 'My Account' button in the top right corner of the page, which is part of the user profile dropdown menu.

Images are examples and for information purposes only. They may vary across platforms and are subject to change.

- Then, select which tax form you wish to update delivery of and click **Receive forms online**.

The screen is titled "DELIVERY SELECTIONS". It features two large square buttons side-by-side. The left button is pink and labeled "W-2 Paper Copy By Mail", with a green checkmark icon in the top right corner. The right button is white and labeled "1095-C Paper Copy By Mail", with an unchecked checkbox icon in the top right corner. Below these buttons is a blue button labeled "Receive forms online" with a checkmark icon.

Consent for Delivery

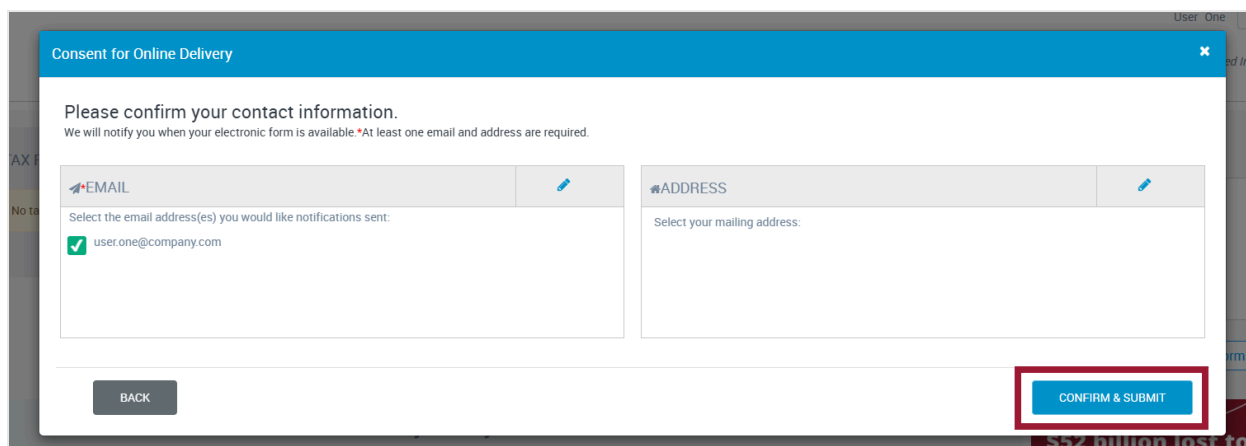
- The **Consent for Delivery** screen will appear. Read through the disclosures on the screen and, if you still wish to receive forms electronically, check the box and click **Accept & Continue**.

The screen is titled "Consent for Online Delivery". It has a blue header bar. Below the header, it says "Important Disclosures" and "Consent changes will be applied to W-2". There are four grey boxes with icons and text: 1. A checkmark icon with text "You must consent to receive your form online." 2. A document icon with text "By consenting, you will no longer receive a paper form." 3. A computer monitor icon with text "Your form will be delivered online going forward." 4. A circular arrow icon with text "You may remove your consent for online delivery at anytime." Below these boxes, a paragraph states: "By consenting to receive your form online, you will not receive paper forms from your employer. Your consent will remain in effect until you withdraw it. You must read the [Electronic Tax Form Disclosures](#) document before accepting the terms." Below this paragraph is a checkbox with a green checkmark and the text "I understand and accept the terms for consenting for online tax form delivery." At the bottom, there are two buttons: a grey "CANCEL" button on the left and a blue "ACCEPT & CONTINUE" button on the right. The checkbox and the "ACCEPT & CONTINUE" button are highlighted with red rectangles.

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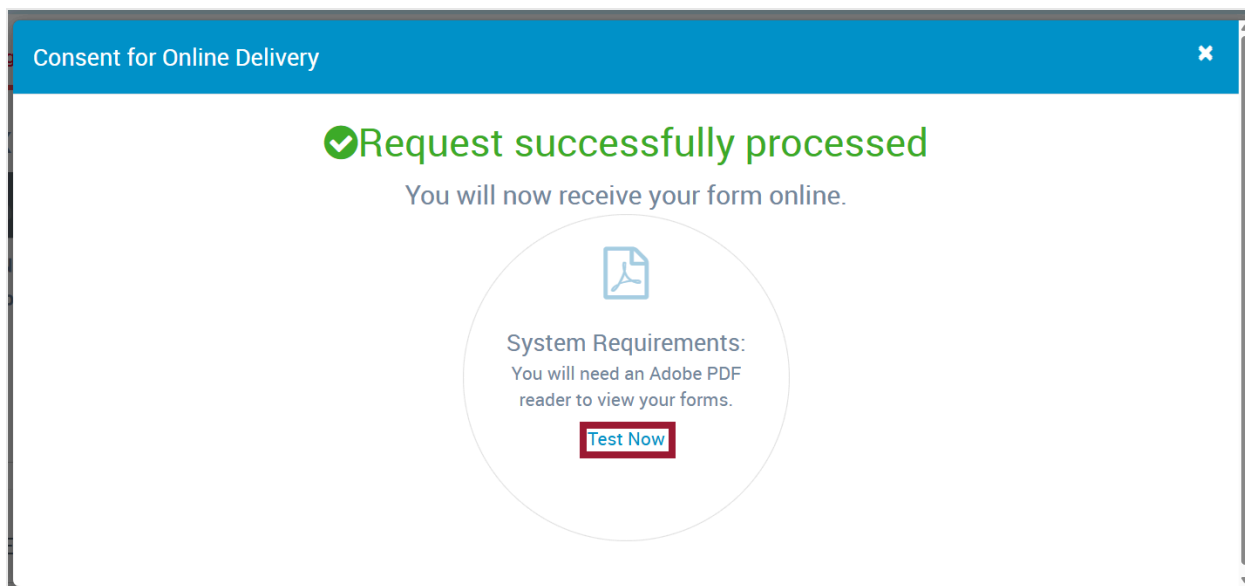
Confirm Contact Information

- Next, the **Confirm Contact Information** screen will appear. If contact information needs updated, select the **pencil icon** in the upper right corner of the box. Type in the correct information and select **Save**.
- Then, click **Confirm & Submit**.



Success

A screen will appear confirming the change in delivery was successfully made. To test the System Requirements to view forms, select **Test Now**.



Testing System Requirements

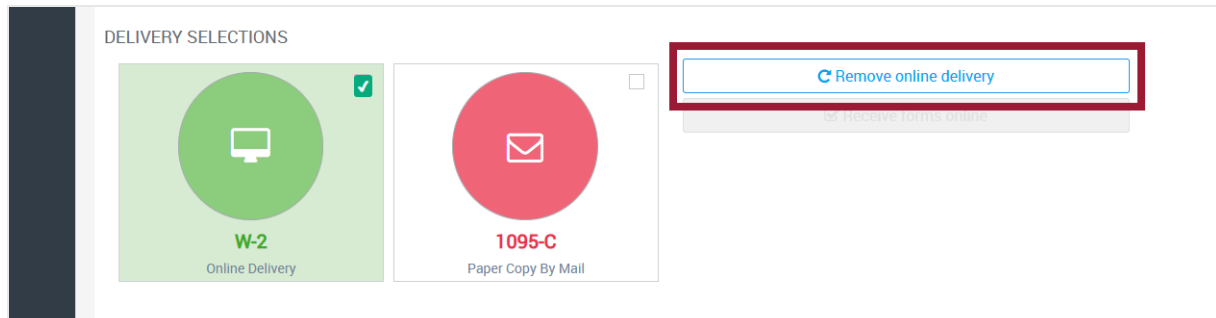
Selecting **Test Now** will open a new window displaying an example form with the message **CONGRATULATIONS TEST COMPLETE CLOSE THIS WINDOW TO CONTINUE**. Closing the window will return you to Tax Form Management.

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Disabling Online Delivery

Removing Online Delivery

1. To remove online delivery of forms, navigate to **My Account**.
2. Scroll to the **Delivery Selections** tile, and select the forms to update.
3. Click **Remove online delivery**. You will then read and acknowledge the disclosures to un-enroll in online delivery.



More Training Available!

Check out additional training resources available on our site, [Connections](#).

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.

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