

Client Training HQ

How to Set Up Email Alerts in Tax Form Management

This document overviews how to set up and manage email alert settings in Tax Form Management in Test/UAT and Production for administration and employee purposes.

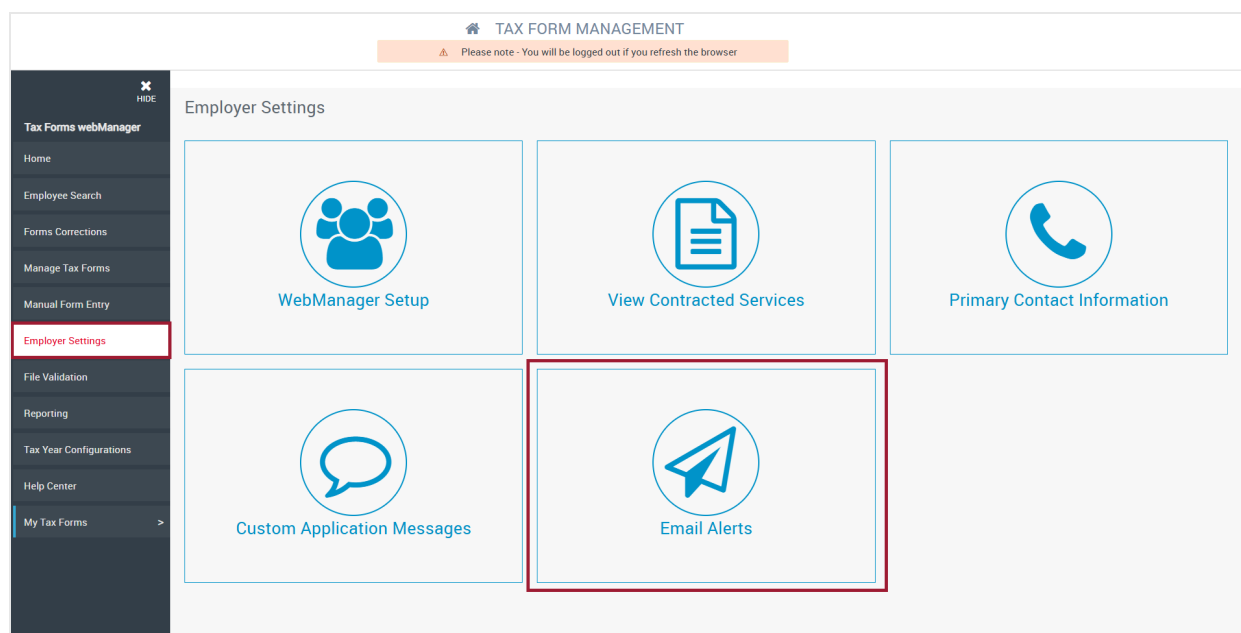
Access Tax Form Management

To begin, log in to mytaxform.com.

Then, utilizing the left navigation menu, click **Employer Settings**.

Select Email Alert

From the **Employer Settings** page, select **Email Alerts**.



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

Enabling Employee Correction Alerts (For W-2 Only)

1. Select which **Employee Correction Alerts** to send to employees by toggling the alert **ON**.

Add User

2. At the bottom of the **Email Alerts** page, select **+Add Another Employee**. Enter the email address of the employee and select which alerts the employee should receive.
3. Select **Save** to save the changes.

Remove User from Email Alerts

4. To remove a user from email alerts, select the **trash can** icon at the end of the user row.

TAX FORM MANAGEMENT

Please note - You will be logged out if you refresh the browser

Employer Settings

Contracted Services Project Contact Info Custom Application Messages WebManager Setup **Email Alerts**

Select email alert preferences for your company.

1 **EMPLOYEE CORRECTION ALERTS**

These preferences will be applied to all employees in your company.

Approved Correction
Notify When a Tax Form Correction is Approved ☒

Declined Correction
Notify When a Tax Form Correction is Declined ☒

ADMINISTRATIVE ALERTS

Specify the administrative alerts you want your individual users to receive.

Email	W-2	1095C	Load	Validation	Correction Request	Remove
user.one@equifax.com	☒	☐	☒	☒	☒	4

2 **+Add Another Employee**

3 **Save**

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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