



W-2 Management

Truly a win-win situation.

Your organization can cut costs and improve efficiency in the W-2 process while improving the service to your employees.

Hassle-Free Initial Disbursement

TALX offers a flexible, end-to-end solution to the never-ending paperwork involved in W-2 distribution. Improved convenience and efficiency start at the very beginning, when TALX creates electronic W-2s from data provided by the employer. This same data is also used for reissues and corrections. The system accommodates both current and former employees, and is in compliance with the IRS.

Information contained in these electronic files can be immediately delivered to consenting employees via the Web (or printed out and mailed First Class within days). Employees who consent to electronic delivery of their original W-2 have the benefit of being able to retrieve it from the Web sooner than the employees whose W-2 is being printed and mailed.

Relief from Reissue Requests

Because TALX empowers organizations with self-service, your current and former employees can request reprints at any time, from anywhere, without contacting your payroll department. Employees simply connect with our secure system via phone or Web, enter their User ID and PIN for verification, then make their request. Fulfillment of requests is highly flexible, designed to accommodate a variety of employee preferences. Our system delivers W-2 reissues by mail, fax, or the Web. Because the employee has the freedom to choose where their reissue is sent, the option to have it sent directly to a lender or tax preparer is in their hands.

Timesaving Correction Service

Yet another advantage of increasing employee control, this service collects requests for corrections (W-2c forms) through a secure Web site or the TALX call center. Once collected, employee correction requests are presented to authorized payroll staff in a clear, organized manner on your Web administration site. Authorized users then view and approve or deny requests electronically. The system takes care of the rest, issuing a W-2c or responding with a denial. Cover letters of explanation may be included for either outcome. Approved W-2cs immediately become part of the employee's complete W-2 record.

High-Level Security & Accuracy

As W-2 data is sensitive and subject to federal regulations, every precaution is taken to ensure both security and accuracy. TALX performs extensive testing and reviews before distribution. And we keep you informed throughout the process, allowing approved managers access to audits and error reports.

Our service also ensures against potentially disastrous loss of data with double archiving. A backup of each electronic W-2 file is stored on our secure system. As extra protection, we also create a CD-ROM archive of all current year W-2s and share it with you for safekeeping.

Online Reporting & Approvals

TALX makes it easy to manage administration related to W-2s through webManager. This user-friendly online tool is seamlessly integrated into all TALX services, and can only be accessed by authorized staff members with a valid User ID and PIN. A "control center" for W-2 issues, webManager can be used to:

- Access and review any W-2 online
- Approve or deny a W-2c request
- Create a W-2c
- Modify employee settings
- Perform transactions for employees
- Access reports

Designed to suit a variety of personal work styles, webManager allows the user to schedule automatic reports on service usage, perform minor correction requests, and more. Reports can be viewed online, printed out, or downloaded according to user preferences and needs. All reports are compatible with Microsoft Excel and Access so they can easily be shared with others.

Services Snapshot

Paperless Original W-2s:

Electronic consent and secure delivery with a paper option available

W-2 Reissues:

Self-service, electronic, or printed distribution

W-2 Corrections:

Complete processing and distribution of W-2c forms

Web Management Tools:

User-friendly online administration and reporting

W-2 Imports:

Convenient and efficient for tax return software and service vendor users

CD-ROM Archive:

Electronic file of all originally issued W-2 forms provided as backup

Call Center Support:

Assistance for administrators and employees

W-2 Import Feature

The ultimate convenience, this capability adds value for employees and eases acceptance of new W-2 procedures. It allows employees to instantly download their W-2 (and W-2c) information into popular tax preparation software and services, saving time and reducing errors. This advanced feature is compatible with many popular tax preparation programs and service providers including TurboTax®, Jackson Hewitt®, CompleteTax®, Liberty Tax Service®, eztaxreturn.com, H & R Block, and TaxACT.

Optional W-2 Service Features

- Canada - Standard T4 Services
- Puerto Rico - Standard 499R-2/W-2PR Service
- U.S. Virgin Islands - Standard W-2VI Services
- Guam - Standard W-2GU Services
- 1099 Services
- 1042-S Services
- Governmental Reporting Package (U.S. Federal Reporting EFW2, U.S. State Reporting, W-2 Hard Copy Reporting)
- Historical Data Load for past tax years

Paperless W-2s: How They Work



TALX makes W-2 processing easy and efficient, from start to finish. Subscribers of our employment verification or pay stub offering have built-in employee access, further increasing employee satisfaction and ease of use.

“I personally downloaded my W-2 from TALX using TurboTax. I found it very easy to use.”

- Joe Williams,
Director of Payroll, Yellowfreight



“In 2009, we were able to obtain consent from over 62,000 employees for an electronic W-2 which exceeded our expectations...”

The screenshot shows a web portal interface. At the top right, it displays the user's name "John Smith" and company "ABC123Co." with links for "Privacy Policy", "Help", and "Logout". A left-hand navigation menu includes "Main Menu", "W-2 Features", "My Account", "Customer Service", and "Resource Center". The main content area features a "Main Menu" header, a notification stating "You are already enrolled to receive your original W-2 electronically.", and three primary sections: "W-2 Features" with links for reprinting, error correction, status, consent withdrawal, instructions, and e-filing; "My Account" with links for changing personal information, PIN, and PIN reset options; and "Customer Service" with a link for more help. To the right, there are two additional boxes: "Other Services You Have" featuring "THE WORK NUMBER" logo and a link to automated employment verifications, and "Resource Center" with a link for tools, advice, and coupons. The footer contains "Terms and Conditions" and a copyright notice for 2011 TALX.

The primary benefit for Lowe’s in offering an electronic W-2 is knowing that the employees are getting their W-2 early and at a lower cost to us – both of which are very important.”

- Mark Canter,
Director of Payroll & HR Shared Services,
Lowe’s Companies

Stop the flood of W-2 requests and increase savings with electronic services.

Eliminate piles of paper and create more time for strategic work with TALX. Our efficient, automated system for W-2 management gives your payroll department much needed relief during tax season and beyond. It's an intelligent investment that delivers returns in the long and short term, saving money and many hours of staff time.

TALX has a streamlined, electronic solution for distribution of W-2 originals, reissues, and corrections. It reduces printing and postage expenses with the ability to distribute W-2 forms via Web, IVR, fax, or mail. User-friendly and secure, this system dramatically improves W-2 processing for employers and employees. Self-service features provide employees with more control, resulting in quicker response and the potential for faster tax refunds. It also allows employers to eliminate seasonal staff support.

“We are in retail and if the electronic W-2 can work for us, it can work for anyone. This applies to every organization.”

– Greg L. Lohman,
Stein Mart Human Resources



Features	Benefits
Handles paperless and printed forms	A single resource for all W-2 needs
Users can access the system via phone or Web 24/7	True automation and relief from W-2 workload
Employee self-service for original, reprint, and correction requests	Faster, more efficient distribution that eliminates paper processes
Web management tool for employer-approved administrators	Controlled, user-friendly access to W-2 information
Compliant with all IRS regulations	Accurate and on-time distribution
Easily integrated with TALX employment verification and electronic pay stub services	Streamlined employee authentication process
Compatible with popular tax preparation software and service vendors	Increased convenience and added value for employees

More TALX Services That Save Time and Money

Employment Verification

Offer your employees automated employment and income verifications.

Unemployment Cost Management

Reduce unemployment costs through claims processing, hearing representation, and reemployment strategies.

Employment Tax Services

Receive comprehensive employment tax planning, compliance, and refund services.

Assessments

Leverage best-in-class assessments and technology to help you identify, hire, and develop the right people.

I-9 Management

Maintain compliance with immigration and E-Verify® regulations by completing and storing federal I-9s electronically.

Paperless Pay

Offer electronic paystubs and paycards and better manage direct deposits, W-4s, and other employee information.

Onboarding

Collect and manage information for new hire forms online to increase compliance and eliminate costs.

W-2 Management

Deliver an electronic W-2 option to your employees, including optional paper distribution, reissues, corrections, and tax software upload capability.

Tax Credits and Incentives

Capture all the federal, state, and local tax credits and incentives you're eligible for.

Garnishments

Diminish the paperwork and liability of employee garnishment processing.

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