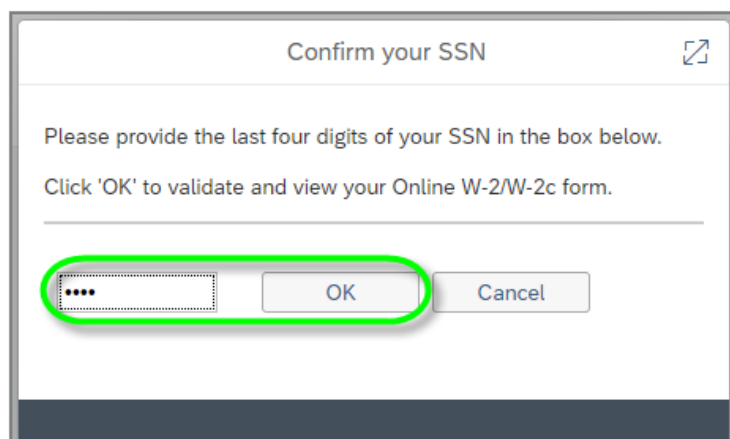


ESS – Payroll – Display W-2 Form

1. **Display W-2 Form** – The following information pertains **only** to employees who, via the *Self-Service Portal/Payroll/Update W-2 Election*, have opted to receive their W-2 in electronic format. For any employee not electing to receive an electronic copy of the W-2, no information will be available if the *Display W-2 Form* link is utilized.

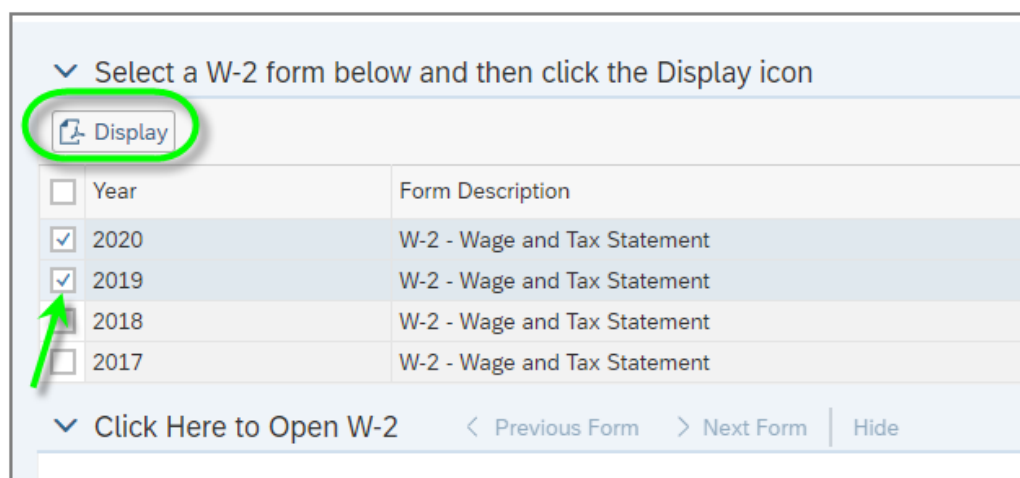
For employees who have elected to receive their W-2 in electronic format:

- 1.1. First, enter the last four digits of your SSN to validate your identity. Select OK.



A dialog box titled "Confirm your SSN" with a close icon in the top right corner. The text inside reads: "Please provide the last four digits of your SSN in the box below. Click 'OK' to validate and view your Online W-2/W-2c form." Below the text is a text input field containing four asterisks, which is highlighted with a green oval. To the right of the input field are two buttons: "OK" and "Cancel".

- 1.2. Place a checkmark in the row(s) of the W-2 statement(s) that you want to view and/or print, and then click on the *Display* icon.



A screen titled "Select a W-2 form below and then click the Display icon". At the top, there is a "Display" button with a document icon, which is highlighted with a green oval. Below this is a table with two columns: "Year" and "Form Description". The table contains four rows for the years 2020, 2019, 2018, and 2017. The checkboxes for 2020 and 2019 are checked, and a green arrow points to the checkbox for 2018. At the bottom of the screen, there is a "Click Here to Open W-2" button, and navigation links for "Previous Form", "Next Form", and "Hide".

Year	Form Description
<input checked="" type="checkbox"/> 2020	W-2 - Wage and Tax Statement
<input checked="" type="checkbox"/> 2019	W-2 - Wage and Tax Statement
<input type="checkbox"/> 2018	W-2 - Wage and Tax Statement
<input type="checkbox"/> 2017	W-2 - Wage and Tax Statement

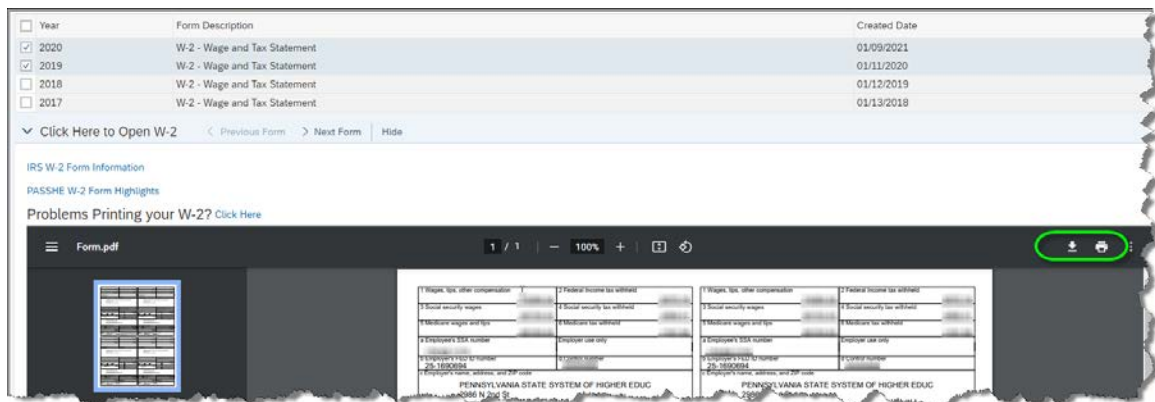
- 1.3. The employee-specific W-2 information will display at the bottom of the screen. If more than one year was selected for display, use the **Previous Form** and **Next Form** buttons to scroll between years.

The screenshot shows the ESS interface with a table of selected years (2020, 2019, 2018, 2017) and a 'Click Here to Open W-2' button. Below this, the 'Previous Form' button is highlighted with a green circle. The main content area displays a preview of the W-2 form for the Pennsylvania State System of Higher Education, with a thumbnail image on the left and the form details on the right.

- 1.4. To zoom in or out on the document, use the '+' and '-' icons.

The screenshot shows the ESS interface with a table of selected years (2020, 2019, 2018, 2017) and a 'Click Here to Open W-2' button. Below this, the zoom controls (1 / 1, -, 100%, +) are highlighted with a green circle. The main content area displays a preview of the W-2 form for the Pennsylvania State System of Higher Education, with a thumbnail image on the left and the form details on the right.

1.5. To download or print directly from the web, select the appropriate icon where indicated.



Next, hover the mouse over the very bottom of the PDF document to make the Adobe toolbar appear. Depending on whether you are using a PC or a MAC, one of the following toolbars will appear:

Adobe toolbar on PC



Adobe toolbar on MAC



1.6. To zoom in on the document, click on the “+” sign. To zoom back out, click on the “-” sign.

Zoom in



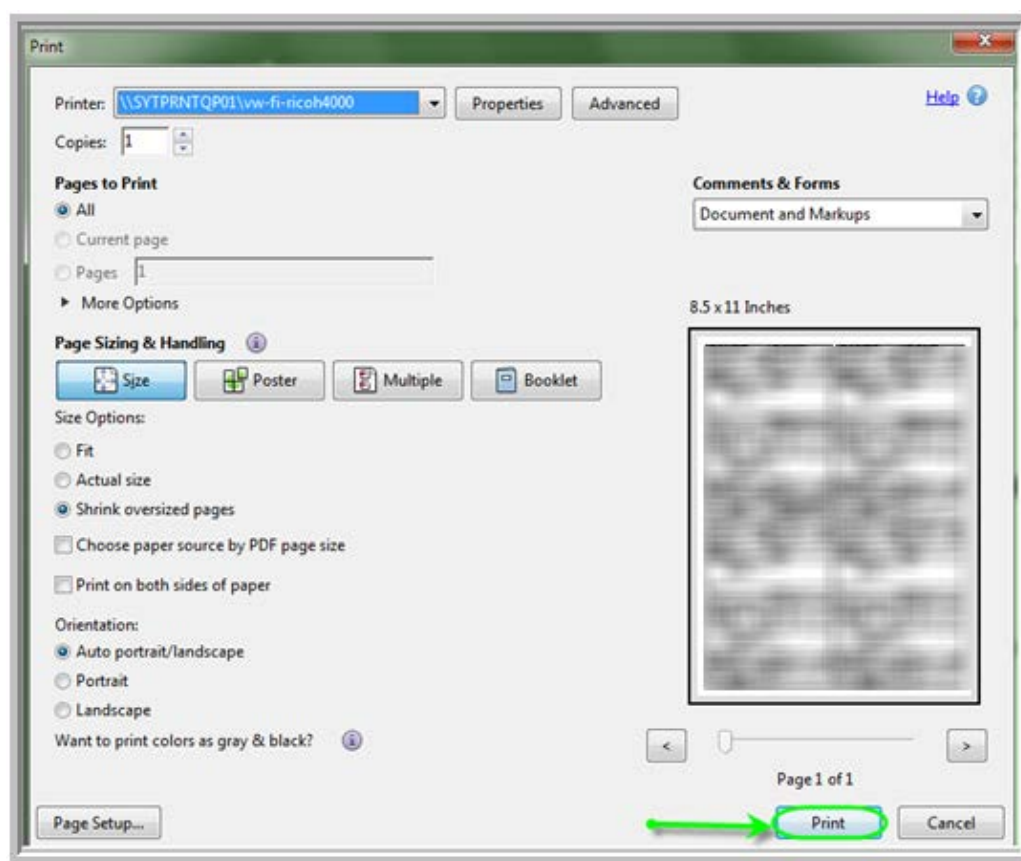
Zoom out



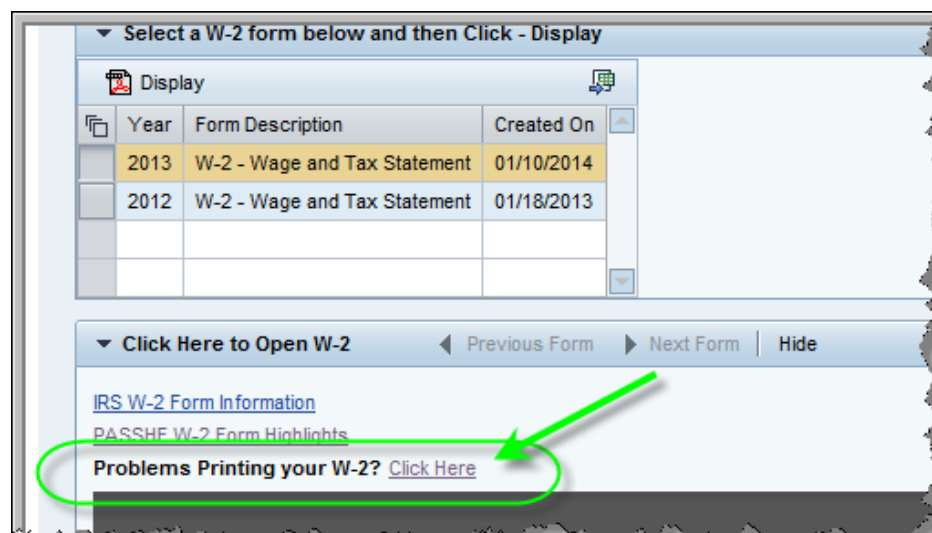
1.7. To print a copy of the W-2 form, select the *Print* icon as shown here:



1.8. Make the desired selections on the *Print* screen such as the number of copies and click *Print*.



NOTE: If you are still experiencing issues with printing your W-2 statement, follow the link for *Problems Printing your W-2? Click here* for alternative printing methods.



- 1.4. To view and/or print the W-2 Form Information, click the link for *IRS W-2 Form Information* as shown here:

Select a W-2 form below and then click the Display icon

Display

<input type="checkbox"/> Year	Form Description
<input checked="" type="checkbox"/> 2020	W-2 - Wage and Tax Statement
<input checked="" type="checkbox"/> 2019	W-2 - Wage and Tax Statement
<input type="checkbox"/> 2018	W-2 - Wage and Tax Statement
<input type="checkbox"/> 2017	W-2 - Wage and Tax Statement

Click Here to Open W-2 < Previous Form > Next Form Hide

IRS W-2 Form Information

PASSHE W-2 Form Highlights

Problems Printing your W-2? Click here

- 1.5. A new internet browser tab or window will open for employees to read the *W-2 Notice to Employee* along with *Instructions for Employee*.

Notice to Employee

Refund. Even if you do not have to file a tax return, you should file to get a refund if box 2 shows federal income tax withheld. To correct reported tax with

Instructions for Employee (Also see *Notice to Employee*, on the back of Copy B.)

Box 1. Enter this amount on the wages line of your tax return.

Box 2. Enter this amount on the federal income tax withheld line of your tax return.

Box 3. Enter this amount on the state income tax withheld line of your Form 1040.

Unemployment compensation (box 10) is not included in boxes 1, 3, or 5.

4137 with Form 1040

Instructions for Employee (continued from back of Copy C)

F— Elective deferrals under a section 408(k)(6) salary reduction SEP

G— Elective deferrals and employer contributions (including nonelective deferrals) to a section 457(b) deferred compensation plan

H— Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan. See "Adjusted Gross Income" in the Form 1040 instructions for how to deduct.

J— Nontaxable sick pay (information only, not included in boxes 1, 3, or 5)

K— 20% excise tax on excess golden parachute payments. See "Other Taxes" in the Form 1040 instructions

contributions limited to a total of \$20,000 for salary deferrals and \$17,000. Deferrals over these limits are not deductible.

T— Adoption benefit. Qualified Adoption amounts.

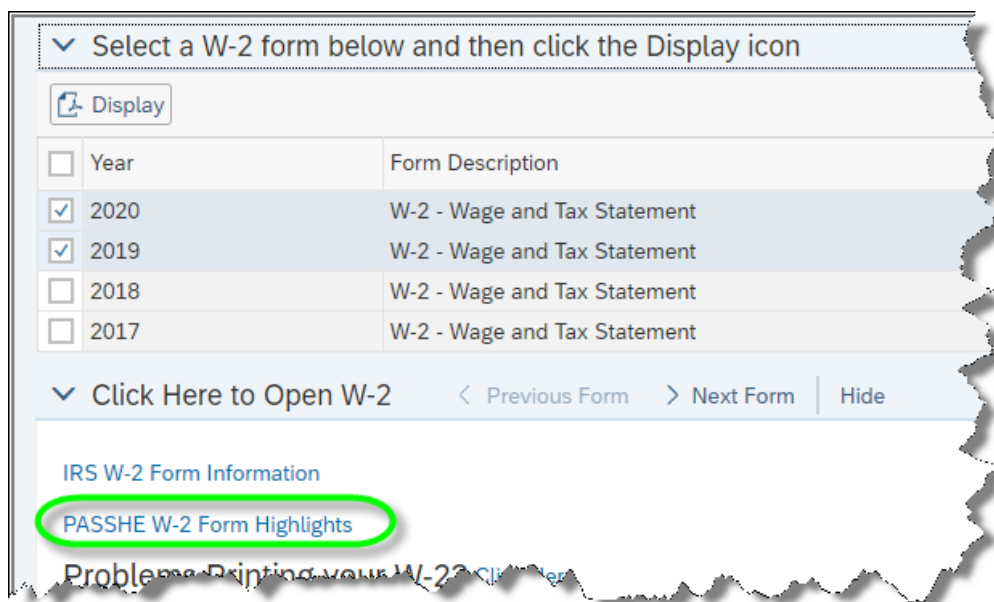
V— Income from excess deferrals (up to \$5,000) explained in Form 1040 instructions for Schedule 1.

W— Employer contributions to a qualified pension, profit-sharing, or annuity plan. Report on Form 1040.


Y— Deferrals under a section 457(b) plan.

Z— Income under a section 457(b) plan.

2. To view the W-2 Form Highlights, click the link for *PASSHE W-2 Form Highlights* as shown.



▼ Select a W-2 form below and then click the Display icon

 Display

<input type="checkbox"/> Year	Form Description
<input checked="" type="checkbox"/> 2020	W-2 - Wage and Tax Statement
<input checked="" type="checkbox"/> 2019	W-2 - Wage and Tax Statement
<input type="checkbox"/> 2018	W-2 - Wage and Tax Statement
<input type="checkbox"/> 2017	W-2 - Wage and Tax Statement

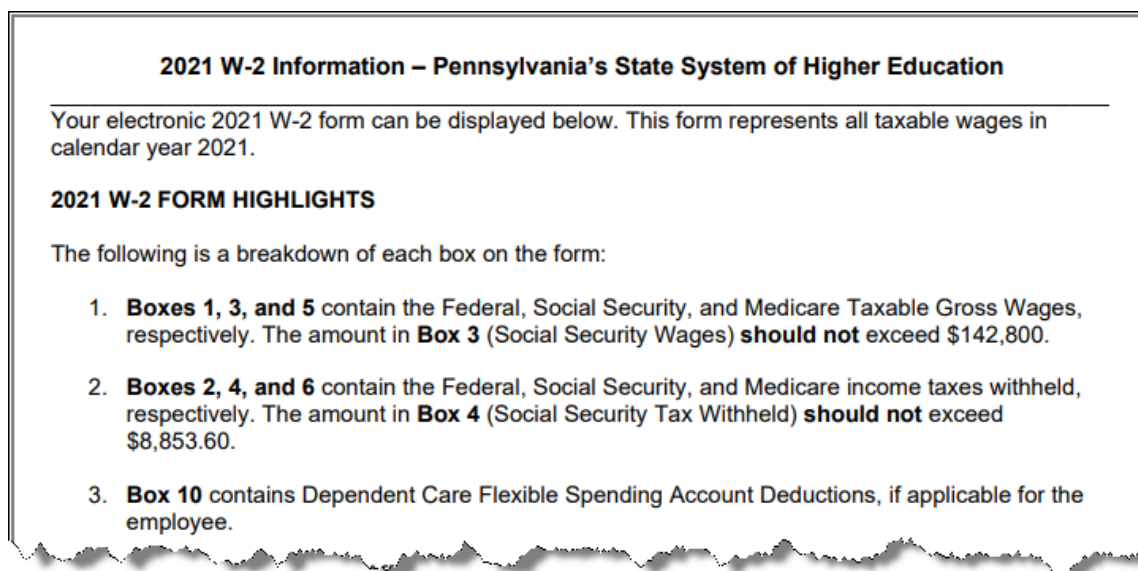
▼ Click Here to Open W-2 < Previous Form > Next Form Hide

IRS W-2 Form Information

PASSHE W-2 Form Highlights

Problems Printing your W-2? Click Here

3. A new internet browser tab or window will open for employees to read the major changes to the W-2 form for the appropriate year.



2021 W-2 Information – Pennsylvania's State System of Higher Education

Your electronic 2021 W-2 form can be displayed below. This form represents all taxable wages in calendar year 2021.

2021 W-2 FORM HIGHLIGHTS

The following is a breakdown of each box on the form:

- Boxes 1, 3, and 5** contain the Federal, Social Security, and Medicare Taxable Gross Wages, respectively. The amount in **Box 3** (Social Security Wages) **should not** exceed \$142,800.
- Boxes 2, 4, and 6** contain the Federal, Social Security, and Medicare income taxes withheld, respectively. The amount in **Box 4** (Social Security Tax Withheld) **should not** exceed \$8,853.60.
- Box 10** contains Dependent Care Flexible Spending Account Deductions, if applicable for the employee.