Generate the Paperless Enrollment Report

Provides instruction for setting up paperless pay stubs and tax documents W-2, 1099, and 1095 forms for active employees. (YE)

This article is for **administrators**.

If an employee in your organization registered to receive their Form W-2, 1099, 1095, and pay stubs via the Paperless Options feature in Paycor, administrators and manager-level users can review and generate any **active employee's** digital paystub and Form W-2, 1099, and 1095.

Active Employee includes **Not Terminated**, **Resigned**, **Retired**, and **Deceased**.

See this related article from an employee's perspective: How Do I Opt-Out of Printed Form W-2s, 1099, 1095c, and Pay Stubs with Paperless Elections?

Generate the Paperless Report

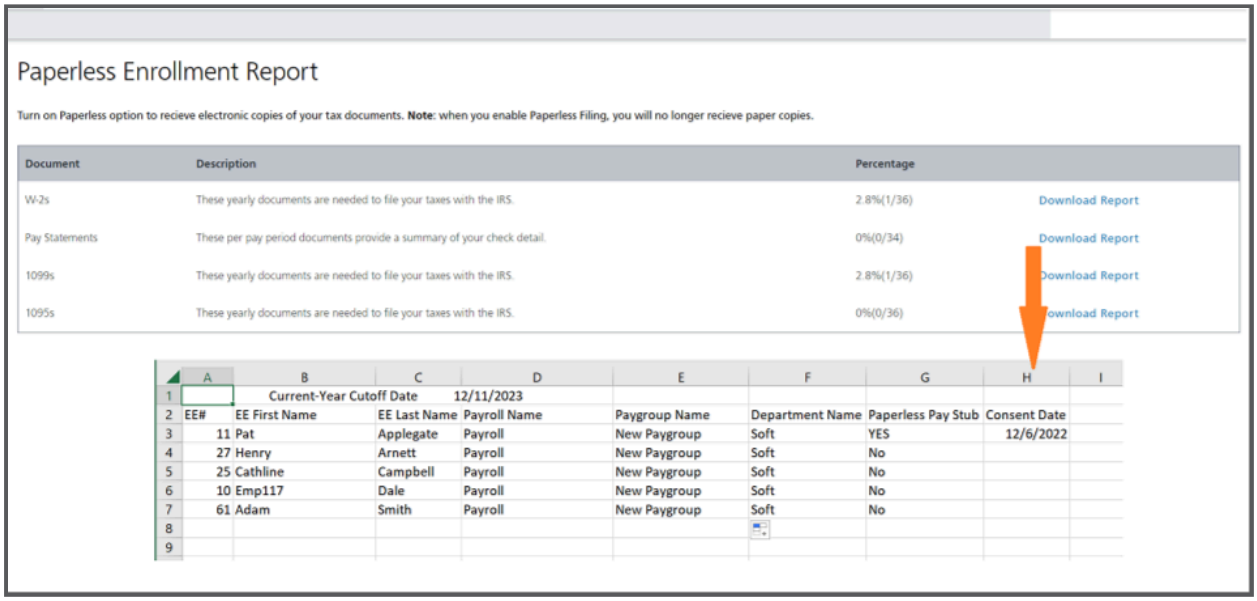
Follow these steps to generate a digital pay stub or Form W-2, 1099, or 1095 report:

1. Go to **Reports > Payroll Reports > Paperless Enrollment Report**.
2. On the **Paperless Enrollment Report** screen, select the **Download Report** link.
    a. The report downloads in **.CSV** format.
3. Open the report to review. It can be sorted and filtered, as needed.
    a. **Employee Report for paperless pay stubs:** Includes all active employees set up with Direct Deposit.

Notes:

- If your organization has opted to receive paper stubs, this report is unavailable. Contact your payroll specialist for more information.
- **Employee Report for paperless W-2, 1099, or 1095:** The report includes all active employees who are set up for paperless W-2, 1099, or 1095.

- The Paperless W-2, 1099, and 1095 column on each report will show **YES** for any employee who opted for paperless, **only** if consent was given **by the consent deadline** for the prior year or tax season.
- Paperless W-2, 1099, and 1095 reports generated after January 31 reflect the paperless preferences that apply to the upcoming tax season, and all employees who have opted for paperless delivery are indicated as **YES**.



Frequently asked questions (FAQ)

Can I enable a setting that requires all of my employees to have paperless W-2s, like the setting that requires all employees to go paperless for pay stubs?

- **No:**
  - This is due to IRS regulations:
    - The IRS requires employers to get consent from employees **before** they provide **electronic** W-2s.
    - The IRS covers this requirement in IRS Publication 15-A (https://paycor.helpjuice.com/https://www.irs.gov/publications/p15a) and IRS Publication 1141 (https://paycor.helpjuice.com/https://static.helpjuice.com/helpjuice_production/uploads/upload/image/16049/3939019/1711626442609-p1141.pdf), **shown here:**

Furnishing Form W-2 to employees electronically. You may set up a system to furnish Form W-2 electronically to employees. Each employee participating must consent (either electronically or by paper document) to receive his or her Form W-2 electronically, and you must notify the employee of all hardware and software requirements to receive the form. You may not send a Form W-2 electronically to any employee who doesn't consent or who has revoked consent previously provided.To furnish Forms W-2 electronically, you must meet the following disclosure requirements and provide a clear and conspicuous statement of each requirement to your employees.

- The employee must be informed that he or she will receive a paper Form W-2 if consent isn't given to receive it electronically.
- The employee must be informed of the scope and duration of the consent.
- The employee must be informed of any procedure for obtaining a paper copy of his or her Form W-2 and whether or not the request for a paper statement is treated as a withdrawal of his or her consent to receiving his or her Form W-2 electronically.
- The employee must be notified about how to withdraw a consent and the effective date and manner by which the employer will confirm the withdrawn consent. The employee must also be notified that the withdrawn consent doesn't apply to the previously issued Forms W-2.
- The employee must be informed about any conditions under which electronic Forms W-2 will no longer be furnished (for example, termination of employment).
- The employee must be informed of any procedures for updating his or her contact information that enables the employer to provide electronic Forms W-2.
- The employer must notify the employee of any changes to the employer's contact information.

You must furnish electronic Forms W-2 by the same due date as the paper Forms W-2. For more information on furnishing Form W-2 to employees electronically, see Regulations section 31.6051-1(j).

paperless options

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