

# W-2 Internal User Guide

### This guide shows you how to:

- Login to the internal system
- Upload W-2 files
- Find individual employees
- Verify employee information
- Change employee passwords
- View opt-in reports
- View and re-print employee W-2s
- Setup internal user accounts
- Edit internal user accounts
- Set access rights for internal users

#### To login to the W-2 internal system:

- Point your web browser to: w2.doculivery.com/internal
- 2. Enter your company ID (the last six digits of your National Payment account number).
- 3. Enter your login ID.
- 4. Enter your password.
- 5. Click the LOGIN button to continue.



#### To upload a W-2 file to setup employees:

- 1. Log in to the W-2 internal system.
- 2. Click the Upload File menu option.
- 3. Select the Upload File To Setup Employees radio button.
- 4. Click the BROWSE button to select the W-2 file that you want to upload.
- 5. Click the UPLOAD FILE button to complete the upload process.

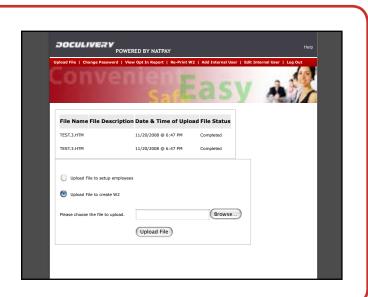
See the Employee Setup Notes on p. 6 for further details.



#### To upload a W-2 file to create W-2s:

- 1. Log in to the W-2 internal system.
- 2. Click the Upload File menu option.
- 3. Select the Upload File To Create W-2s radio button.
- 4. Click the BROWSE button to select the W-2 file that you want to upload.
- 5. Click the UPLOAD FILE button to complete the upload process.

See the Final W-2 File Notes on p. 6 for further details.



#### To change an employee's password:

- 1. Log in to the W-2 internal system.
- 2. Click the Change Password menu option.
- 3. Enter the employee's Social Security Number, then click the FIND EMPLOYEE button.



- 4. Enter the employee's new password in the Enter New Password field.
- 5. Re-enter the employee's new password in the Confirm Password field.
- 6. Click the UPDATE PASSWORD button to complete the update process.

This screen shows the employee's full name, and if the employee has opted in to receive electronic W-2s. You will also see if they have selected the PDF email delivery option, and view their email address on file.



#### To view the opt-in report:

- 1. Log in to the W-2 internal system.
- Click the View Opt-in Report menu option to see which employees have opted in to receive electronic W-2s.

This screens also shows whether or not their email address has been validated, and if they have selected the auto-delivery email delivery option.



### To view a particular W-2 for an employee with the option to re-print it:

- 1. Log in to the W-2 internal system.
- 2. Click the Re-print W-2 menu option.
- 3. Enter the employee's Social Security Number, then click the FIND EMPLOYEE button.



4. A list will appear of all available W-2s for that particular employee. To view a particular W-2, click on the appropriate one from the list to download that particular W-2 as an encrypted PDF to your computer.

You will need to enter the employee's Social Security Number as the password in order to open, view, and print the encrypted PDF.

You will also need access to Adobe Acrobat Reader which is a available as a free download.



# To setup an internal user account with custom access rights:

- 1. Log in to the W-2 internal system.
- 2. Click the Add Internal User menu option.
- 3. Enter a login ID for the new user.
- 4. Enter a password for the new user.
- 5. Enter the first name of the new user.
- 6. Enter the last name of the new user.



- 7. Select the access rights for the new user account by clicking the check boxes next to the following access options:
  - Reprint W-2s
  - View opt-in report
  - Change passwords
- 8. Click the SAVE USER button to finish setting up the the new internal user account.



## To edit an internal user account and it's custom access rights:

- 1. Log in to the W-2 internal system.
- 2. Click the Edit Internal User menu option.
- 3. Select the appropriate internal user account from the drop-down list.



- 4. Edit that user's login ID, password, first name, last name, and access rights by clicking and typing in the appropriate field.
- 5. Click the SAVE USER button to finalize the changes.



#### **Employee Setup Notes**

Files uploaded with the Upload File To Setup Employees radio button selected will result in the creation of your employees' accounts in the Doculivery W-2 system.

After the accounts are created, your employees will be able to login to the W-2 web-site per the credentials provided in your custom quick-start guide.

If you have hired new employees since sending in your original test files, please upload a new employee setup file.

We highly recommend that you upload at least one more employee setup file before the end of the year.



#### **Final W-2 File Notes**

A file uploaded with the Upload File To Create W-2 radio button selected will result in creating the actual W-2s for your employees.

Please note that this radio button option will not be available until January 1st.



