Article ID: PCTY-75173

View Tax Forms as an Employee

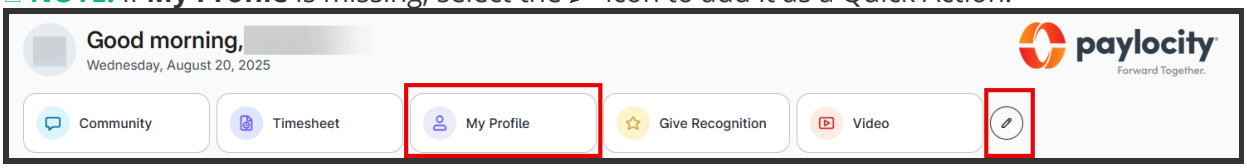
Employees can review and download their individual tax forms from either the web or the Paylocity Mobile App.
NOTE: The Mobile App only displays the W-2 tax form. For all other tax forms, follow the **Web** steps.

Web

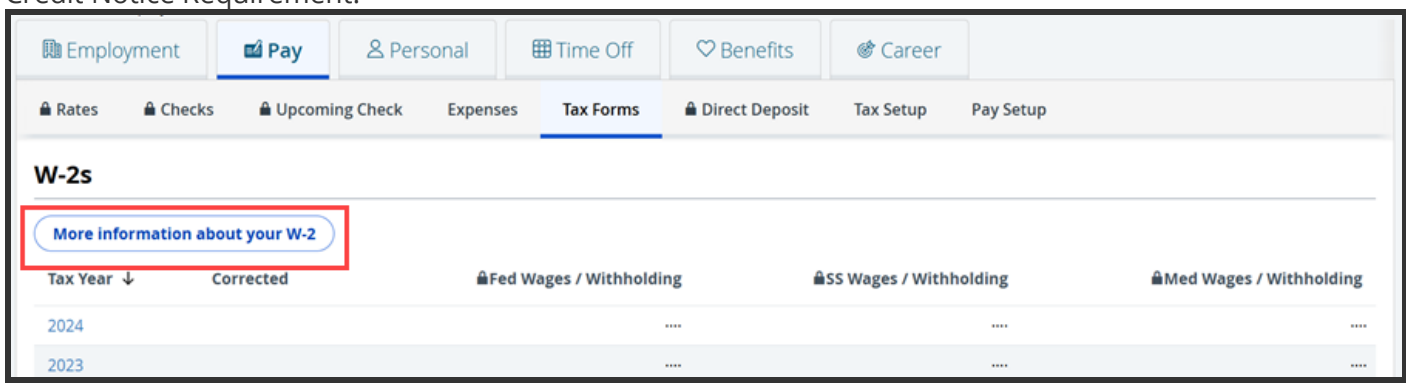
Users can review their tax forms online from the Employee Record, Self-Service Portal, or Home.

To view individual tax forms via the web:

1. Take one of the following paths for the desired workspace:
   - Person Record:
     A. Navigate to **HR & Payroll > Employees > Person Record**.
     B. Select the **Pay** tab.
     C. Select **Tax Forms.**
   - Self Service Portal:
     A. Navigate to **Self Service Portal > View Employee Record**.
     B. Select the **Pay** tab.
     C. Select **Tax Forms.**
     NOTE: Users can also access tax forms on the Self Service Portal **Pay** tile by selecting **More** and using the **Tax Forms** link.
   - Home:
     A. Navigate to Home.
     B. Select the **My Profile** quick action.
     NOTE: If **My Profile** is missing, select the ✎ icon to add it as a Quick Action.

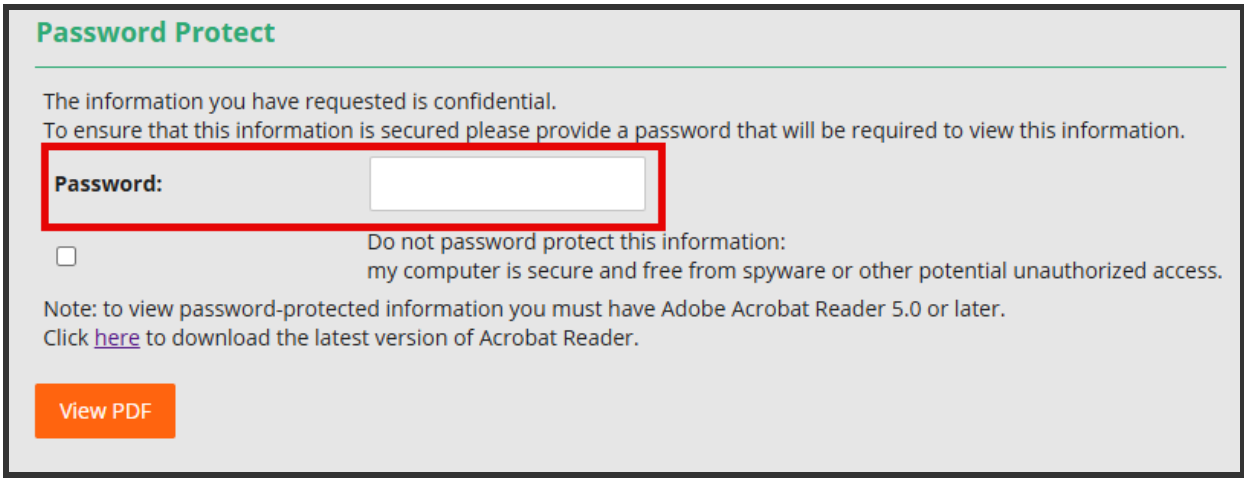


     C. Select the **Pay** tab.
     D. Select **Tax Forms.**
2. If desired, select **More information about your W-2** to review information about the Earned Income Tax Credit Notice Requirement.

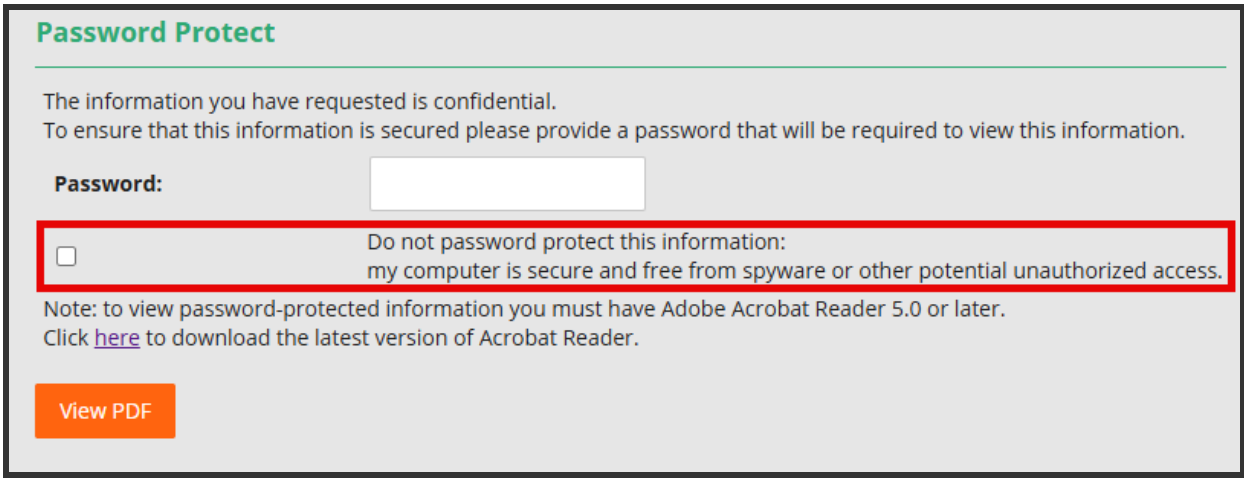


3. Select a form's **Tax Year** to view a PDF of that tax form.
4. If prompted to authenticate before continuing:
   A. Select the desired authentication option.
   B. Select **Send Pin.** This action sends a security code to the option one selects.
   C. Retrieve the security code from the option selected.

        - If a code does not arrive, review the configuration for Stepped Up Authentication (SUA), which follows the parameters for Stepped Up Authentication on Direct Deposit.
        - To update the SUA sources, see Phone Number and Email Sources for MFA and SUA.
    D. Enter the code into the **Security Code** field.
    E. Select **Submit** to authenticate.
5. Take the desired option for securing the downloaded tax form:
    - To force a user to enter a password when opening the document PDF:
        A. Enter the desired password into the **Password** field.
        B. Select **View PDF.**
        NOTE: To view password-protected information, one must have Adobe Acrobat Reader 5.0 or later. Select here to download the latest version of Acrobat Reader.



    - To allow a user to open the document PDF without a password:
        A. Check the **Do not password protect this information: my computer is secure and free from spyware or other potential unauthorized access** box.
        B. Select **View PDF.**



6. Open and review the tax form.
    NOTE: One can download the PDF and save it to a desired location.

Mobile

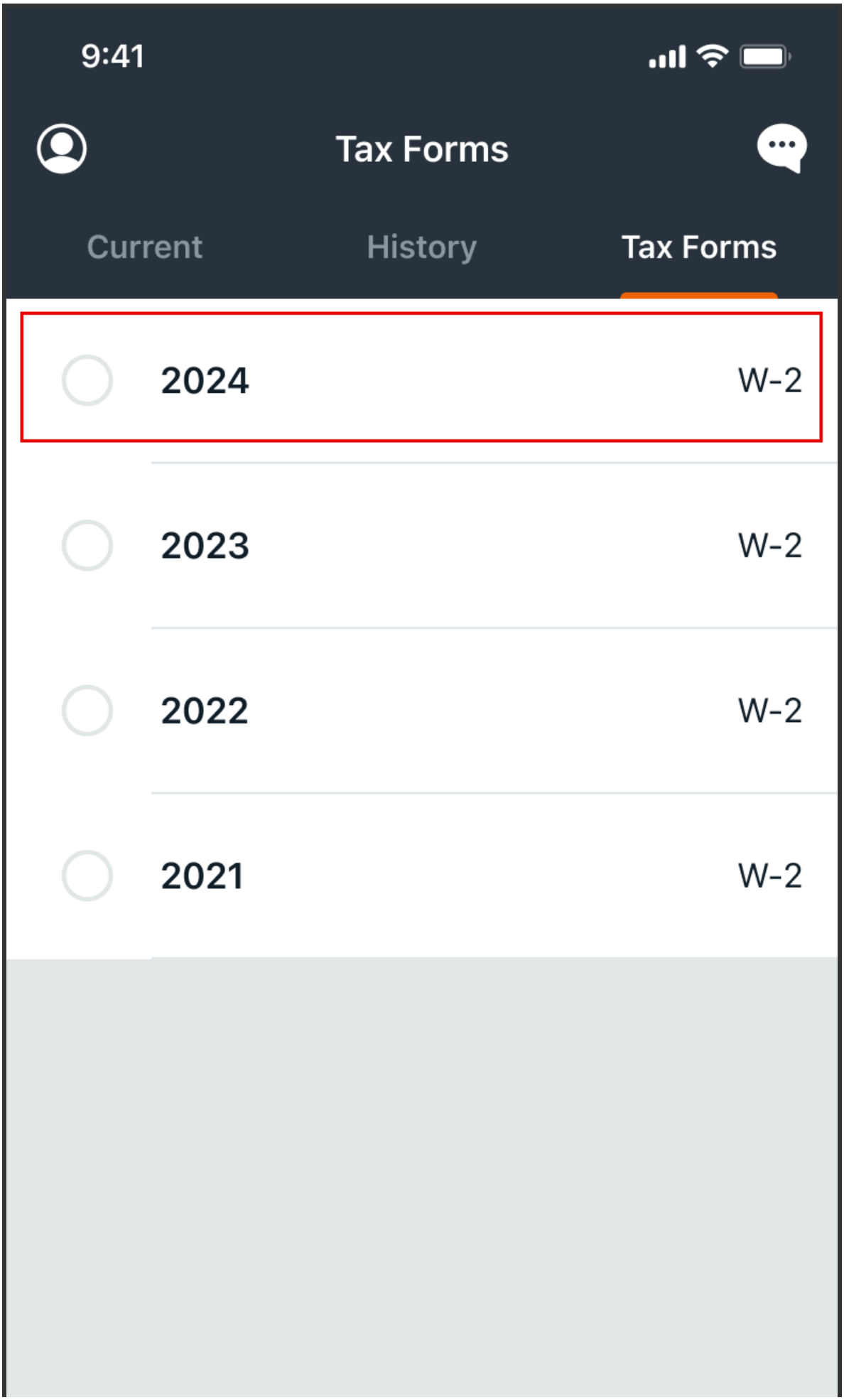
Employees can view and email their W-2 tax form on the Paylocity Mobile App.
⚠ **CAUTION:** The only tax form available on the mobile app is the W-2 tax form. Users can view all other tax forms, like 1099, 1095-C, and W-2C, using the **Web** steps above.

To view and/or email individual W-2 tax forms on the Mobile App:

1. Log In to the Paylocity Mobile App.
2. Access Pay.

3. Navigate to the **Tax Forms** section by swiping left.
4. Take the desired action:
    - To email a tax form:

1. Double tap the tax year to view form details.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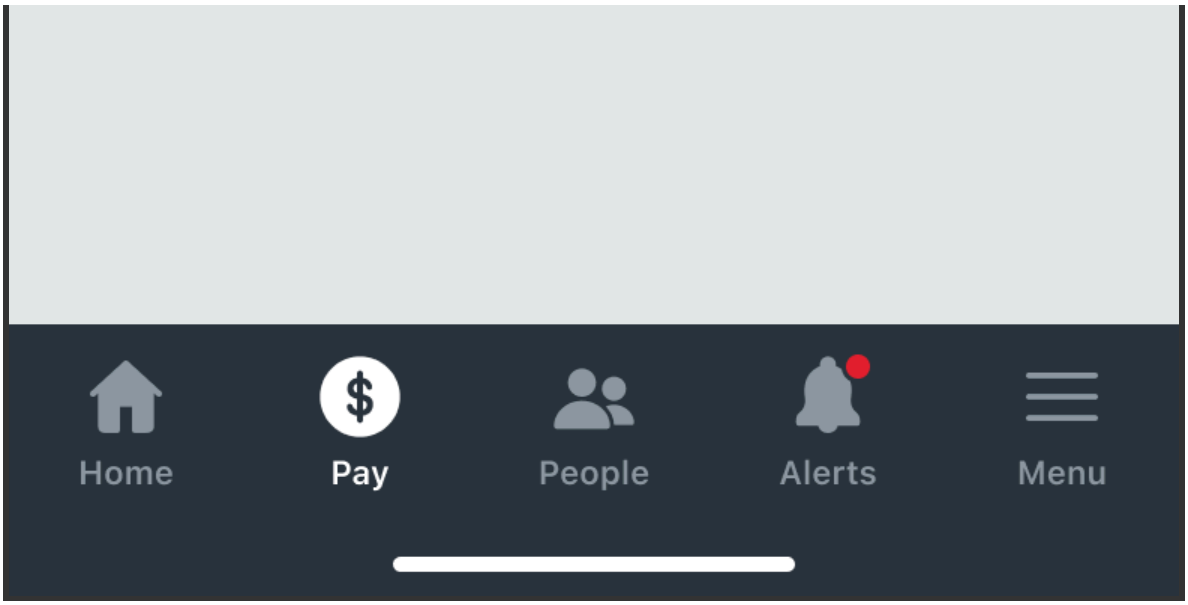
Tax Forms
Current
History
Tax Forms
2024
W-2
2023
W-2
2022
W-2
2021
W-2



2. Select either one of the share icons located in the top-right corner or by scrolling down to the bottom-right corner.

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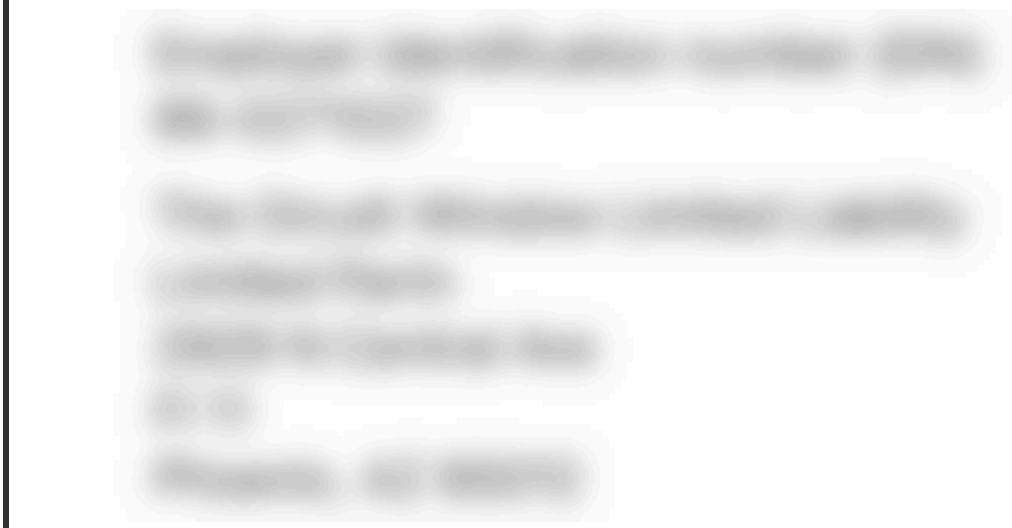
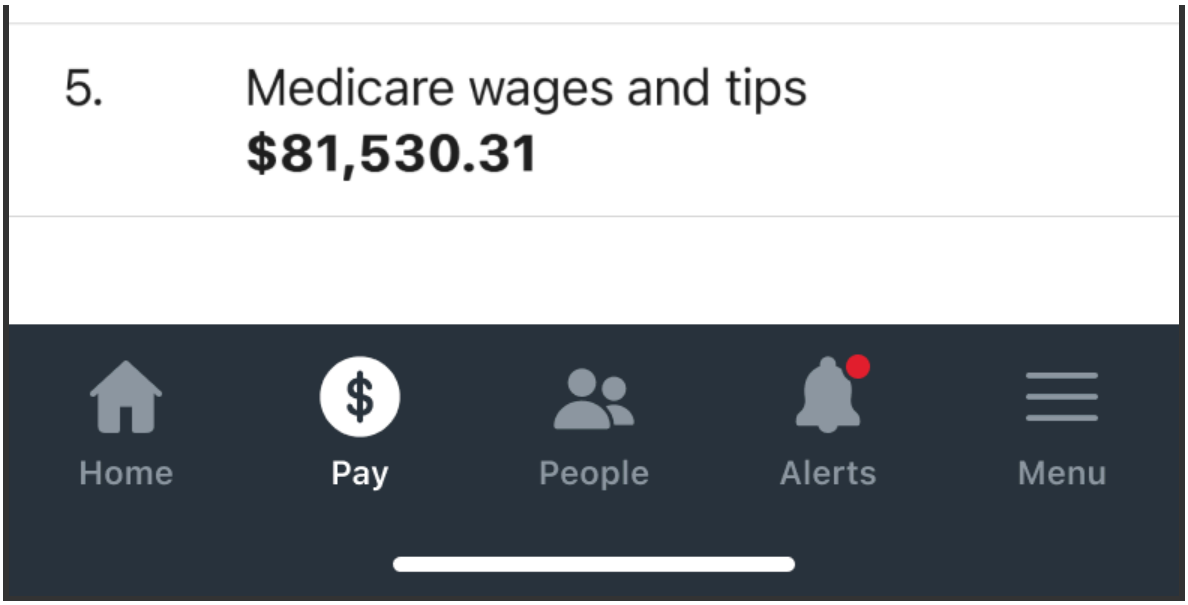
2021 W-2

2021 W-2



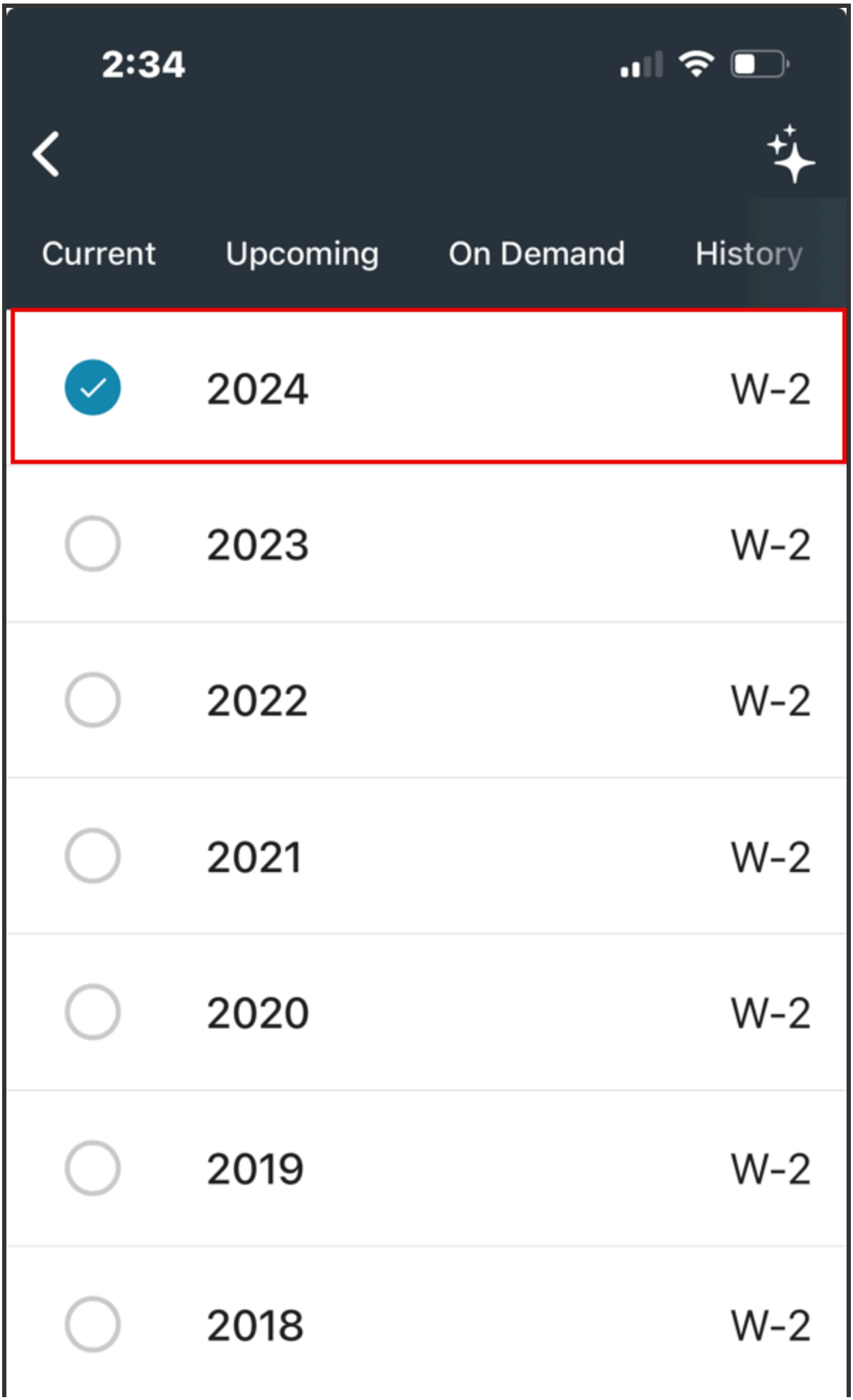
Federal

1.	Wages, tips, other compensation **$69,279.54**
2.	Federal income tax withheld **$6,375.45**
3.	Social security wages **$81,530.31**
4.	Social security tax withheld **$5,054.85**



- To email the tax form:
  1. Select the circle for the applicable year.
     NOTE: Users can only select one form at a time.

2. Select the share icon in the lower-right corner.


2:34
Current
Upcoming
On Demand
History
2024
W-2
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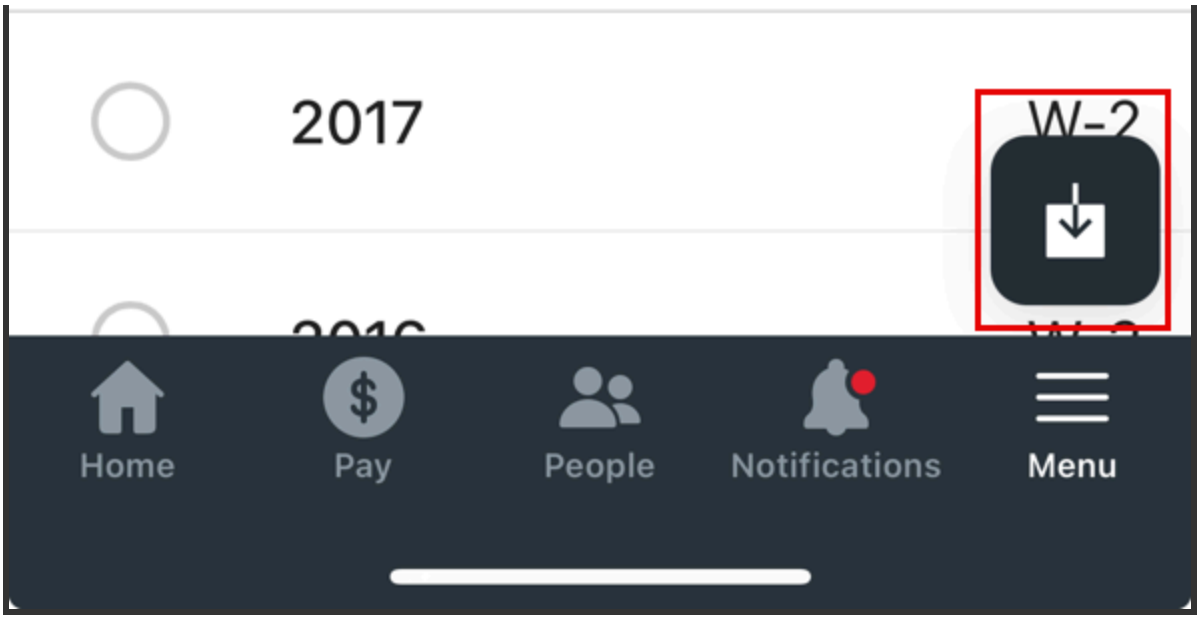
W-2
2022
W-2
2021
W-2
2020
W-2
2019
W-2
2018
W-2



5. Email or save the form to mobile device.

💡 **ADDITIONAL INFORMATION:** Employees cannot adjust their tax setup for Federal and State tax forms from the Mobile App. To adjust tax elections, see Add or Edit Tax Codes for an Employee.

You can view this article at:
https://paylocity.egain.cloud/system/templates/selfservice/pctycss/help/customer/locale/en-US/portal/308600000001010/content-version/PCTY-75173/PCTY-1500642/View-Tax-Forms-as-an-Employee