W2 Self-Service Quick Reference Guide

1. Log in to Lawson
   a. Start your web browser by clicking Start, Programs, Internet Explorer.
   b. From home or outside the Munson network: Enter web address: http://www.munsonhealthcare.org, press Enter. Click For Employees>>myHR>>Employee Self-Service>>LOGIN link. If the Citrix Access Gateway Plug-in is not installed, click Download>>Run>>Run>>Install>>Finish. On the black Welcome page enter your network log in ID, network password and click Log On. If you see a my>HR_SelfService link, click it.
   c. From the Munson home page, click on the my>HR and then click on the my>HR icon.
   d. User Name = your network ID
      Password = your network password
      Click the Login button.

2. Navigation
   a. Click Employee Self-Service a few times to expand and collapse the menu.
   b. Menu items with a small arrow on the right contain another menu. Click Pay. Click Parent Menu to return to the previous menu.
   c. Click the my>HR logo to return to the Lawson home page.
   d. DO NOT click the back and forward buttons on your browser to move between pages.
   e. To exit, click [logout] in the upper-right corner.

3. Authorization and Delivery Settings
   The IRS requires employee consent to distribute W-2’s electronically. Complete the following steps if you would like to receive your W-2 electronically. Please note, you will need to be connected to a printer to complete the authorization.
   a. From the Employee Self-Service menu, click Pay. Then click W2 Self-Service.
   b. If you receive the W2 Self-Service log-in page, enter your network user id and password.
c. The W2 Self-Service Welcome page will appear on your screen. Under the **My Delivery Settings** in the left menu, click on the **Authorization Required** link.

![W2 Self-Service Welcome page](image)

**Under the My Delivery Settings in the left menu, click on the Authorization Required link.**


d. The Electronic W-2 Authorization screen will appear. **You must successfully print a test page before you can agree.** Click the **Print Test** button.

![Electronic W-2 Authorization](image)

**The Electronic W-2 Authorization screen will appear. Click the Print Test button.**

e. The Print Test pop-up message will appear. Click on the **Tax Document in PDF Format** link. This will generate a sample W-2 form on your screen. Try printing this sample document to your desired printer. If the document prints successfully, click **Yes**. If the document did not print successfully, click **No** and attempt printing again until the document does print successfully.

![Print Test](image)

**The Print Test pop-up message will appear. Click on the Tax Document in PDF Format link.**

f. After clicking Yes, you’ll notice an **I Agree** button is now viewable on the screen. Read the verbiage of the message and then click the **I Agree** button to authorize the electronic W-2 delivery.

![I Agree](image)

**After clicking Yes, you’ll notice an I Agree button is now viewable on the screen. Click the I Agree button to authorize the electronic W-2 delivery.**

g. The My Delivery Settings screen will appear. If you have a work e-mail, it will auto-populate in the primary email address field. If you do not have a work email, enter your desired address in the primary email address field. If you would also like your electronic W-2 sent to an additional e-mail, enter that address in the **secondary email address** field. To complete your electronic W-2 authorization, click **Submit**.

![My Delivery Settings](image)

**The My Delivery Settings screen will appear. If you have a work e-mail, it will auto-populate in the primary email address field. If you do not have a work email, enter your desired address in the primary email address field. If you would also like your electronic W-2 sent to an additional e-mail, enter that address in the secondary email address field. To complete your electronic W-2 authorization, click Submit.**

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h. After clicking Submit, notice the W2 My Delivery Settings is updated to **Authorized**.

i. To exit the program, click [logout] in the upper-right corner.  

**4. Viewing and Printing W-2’s**

When the W-2s are available electronically, email notices will be sent to the email addresses listed on the delivery setting.

a. To view or print a W-2, click on the Employee Self-Service **Pay** menu. Then click **W2 Self-Service**.

b. The W2 Self-Service window will appear on your screen. Click **My W2** under the View My Documents heading.

c. The My W2 Documents screen will appear. Click on the ![icon] to view or print your desired W-2. The W-2 document will appear on your screen. Follow the printing instructions noted on the document.

**My W2 Documents**

Please click the icon to see your W-2 and/or W-2c. Your document will display in a different window.

**Delivery Options**

Filter By Year: [SHOW AB]

<table>
<thead>
<tr>
<th>Tax Year</th>
<th>Doc Type</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>W-2</td>
<td>![icon]</td>
</tr>
</tbody>
</table>

d. Delivery options can be viewed and/or updated by clicking secondary email address field, then click **Submit**.

e. To exit the program, click [logout] in the upper-right corner.

**5. Revocation of Consent**

If you wish to discontinue the receipt of an electronic W-2, complete the following steps to revoke your consent.

a. Click the Employee Self-Service **Pay** menu. Then click **W2 Self-Service**.

b. The W2 Self-Service window will appear on your screen. Click **W2** under the My Delivery Settings.

c. The My Delivery Settings screen will appear. Select **No** to stop the electronic W-2 delivery. Then click **Submit**.

**My Delivery Settings**

Please choose your delivery options for your W2 documents.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Web Delivery]</td>
<td>![Print]</td>
</tr>
</tbody>
</table>

W2 Document(s) via web access.

d. After clicking Submit, notice the W2 My Delivery Settings is updated to **Authorization Required**.

e. To exit the program, click [logout] in the upper-right corner.