


9.2 Managing Electronic Consent for Year End Forms

Purpose: Use this document as a reference for how to manage W-2/W-2c electronic consent results in ctcLink.

Audience: Payroll Administrator.

 You must have at least one of these local college managed security roles:

- ZC Payroll Data Maintenance
- ZZ Payroll Data Maintenance
- ZZ Payroll Processing

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Employees have the option to elect to receive their year end forms such as W-2 and W-2c in paper form or in electronic form only. The option for this election is available via the Employee Self Service tool.

The college Payroll Administrator can audit the results of the e-consent election by running the following reports/queries in ctcLink.

Managing Electronic Consent for Year End Forms

Review W-2/W-2c Consent Status

Navigation: NavBar > Navigator > Payroll for North America > US Annual Processing > Year-End/New Year Preparation > Review W-2/W-2c Consent Status

1. The **Review W-2/W-2c Consent Status** search page displays.
2. On the **Review W-2/W-2c Consent Status** search page, enter applicable search criteria (At least one criteria must be entered).
3. Select the **Search** button.

Review W-2/W-2c Consent Status

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Empl ID begins with

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

4. The **Review W-2/W-2c Consent Status** page displays.

Review W-2/W-2c Consent Status

Employee ID

Consent Information [Q](#) | [|](#) [|](#) [1 of 1](#) [View All](#)

Effective Date 11/11/2018 Effective Sequence 0

Last Update Date/Time 11/11/2018 8:37:12AM Updated By User

Consent Status

☒ No consent received. Print paper forms.
☐ Consent granted. Produce electronic forms.
☐ Consent withdrawn. Print paper forms.
☐ Consent reset by employer. Print paper forms.

Email Notification Status


Consent
☐ Consent Granted
☐ Consent Withdrawn
☐ Consent Reset

Form
☐ W-2 Form Available
☐ W-2c Form Available

[Return to Search](#)

5. The process to view an employee's consent status is now complete.

Custom Queries

 A custom query has been developed to assist with reviewing the electronic consent results for your company.

 You must have at least one of these local college managed security roles:

- ZD_DS_QUERY_VIEWER

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Reporting Tools > Query > Query Viewer

1. The **Query Viewer** search page displays.
2. Enter the Query name: **QHC_PY_W2_W2C_CONSENT**.
3. Select the **Search** button.
4. The **Query Viewer** page displays.
5. Select the **Run to** type: HTML, Excel or XML.
6. Query results provide the following data fields for your review:
 - Company #
 - Empl ID
 - Last Name
 - First Name
 - Effective Date
 - Sequence#
 - Consent Status
 - Last Updated Date/Time
 - Updated By

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query				Personalize	Find	View All	First	1 of 1	Last
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
QHC_PY_W2_W2C_CONSENT	W-2/W-2c self-service consent	Public	PAYROLL	HTML	Excel	XML	Schedule	Lookup References	Favorite

7. The process to run a custom query is now complete.

Year End Auditing

i To ensure terminated or retired employees who previously elected to receive their W2 electronically will now receive a paper form, you will need to identify employees in terminated or retired status prior to W2's being issued.

A custom query has been developed to assist with this audit.

Navigation: NavBar > Navigator > Reporting Tools > Query > Query Viewer

1. The **Query Viewer** search page displays.
2. Enter the Query name: **QHC_PY_INACTIVE_ALL_JOBS_W2**.
3. Select the **Search** button.
4. Once a user selects the **Run to** type (HTML, EXCEL, XML), a prompt screen will appear.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query				Personalize	Find	View All	First	1 of 1	Last
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
QHC_PY_INACTIVE_ALL_JOBS_W2	All Jobs are Inactive	Public	PAYROLL	HTML	Excel	XML	Schedule	Lookup References	Favorite

5. Enter the following data:
 - **Company**

- From Eff Date
- To Eff Date

QHC_PY_INACTIVE_ALL_JOBS_W2 - All Jobs are Inactive

Company (or blank)

From Eff Date

To Eff Date

View Results

- The **Query** results display.
- The following data fields available for your review:
 - Empl ID
 - Empl Record
 - Name
 - Eff Date
 - HR Status= I (Inactive)
 - Pay Status = T or R (Terminated or Retired)
 - Action
 - W2 Consent Status

! IMPORTANT: If you have terminated or retired employees who's W2 Consent status is "Consent", you will need to submit a ticket to ERP Support to request to have their consent status reset so these employees will receive a paper W2 form.

- The process for managing electronic consent for year end forms is now complete.
- End of procedure.