CIC Plus User Guide - Year End for Employees

1/19/2019

CIC Plus, Inc.

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Contents

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1. Purpose

This user guide is for the employee user role in the Paperless Employee site. It includes much of the functionality that you will use as an employee user such as completing, updating and retrieving copies of your tax forms among other services your company has contracted CIC Plus to provide.

If you have further questions regarding the Paperless Employee site and the services provided to your company, please contact your employer.

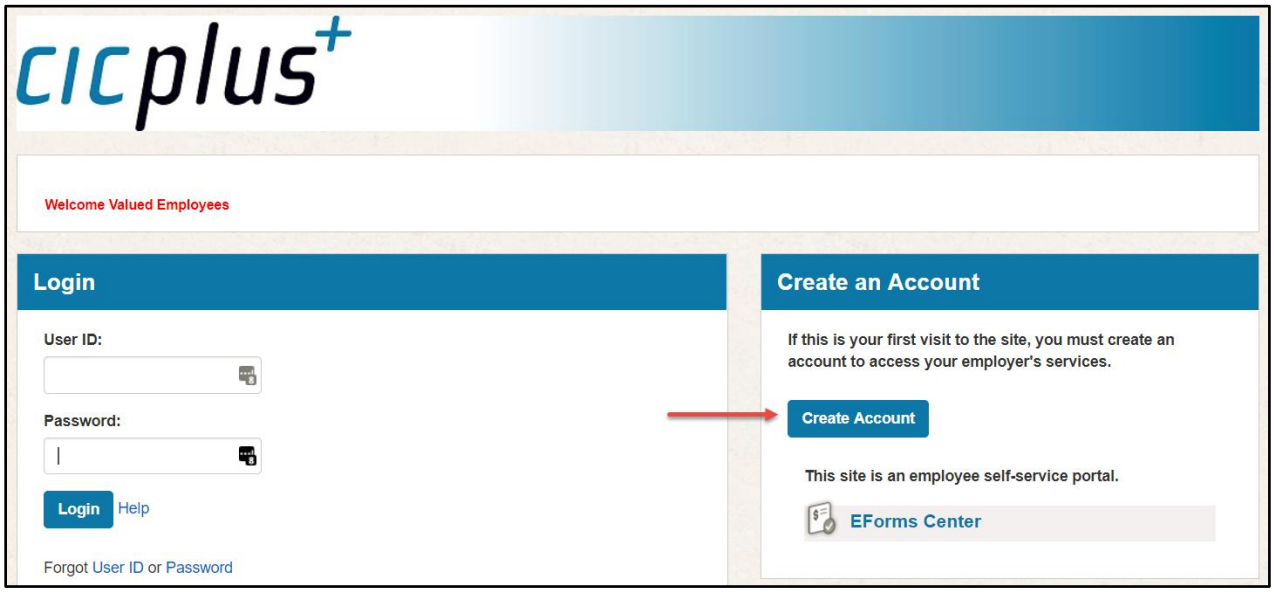
2. Account Creation

You will need to create an account in the Paperless Employee site for access. If your company has enabled single sign on (SSO) you will automatically be logged in from your company site and do not need to create an account.

2.1 Creating an Account

Begin by accessing your company's Paperless Employee site, (example: https://www.paperlessemployee.com/companyurl). If you need further assistance with your company's link to Paperless Employee, please contact your employer.

If this is your first time accessing the Paperless Employee site, click ***Create Account*** to begin the process.

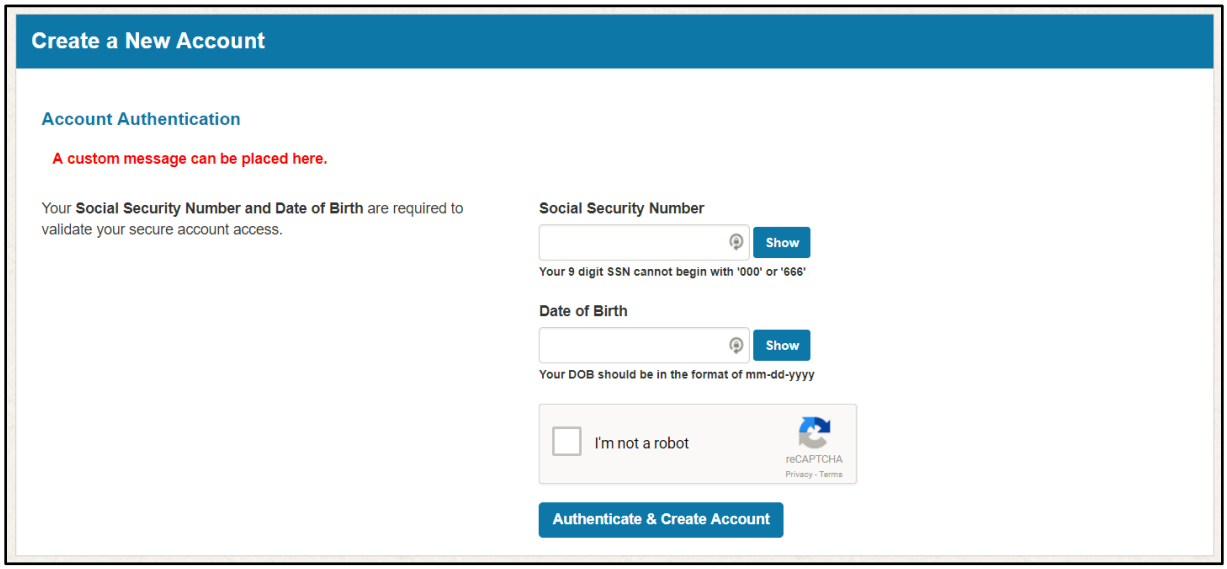


For the safety of your account, your employer will require you to verify your identity.

NOTE: *These values will vary by company, so your screen may not match the image below. Please contact your employer if you are unable to create an account.*

Enter your information in the field(s) provided.

1. Select the checkbox next to ***I'm not a robot***
2. Click ***Authenticate & Create Account*** at the bottom of your screen***.***



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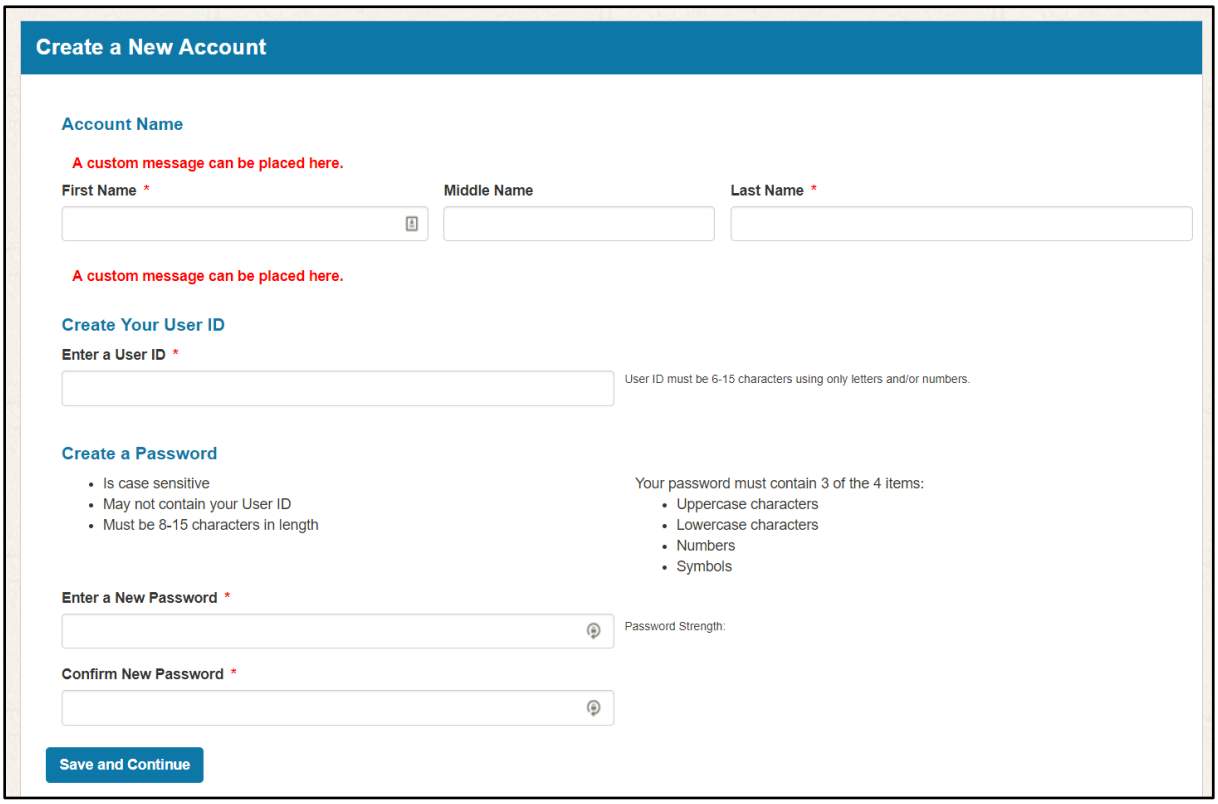
1. Enter your ***First Name***, ***Middle Name*** (optional) and ***Last Name.***
2. Create and enter a ***User ID*** in the field provided. User ID's should be 6-15 characters long using only numbers and letters.
3. Create and enter a ***Password*** in the field provided following the password rules on your screen.
4. Enter the password you created again in the ***Confirm New Password*** field***.***
5. Click ***Save and Continue*** at the bottom of your screen to activate your account.



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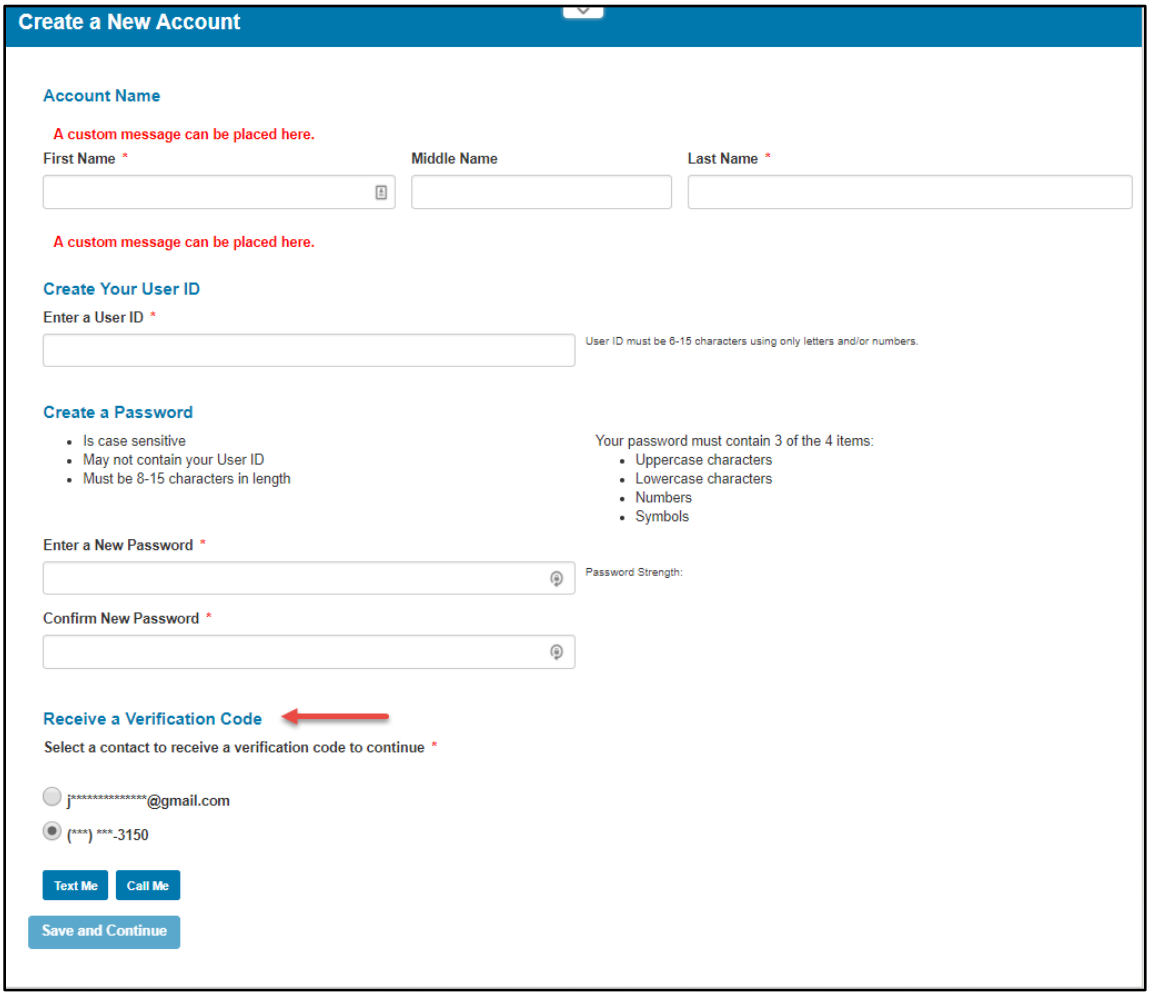
2.1.1. Trusted Contacts

Trusted contacts are used to further confirm that you are who you say you are. Some employers enable this feature to add an additional layer of security to your account. Since your account contains personal identifiable information about you, keeping your account safe is of the utmost importance.

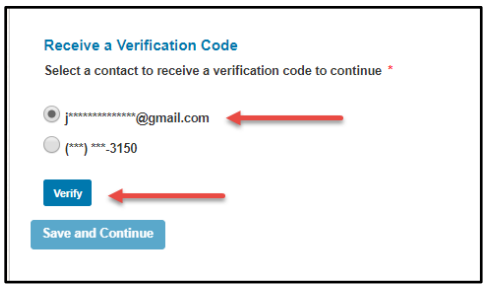
Your employer will send your Trusted Contacts information to CIC Plus. This information is then used to verify the that the person that is creating the account is actually you.

If your employer has chosen to use trusted contacts, you will see a section on the **Create a New Account** screen called **Receive a Verification Code***.* You will be required to complete this one-time verification step.



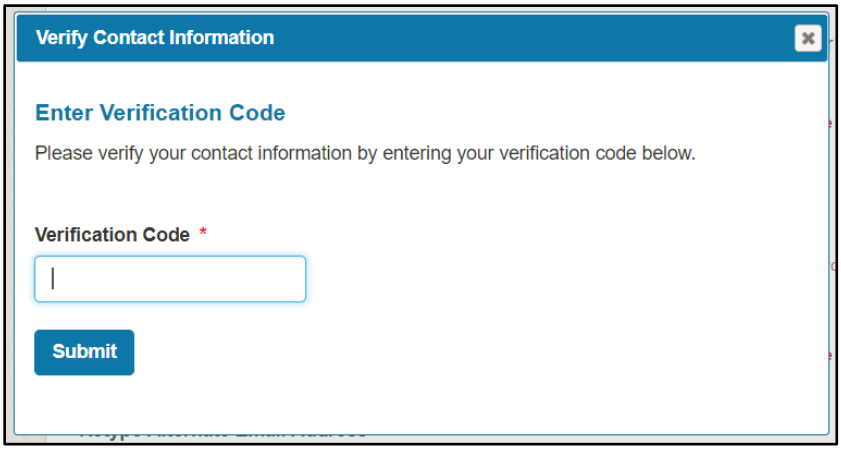
Under the **Receive a Verification Code** section, the contact information provided by your employer will appear and is masked for your security.

1. Select which contact method you prefer to receive your verification code.
    - If you select the radio button by your email address, you can click ***Verify.*** Please open your email message to retrieve the verification code.



    - If you prefer a text, choose the radio button next to ***Text Me*** to receive your verification in a text message.
    - If you prefer a phone call, choose the radio button next to ***Call Me*** to receive your verification code via a phone call.

2. When you receive the verification code, enter it in the ***Verification Code*** field.
3. Click ***Submit***.



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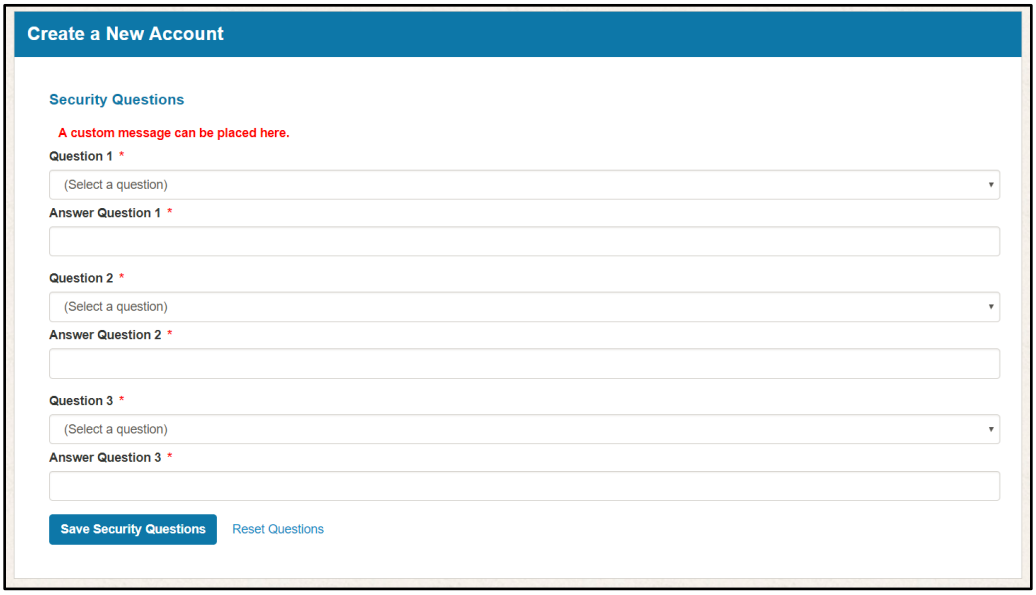
2.1.2. Security Questions

If you forget your user ID or password, security questions are used to retrieve your login information. If your company has elected to use security questions, you will be required to choose three (3) during the account creation process.

1. Using the arrows next to ***(Select a question)***, click to choose the question you wish to answer.
2. Type your answer to the question under ***Answer Question 1***.
3. Continue until you have completed all three questions.
4. Once complete, click ***Save Security Questions*** at the bottom of the screen.



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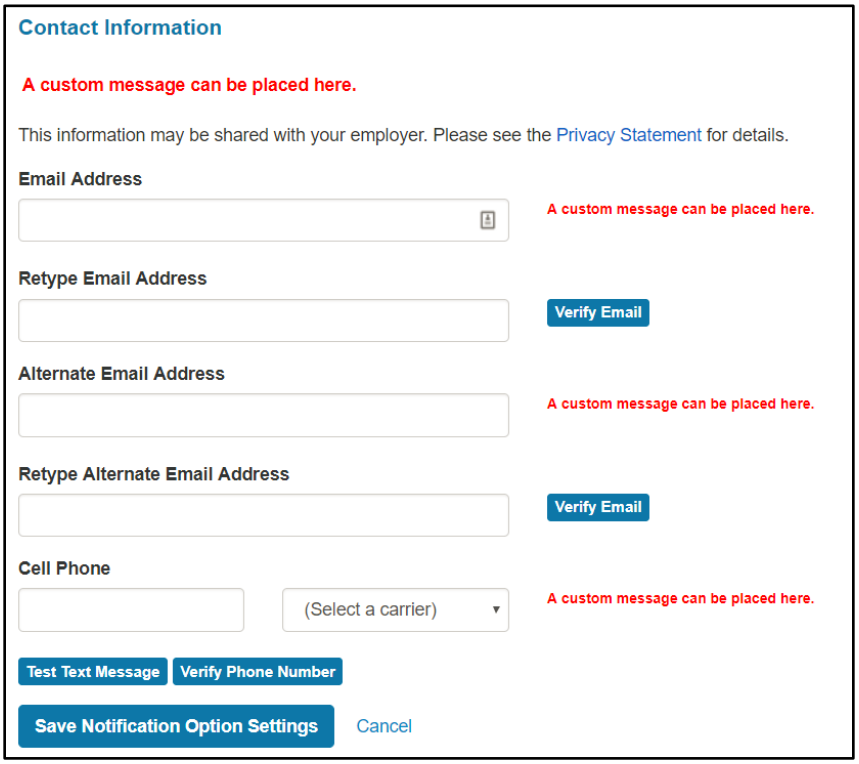
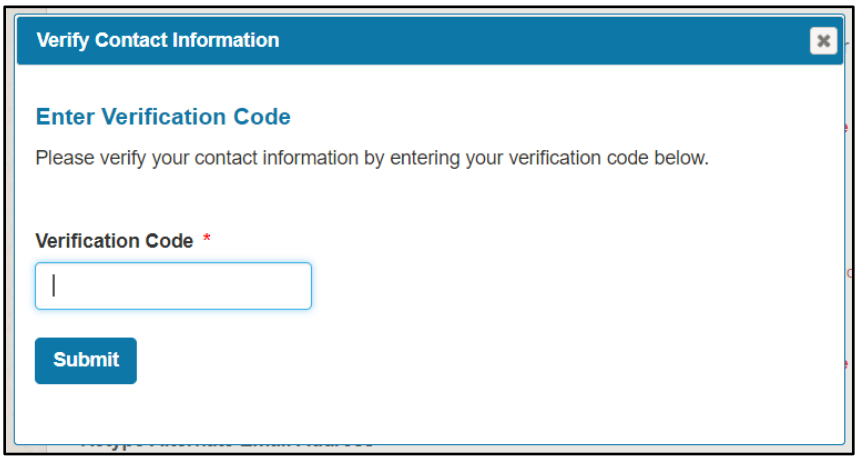
2.1.3. Additional Contact Information

1. If email verification is required, you will click on the ***Verify Email*** button. A code will be sent to your email address. Enter the code the code in the field provided and click ***Submit***.
2. If phone verification is required, click ***Test Text Message*** or ***Verify Phone Number*** button. A code will be sent to your phone or you will receive a phone call.
3. Enter the code in the field provided and click ***Submit***.





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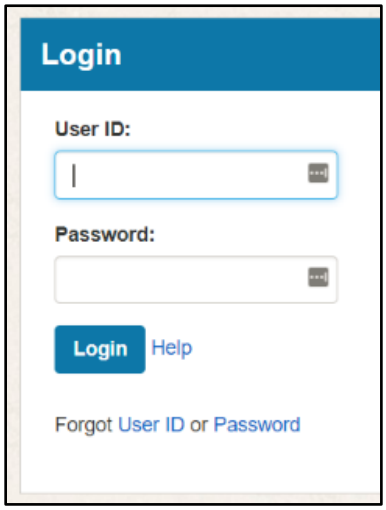
2.2 Forgotten User ID or Password

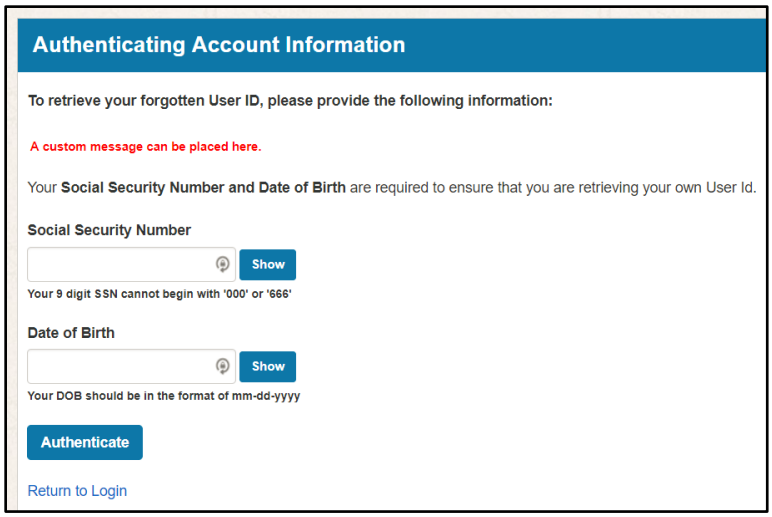
If you cannot remember either your user ID or password that was initially created to access your Paperless Employee account, click the blue link for either ***User ID*** or ***Password***, depending on what information you need.



2.2.1. Forgotten User ID

You will need to enter the values originally used to set up your account. If you cannot remember these values, please contact your employer.

1. Enter your information in the fields provided.
2. Click the ***Authenticate*** button at the bottom of the screen.
3. Your user ID will be displayed. Make sure to remember this information.
4. Click the blue ***Return to Login*** link and enter your user ID and password in the fields provided to login.



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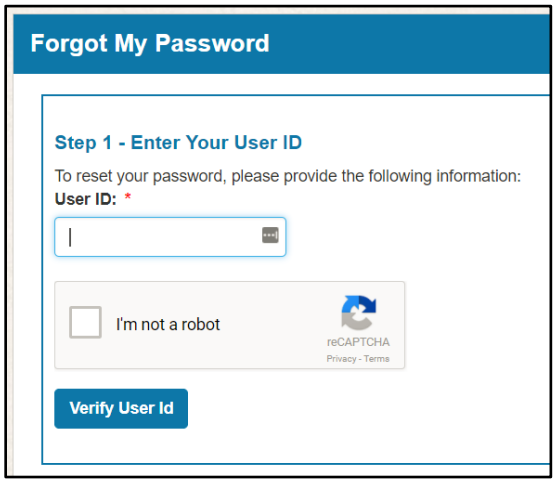
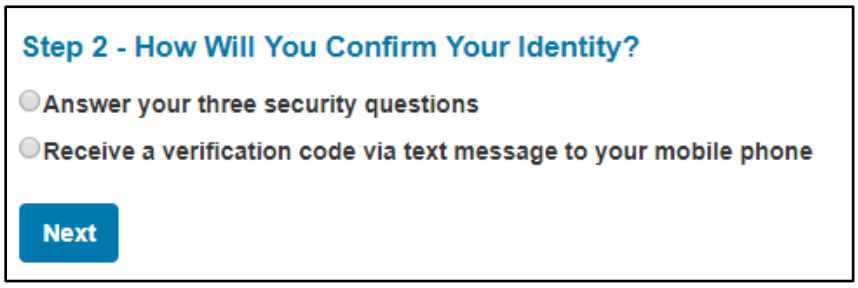
2.2.2. Forgotten Password

If you have forgotten your password, you will need to enter your user ID that was set-up during initial account creation.

1. Enter your ***User ID***.
2. Select the checkbox next to ***I'm not a robot***.
3. Click ***Verify User Id.***



4. Select the radio button based on how you want to confirm your identity.
5. Click ***Next***.
6. Either answer your security questions OR the verification code you received.
7. You will be prompted to set up a new password and be given a link to return to the login screen.



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3. Year-End Tax Statements

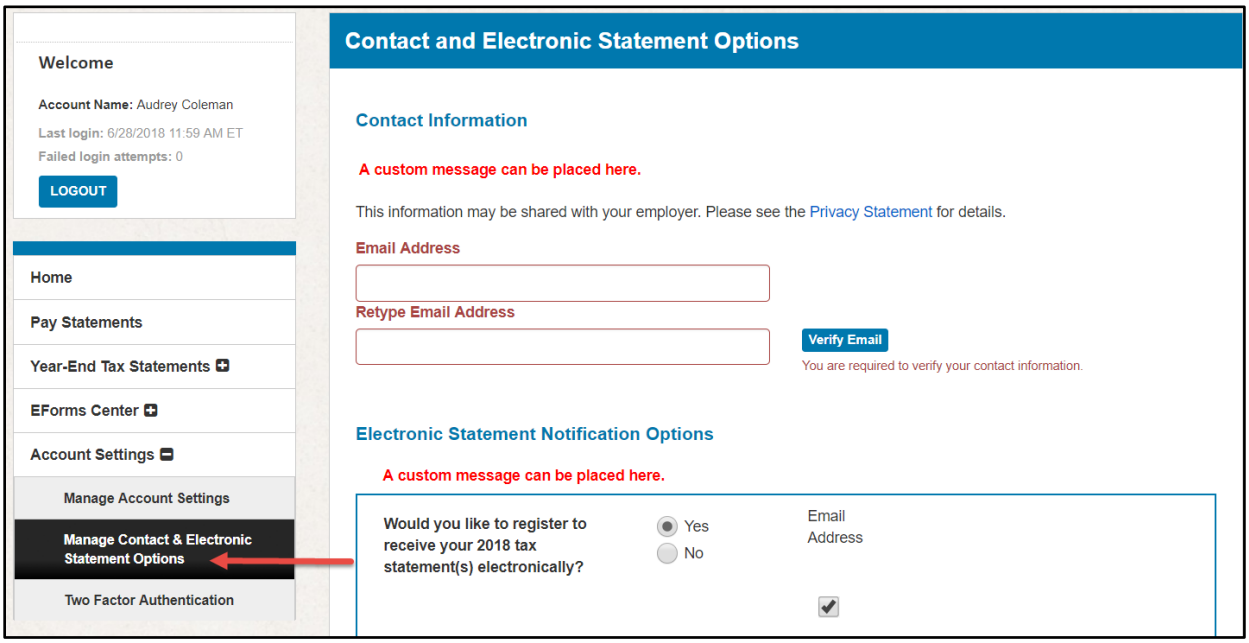
If you registered to receive your tax statements electronically in the Paperless Employee site during your account setup, you can access these in your Paperless Employee account as your employer makes them available.

You can download these form(s) as often as you like until October 15th. After this date, tax forms are considered reissues and can include a cost depending on options set by your employer. Year-End Tax Statements include: W-2, W-2GU, W-2 PR, W-2VI, 1099-M, 1099-R, 592B, T-4, T-4A, RL-1, T4A-NR, and NR4.

3.1 Register to Receive Tax Statement(s) Electronically

If you didn't elect to receive your tax statement(s) electronically during your account setup, you can change your delivery method under **Account Settings** in the Paperless Employee site. Your employer cannot choose electronic delivery for you per IRS regulations.

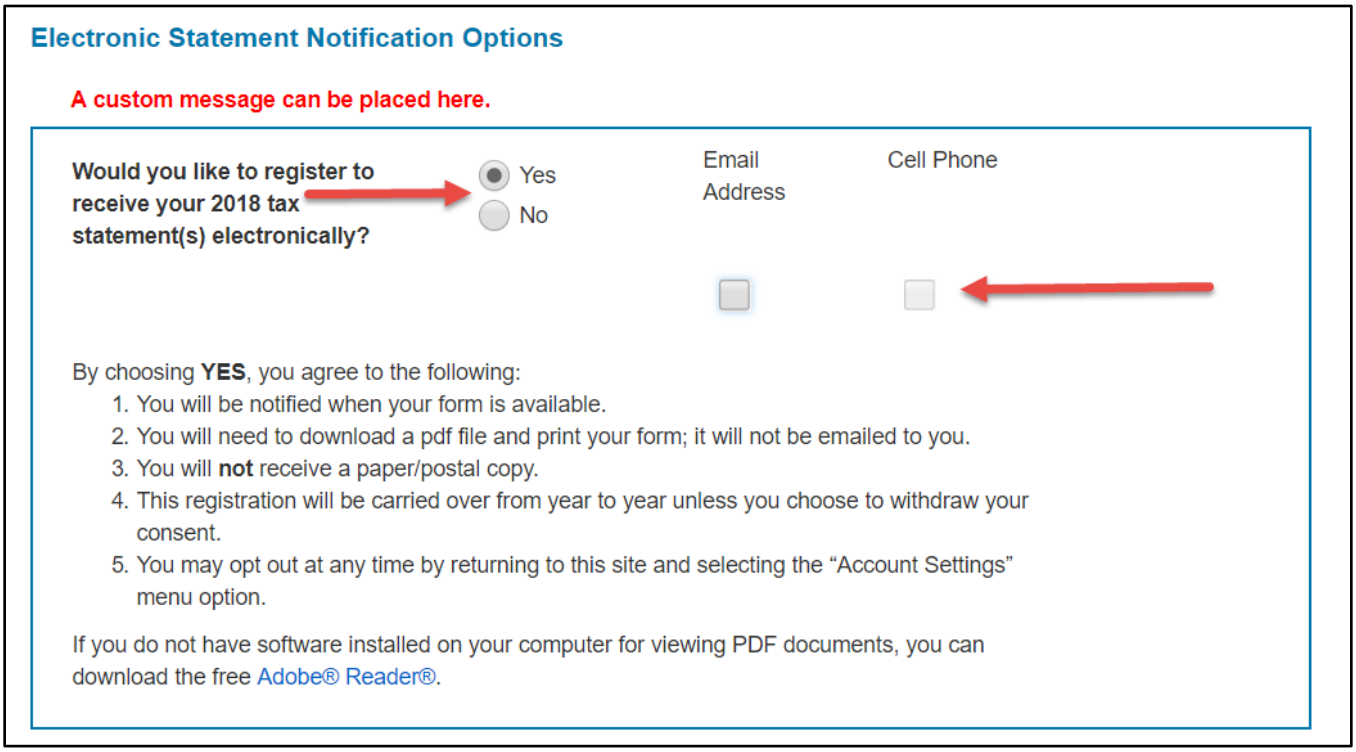
1. From the home page, click ***Account Settings*** from the left side navigation.
2. Click ***Manage Contact & Electronic Statement Options***. You can also select this option from your home page.



3. From the **Manage Contact and Electronic Statement** page, scroll down to the **Electronic Statement Notification Options** section.
4. Select the ***Yes*** radio button to receive your statements electronically in the Paperless Employee site. Select the ***No*** radio button if you prefer to have them mailed.
5. Select the radio button for how you want to be notified that your tax statement(s) are ready.

   Your tax statement(s) will not be delivered via email or text message for security reasons. You will need to log into the Paperless Employee site to retrieve you documents.
6. Click ***Save Notification Option Settings.***

   If you elect electronic delivery, you will receive your tax statement(s) in the Paperless Employee site until you change your delivery method.



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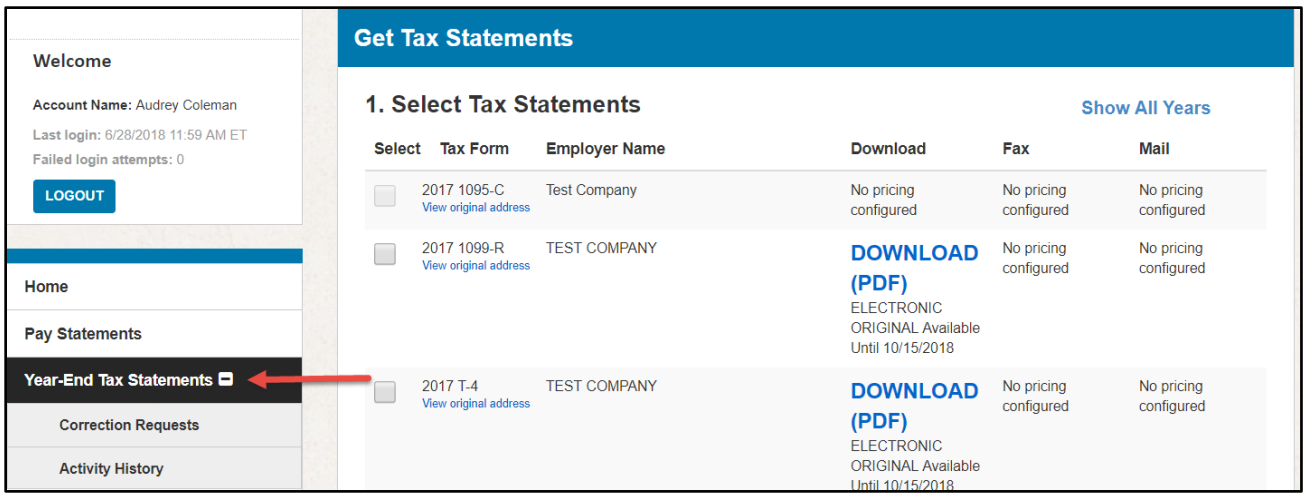
3.2 Retrieving Original Electronic Tax Statement(s)

If you registered to receive your tax statement(s) electronically (instead of mailed) you can retrieve them in the Paperless Employee site.

To enroll in electronic delivery of your tax statement(s) see section 3.1 Register to Receive Tax Statement(s) Electronically in this document.

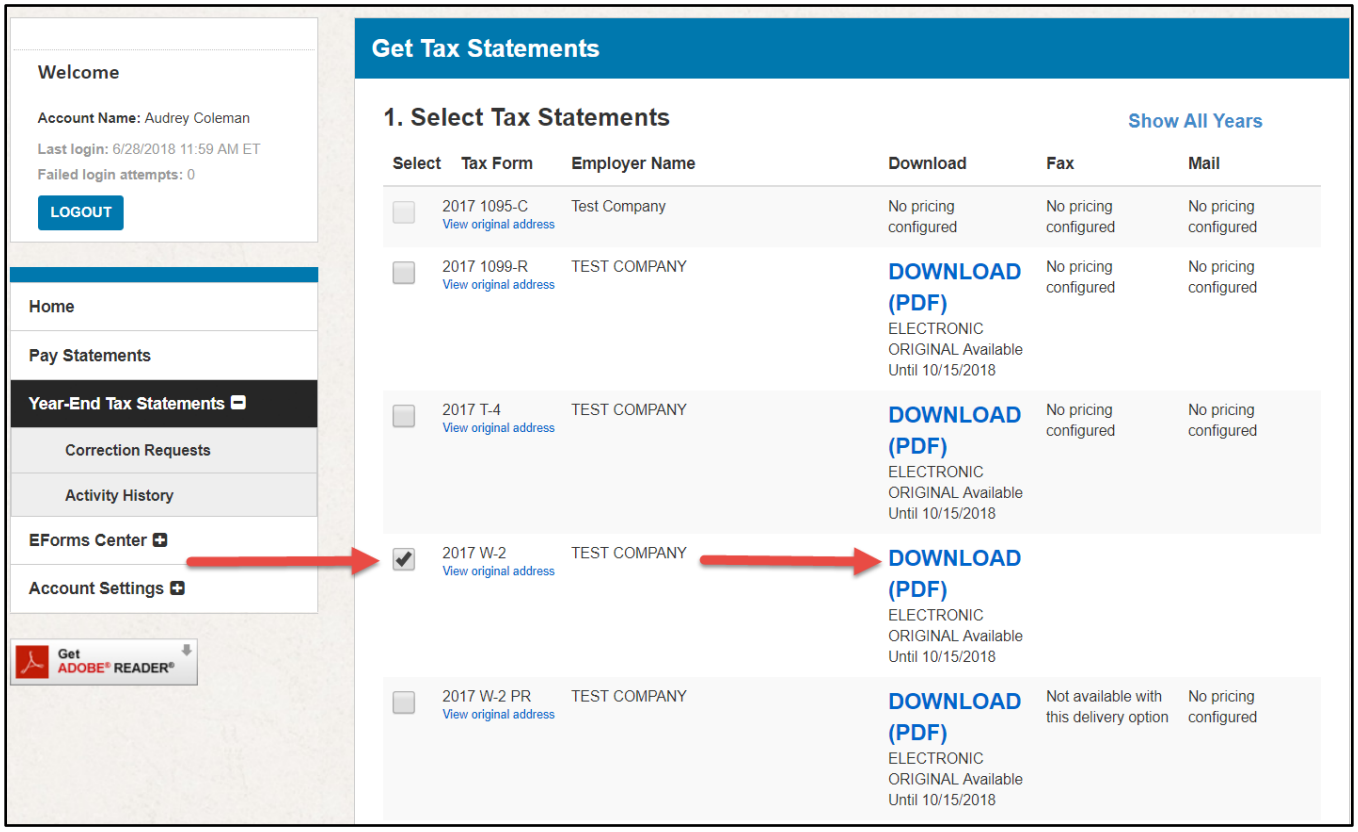
1. From the home page, click ***Year-End Tax Statements*** in the left-hand navigation OR click on the ***Access Current Year-End Statements*** from the home page.



2. On the ***Get Tax Statements*** page, under the **Select** column select the checkbox next to the document(s) you want to retrieve.
3. Click the ***Download PDF*** link to access the statement.

   You will need a PDF reader on your computer to view the documents. If you don't have a PDF reader on your computer, click the ***Get Adobe Reader*** icon on the left side of the page to download a free version.

The document will appear in a new tab in your browser. You can view, print, and/or save the PDF document based on your needs.



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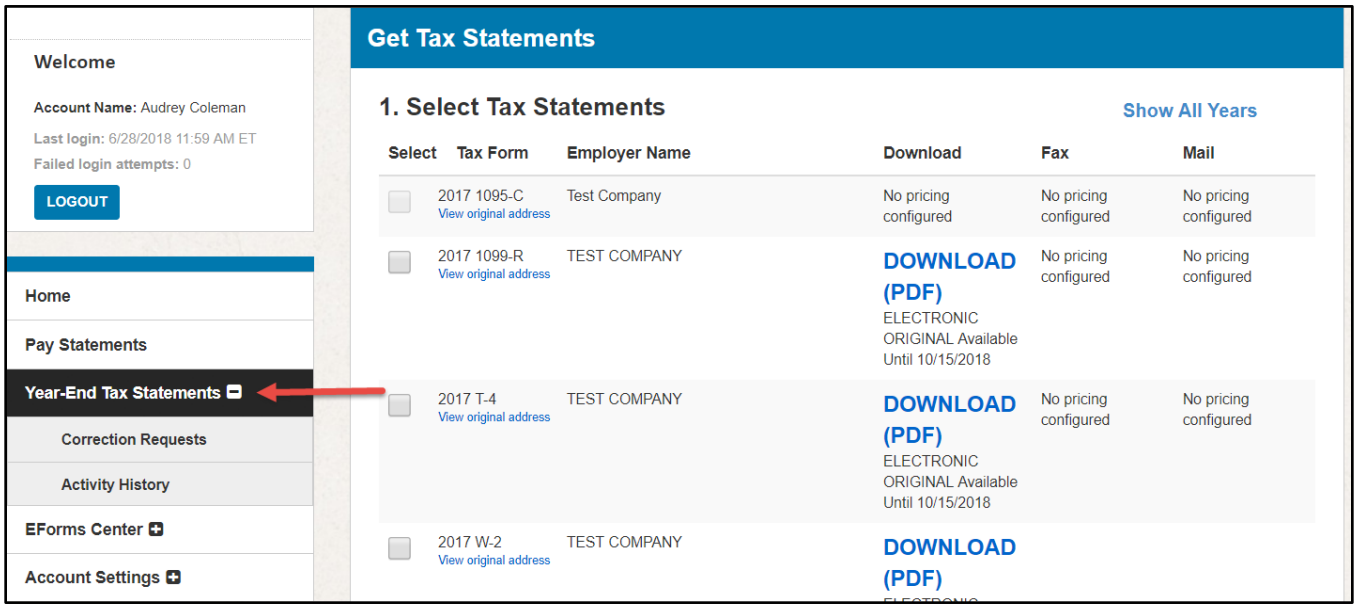
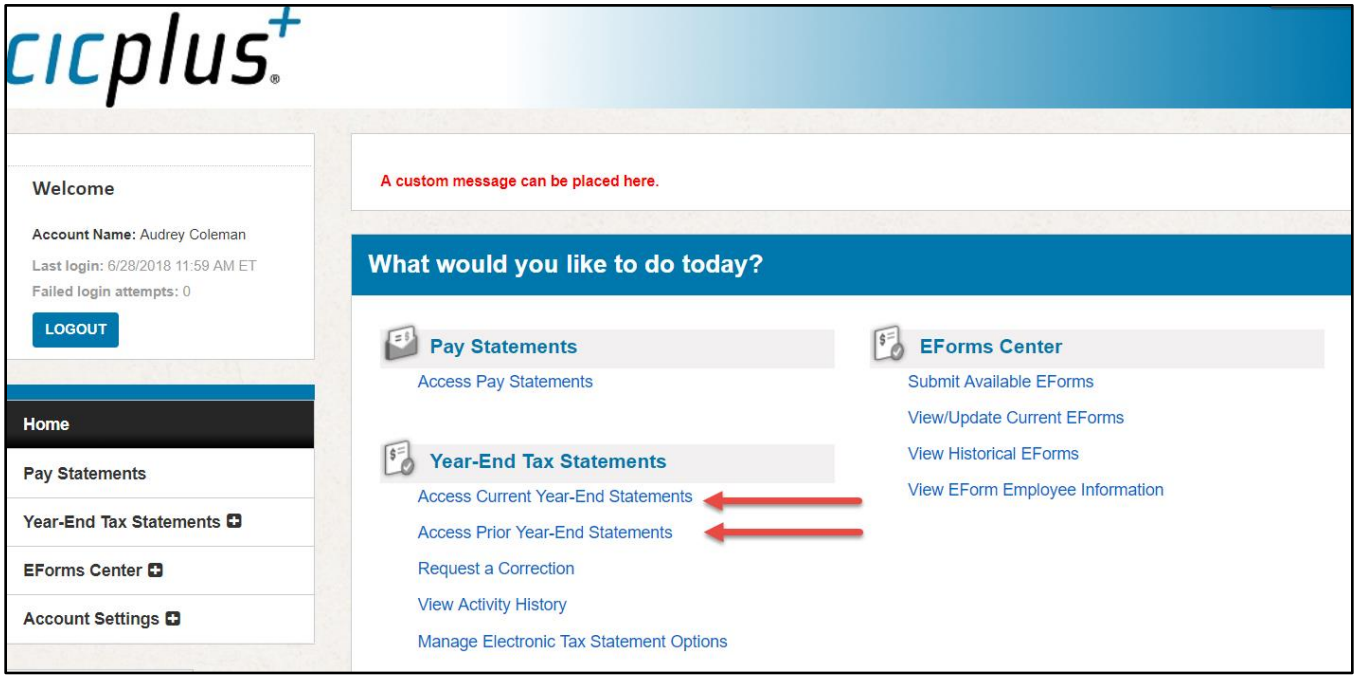
3.3 Requesting a Reissued Copy of Tax Statement(s)

If you lose your tax statement(s), you can request a reissue of the statement(s) from the current or previous year(s) in the Paperless Employee site.

From the home page, click ***Year-End Tax Statements*** in the left-hand navigation. You can also, depending on the year of the statement, click on ***Access Current Year-End Statements*** or ***Access Prior Year-End Statements*** from the home page.

Employers have the option to charge employees for reissued tax statements. If your employer is charging for reissued tax statements, the price will appear next to each form on the **Get Tax Statements** page.





In the **Get Tax Statements** page follow the steps to request a reissue:

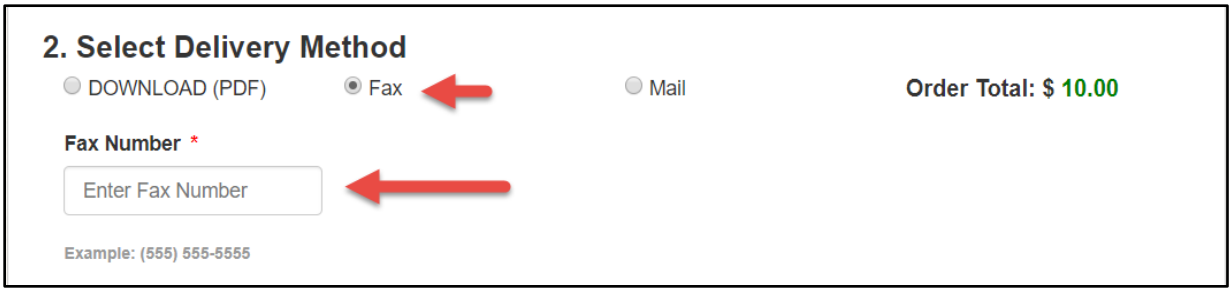
1. In the **Select** column, select the checkbox for the tax statement(s) you need reissued.

☐	2016 T-4 View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
☐	2016 T-4 View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
☑	2016 W-2 View original address	TEST COMPANY	$10.00	$10.00	$10.00
☐	2015 1095-C View original address	Test Company			
☐	2015 1099-R View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
☐	2015 T-4 View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured

2. Select the desired delivery method for the reissued form. Employers have the option to determine the delivery methods; therefore, depending on the employer, the delivery options may vary from what's shown below.

   Download (PDF) – allows you to immediately view, download or print the document. Electronic reissues are free for 30 days.

   Fax - Enter the fax number where you want the statement(s) sent. Statements are faxed within 5 minutes. If the first attempt is unsuccessful, the site will reattempt to send every 5 minutes for 30 minutes. The site will stop after this time if these attempts are unsuccessful. If you do not receive the document(s), please confirm your fax number. Faxes reissues are free for 30 days.



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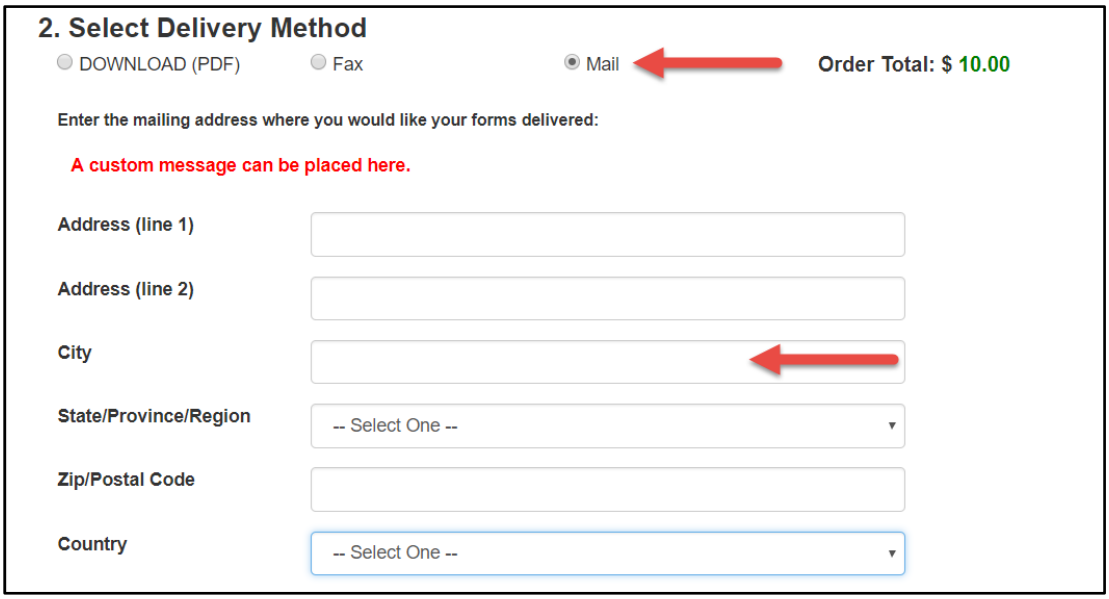
Mail - Enter the mailing address where you would like the document(s) sent. This will not change the address on your tax statement, only the postal address where the statement is being mailed. Reissued statements are mailed the next business day. A free reissue is available after a 7-day hold.



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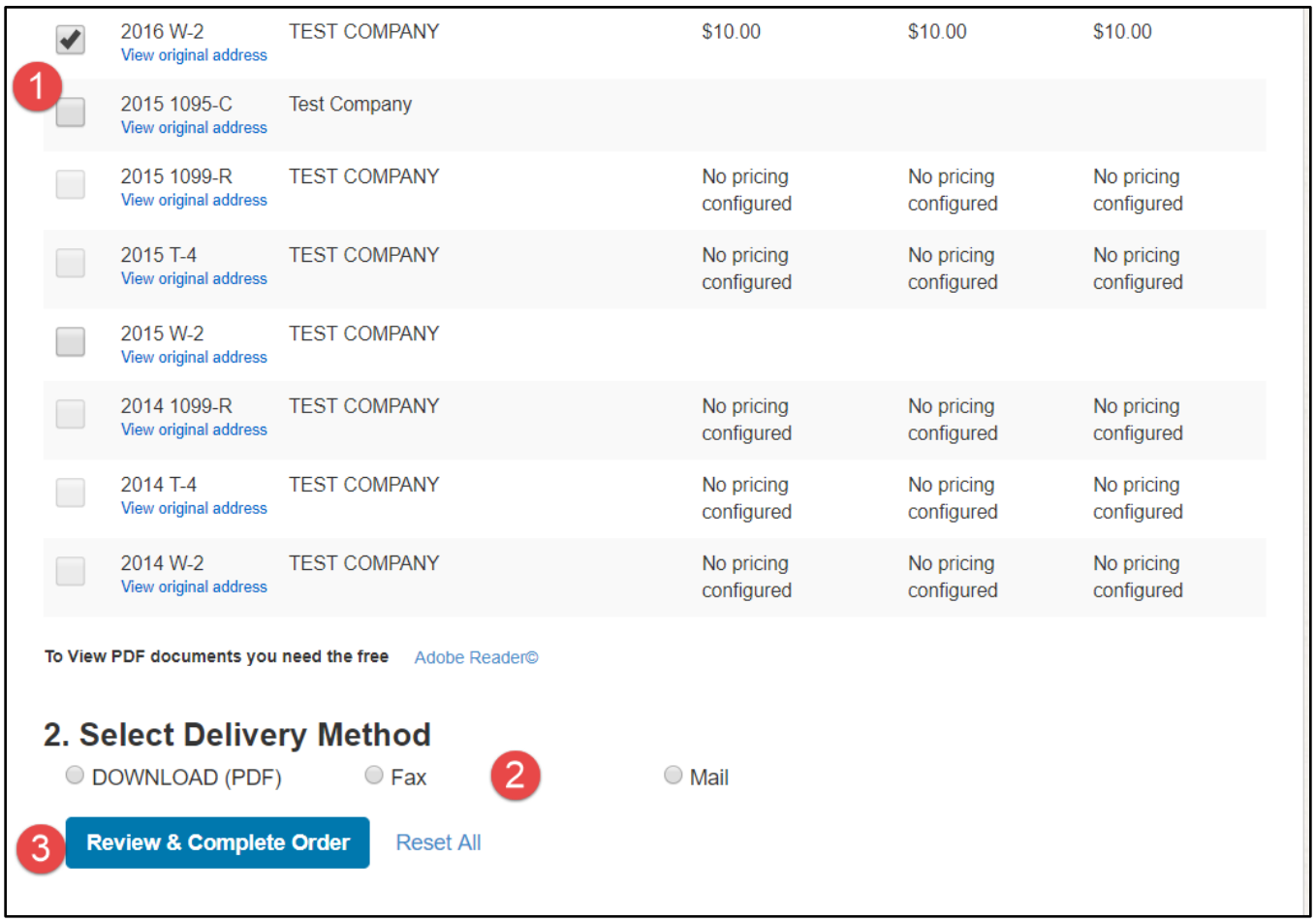
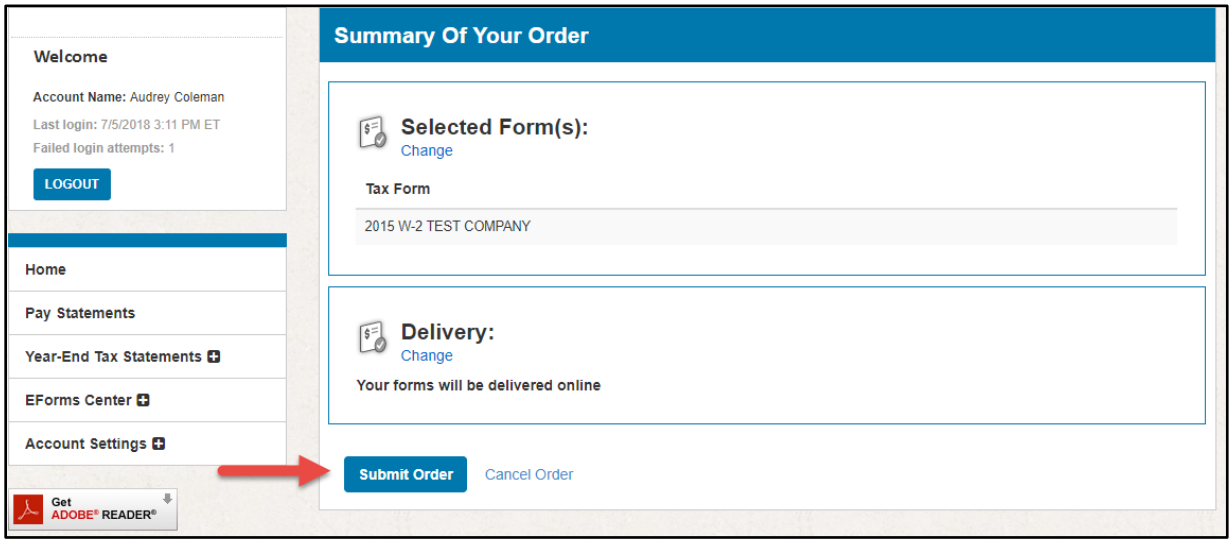
3. Click on the ***Review & Complete Order*** button.



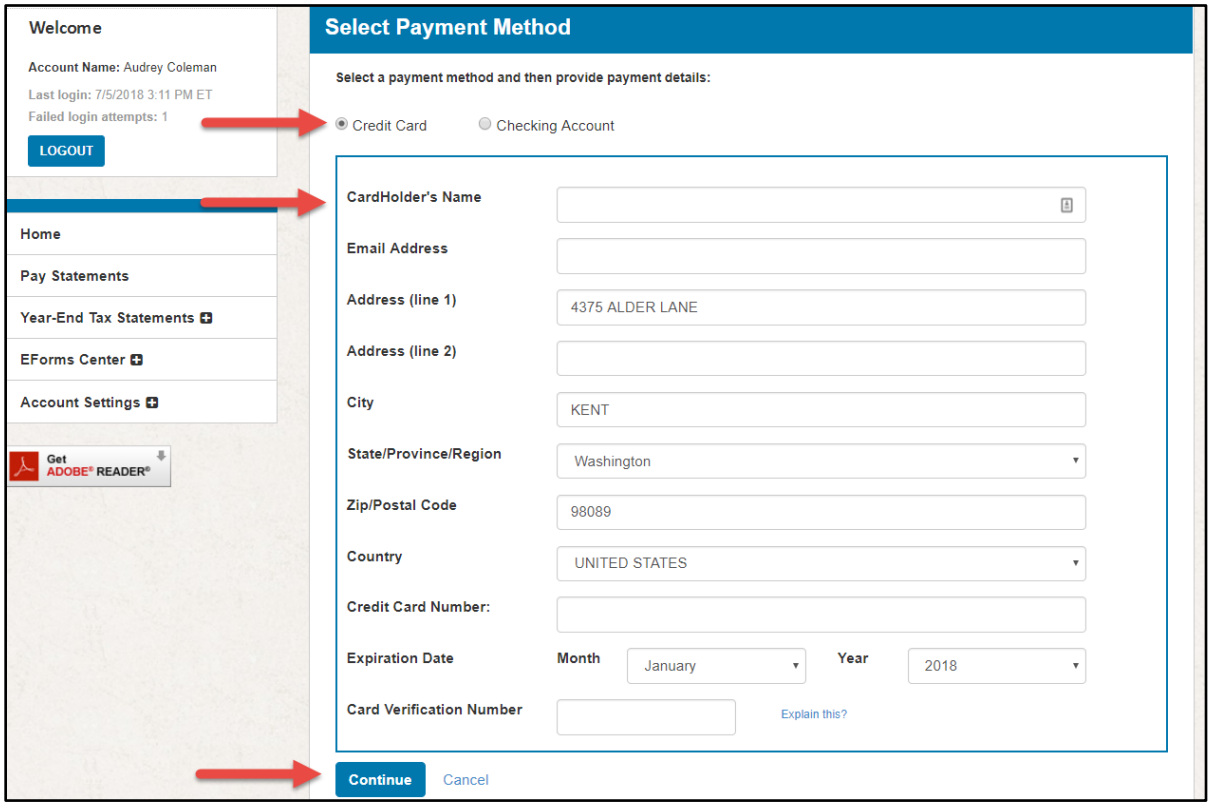
If your employer does not charge for reissued tax statements, the **Summary of Your Order** page will appear with a summary of your order.

To complete the order, click ***Submit Order***.



If your employer charges for reissued tax statements, the **Select Payment Method** screen will appear.

1. Choose your preferred payment; credit card or check.
2. If paying with a credit card, select the ***Credit Card*** radio button, fill in the payment details, and click ***Continue***.



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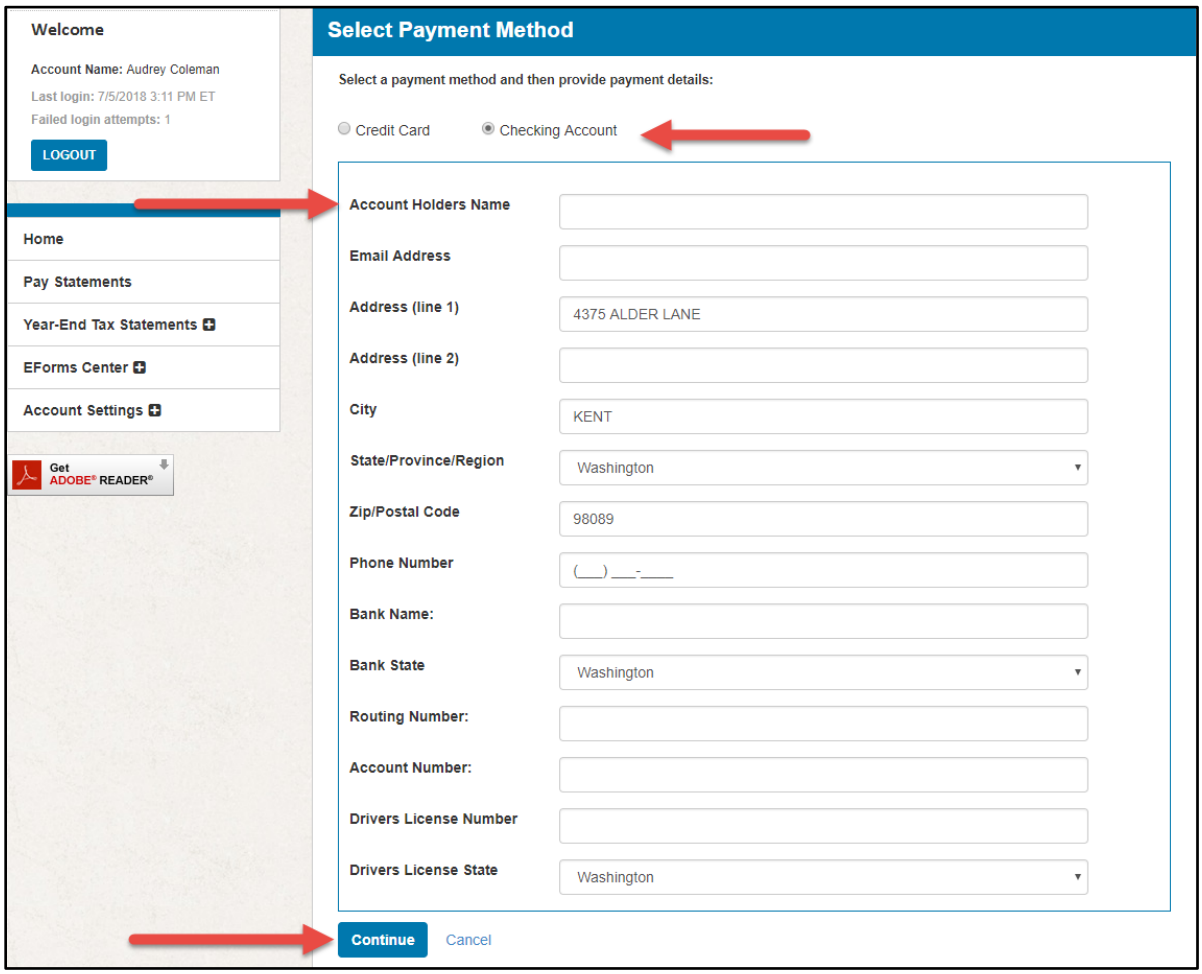
3. If paying with a check, select the ***Checking Account*** radio button, fill in the payment details and click ***Continue***.



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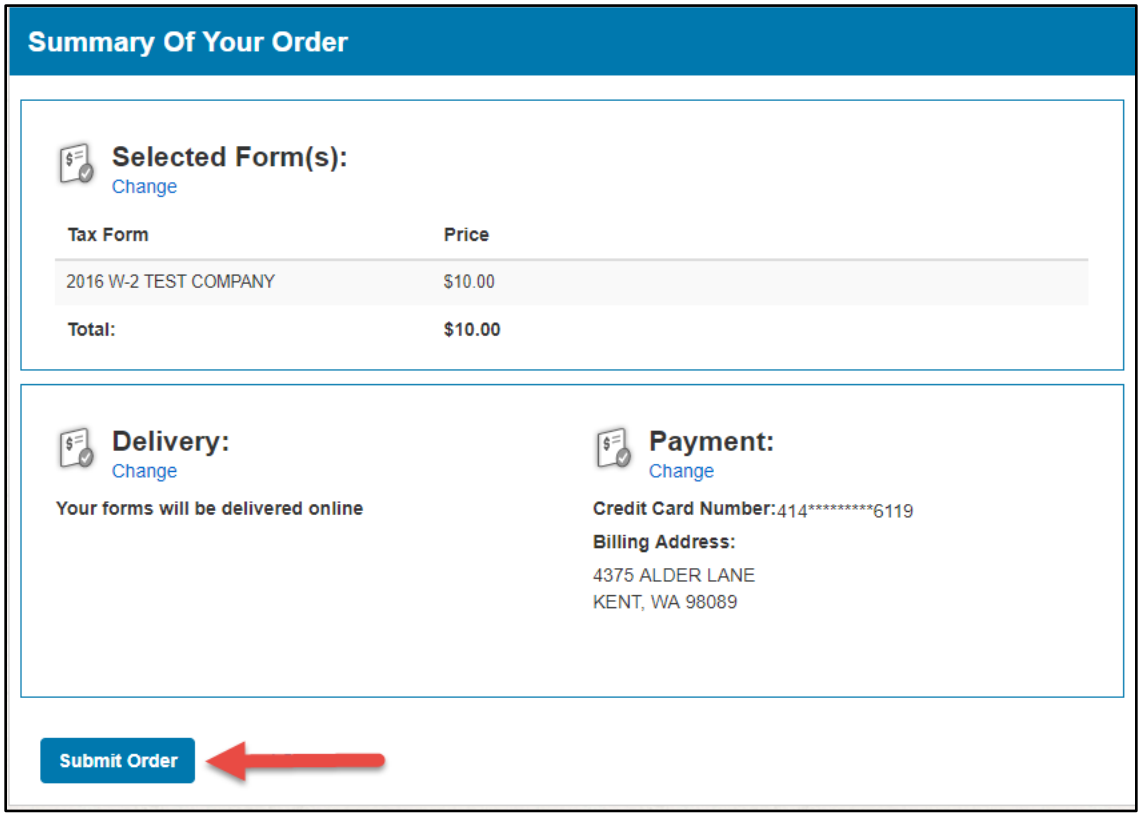
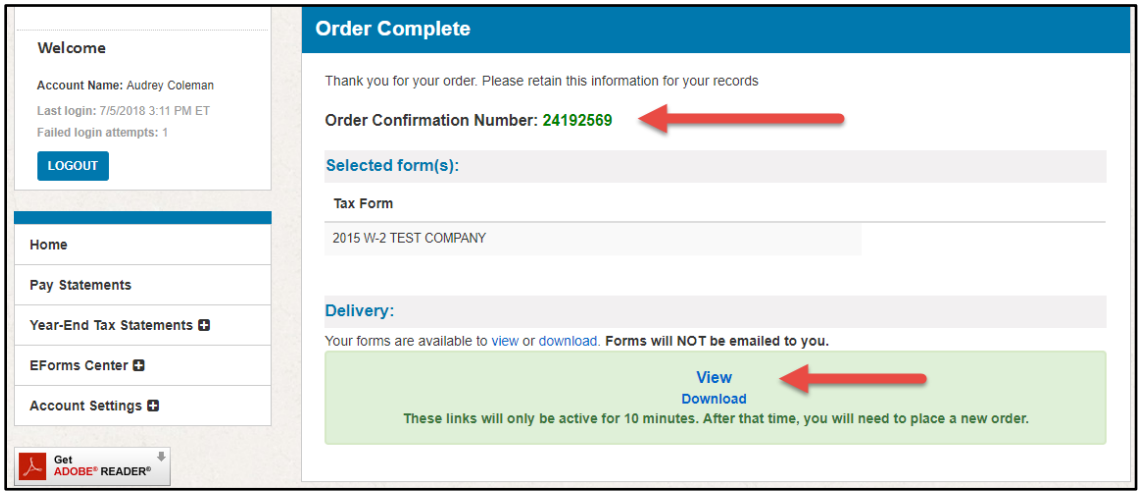
4. The **Summary of Your Order** page will appear detailing your order. The forms selected, and the delivery method can be changed prior to completing the order by clicking ***Change*** under ***Selected Form(s)*** and/or ***Delivery.***
5. To complete the order, click ***Submit Order***



Once the order has been submitted, the **Order Complete** page will appear with a confirmation that your order was processed and complete. Retain this information for your records.

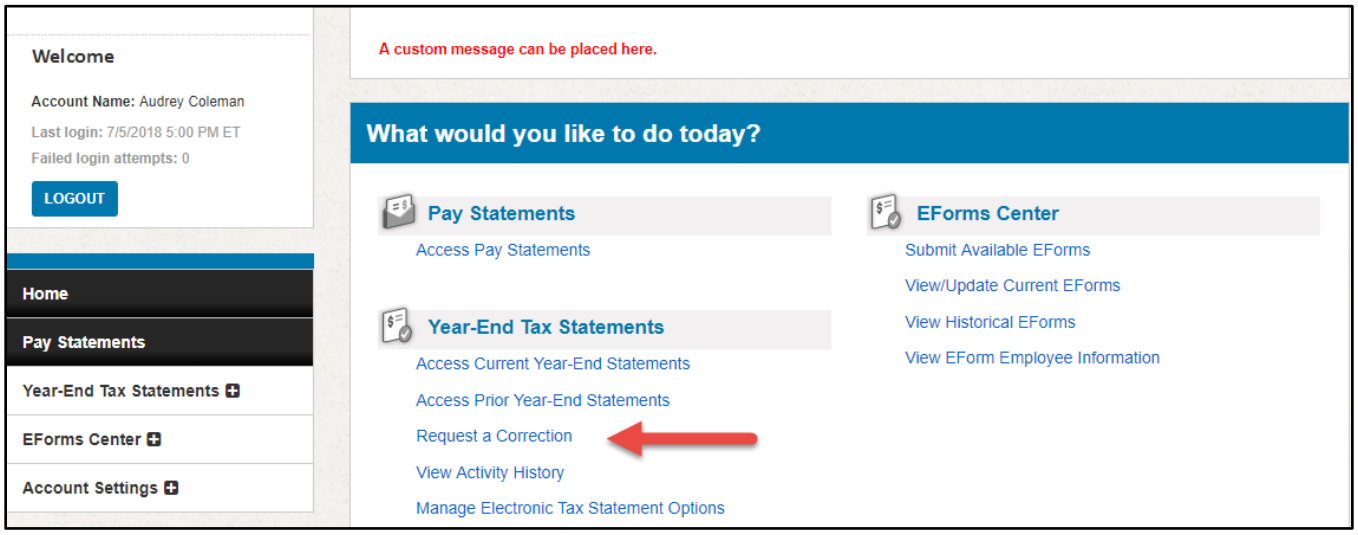
If you selected online delivery, your documents will be available to **View** or **Download** for 10 minutes. After 10 minutes, you will need to submit a new order.

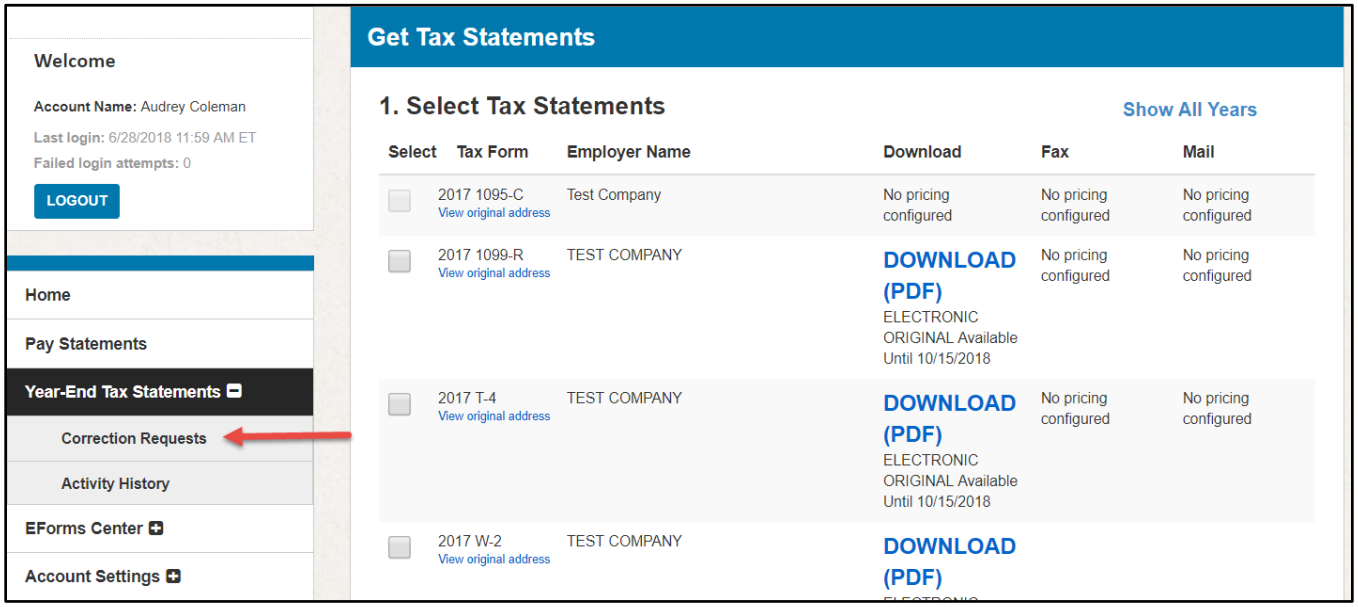


3.4 Requesting a Correction to a Tax Statement

If you need a correction to your tax statement(s), you can request a correction in the Paperless Employee site. The correction request will be sent to your employer for review.

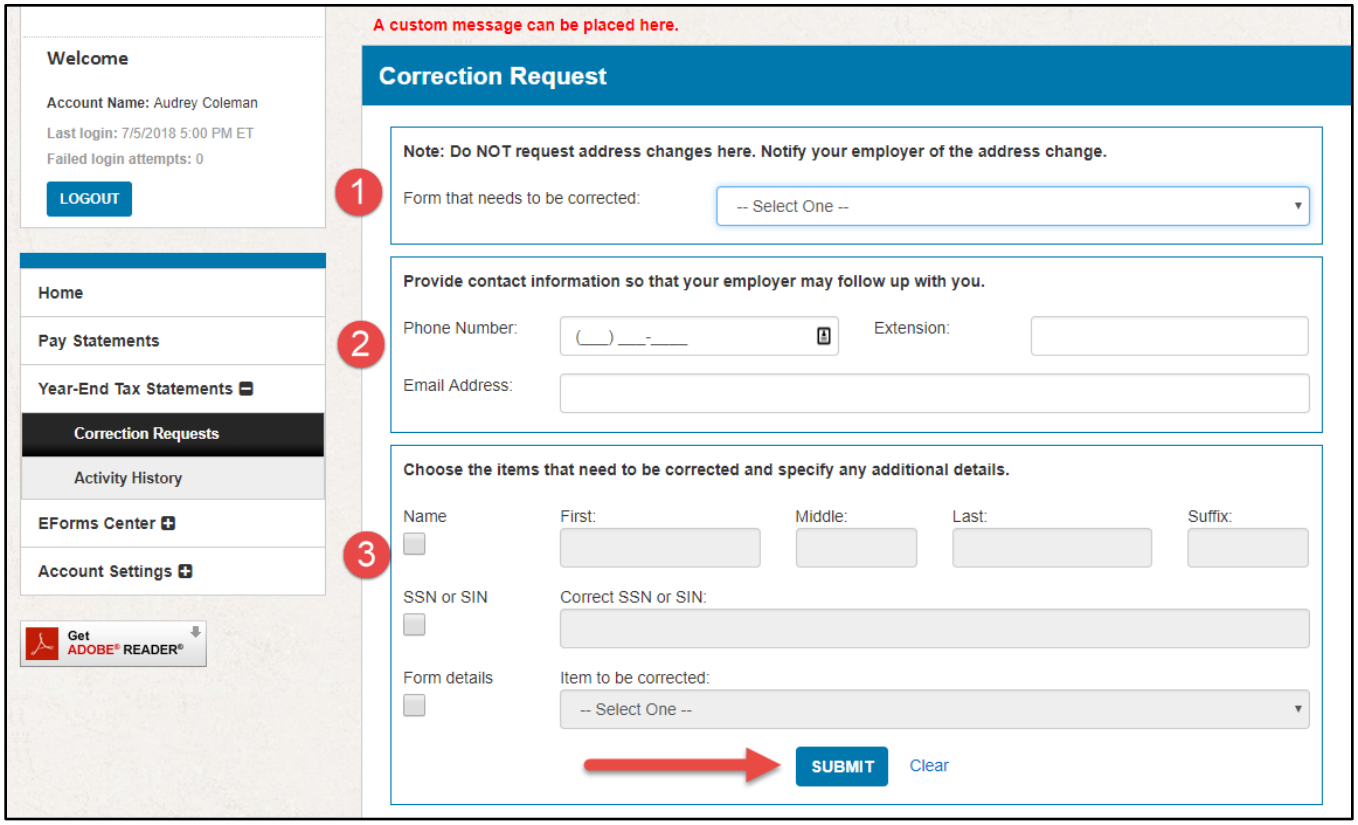
From the home page, click ***Correction Request*** in the left-hand navigation or click ***Request a Correction*** form your home page.



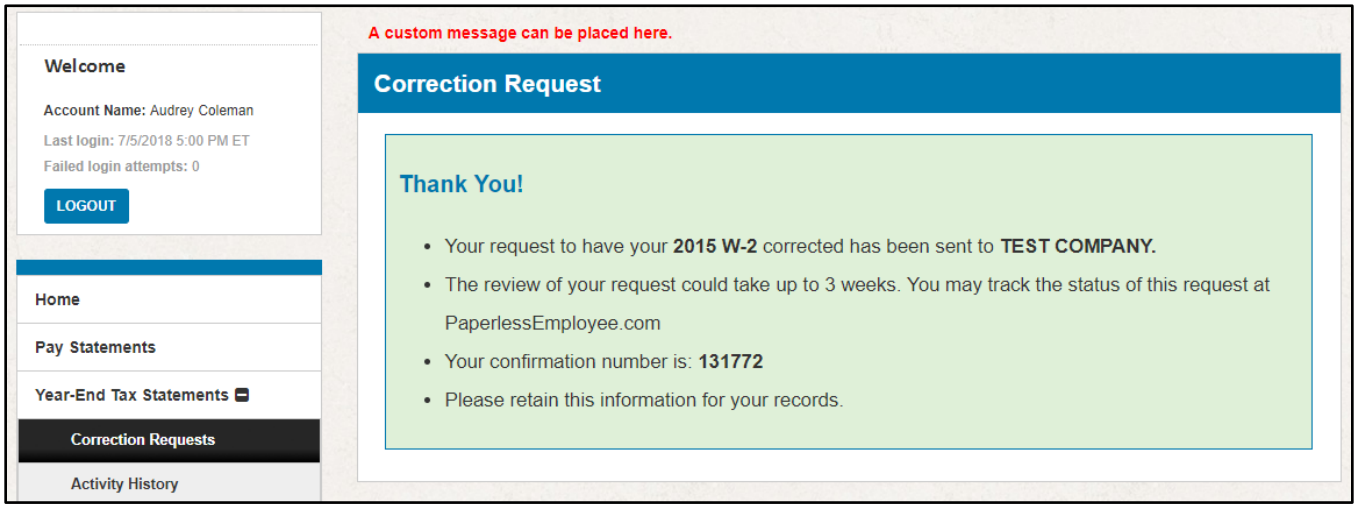


On the **Correction Request** page, complete the following information:

1. Click on the ***Select One*** arrow and choose the document you want corrected.
2. Provide your contact information in the fields provided.
3. Select the checkbox next to the items that need correction and enter the new information.
4. When you are done, click ***Submit***.



After clicking ***Submit***, the **Correction Request** page will appear with the correction details. Retain the confirmation number for your records.



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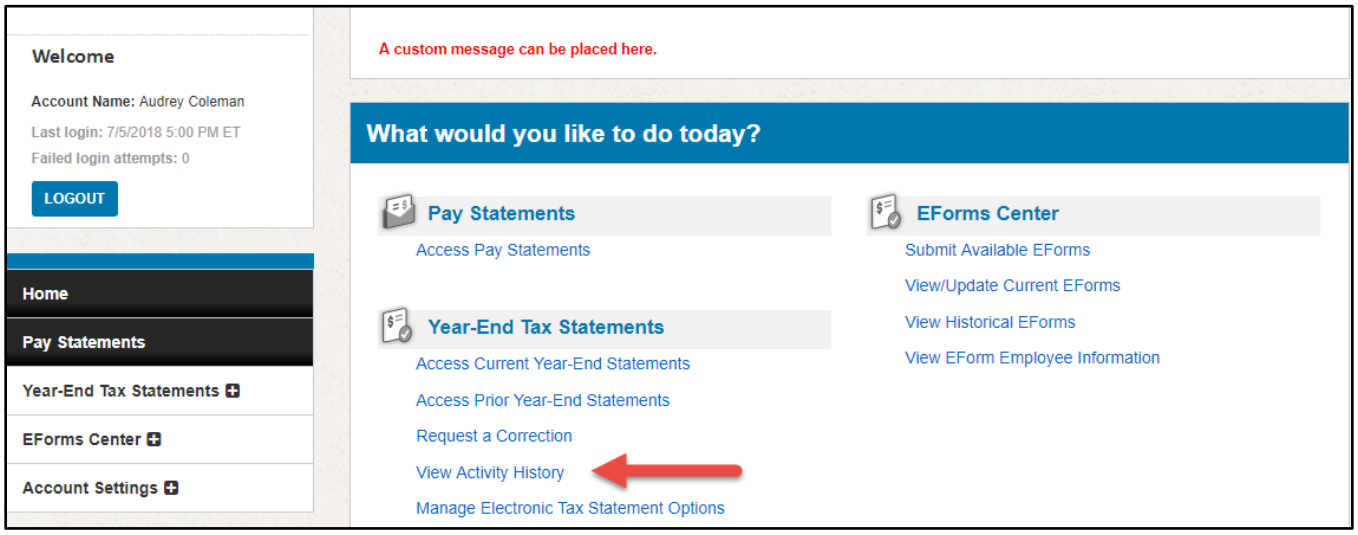
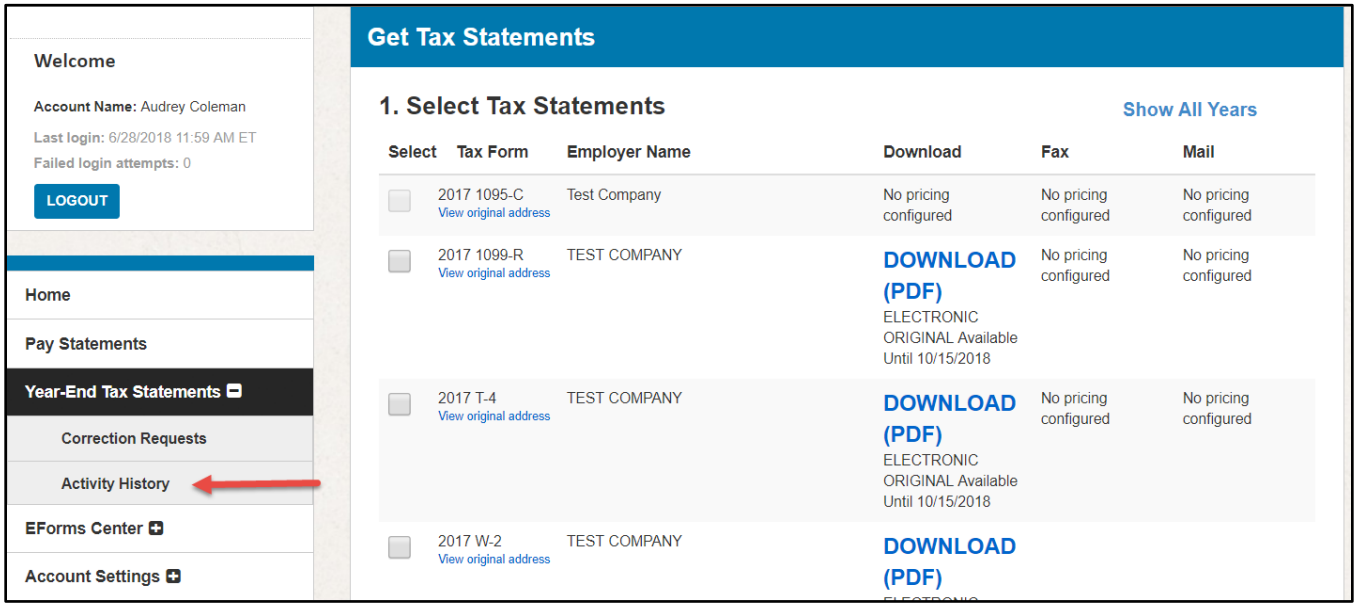
3.5 Viewing Correction Request History and Status

If you have requested a correction and want to review the status or history, you can access this information in the Paperless Employee site.

From the home page, click ***Activity History*** in the left-hand navigation or ***View Activity History*** from the home page.

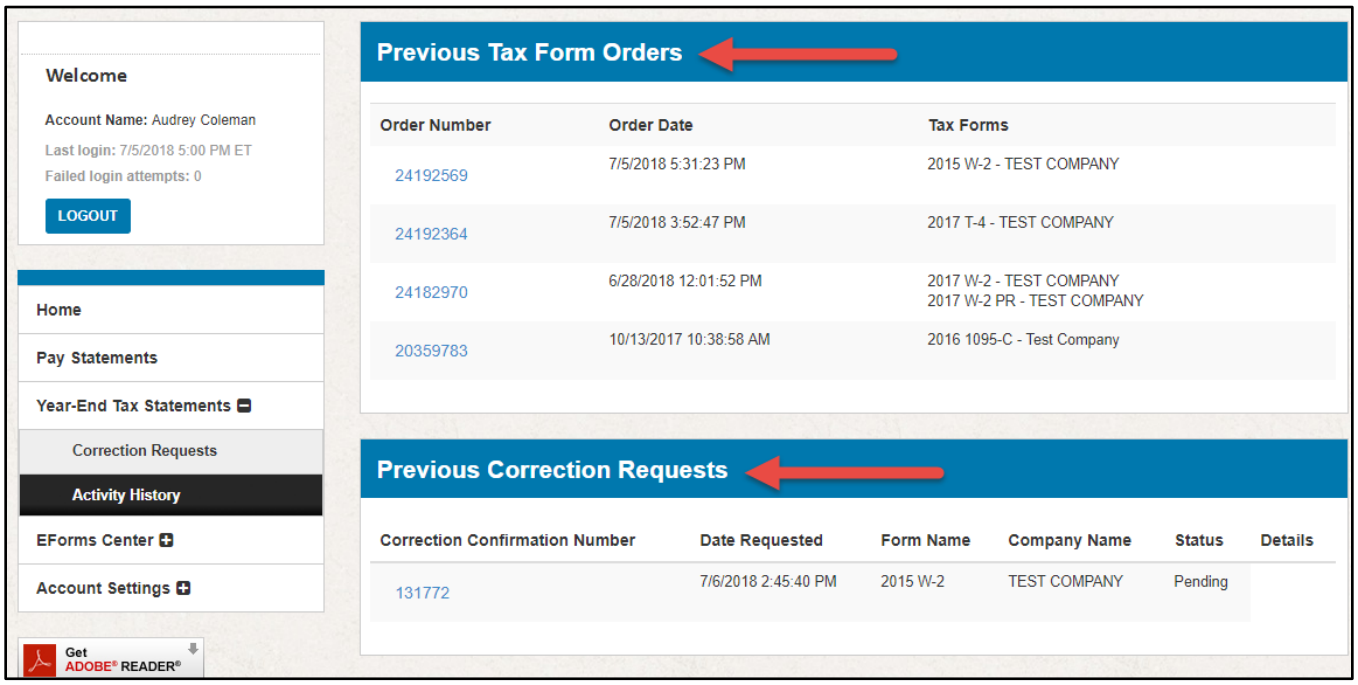




You will be able to view **Previous Tax Form Orders,** which lists any reissue requests you have submitted, and **Previous Correction Requests,** which lists any correction requests you have submitted.

To view the details and status of your request, click on the blue ***Order Number*** or the ***Correction Confirmation Number*** and the **Correction Request Details** page will appear.

Pop-ups must be enabled in the browser to see the **Correction Request Details** page.

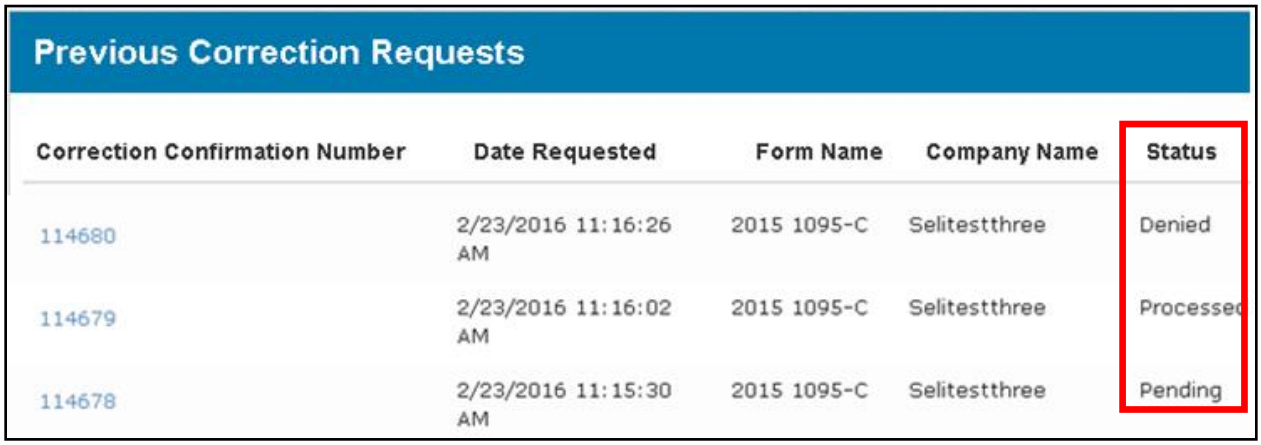


Your request will have one of the following statuses:

Pending – needs to be reviewed by your employer.

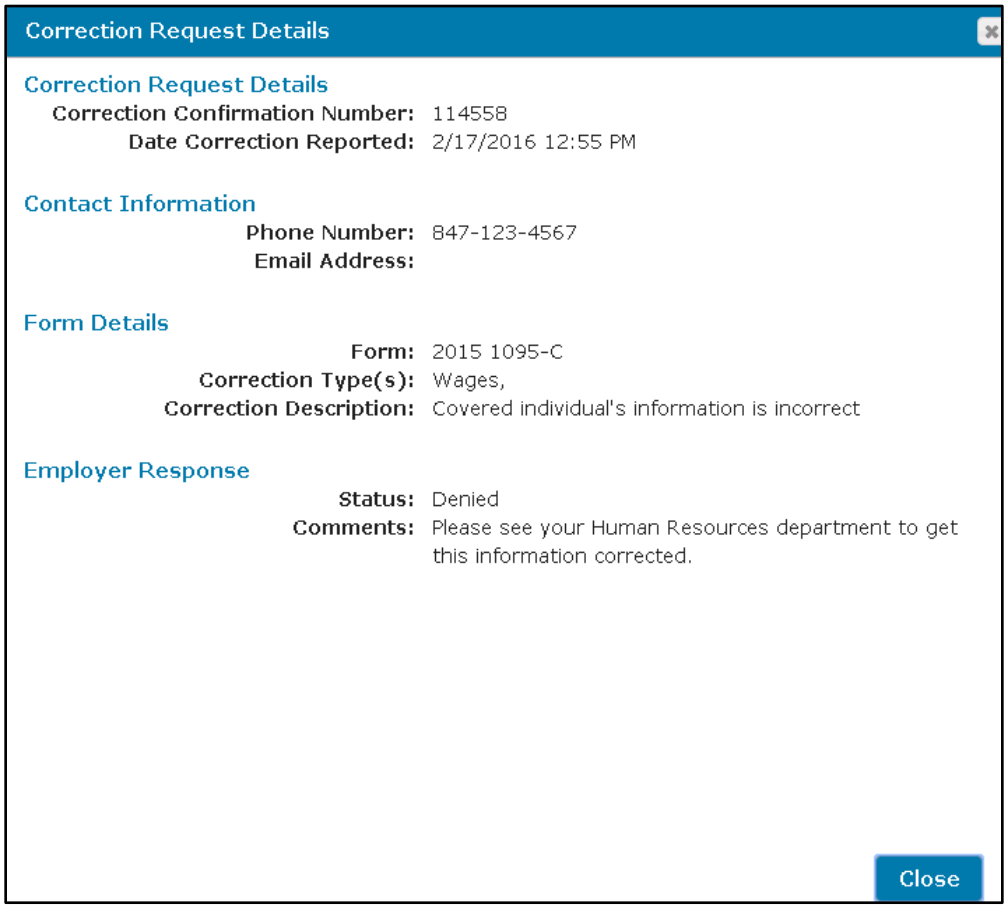
Processed – the correction has been made and the new form will be mailed or available online, depending on your selected delivery method.

Denied – your employer has denied the correction. If your request has been denied, click on the blue ***Correction Confirmation Number*** to view the **Correction Request Details** page.



Previous Correction Requests

Correction Confirmation Number	Date Requested	Form Name	Company Name	Status
114680	2/23/2016 11:16:26 AM	2015 1095-C	Selitestthree	Denied
114679	2/23/2016 11:16:02 AM	2015 1095-C	Selitestthree	Processed
114678	2/23/2016 11:15:30 AM	2015 1095-C	Selitestthree	Pending



Correction Request Details

Correction Request Details
Correction Confirmation Number: 114558
Date Correction Reported: 2/17/2016 12:55 PM

Contact Information
Phone Number: 847-123-4567
Email Address:

Form Details
Form: 2015 1095-C
Correction Type(s): Wages,
Correction Description: Covered individual's information is incorrect

Employer Response
Status: Denied
Comments: Please see your Human Resources department to get this information corrected.

Close

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4. Revision History

Date	Description
10/22/2018	Initial version
1/19/2019	Adjust example paperlessemployee.com URL

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