

## View Tax Forms as an Employee in Paylocity

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.

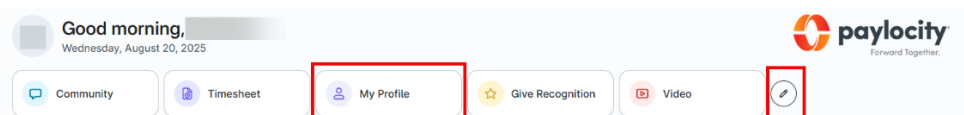
To view individual tax forms via the web:

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](#).

The screenshot shows a web interface with a top navigation bar containing tabs: Employment, Pay (selected), Personal, Time Off, Benefits, and Career. Below this is a secondary navigation bar with links: Rates, Checks, Upcoming Check, Expenses, Tax Forms (selected), Direct Deposit, Tax Setup, and Pay Setup. The main content area is titled 'W-2s' and contains a table. The first row of the table has a link 'More information about your W-2' highlighted with a red box. Below this link is a table with columns: Tax Year (with a dropdown arrow), Corrected, Fed Wages / Withholding, SS Wages / Withholding, and Med Wages / Withholding. The rows for 2024 and 2023 show 'Corrected' as 'Yes' and the other columns as empty.

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.

**Password Protect**

The information you have requested is confidential.  
To ensure that this information is secured please provide a password that will be required to view this information.

**Password:**

☐ Do not password protect this information:  
my computer is secure and free from spyware or other potential unauthorized access.

Note: to view password-protected information you must have Adobe Acrobat Reader 5.0 or later.  
Click [here](#) to download the latest version of Acrobat Reader.

**View PDF**

- 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**.

**Password Protect**

The information you have requested is confidential.  
To ensure that this information is secured please provide a password that will be required to view this information.

**Password:**

☐ Do not password protect this information:  
my computer is secure and free from spyware or other potential unauthorized access.

Note: to view password-protected information you must have Adobe Acrobat Reader 5.0 or later.  
Click [here](#) to download the latest version of Acrobat Reader.

**View PDF**

6. Open and review the tax form.

📄 **NOTE:** One can download the PDF and save it to a desired location.

## Mobile

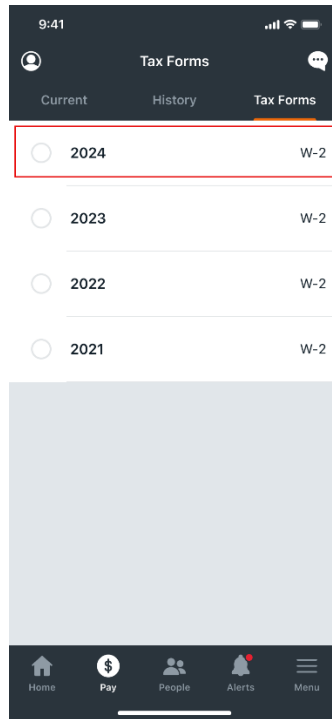
Employees can view and email their W-2 tax form on the [Paylocity Mobile App](#).

**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.

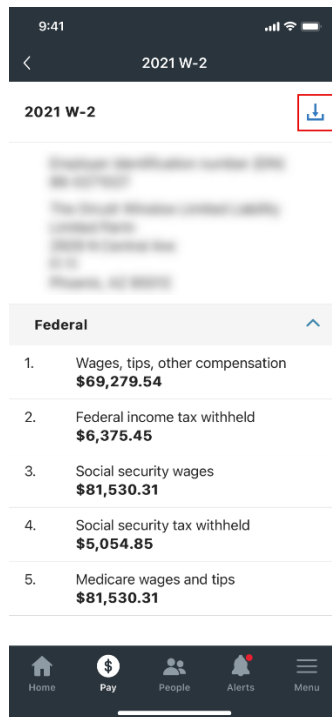
To view and/or email individual W-2 tax forms on the Mobile App:

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.




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

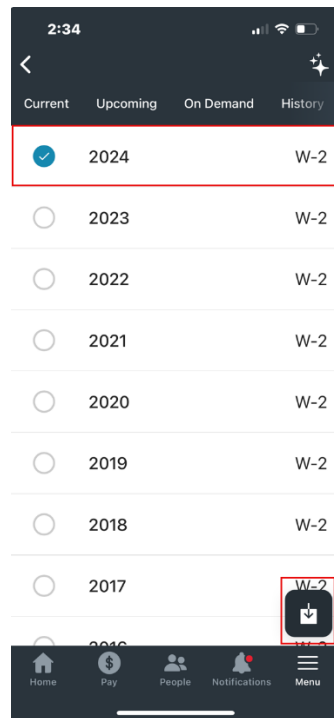


- To email the tax form:

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.



5. Email or save the form to mobile device.