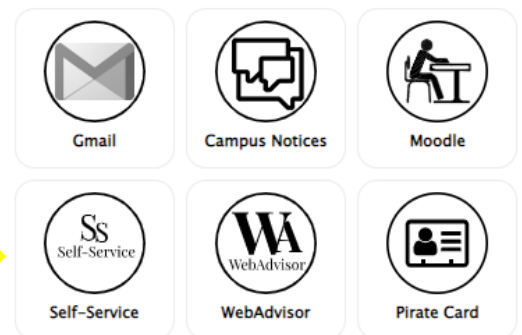


# Instructions to Access W-2 & 1095-C Tax Forms

Please follow the instructions below to access your electronic W-2 forms and to change your delivery preference.

These instructions can also be used to access your Employer-Provided Health Insurance Offer and Coverage form or 1095-C form.

## 1. Log into my.southwestern.edu & select the Self-Service Tab



2. Once in Self-Service select the “Tax Information” box to access your W-2 and 1095-C tax forms for the current year as well as prior years.

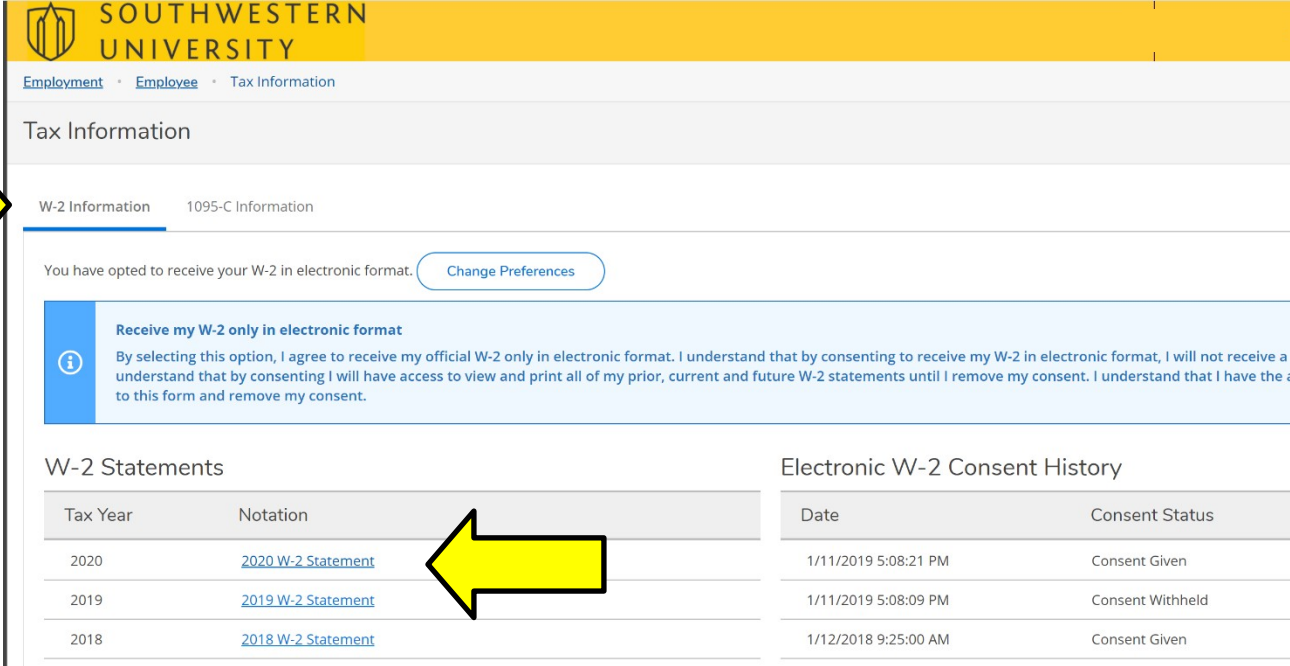
**SOUTHWESTERN UNIVERSITY**

Hello, Welcome to Colleague Self-Service!  
Choose a category to get started.

- Tax Information**  
Here you can change your consent for e-delivery of tax information.
- Banking Information**  
Here you can view and update your banking information. Directly payable payments (reimbursements, refunds, etc). For payroll contact waclawcl@southwestern.edu.
- Employee**  
Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.
- Course Catalog**  
Here you can view and search the course catalog.
- Grades**  
Here you can view your grades by term.
- Advising**  
Here you can access your advisees and provide guidance & support.
- Faculty**  
Here you can view your active classes and submit grades and waivers for students.
- Financial Management**  
Here you can view the financial health of your cost centers & departments.

### 3. Click on the “W-2 Information” tab & then select the desired year for your “20XX W-2 Statement.”

- Note that prior year W-2 statements are also available.



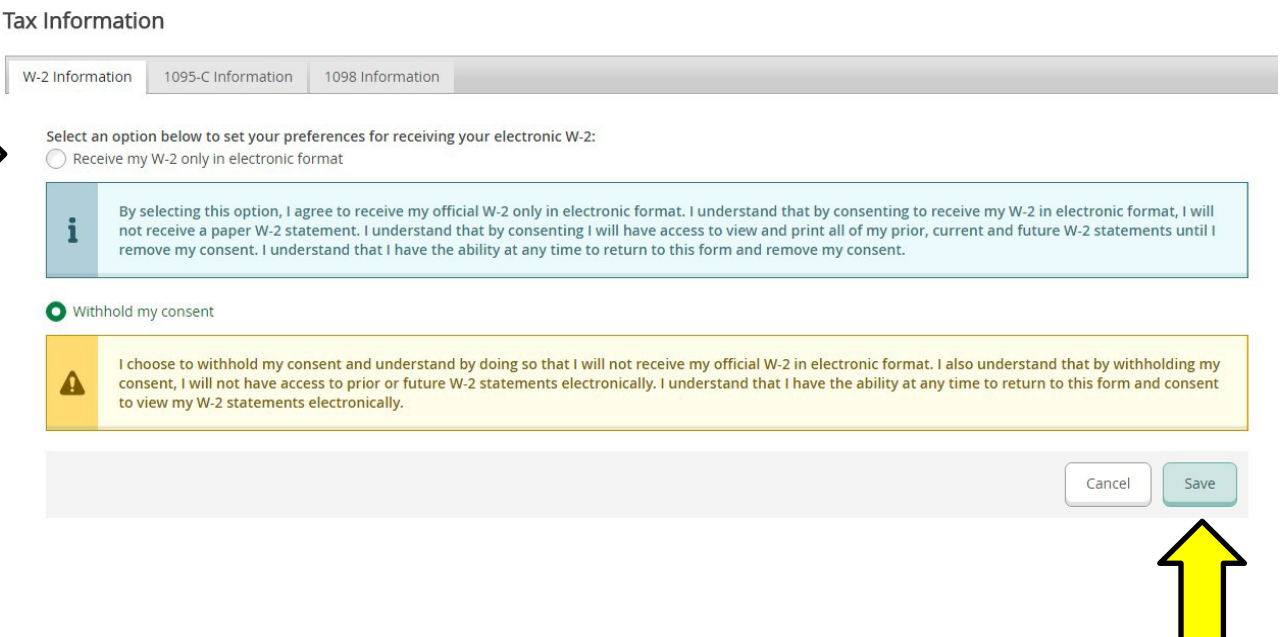
The screenshot shows the Southwestern University Tax Information page. The "W-2 Information" tab is selected, indicated by a yellow arrow. Below the navigation tabs, there is a section for "W-2 Statements" with a table listing statements for the years 2020, 2019, and 2018. A yellow arrow points to the "2020 W-2 Statement" link. To the right, there is an "Electronic W-2 Consent History" table with columns for Date and Consent Status.

Tax Year	Notation
2020	<a href="#">2020 W-2 Statement</a>
2019	<a href="#">2019 W-2 Statement</a>
2018	<a href="#">2018 W-2 Statement</a>

Date	Consent Status
1/11/2019 5:08:21 PM	Consent Given
1/11/2019 5:08:09 PM	Consent Withheld
1/12/2018 9:25:00 AM	Consent Given

If you have NOT agreed to receive your W-2 electronically, the following screen will appear because you do not have access.

- Click on the circle in front of the first statement, “Receive my W-2 only in electronic format”
- Click on the “Save” Button at the bottom.



The screenshot shows the "Tax Information" page with the "W-2 Information" tab selected. A yellow arrow points to the "Receive my W-2 only in electronic format" radio button. Below this, there are two informational boxes: a blue one for electronic consent and a yellow one for withholding consent. At the bottom right, there are "Cancel" and "Save" buttons, with a yellow arrow pointing to the "Save" button.

Select an option below to set your preferences for receiving your electronic W-2:

Receive my W-2 only in electronic format

Withhold my consent

Cancel Save

# To change your electronic preference -

- Click on the change preference button
- Then follow the step above.


## Tax Information

W-2 Information	1095-C Information	1098 Information
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You have opted to withhold consent to view your W-2 online. [Change Preferences](#)



**Withhold my consent**

 I choose to withhold my consent and understand by doing so that I will not receive my official W-2 in electronic format. I also understand that by withholding my consent, I will not have access to prior or future W-2 statements electronically. I understand that I have the ability at any time to return to this form and consent to view my W-2 statements electronically.

### Electronic W-2 Consent History

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