

How to Access Your W-2 Tax Document in Paylocity

(If you have not yet signed up for paperless documents, your W-2 will be mailed out by Jan. 31st)

From a computer or internet browser:

- To view your W-2 online, log into Paylocity at <https://access.paylocity.com/>
If you do not recall how to login, you can view directions here: [English](#) | [Spanish](#)
- Under the “\$ Pay” section click on **More...** (under the **Go Paperless** option)
- Then click on **Tax Forms** and select the year
- To view/print your W-2 as a PDF, click on **Download W-2** in the upper right corner
- You’ll have the option to add a password to protect the document or you can click the box to the left to not add a password before it opens.
- Click **View PDF** and it should open in your browser.
 - If you want to print it, choose that option now
 - If you want to download it to save it to your device:
 - In Chrome, click the down arrow
 - In Firefox, click the folder icon and save it

From the Paylocity App on a mobile device:

- To view your W-2 on your phone or tablet, tap the menu (the 3 lines at the top left)
- At the top left select **Pay**, select **Tax Forms** and then choose the **year**
- You will now be able to view the amounts that are listed on the W-2. You can click **View as .pdf** if you want to view it on your screen in the proper formatting, which will then allow you to save it to your device by clicking the up arrow.
- To email the document:
 - Tap the **envelope icon** at the top right to send this info to an email address. Enter the email address, enter a password for the PDF document, then enter it again to confirm it. Click **Send** and you should see a confirmation message on the screen.
 - Go to your email and find the one sent from Paylocity. Open the attachment (you may have to save it first), and enter the password to view the document.
 - In Android, you can use the Notes app to open the PDF attachment if needed
 - In iPhone, after entering the password, click Enter or Submit to view the document and then you can save or share it.

If you have not selected the paperless option in Paylocity, which we highly recommend to protect your identity, your W-2 will be mailed to you when we receive them at the office from Paylocity and no later than January 31.

Please reach out to Barbara at Ext. 878 with any questions about your W-2s or other tax-related documents.

