

Receiving an Electronic Copy of Your W-2

This tip sheet provides guidance regarding receiving an electronic copy of your W-2 instead of a paper copy.

1. Login to Workday with your NetID and password. Workday is available on the homepage of It's Your Yale.

It's Your Yale

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2. When Workday opens, click the 'Menu' button on the top left side of your screen. This will open a pulldown menu on the left. Select 'Pay.'

The screenshot shows the Workday interface. At the top, there is a navigation bar with the Yale logo, a search bar, and several utility icons. Below this is a large banner image of a Yale building. A red arrow labeled '2' points to the 'MENU' button in the top left corner. Below the banner, there is a 'Pay' dashboard. On the left side of the dashboard, there is a 'Menu' sidebar with various app icons. A red arrow labeled '3' points to the 'Pay' app icon in this sidebar. In the main content area of the dashboard, there are several sections: 'Actions' (Withholding Elections, Payment Elections), 'External Links' (Payroll Toolbox, Payslips (prior to July 2015), W-2 Forms (prior to 2015)), 'View' (Bonus & One-Time Payment History - Yale, Payslips, My Tax Documents, Total Rewards, Historical Activity Pay, More (2)), and 'Payslips' (a list of payslip records with dates and period ends). The 'My Tax Documents' option in the 'View' section is highlighted with a red box and a red arrow labeled '3'.

3. In the Pay dashboard, under 'View', select 'My Tax Documents.' This will open a window where you can select Printing Elections.

4. Click 'Edit' on the right:

The screenshot shows the Workday interface for 'My Tax Documents'. At the top, there is a navigation bar with the Yale logo and a search bar. Below this is a blue header for 'My Tax Documents'. The main content area is titled 'Tax Forms Printing Elections' and contains a table with one item for 'Yale University'. The table has three columns: 'Company', 'Current Year End Tax Document Printing Election', and 'Printing Election'. The 'Printing Election' column contains the text 'You are currently receiving both electronic and paper copies of your Year End Tax Documents.' and an 'Edit' button. A red circle with the number '4' is positioned above the 'Edit' button, and a red arrow points from this circle to the button.

5. Select the radio button to receive an electronic copy of tax documents:

The screenshot shows the 'New Election' section. It features two radio button options. The first option is 'Receive electronic copy of my Year End Tax Documents', which is selected and highlighted with a red circle and arrow labeled with the number '5'. The second option is 'Receive both electronic and paper copies of my Year End Tax Documents', which is unselected. A red asterisk is placed between the two options.

6. Click 'OK' in lower left corner.

7. Click 'Done' in lower left corner.

8. Close your browser and exit Workday.