



mytaxform.com User Guide

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Application Login Guide



We've made some changes to the application login process. Below is a step-by-step guide to walk you through the new process.

Let's get started!

First-time users:

If you've never logged into the application before, click on "Register Now" to start the process. Users will be required to enter personal information to verify the account they are attempting to access and validate identity.

Returning users:

If you've recently logged into the application, you will log in as usual with your same User ID and password. Once you've logged in, you will be prompted to create a personalized User ID. You will use that new User ID for all subsequent logins.

All new users and some returning users may go through an identity verification challenge. If you're a returning user, you will likely be challenged if:

- you haven't logged in for a while
- you choose "Forgot User ID or Password"
- we require additional information to be used during our identity verification process

You may also go through an additional type of verification challenge where you are asked to identify letters or objects in a distorted image.



Some users will be sent a One-Time Passcode via phone, text, or email. Passcodes are sent in real time, so please enter it immediately into the application without exiting the login session or closing the browser.



If we are unable to send you a One-Time Passcode via email or phone, you may be sent a One-Time Passcode in the mail. You will have 12 days from the date of mailing to receive the passcode and enter it into the system.

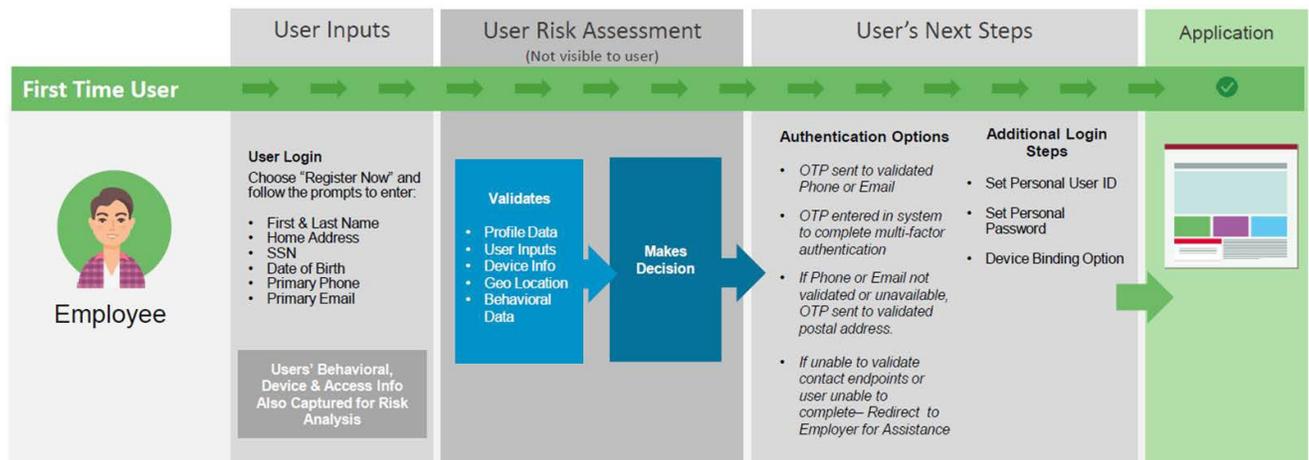


If you cannot receive a One-Time Passcode, you may be prompted to contact a representative from your company to help verify your identity and gain access to the application.



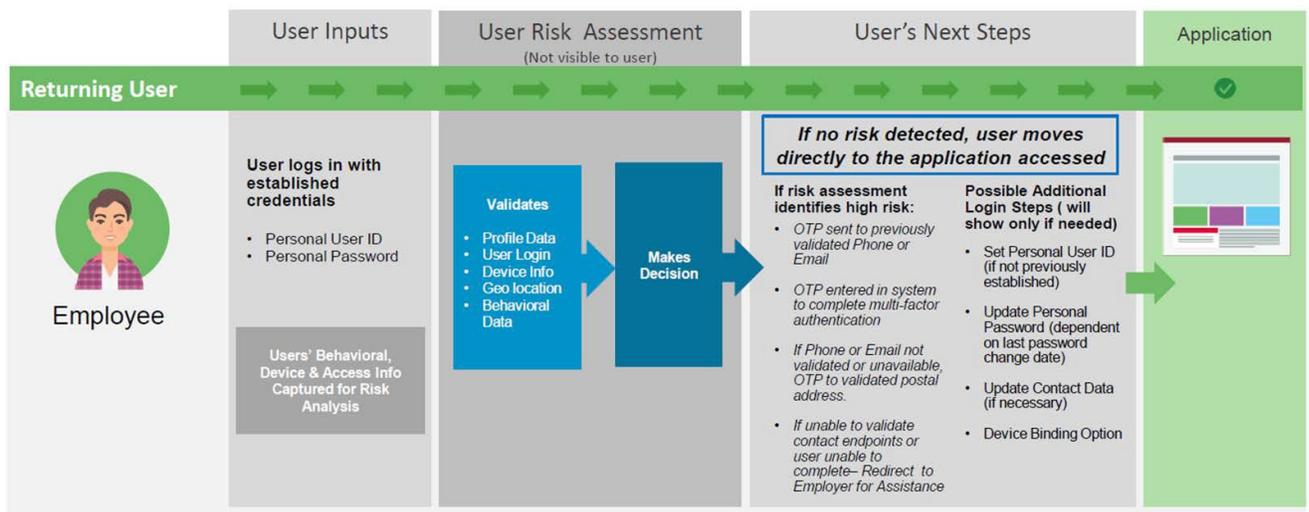
Once you have successfully logged in, all users will be required to create a personalized User ID and password if you have not already done so. Make sure to remember your new User ID — you will need it to log in next time!

First Time User



- Users should enter personal phone, email, and home address, as this information is used to validate both identity and contact endpoints for one-time passcode (OTP) delivery.
- One-time passcodes (OTPs) can be sent to validated user-provided contact endpoints *or* to employer-provided contact data for an employee user.

Returning User – Previously Passed Authentication



- Users who forget their personal User ID or Password will be subject to the same authentication process as a first time user.
- One-time passcodes (OTPs) can only be sent to validated user-provided contact endpoints *or* to employer-provided contact data provided for an employee user.

How to Consent for Online Delivery of Your Tax Form

In order to receive an electronic copy of your tax form instead of a paper copy, you must provide your consent through Tax Form Management. Complete the following steps to consent to online delivery of your tax form.

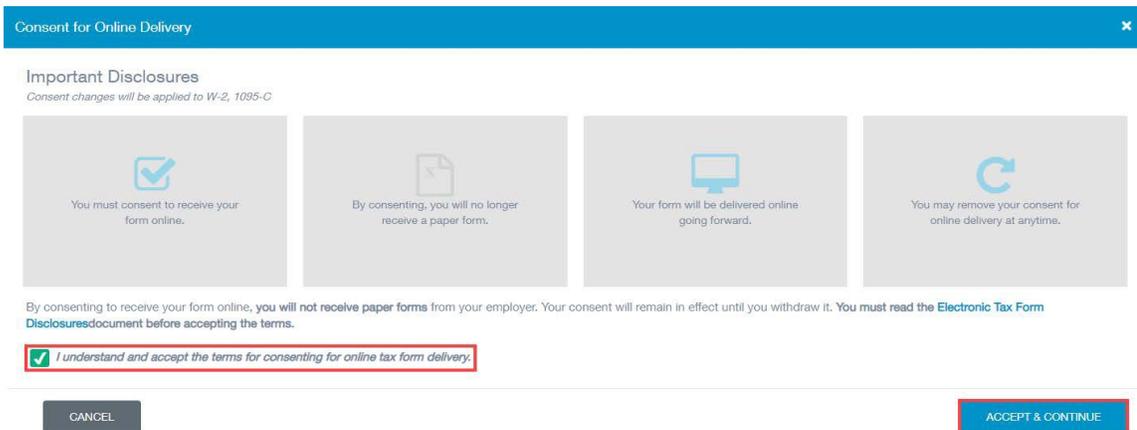
1. Under Online Delivery Consent, mark the checkbox for the tax form you wish to receive an electronic copy of.

NOTE: The option to consent for online tax form delivery will only appear on the home page if the user has not previously consented. If the user has already provided consent for online tax form delivery, they will need to navigate to the “My Account” tab to review their consent settings.

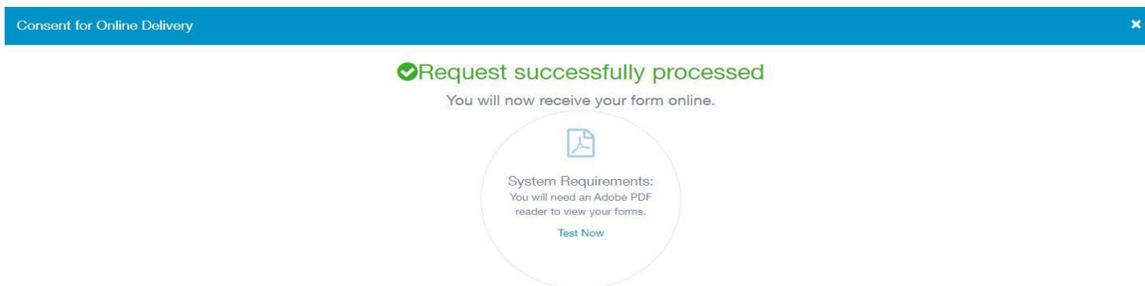
2. Select “Receive Forms Online.”



3. Read the disclosure, and mark the checkbox to acknowledge that you understand and accept the terms for consenting to online tax form delivery.
4. Select “Accept & Continue.”



5. Select the correct email address and mailing address and select “Confirm & Submit.” After you have confirmed your information, you will see a receipt page indicating that you have consented to online delivery of your tax form.



How to Get Your Tax Form

You can get your tax form by completing the following steps:

1. Your most recent tax forms will be available on the home page.
2. Mark the checkbox for the tax form you wish to print or send.
3. To view the document electronically, click "View." To send the document via mail or fax, follow the instructions below:
 - To download your tax form directly from the home page, select Download.
 - If you chose to view your tax form, you can either save it or print it.
 - If you would like to receive your tax form via mail, select Postal Mail.
 - If you would like to receive your tax form via fax, select Fax.

How to Change Your Personal Information

Once you have logged in to your tax form account, you can manage/update your account information by completing the following steps:

1. Click "My Account"
2. Select the pencil icon next to the information you want to update.
3. Update your information

