

# W-2 ELECTRONIC DELIVERY INSTRUCTIONS



## What You Should Know About W-2 Electronic Delivery

You can consent to receive your W-2 electronically by accessing [www.mytaxform.com](http://www.mytaxform.com) using Phillips 66 Employer Code 14844.

- **More secure.** No important tax documents being sent through the U.S. mail.
- **Get it faster.** Your electronic W-2 will be available in approximately 10 days, sooner than you would normally receive it in your mailbox.
- **Never lose your W-2.** Download a copy as many times as you want.
- **Ease of use.** Ability to download the electronic W-2 into tax preparation software.
- Participation in electronic delivery is optional.
- You can withdraw your consent at any time.

## How to Sign Up to Receive Your W-2 Online

### Step 1

Launch Tax Form Management at [www.mytaxform.com](http://www.mytaxform.com)

### Step 2

Sign into Tax Form Management:

- Enter the Phillips 66 Employer Code **14844** in “**Employer Name or Code**” field
- Click “**Login >>**”
- Enter your 8-digit U.S. employee number (6-digit number plus 2 leading zeros)
- Click “**Continue >**”
- Enter your PIN (default PIN is the last 4 digits of your SSN, 2-digit birth day and 2-digit birth year)
- Click “**Log In**”
- If this is your first sign-in, you will go through a series of six steps to complete the enrollment process. Skip to Step 4 if you have accessed the Tax Form Management website before

### Step 3

Change the default password:

- At initial sign-in, you may be asked questions to confirm your identity
- You will then select and answer security questions
- Enter your contact information (phone number and email)
- You will now be asked to enter a new PIN
- Enrollment into Tax Form Management is now complete

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## Step 4

- For authentication purposes, you may be asked a series of questions to confirm your identity
- You will be asked the destination of a one-time passcode (text, call or email)
- Enter the one-time passcode and you should be successfully authenticated
- If the system is unable to authenticate you, please call HR Connections at 855-480-6634 to confirm your identity

You are now at your home dashboard:

- To give consent to receive W-2 statements online, select **“My Account”**
- At the **“My Account”** screen, click the checkbox in the delivery selections, and select **“Receive forms online”**

## Step 5

W-2 Consent Disclosure and Test:

- Carefully read the W-2 consent for online delivery instructions
- Check the **“I understand and accept the terms for consenting for online tax form delivery”** checkbox
- Click **“Accept and Continue”**
- You will be notified when your online W-2 is available. Select the email address(es) you would like notifications sent when your W-2 is ready. You can add another email address by clicking on the pencil button
- Select **“Confirm and Submit”**
- You will receive a message that your request processed successfully
- Upon successfully consenting to receive a form online, you may test your system to ensure Adobe PDF files will open and display correctly by selecting **“Test Now”**
- When finished testing, close the new tab or window in which the test tax form opened, then click the top-right X of the success message to close out and return to where you left off in the Tax Management Form portal. The tax form icon will update to indicate the new online delivery consent status
- You will receive an email confirming the consent of your online delivery election

## Step 6

Click **“Log out”** at the top of the screen and be sure to close the browser window

## Forgot Your Pin?

- Enter the Phillips 66 Employer Code **14844** at [www.mytaxform.com](http://www.mytaxform.com)
- Enter your Employee ID including the two leading zeros
- If you have forgotten your PIN, click **“Forgot your PIN?”**
- You will be asked to enter identifying information
- You will select an option to validate your identity (text, call or email)
- You will receive a one-time passcode
- Enter passcode and select **“Continue”**
- Enter your new PIN and re-enter PIN and click **“Continue”**
- You will receive an email confirming your PIN update
- If you input an incorrect password three times, the system will **“lock”** you out of the system. Please contact **HR Connections** at 855-480-6634 to unlock your account

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## How to Update Account Information (From Dashboard)

- Select “**My Account**” tile
- On the next screen, review and update contact information as needed (phone, email, address)
- You can also review and change your PIN, security questions and device options
- You will receive an email confirming any updates made to your account

## Get Your W-2

- Your most recent tax forms will be available on the home page
- Click on the checkbox for the W-2 file you wish to print or send
- To view your W-2 electronically, click “**View**”
- To send your W-2 via mail or fax, click “**Postal Mail**” or “**Fax**” for your delivery method preference

## Withdraw W-2 Online Delivery Consent (From “My Account”)

- To withdraw consent to receive W-2 statements online, simply mark the checkbox for the desired tax form and select the “**Remove Online Delivery**” button
- By removing your consent for online form delivery, you will **only receive paper forms**. Your removal of consent will remain in effect until you change it. You may switch back to online delivery at any time
- Check the “**I understand and accept the terms for removing consent to online tax form delivery**” checkbox
- Select “**Accept and Continue**”
- Confirm your contact information and select “**Confirm and Submit**”
- You will receive a pop-up message that your request has been processed successfully
- You will receive an email confirming the removal of your W-2 online delivery consent

### When will your W-2 be available?

Your W-2 will be available for viewing and printing approximately 10 days prior to when you would normally receive it in your mailbox. You will receive notification when your online W-2 is available, along with instructions for retrieval. You will also receive a confirmation email when you enroll for online delivery as well as confirmations of any changes you make to your contact information.

- **For more information or questions concerning the Phillips 66 W-2, contact: HR Connections at 855-480-6634 or 918-977-7905 weekdays from 8 a.m. – 6 p.m., Central time.**