

PE Site User Guide – ACA for Employees

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1. Purpose

This user guide is for the Employee user role in the Paperless Employee site. It includes much of the functionality that you will use as an employee user such as completing, updating and retrieving copies of your tax forms among other services your company has contracted to provide.

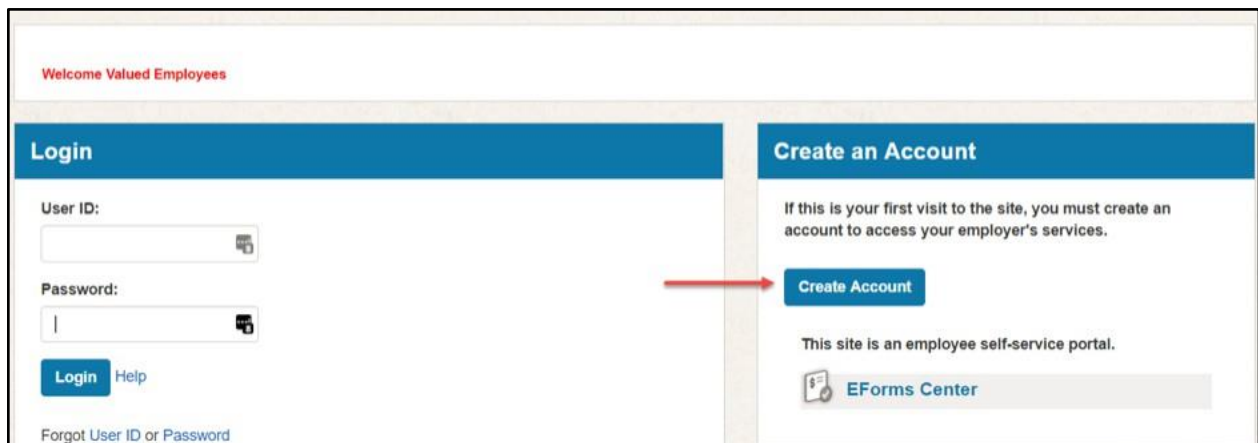
If you have further questions regarding the Paperless Employee site and the services provided to your company, please contact your employer.

2. Account Creation

You will need to create an account in the Paperless Employee site for access. If your company has enabled single sign on (SSO) you will automatically be logged in from your company site and do not need to create an account.

2.1 Creating an Account

If this is your first time accessing the Paperless Employee site, click **Create Account** to begin the process. If you need assistance with your company's link to Paperless Employee, please contact your employer.



The screenshot shows the Paperless Employee site interface. At the top, a red banner reads "Welcome Valued Employees". Below this, the page is split into two main sections. The left section, titled "Login", contains fields for "User ID:" and "Password:", each with a password icon. Below these fields are "Login" and "Help" buttons. At the bottom of the login section is a link for "Forgot User ID or Password". The right section, titled "Create an Account", contains the text: "If this is your first visit to the site, you must create an account to access your employer's services." Below this text is a blue "Create Account" button. A red arrow points from the "Create Account" button in the right section to the "Create Account" button in the left section. Below the "Create Account" button in the right section is the text "This site is an employee self-service portal." and a link for "EForms Center" with a document icon.

For the safety of your account, your employer will require you to verify your identity.

NOTE: These values will vary by company, so your screen may not match the image below. Please contact your employer if you are unable to create an account.

Enter your information in the field(s) provided.

1. Select the checkbox next to **I'm not a robot**
2. Click **Authenticate & Create Account** at the bottom of your screen.

Create a New Account

Account Authentication

A custom message can be placed here.

Your **Social Security Number** and **Date of Birth** are required to validate your secure account access.

Social Security Number

[Show](#)

Your 9 digit SSN cannot begin with '000' or '666'

Date of Birth

[Show](#)

Your DOB should be in the format of mm-dd-yyyy

☐ I'm not a robot  [Privacy](#) [Terms](#)

Authenticate & Create Account

Next Screen to Follow:

1. Enter your **First Name**, **Middle Name** (optional) and **Last Name**.
2. Create and enter a **User ID** in the field provided. User IDs should be 6-15 characters long using only numbers and letters.
3. Create and enter a **Password** in the field provided following the password rules on your screen.
4. Enter the password you created again in the **Confirm New Password** field.
5. Click **Save** and **Continue** at the bottom of your screen to activate your account.

Create a New Account

Account Name

A custom message can be placed here.

First Name *

Middle Name

Last Name *

Create Your User ID

Enter a User ID *

User ID must be 6-15 characters using only letters and/or numbers.

Create a Password

• Is case sensitive

• May not contain your User ID

• Must be 8-15 characters in length

Your password must contain 3 of the 4 items:

• Uppercase characters

• Lowercase characters

• Numbers

• Symbols

Enter a New Password *

Confirm New Password *

Save and Continue

2.1.1 Trusted Contacts

Trusted contacts are used to further confirm that you are who you say you are. Some employers enable this feature to add an additional layer of security to your account. Since your account contains personal identifiable information about you, keeping your account safe is of the utmost importance.

Your employer will send your Trusted Contacts information to the Paperless Employee site. This information is then used to verify that the person creating the account is actually you.

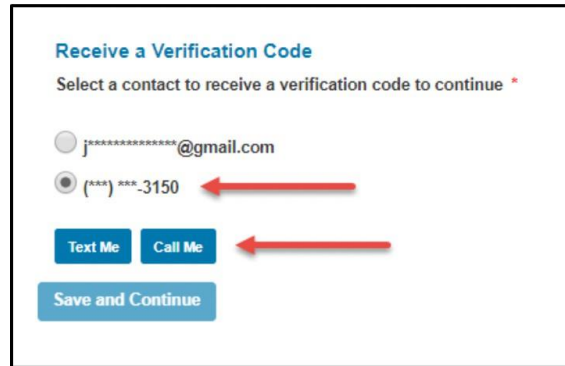
If your employer has chosen to use trusted contacts, you will see a section on the **Create a New Account** screen called **Receive a Verification Code**. You will be required to complete this one-time verification step.

Under the **Receive a Verification Code** section, the contact information provided by your employer will appear and is masked for your security.

1. Select which contact method you prefer to receive your verification code.
 - If you select the radio button by your email address, you can click **Verify**. Please open your email message to retrieve the verification code.

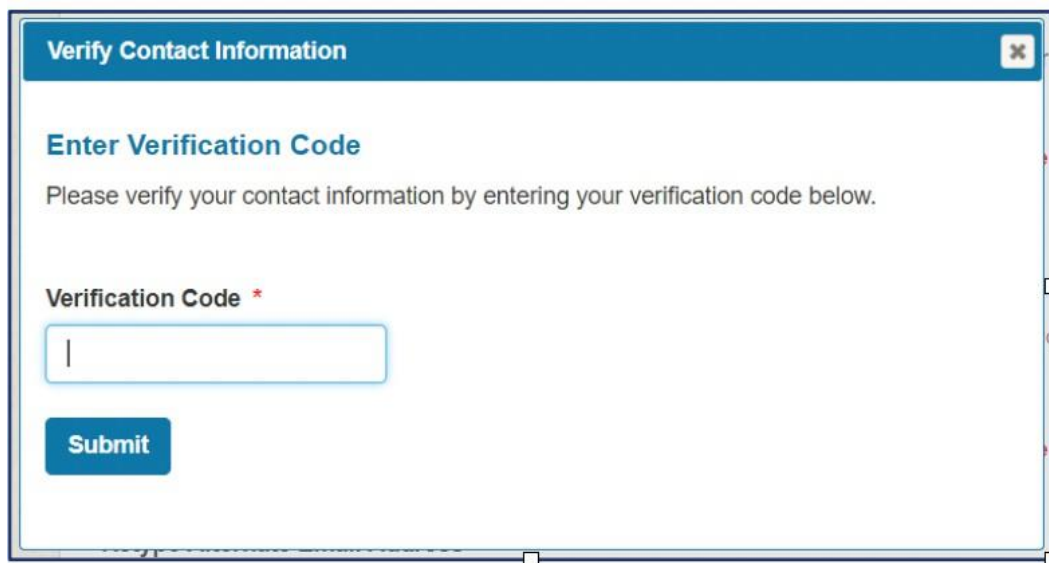
- If you prefer a text, choose the radio button next to **Text Me** to receive your verification in a text message.

- If you prefer a phone call, choose the radio button next to **Call Me** to receive your verification code via a phone call.



The screenshot shows a form titled "Receive a Verification Code" with the instruction "Select a contact to receive a verification code to continue *". There are two radio buttons: the first is next to "j*****@gmail.com" and is unselected; the second is next to "(***).***.3150" and is selected. A red arrow points to this second radio button. Below the radio buttons are two blue buttons: "Text Me" and "Call Me". A red arrow points to the "Call Me" button. At the bottom is a light blue button labeled "Save and Continue".

2. When you receive the verification code, enter it in the **Verification Code** field.
3. Click **Submit**.



The screenshot shows a dialog box titled "Verify Contact Information" with a close button (X) in the top right corner. Inside the dialog, the title "Enter Verification Code" is followed by the instruction "Please verify your contact information by entering your verification code below." Below this is a label "Verification Code *" next to a text input field. A blue "Submit" button is located below the input field.

2.1.2 Security Questions

If you forget your user ID or password, security questions are used to retrieve your login information. If your company has elected to use security questions, you will be required to choose three (3) during the account creation process.

1. Using the arrows next to (Select a question), click to choose the question you wish to answer.
2. Type your answer to the question under Answer Question 1.
3. Continue until you have completed all three questions.
4. Once complete, click **Save Security Questions** at the bottom of the screen.

Create a New Account

Security Questions

A custom message can be placed here.

Question 1 *

(Select a question) ▼

Answer Question 1 *

Question 2 *

(Select a question) ▼

Answer Question 2 *

Question 3 *

(Select a question) ▼

Answer Question 3 *

Save Security Questions [Reset Questions](#)

2.1.3 Additional Contact Information

1. If email verification is required, you will click on the **Verify Email** button. A code will be sent to your email address. Enter the code in the field provided and click **Submit**.
2. If phone verification is required, click **Test Text Message** or **Verify Phone Number** button. A code will be sent to your phone, or you will receive a phone call.
3. Enter the code in the field provided and click **Submit**.

Contact Information

A custom message can be placed here.

This information may be shared with your employer. Please see the [Privacy Statement](#) for details.

Email Address

A custom message can be placed here.

Retype Email Address

Verify Email

Alternate Email Address

A custom message can be placed here.

Retype Alternate Email Address

Verify Email

Cell Phone

(Select a carrier) ▼

A custom message can be placed here.

Test Text Message

Verify Phone Number

Save Notification Option Settings

Cancel

Verify Contact Information

Enter Verification Code

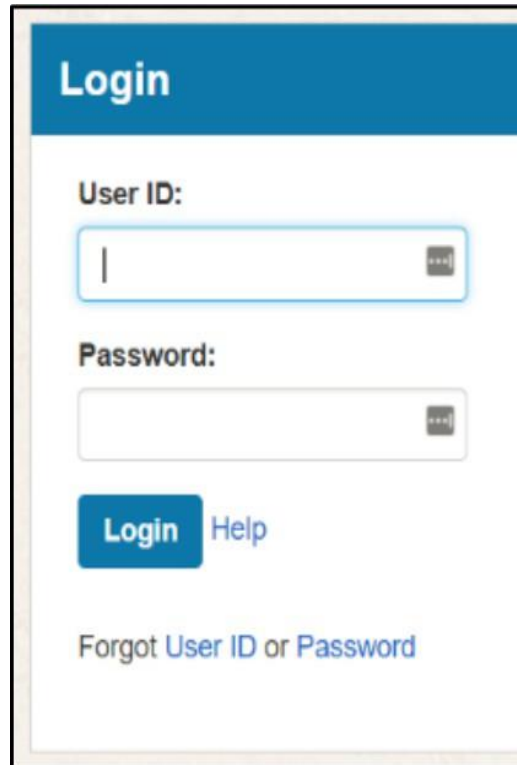
Please verify your contact information by entering your verification code below.

Verification Code *

Submit

2.2 Forgotten User ID or Password

If you cannot remember either your user ID or password that was initially created to access your Paperless Employee account, click the blue link for either **User ID** or **Password**, depending on what information you need.

A screenshot of a web application's login page. At the top is a blue header with the word "Login" in white. Below the header, the page has a white background. There are two input fields: the first is labeled "User ID:" and the second is labeled "Password:". Both fields have a small icon on the right side. Below the password field is a blue button labeled "Login" and a blue link labeled "Help". At the bottom of the form area, there is a link that says "Forgot User ID or Password".

2.2.1 Forgotten User ID

You will need to enter the values originally used to set up your account. If you cannot remember these values, **please contact your employer**.

1. Enter your information in the fields provided.
2. Click the Authenticate button at the bottom of the screen.
3. Your user ID will be displayed. Make sure to remember this information.
4. Click the blue Return to Login link and enter your user ID and password in the fields provided to login.

Authenticating Account Information

To retrieve your forgotten User ID, please provide the following information:

A custom message can be placed here.

Your **Social Security Number** and **Date of Birth** are required to ensure that you are retrieving your own User Id.

Social Security Number

Your 9 digit SSN cannot begin with '000' or '666'

Date of Birth

Your DOB should be in the format of mm-dd-yyyy

[Return to Login](#)

2.2.2 Forgotten Password

If you have forgotten your password, you will need to enter your user ID that was set-up during initial account creation.

1. Enter your **User ID**.
2. Select the checkbox next to **I'm not a robot**.
3. Click **Verify User ID**.

The screenshot shows a web form titled "Forgot My Password" with a blue header. Below the header, the text "Step 1 - Enter Your User ID" is displayed in blue. A sub-header reads "To reset your password, please provide the following information:". The form includes a label "User ID: *" followed by a text input field. Below the input field is a reCAPTCHA widget with the text "I'm not a robot" and a checkbox. To the right of the checkbox is the reCAPTCHA logo and the text "reCAPTCHA Privacy - Terms". At the bottom of the form is a blue button labeled "Verify User Id".

4. Select the radio button based on how you want to confirm your identity.
5. Click **Next**.
6. Either answer your security questions OR the verification code you received.
7. You will be prompted to set up a new password and be given a link to return to the login screen.

The screenshot shows a web form titled "Step 2 - How Will You Confirm Your Identity?" in blue. Below the title are two radio button options: "Answer your three security questions" and "Receive a verification code via text message to your mobile phone". At the bottom left of the form is a blue button labeled "Next".

3. Affordable Care Act (ACA) Forms

If you registered to receive your ACA forms electronically in the Paperless Employee site during your account setup, you can access these in your Paperless Employee account as your employer makes them available.

You can download these form(s) as often as you like until October 15th. After this date, forms are considered reissues and can include a cost depending on options set by your employer. ACA forms include: 1095-B and 1095-C.

3.1 Register to Receive 1095 Electronically

If you didn't elect to receive your form(s) electronically during your account setup, you can change your delivery method under Account Settings in the Paperless Employee site. Your employer cannot choose electronic delivery for you per IRS regulations.

1. From the home page, click **Account Settings** from the left side navigation.
2. Click **Manage Contact & Electronic Statement Options**. You can also select this option from your home page.

Welcome

Account Name: Audrey Coleman
Last login: 6/28/2018 11:59 AM ET
Failed login attempts: 0
[LOGOUT](#)

Home

Pay Statements

Year-End Tax Statements +

EForms Center +

Account Settings -

Manage Account Settings

Manage Contact & Electronic Statement Options ←

Two Factor Authentication

Contact and Electronic Statement Options

Contact Information

A custom message can be placed here.

This information may be shared with your employer. Please see the [Privacy Statement](#) for details.

Email Address

Retype Email Address

[Verify Email](#)

You are required to verify your contact information.

Electronic Statement Notification Options

A custom message can be placed here.

Would you like to register to receive your 2018 tax statement(s) electronically?

☒ Yes ☐ No

Email Address

☒

1. From **the Manage Contact and Electronic Statement** page, scroll down to the **Electronic Statement Notification Options** section.
2. Select the **Yes** radio button to receive your statements electronically in the Paperless Employee site. Select the **No** radio button if you prefer to have them mailed.
3. Select the radio button for how you want to be notified that your form(s) are ready.

Your form(s) will not be delivered via email or text message for security reasons. You will need to log into the Paperless Employee site to retrieve your documents.

4. Click **Save Notification Option Settings**.

If you elect electronic delivery, you will receive your form(s) in the Paperless Employee site until you change your delivery method.

A custom message can be placed here.

If you are eligible for a 2016 Affordable Care Act (ACA) Form 1095, would you like to access this statement electronically?

☒ Yes ☐ No

Email Address

Cell Phone

☒ ☐

A custom message can be placed here.

By choosing **YES**, you agree to the following:

1. You will be notified when your form is available.
2. You will need to download a pdf file and print your form, it will not be emailed to you.
3. You will **not** receive a paper/postal copy.
4. This registration will be carried over from year to year unless you choose to withdraw your consent.
5. You may opt out at any time by returning to this site and selecting the "Account Settings" menu option.
6. If you are terminated, your employer will inform you on how your forms can be attained moving forward.

You will receive a paper/postal copy if you do not choose a notification option.
If you do not have software installed on your computer for viewing PDF documents, you can download the free [Adobe® Reader®](#).

Save Notification Option Settings

Cancel

3.2 Retrieve Original Electronic Form

If you registered to receive your form(s) electronically (instead of mailed) you can retrieve them in the Paperless Employee site.

To enroll in electronic delivery of your form(s) see section Register to Receive Tax Statement(s) Electronically in this document.

1. From the home page, click **Year-End Tax Statements** in the left-hand navigation OR click on the **Access Current Year-End Statements** from the home page.

The top screenshot shows the 'Get Tax Statements' page. The left sidebar has a 'Welcome' section for Sadie White, a 'Logout' button, and a navigation menu with 'Home', 'Pay Statements', 'Year-End Tax Statements' (highlighted with a red arrow), 'Correction Requests', and 'Activity History'. The main content area is titled 'Get Tax Statements' and '1. Select Tax Statements'. It includes a 'Hide Prior Years' link and a table of tax forms.

Select	Tax Form	Employer Name	Download	Fax	Mail
☐	2018 1095-C View original address	Test Company	DOWNLOAD (PDF)		
☐	2018 W-2 View original address	TEST COMPANY	DOWNLOAD (PDF)		
☐	2017 1099-R View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
☐	2017 T-4 View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured

The bottom screenshot shows the 'What would you like to do today?' page. The left sidebar has a 'Welcome' section for Audrey Coleman, a 'Logout' button, and a navigation menu with 'Home', 'Pay Statements', 'Year-End Tax Statements' (highlighted with a red arrow), 'EForms Center', and 'Account Settings'. The main content area is titled 'What would you like to do today?' and has two columns of options.

Pay Statements	EForms Center
Access Pay Statements	Submit Available EForms
	View/Update Current EForms
	View Historical EForms
	View EForm Employee Information

Below the 'Pay Statements' column, there is a 'Year-End Tax Statements' section with a red arrow pointing to 'Access Current Year-End Statements'.

- [Access Current Year-End Statements](#)
- [Access Prior Year-End Statements](#)
- [Request a Correction](#)
- [View Activity History](#)
- [Manage Electronic Tax Statement Options](#)

2. Click the **Download (PDF)** link to access the statement.

You will need a PDF reader on your computer to view the documents. If you don't have a PDF reader on your computer, click the Get Adobe Reader icon on the left side of the page to download a free version.

The document will appear in a new tab in your browser. You can view, print, and/or save the PDF document based on your needs.

Welcome

Account Name: Sadie White

Last login: 4/12/2019 11:34 AM ET

Failed login attempts: 0

LOGOUT

Home

Pay Statements

Year-End Tax Statements

Correction Requests

Activity History

Get Tax Statements

1. Select Tax Statements

Hide Prior Years

Select	Tax Form	Employer Name	Download	Fax	Mail
☐	2018 1095-C View original address	Test Company	DOWNLOAD (PDF)		
☐	2018 W-2 View original address	TEST COMPANY	DOWNLOAD (PDF)		
☐	2017 1099-R View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
☐	2017 T-4 View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured

Home

Pay Statements

Year-End Tax Statements

Correction Requests

Activity History

EForms Center

Account Settings

Get ADOBE® READER®

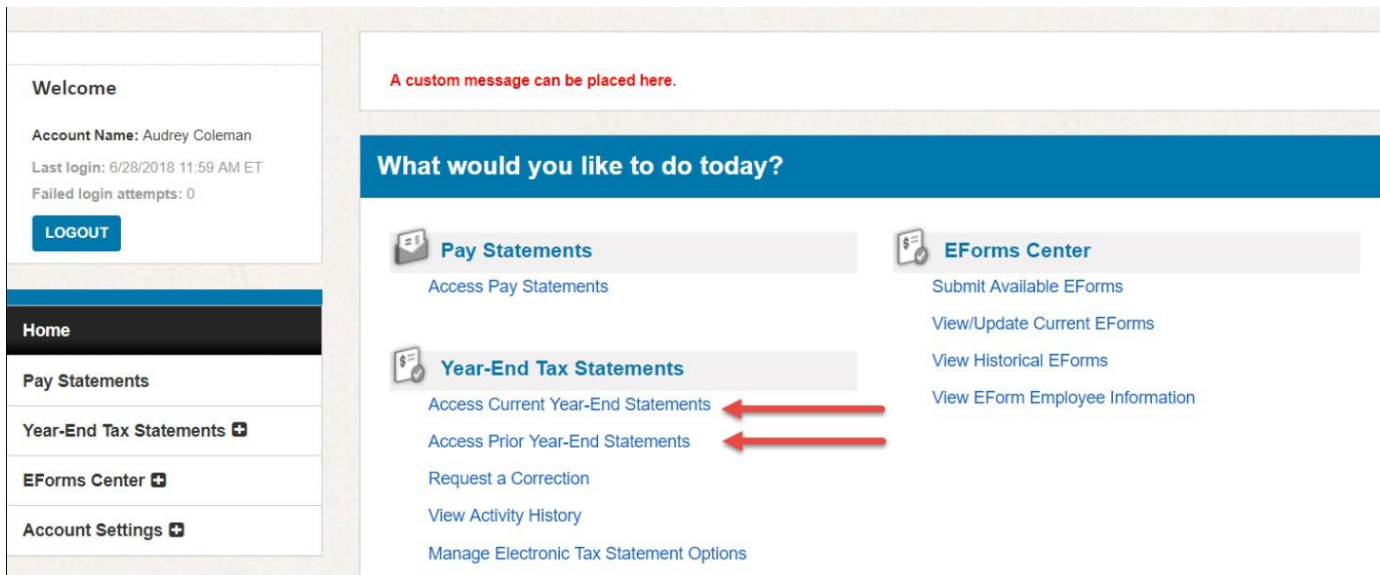
3.3 Request Reissued Copy

If you lose your form(s), you can request a reissue of the form(s) from the current or previous year(s) in the Paperless Employee site.

From the home page, click **Year-End Tax Statements** in the left-hand navigation. You can also, depending on the year of the statement, click on **Access Current Year-End Statements** or **Access Prior Year-End Statements** from the home page.

Employers have the option to charge employees for reissued forms. If your employer is charging for reissued forms, the price will appear next to each form on the **Get Tax Statements** page.

Please contact your employer if you do not see the below as an option to select, as not all options may be available.



In the **Get Tax Statements** page follow the steps to request a reissue:

1. In the **Select** column, select the checkbox for the form(s) you need reissued.

Get Tax Statements

1. Select Tax Statements

Hide Prior
Years

Select	Tax Form	Employer Name	Download	Fax	Mail
☐	2018 1095-C View original address	Test Company	DOWNLOAD (PDF)		
☐	2018 W-2 View original address	TEST COMPANY	DOWNLOAD (PDF)		
☐	2017 1099-R View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
☐	2017 T-4 View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
☐	2017 W-2 View original address	TEST COMPANY			
☐	2017 W-2 PR View original address	TEST COMPANY	No pricing configured	Not available with this delivery option	No pricing configured
☐	2017 1095-C View original address	Test Company ABC			
☐	2016 1095-C View original address	Test Company			

2. Select the desired delivery method for the reissued form. Employers have the option to determine the delivery methods; therefore, depending on the employer, the delivery options may vary from what's shown below.

Download (PDF) – allows you to immediately view, download or print the document. Electronic reissues are free for 30 days.

2. Select Delivery Method

☒ **DOWNLOAD (PDF)** ☐ Fax ☐ Mail

Forms will **NOT** be emailed to you.

1

☐	2016 T-4 View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
☐	2016 W-2 View original address	TEST COMPANY	\$10.00	\$10.00	\$10.00
☒	2015 1095-C View original address	Test Company			
☐	2015 1099-R View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
☐	2015 T-4 View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
☐	2015 W-2 View original address	TEST COMPANY			
☐	2014 1099-R View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
☐	2014 T-4 View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured
☐	2014 W-2 View original address	TEST COMPANY	No pricing configured	No pricing configured	No pricing configured

To View PDF documents you need the free [Adobe Reader](#)

2

2. Select Delivery Method

☒ DOWNLOAD (PDF)
 ☐ Fax
 ☐ Mail

Forms will NOT be emailed to you.

3

Review & Complete Order

[Reset All](#)

3. Click on the **Review & Complete Order** button.

If your employer doesn't charge for reissued forms, the **Summary of Your Order** screen will appear with a summary of your order.

To complete the order, click **Submit Order**.

Summary Of Your Order

Selected Form(s):

Tax Form

2019 1095-C Test Company

Change

Delivery:

Your forms will be delivered online

Change

Submit Order

Cancel Order

Once the order has been submitted, the **Order Complete** page will appear with a confirmation that your order was processed and complete. Retain this information for your records.

If you selected online delivery, your documents will be available to **View** or **Download** for 10 minutes. After 10 minutes, you will need to submit a new order.

Order Complete

Thank you for your order. Please retain this information for your records

Order Confirmation Number: 24258183

Selected form(s):

Tax Form

2016 1095-C Test Company

2015 1095-C Test Company

Delivery:

Your forms are available to view or download. Forms will NOT be emailed to you.

View

Download

These links will only be active for 10 minutes. After that time, you will need to place a new order.

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