

How to Find and Download Your W-2 Form in Workday

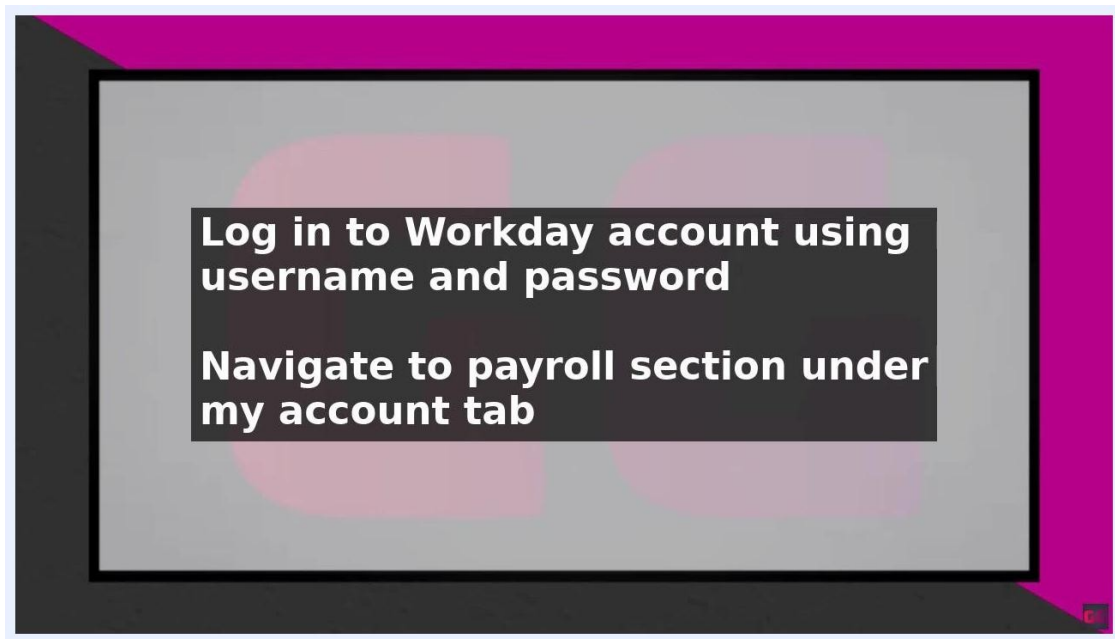
This guide walks you through locating, reviewing, and saving your W-2 form using Workday. Follow the steps below to access your payroll records, download the correct tax year's form, and store it securely for tax filing.

Prerequisites

- An active Workday account with a valid username and password.
- Access to the Payroll section, typically found under My Account or Employee Self-Service.

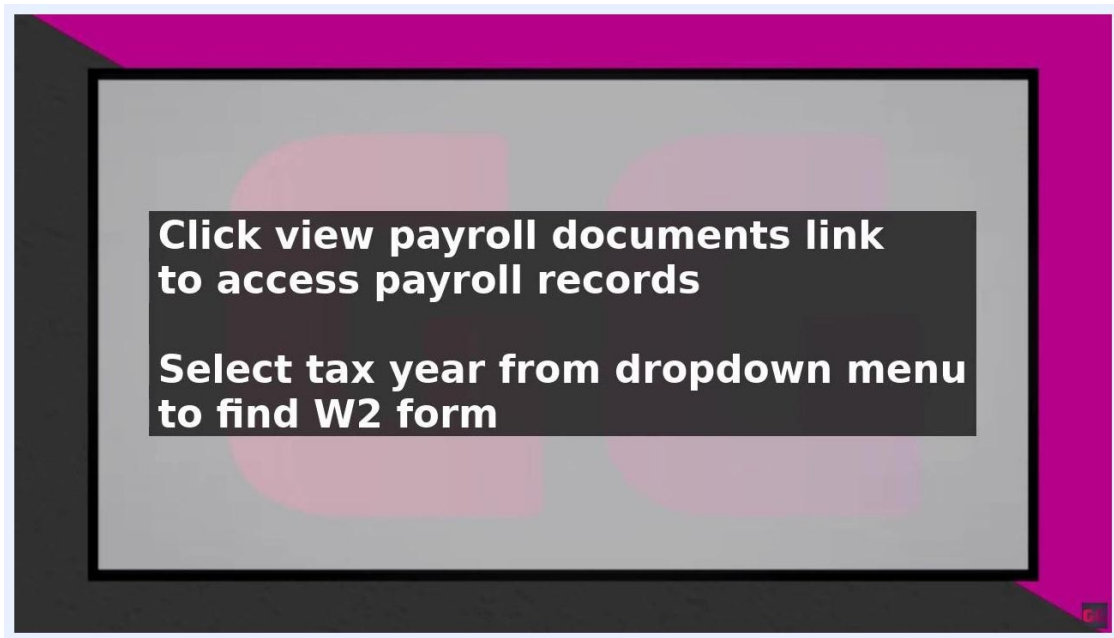
Steps to access your W-2 form

1. Log in to your Workday account using your username and password.
2. Navigate to the Payroll section. This is typically found under the My Account or Employee Self-Service tab.



Screen showing instructions to log in to a Workday account and navigate to the payroll section under the My Account tab

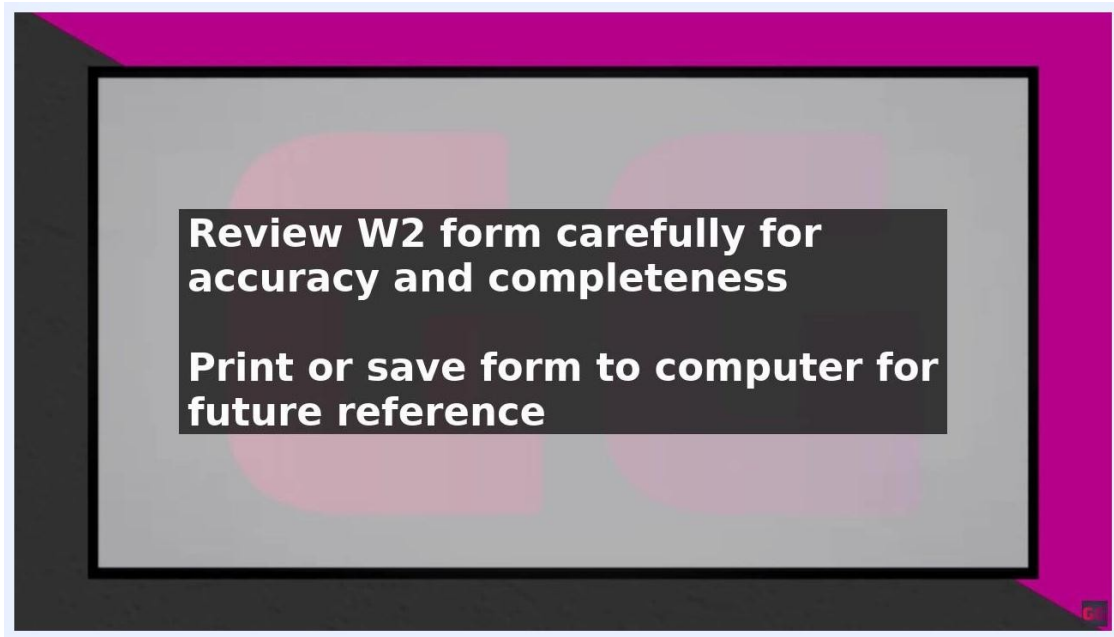
3. In the Payroll section, click View Payroll Documents to access your payroll records.
4. On the payroll documents page, locate the drop-down menu at the top of the page.
5. Select the tax year for which you want to view your W-2 form from the drop-down menu.



Screen showing instructions to click the View Payroll Documents link and select a tax year from the dropdown menu to find the W-2 form

6. Click the W-2 link to view and download your form for the selected tax year.
7. Your W-2 form will be displayed on the screen.
8. Review your W-2 form carefully to ensure all information is accurate and complete.

9. Print or save the W-2 form to your computer for future reference.



Screen showing instructions to review the W-2 form carefully for accuracy and completeness, then print or save it for future reference

If you have trouble finding your W-2 form

If you cannot locate your W-2 form in Workday, contact your payroll department or HR representative for assistance. They can help you troubleshoot any issues and provide further guidance on accessing your form.

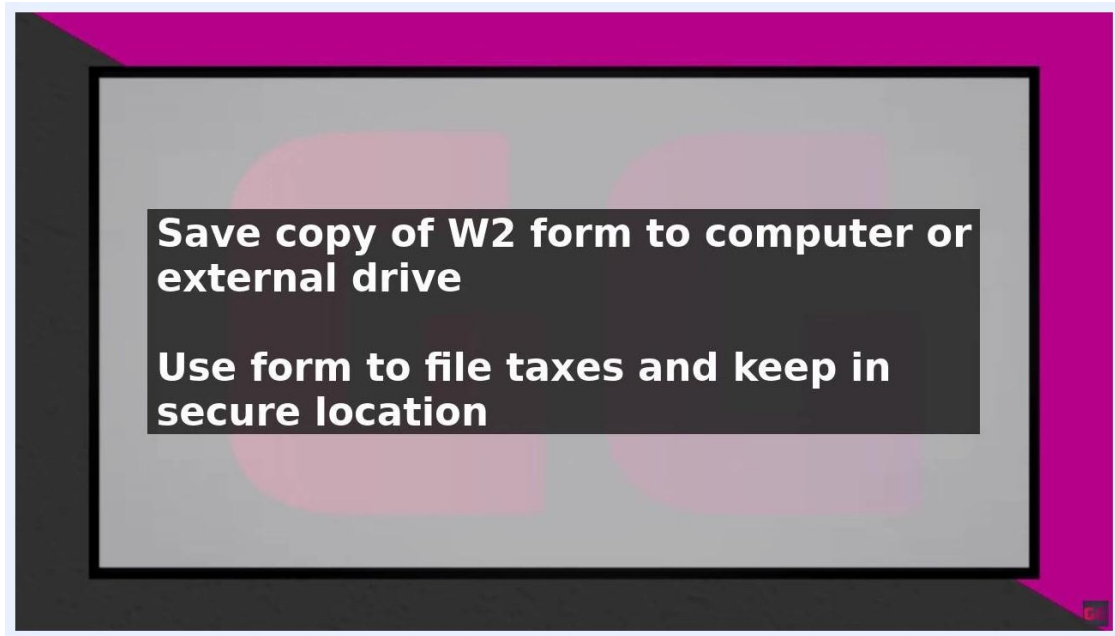
Tips:

- Always save a copy of your W-2 form to your computer or an external hard drive for your records.
- Double-check all details on your W-2 form before submitting it for tax purposes.

Best practices for managing your W-2 form

Once you have downloaded your W-2 form, follow these recommendations to keep it secure and ready for tax filing.

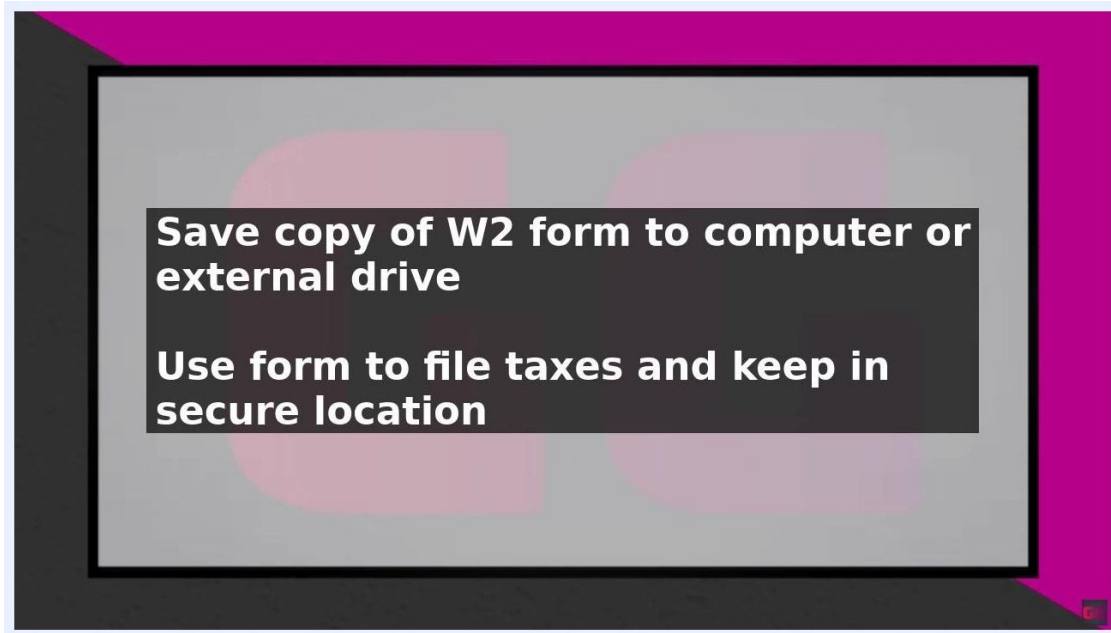
10. Save a copy of your W-2 form to your computer or an external hard drive. This ensures you have a backup in case you need to access it in the future. Use a secure folder or encrypted drive if possible for added protection.



Screen displaying instructions to save a copy of the W-2 form to a computer or external drive, use it to file taxes, and keep it in a secure location

11. Use your W-2 form to file your taxes. Refer to the saved digital copy or print a physical copy as needed for your tax preparation.
12. Keep your W-2 form in a safe and secure location. Store both digital and printed copies in places protected from unauthorized access or loss.
13. Review your W-2 form carefully for accuracy and completeness before using it for tax filing. Double-check all personal and financial information.
14. Always save a copy of your W-2 form for your records. Retain your W-2 forms for several years, as they may be needed for future reference or audits.

15. If you encounter any issues or cannot locate your W-2 form, contact your payroll department or HR representative for assistance.



Screen displaying instructions to save a copy of the W-2 form to a computer or external drive, use it to file taxes, and keep it in a secure location

Best Practices:

- Use strong passwords and secure storage for digital copies.
- Do not share your W-2 form with unauthorized individuals.
- Back up your files regularly to prevent data loss.

Summary

By following these steps, you can quickly and easily access your W-2 form in Workday and use it to file your taxes. Review your form carefully and save a copy for your records so it remains safe, accessible, and ready whenever you need it.