Functional Requirements Document (FRD)

Project#	Project Title:	Date Prepared:
735244	Electronic Form W-2	08-05-14

Version 2.0	As of: 13 October 2015

Scope:	The scope of this document is to outline the process in which an employee can elect to stop or resume receiving a mailed W-2 (Wage and Tax Statement) & 1095C (Employer-Provided Health Insurance Offer and Coverage) in lieu of accessing their W-2 & 1095C via the Employee Personal Page (EPP). Both the paperless and paper option will automatically be selected for all employees unless an election has been made during the allotted timeframe to stop receiving the W-2 by mail.
Assumptions:	Customers will be notified of the need to elect to receive their W-2 mailed by the following ways: • Email Notification via EPP • Customer Notification • Bulletin PTRS yearly W-2 process will include the timeframe of the final pay period that is applicable for that tax year. Corrected W-2s will follow their normal process (there is no election on this). Corrected W-2s will continue to be mailed. Cut-off date of electing the no paper option for W-2s need to be a part of the PTRS process.
Test:	

Functional Requirements

☑ **Payroll Applications Systems Branch (PASB) Requirements**

WTWO will write a program to receive the File Transfer Protocol file
NFCPGWEB.WEB.W2NOPRNT from EPP to WTWO.

☐ **Personnel Applications Systems Branch (PESB) Requirements**

"Not Applicable"

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☑ **Administrative Applications Systems Branch (AASB) Requirements**

"Not Applicable"

☑ **Payroll Web Systems Branch (PWSB) Requirements**

Modify the Preferences tab in EPP to add Subcategory "Change Paper W-2 & 1095C". Under the Change Paper W-2 & 1095C, employees will be given the option to stop receiving their W-2s & 1095C by mail. This shall be done as follows:

- If the employee would like to stop receiving their W-2 & 1095C by mail, he/she will have to select the "Paperless" option. The Paperless option will take the employee to another page allowing them to confirm or cancel the selection of receiving the W-2 & 1095C by mail. The confirmation page will pop up to make the employee aware of his/her selection and must be confirmed in order for the selection to take effect. Upon confirmation, an EPP email account change notification will be sent to the employee's agency work email address and their EPP default email address. (See Diagrams 1 and 2)

- If the employee would like to resume receiving their W-2 & 1095C by mail, he/she will have to select the "Paper" option. The Paper option will take the employee to another page allowing them to confirm or cancel the selection of receiving the W-2 & 1095C by mail. The confirmation page will pop up to make the employee aware of his/her selection and must be confirmed in order for the selection to take effect. Upon confirmation, an EPP email account change notification will be sent to the employee's agency work email address and their EPP default email address. (See Diagrams 3 and 4)

- Selection of how the W-2 & 1095C is received (paper or paperless) will remain on EPP as history until changed by the employee. W-2 history will be found under subcategory "Change Paper W-2 & 1095C" under the Preferences tab. The history of changes to the W-2 & 1095C selection shall be listed vertically by Year and W-2 Selection (Paper or Paperless).

After the selection is made to stop the W-2 & 1095C by mail, EPP will create a file of social security numbers for the WTWO application to remove from the printing process in the final pay period of the W-2 load. Ensure the file does not include employees that are separated. (If the employee is separated, he/she will receive their W-2 & 1095C by mail to their last known address. If the employee does not receive their W-2 & 1095C, the employee will have to contact their previous employer for a copy which is housed on the Reporting Center.)

Employees will be able to elect to stop or resume receiving their W-2 & 1095C by mail between pay period 01 through pay period 24. This option shall no longer be available

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after pay period 24.

Diagrams 1 – 4 are shown below:
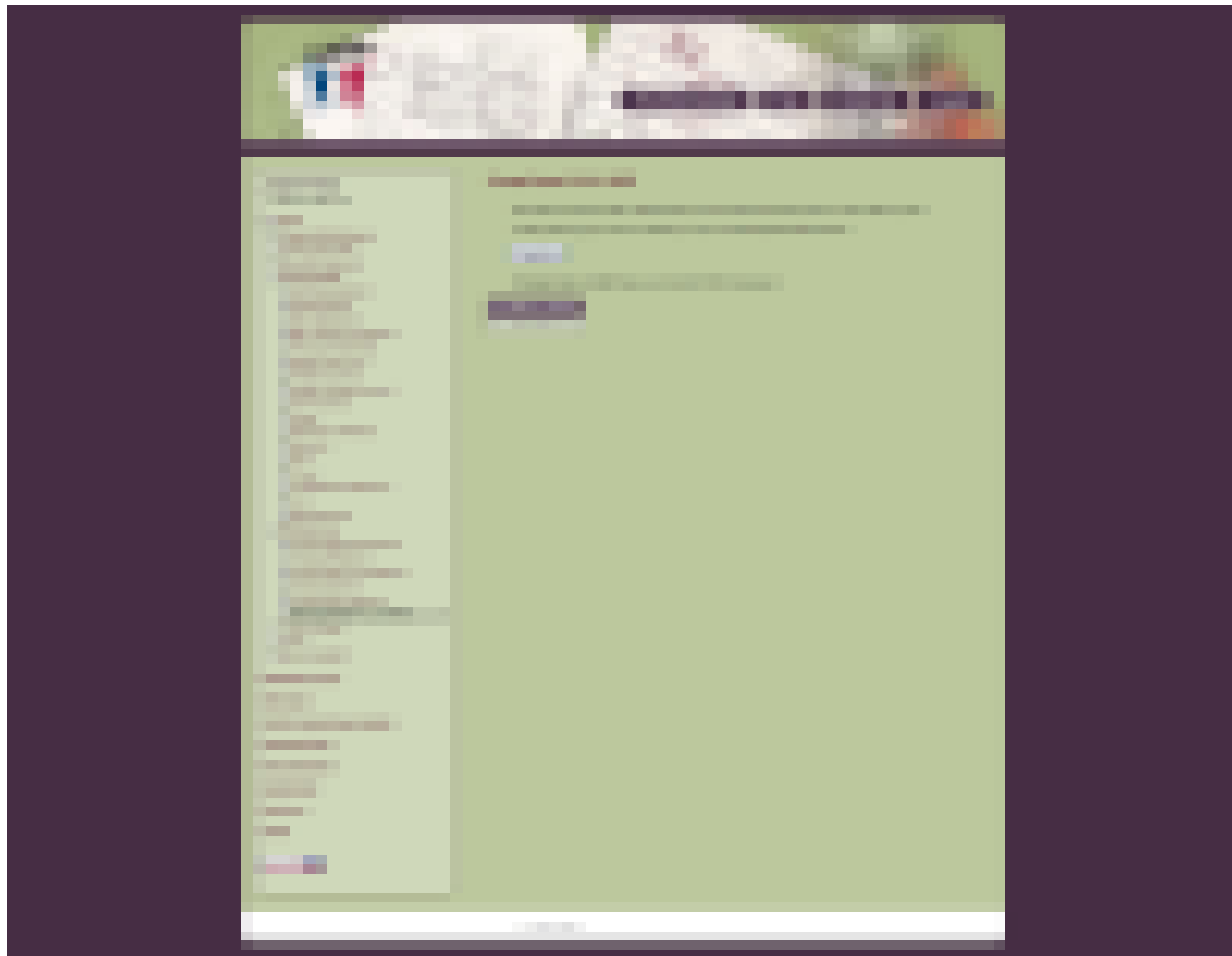
Diagram 1: The "Paperless" option and added subcategory in EPP.

Diagram 2: An example of the pop-up page after the "Paperless" option is selected in
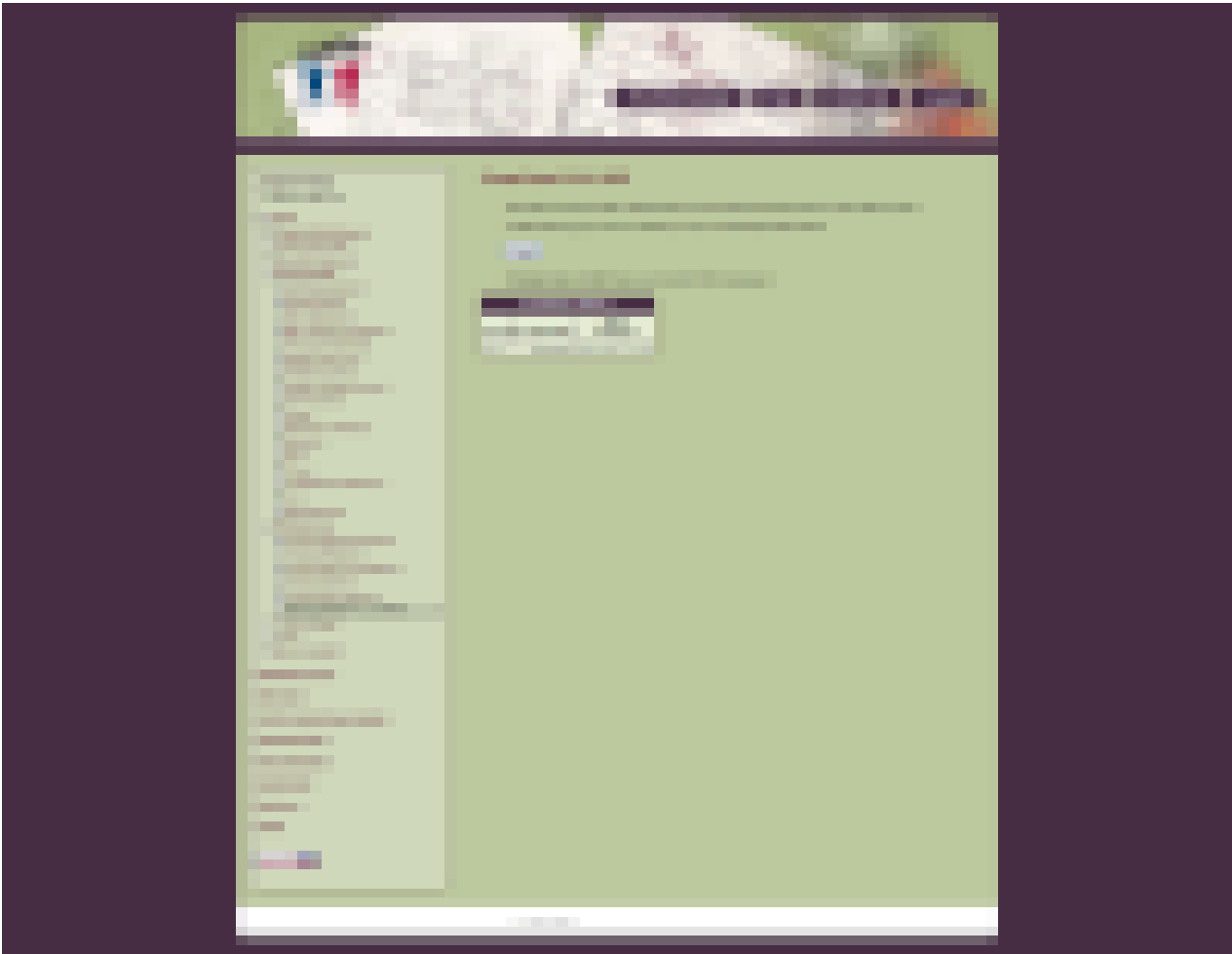
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EPP.

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Diagram 3: The "Paper" option in EPP.

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Diagram 4: An example of the pop-up page after the "Paper" option is selected in EPP.
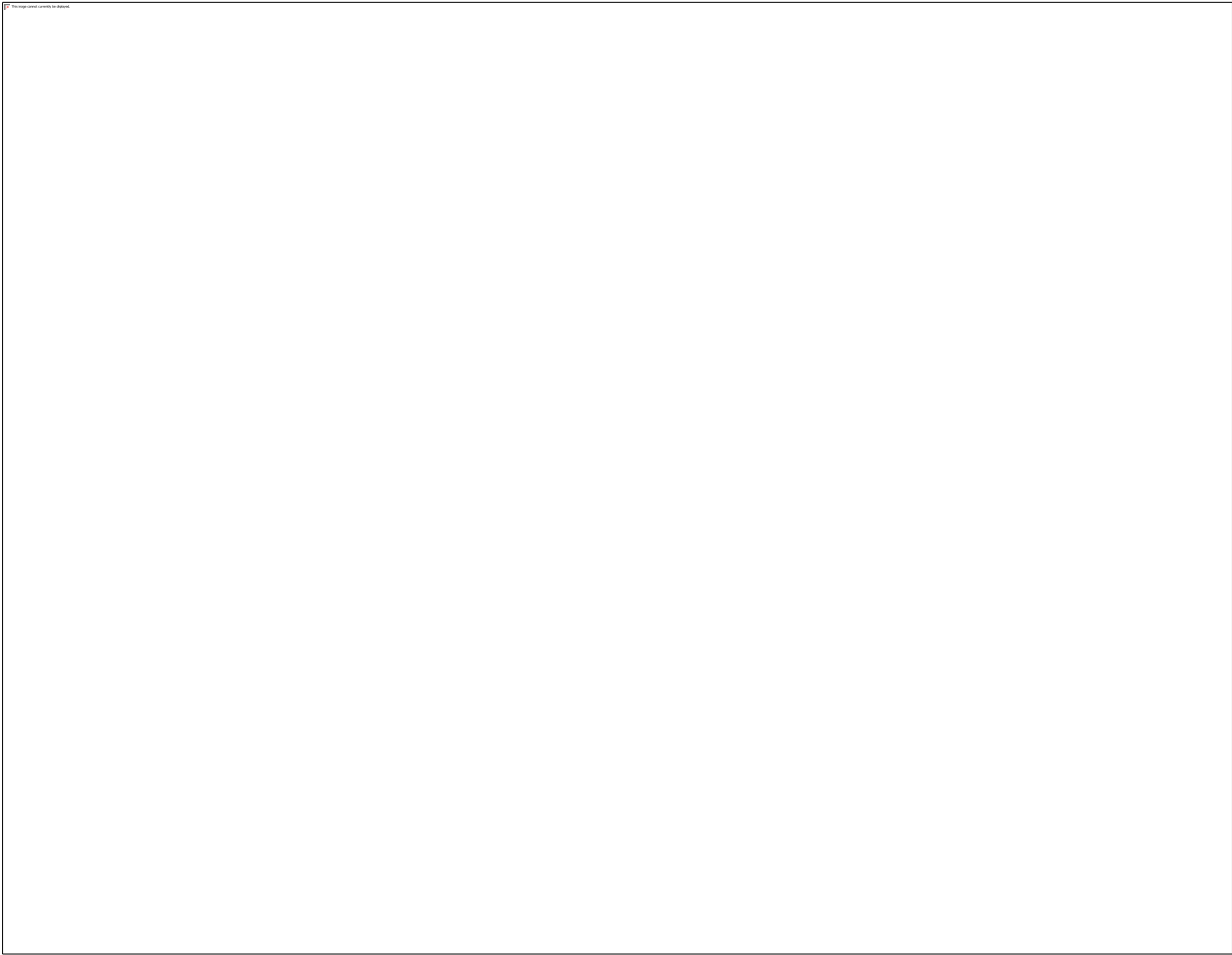
☐ **Administrative Web Systems Branch (AWSB) Requirements**

"Not Applicable"

☐ **Human Resources Applications Branch (HRAB) Requirements**

"Not Applicable"

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Signature of Systems Requirements Branch Chief: Lisa Stafford /s/	Date: 07/01/15
Signature of Web Requirements Branch Chief: Alisa R. Wells /s/	Date: 10/14/15