Online W-2 Instructions

1. Enter the Samford Portal through the Quick Links at the bottom of the Samford home page or by entering connect.samford.edu in the address line of your browser.

2. Select the BANNER icon near the top of the page

3. Choose the Employee option.

4. Choose Employee Dashboard.

5. Then select Taxes.

6. If you have not done so in previous years, to view your W-2 online, you must select Electronic Regulatory Consent. If you wish to receive your W-2 electronically only and not have it printed and mailed at the end of January, please read the agreement, and choose the Consent to receive electronically box for either your W-2 or 1095-C to receive them electronically. If you made either selection in a previous year, your selection is retained for future years for any tax forms selected. These will not be mailed.   By selecting this option, you will be saving the university the cost of printing and postage as well as reducing our impact on the environment.

7. If you are making or changing your selection, choose Submit.

8. When the screen refreshes, you should see a green check mark and a small message near the top indicating that your choice was submitted successfully.

9. Choose Return to Tax Forms Menu.

10. Select W-2 Wage and Tax Statement.

11. Be sure the desired year is displayed in the Tax Year box.

12. Select Display to view your W-2. *Please note that this version displays a partially masked social security number.*

13. To print your W-2, choose the Printable W-2 box at the bottom of the W-2.

14. A screen will appear that asks you to enter your PIN. **For this application, this is your normal Samford password.**

15. Once your W-2 appears, depending on your choice of browser, you may:
    - Hold the Control (Ctrl) and the letter P key together.
    - A print dialog box should appear allowing you to select your printer and choose Print.

16. Please trim this copy if you are submitting your taxes by mail rather than filing on-line.

17. Adjustments can be made depending on your browser settings to print your W-2 to your preference. This can usually be done on the Page Setup section of your browser. You may also choose the Landscape button in this section. This will yield a clean copy of your W-2 in a small font. This is the only size available with this option.

18. For a larger font you may select the browser print button from the page that displays the W-2 Wage and Tax Statement heading. This will yield a copy of your W-2 in a larger font so you can see to complete your tax return, **but it will not contain your full SSN and since it becomes two pages, it cannot be submitted to the IRS.** This can only be used to see numbers more clearly if you are using on-line tax submission.

19. When submitting a copy of the "Printable W-2" with your tax return, you need to trim the printed page to include only the form along with the form name and year at the bottom of the printed page.

20. For additional assistance in printing your W-2, please contact the Samford Service Desk at 205-726-2332.

21. If you have questions regarding the content of your W-2, **after** reading the document Samford Specific W-2 Information, please contact your payroll office at 205-726-2347.