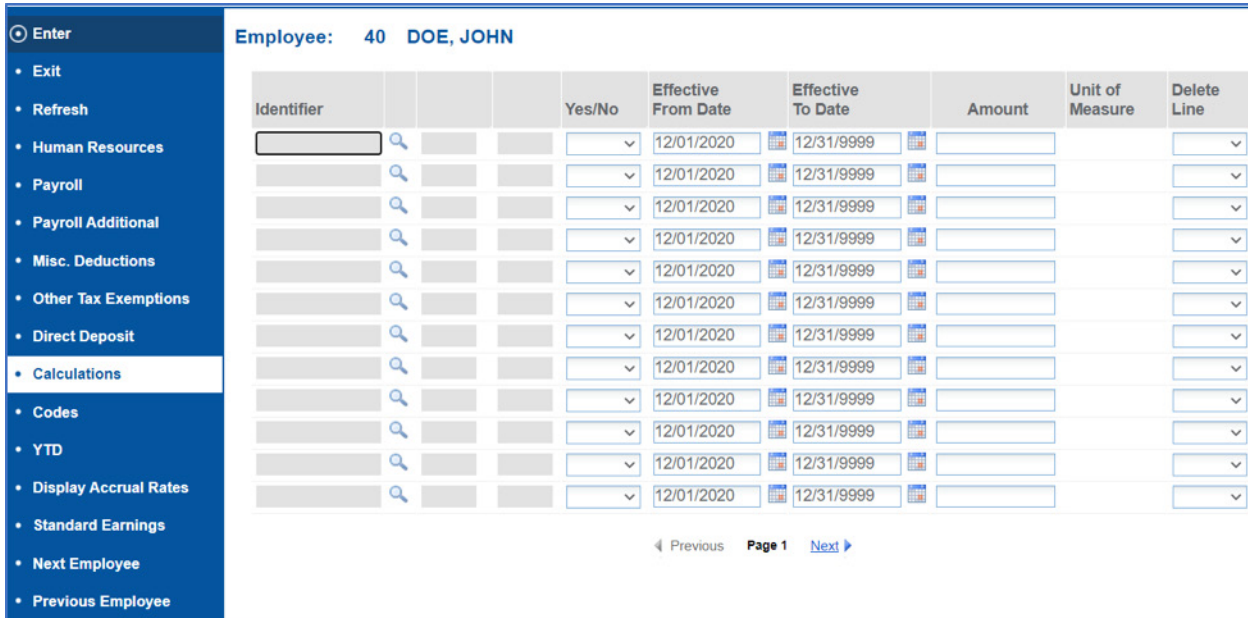


How to Set up an Employee for an Electronic Tax Form

Setting up an employee to receive an electronic tax form is easy. Once you have written consent from your employee that they agree to receive their tax form electronically, go to the Employee Profile and follow the steps below.

Note: The employee's written consent must be kept on file with the employer.

Step 1: Select the **Employee Profile** and click on the **Calculations** Tab

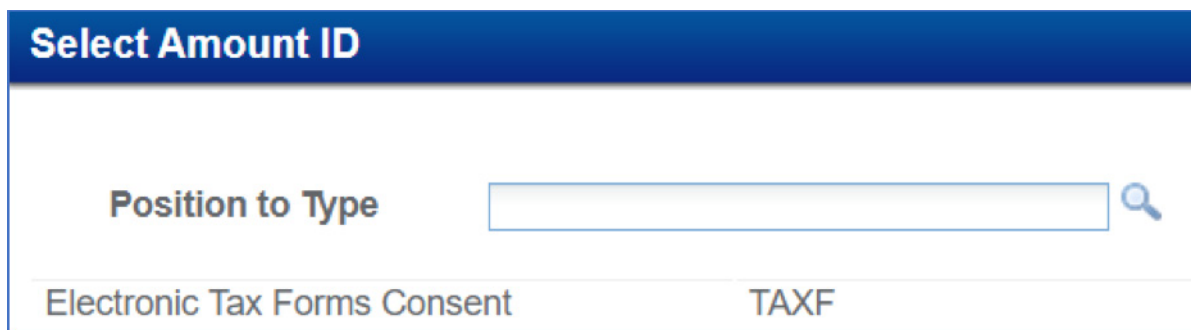


Employee: 40 DOE, JOHN

Identifier	Yes/No	Effective From Date	Effective To Date	Amount	Unit of Measure	Delete Line
		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			
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		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			
		12/01/2020	12/31/9999			

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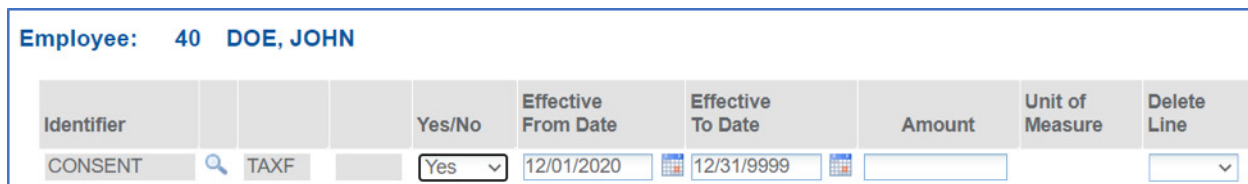
Step 2: Click on the magnifying glass next to the **Identifier** field and choose **Electronic Tax Form Consent**. Then select **Yes** in the **Yes/No** column. Click **Enter** to save.



Select Amount ID

Position to Type

Electronic Tax Forms Consent TAXF



Employee: 40 DOE, JOHN

Identifier	Yes/No	Effective From Date	Effective To Date	Amount	Unit of Measure	Delete Line
CONSENT	Yes	12/01/2020	12/31/9999			

Questions or concerns? We are here to help!

Please contact our support team at: 1.866.772.9932 or support@deluxe.ca

Important Reminders:

1. The employee must be set up for Email delivery in the **Direct Deposit** tab of their profile with a valid email address.
2. Electronic Tax Forms will be delivered password protected, using the same password formula as their E-stubs. Only employees receiving E-stubs are eligible for electronic tax forms.
3. Employees receiving multiple tax forms (T4, T4A, RL-1, and T5018) will receive multiple emails.
4. You may remove the option on a per employee basis, by using the same steps as above and selecting **No** in the **Do Calc** field to turn off electronic delivery.
5. For employers who would like all employees with an email address to receive Electronic Tax Forms, this option can be selected when you authorize your tax forms.
6. Electronic Tax Forms are no additional charge, and easy to distribute. Please keep in mind that self-sealed printed copies produced by Deluxe Payroll are subject to a surcharge per tax form.
7. When authorizing your tax forms, if you choose to have Deluxe Payroll print your tax forms, emailed tax forms will be sent to the applicable employees during the evening when they are printed by Deluxe or the following Monday if they are printed on a weekend. Otherwise, emailed tax forms will be sent during the evening that you authorize your tax forms or the following Monday if you authorize on a weekend.

Recommendation for Inactive Employees:

- › It is not recommended to send Electronic Tax Forms to Inactive or Terminated employees, unless you have received written consent and an updated email address.
- › Please note that tax forms are time sensitive and an invalid email address may prevent the tax form from being received by the employee.

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