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Introduction

This document is intended to supplement the Image/Upgrade Overview Document and provide ctcLink users with a more detailed summary of the accessibility changes that will be made in the system as a result of the upcoming HCM image 37-38. Oracle releases multiple updates every year that often include improvements to PeopleSoft’s accessibility. Below is an overview of the accessibility enhancements that you can expect to see as part of HCM image 37-38.

Accessibility

PeopleSoft for North America supports the display of year-end tax forms in accessibility mode in Employee Self-Service. By providing accessibility setup configurations for tax forms, it allows self-service users to access tax form information using screen readers in non-PDF format when they log on to the PeopleSoft system with screen reader mode enabled.

Year End Accessibility Definitions for Tax Forms W-2, W-2AS, W2-GU, W2-VI and W-2c

Year End Accessibility definitions for the Year 2020 for Tax Forms W-2, W-2AS, W2-GU, W2-VI and W-2c were not provided prior to Image 38.

Navigation

Navigator > Payroll for North America > U.S. Annual Processing > Define Annual Tax Reporting > Year End Accessibility

Image: Year End Accessibility Definitions Search Results Prior to Image 38

Year End Accessibility definitions for Effective Dates 2012 to 2019 were available prior to the update.
Screen Viewer Text: Accessibility Search Definition Results for Tax Form W-2 Prior To The Update

Year End Accessibility document

Main Content frame

Main Content document

Tax Form Identification combo box W-2 collapsed

Search type for Effective Date combo box = collapsed

Effective Date edit blank

Calendar Effective Date button

clickable Include History check box not checked

clickable Correct History check box not checked

Search button Search (Alt+1)

Search Results. Row 1-8 of 8 table with 9 rows and 2 columns row 2 Tax Form Identification column 1 W-2 link

Effective Date column 2 link 01/01/2019

row 3 Tax Form Identification column 1 link W-2

Effective Date column 2 link 01/01/2018

row 4 Tax Form Identification column 1 link W-2

Effective Date column 2 link 01/01/2017

row 5 Tax Form Identification column 1 link W-2

Effective Date column 2 link 01/01/2016

row 6 Tax Form Identification column 1 link W-2

Effective Date column 2 link 01/01/2015

row 7 Tax Form Identification column 1 link W-2

Effective Date column 2 link 01/01/2014

row 8 Tax Form Identification column 1 link W-2

Effective Date column 2 link 01/01/2013

row 9 Tax Form Identification column 1 link W-2

Effective Date column 2 link 01/01/2012
Year End Accessibility Definitions for Tax Forms W-2, W-2AS, W2-GU, W2-VI and W-2c after Image 38

Year End Accessibility definitions for the Year 2020 for Tax Forms W-2, W-2AS, W2-GU, W2-VI and W-2c are added after the Image 38 update.

**Image: Year End Accessibility Definitions Search Results after the Image 38**

**Screen Viewer Text: Accessibility Search Definition Results for Tax Form W-2 After the Update**

Year End Accessibility document

Button Search button Clear link Basic Search link Save Search Criteria

Search Results. Row 1-9 of 9 table with 10 rows and 2 columns row 2 Click to sort ascending Tax Form Identification column 1 W-2 link

Click to sort ascending Effective Date column 2 link 01/01/2020 row 3 Click to sort ascending Tax Form Identification column 1 link W-2

Click to sort ascending Effective Date column 2 link 01/01/2019 row 4 Click to sort ascending Tax Form Identification column 1 link W-2

Click to sort ascending Effective Date column 2 link 01/01/2018 row 5 Click to sort ascending Tax Form Identification column 1 link W-2

Click to sort ascending Effective Date column 2 link 01/01/2017
W-2/W-2c Forms

Year End Accessibility definitions for year 2020 were not provided prior to Image 38. As a result, the Tax Forms opened in PDF format for the Year 2020. Since PDF versions are not accessible, screen reader users could not access Tax Forms for the year 2020.

Navigation
Employee Self Service > Payroll Tile > W-2 W-2c Forms Tile

Image: View W-2/W-2c Forms Prior To Image 38
View W-2 Form button and the Filing Instructions link opened a PDF version of the page.

W-2/W-2c Forms after Image 38

Screen reader users will be able to access the Tax Forms for the year 2020 in Non-PDF format after the update.

Navigation
Employee Self Service > Payroll Tile > W-2 W-2c Forms Tile

Image: View W-2/W-2c Forms after Image 38
Accessibility Filing Instructions Text for W-2, W-2c And W2 Territories for The Year 2019

Navigation
Employee Self Service > Payroll Tile > W-2 W-2c Forms Tile

Image: View W-2/W-2c Forms for Tax Year 2019

Before Image 38

Non-PDF Filing Instructions text for Year End Tax Forms W-2, W-2c and W2 for the screen reader users was not defined for the Year 2019. As a result, when the Filing Instructions link was accessed, it displayed only one line of text “2019 W-2 Filing Instructions” for the screen reader users.
Non-PDF Filing Instructions text for the Year End Tax Forms W-2, W-2c and W2 for the screen reader users is added for the Year 2019. The Filing Instructions link displays the Filing Instructions Text in Non-PDF format for the screen reader users.

Notice to Employee

Do you have to file? Refer to the Form 1040 instructions to determine if you are required to file a tax return. Even if you don't have to file a tax return, you may be eligible for a refund if box 2 shows an amount or if you are eligible for any credit.

Earned income credit (EIC). You may be able to take the EIC for 2019 if your adjusted gross income (AGI) is less than a certain amount. The amount of the credit is based on income and family size. Workers without children could qualify for a smaller credit. You and any qualifying children must have valid social security numbers (SSNs). You can't take the EIC if you're not allowed to claim a exemption on your tax return, if you have certain non-filing status, if you're a nonresident alien or a resident alien of Canada or Mexico, or if you're claimed as a dependent on another person's tax return. For more information, visit www.irs.gov/EITC.
Also see Pub. 596, Earned Income Credit. Any EIC that is more than your tax liability is refunded to you, but only if you file a tax return.

Clergy and religious workers. If you aren't subject to social security and Medicare taxes, see Pub. 517, Social Security and Other Information for Members of the Clergy and Religious Workers.

Corrections. If your name, SSN, or address is incorrect, correct Copies B, C, and 2 and ask your employer to correct your employment record. Be sure to ask the employer to file Form W-2c, Corrected Wage and Tax Statement, with the Social Security Administration (SSA) to correct any name, SSN, or money amount error reported to the SSA on Form W-2. Be sure to get your copies of Form W-2c from your employer for all corrections made so you may file them with your tax return. If your name and SSN are correct but aren't the same as shown on your social security card, you should ask for a new card that displays your correct name at any SSA office or by calling 800-772-1213. You also may visit the SSA website at www.SSA.gov.

Cost of employer-sponsored health coverage (if such cost is provided by the employer). The reporting in box 12, using code DD, of the cost of employer-sponsored health coverage is for your information only. The amount reported with code DD is not taxable.

Credit for excess taxes. If you had more than one employer in 2019 and more than $8,239.80 in social security and/or Tier 1 railroad retirement (RRTA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. If you had more than one railroad employer and more than

$4,836.30 in Tier 2 RRTA tax was withheld, you also may be able to claim a credit. See your Form 1040 instructions and Pub. 505, Tax Withholding and Estimated Tax.
Instructions for Employee

Box 1. Enter this amount on the wages line of your tax return.

Box 2. Enter this amount on the federal income tax withheld line of your tax return.

Box 5. You may be required to report this amount on Form 8959, Additional Medicare Tax. See the Form 1040 instructions to determine if you are required to complete Form 8959.