

W-2 ELECTRONIC DELIVERY INSTRUCTIONS

WHAT YOU SHOULD KNOW ABOUT W-2 ELECTRONIC DELIVERY AND YOUR 2013 W-2's

You can consent to receive your W-2 electronically by accessing www.w2express.com using Phillips 66 Employer Code 14844.

- **Get it faster.** Electronic W-2's will be available around January 24th, well before you would normally receive it in your mailbox (after January 31st).
- **Never lose your W-2.** Download a copy as many times as you want.
- **More secure.** No important tax documents being sent through the U.S. mail.
- **Ease of use.** Ability to download the electronic W-2 into tax preparation software (7 to choose from).
- Participation of electronic delivery is optional.
- Withdrawal of your consent can be done at any time.

HOW TO SIGN UP TO RECEIVE YOUR W-2 ONLINE

Step 1

Launch W-2 eXpress at www.w2express.com.

Step 2

Sign onto W-2 eXpress:

- Enter the Phillips 66 Employer Code **14844** in "Employer Name or Code" field
- Click "GO"
- Enter your 8-digit U.S. employee number (6-digit number plus 2 leading zeros)
- Click "Continue >"
- Enter your PIN (Default PIN is the last 4 digits of your SSN, 2-digit birth day and 2-digit birth year)
- Click "Log In"
- If this is your first sign-on, you will go through a series of six steps to complete the enrollment process. Skip to Step 4 if you have accessed W2eXpress before.
- Read the information and then click "Enroll Now >"

Step 3

Change the default password:

- On the initial sign-on, you will be asked two questions to identify your computer and to select a security image
- You will then select and answer six security questions
- Enter your contact information (phone number and email)
- You will now be asked to enter a new PIN
- Enrollment into W2eXpress is now complete

Step 4

Main Menu option — W-2 Features list:

- Click "Go Paperless"

W-2 ELECTRONIC DELIVERY INSTRUCTIONS

Step 5

W-2 Consent Disclosure and Test:

- Carefully read the W-2 Consent Disclosure
- Click “Test Now” to view sample W-2
- If you DID NOT see the sample W-2:
 - Click “I did not see the test document”
 - If you are still unable to see the test document, click “I do not want to enroll for online delivery of my original W-2 Wage and Tax Statement”
 - You will receive your W-2 at your mailing address
- If you DID see the test document:
 - Click “I saw the test W-2”

Step 6

Complete the W-2 Statement Online Form:

- Click “Add or Change Email”
- Enter your email addresses
- Click “Continue”
- Select Primary and Secondary email addresses
- Select Mailing Address
- You can modify your address by clicking “Add or Change Mailing Address”
- Click “Add or Change Phone Number”
- Enter Work, Home and Fax number
- Click “Continue”
- Review and click “Confirm” if all information is correct or select “Back” if you need to change any information
- Print the Consent Receipt for your records
- Click “Save”
- Click “Continue” to return to the Main Menu

Step 7

Click “logout” and be sure to close the window browser

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FORGOT YOUR PIN?

- Enter the Phillips 66 Employer Code **14844** at www.w2express.com
- Enter your Employee ID
- If PIN is forgotten, click **“Forgot your PIN”**
- You will be asked to answer one security question
- Enter new PIN and click “Save”
- If you input an incorrect password three times, the system will “lock” you out of the system. Please contact the **W-2 eXpress Service Center** at 877-325-9239 to unlock your account.

HOW TO UPDATE ACCOUNT INFORMATION (From Main Menu)

- Select “My Account” on left-hand side of the screen
- On the next screen, review and update contact information as needed (phone, email, address)
- You can also review and your change PIN, security image and security questions
- Click “Save” if updates were made
- You will receive an email confirming any updates made to your account

OTHER W-2 FEATURES (From Main Menu)

- You can select “Order Status” to review a history of your W-2 eXpress activity
- Consent can be withdrawn with the “Withdraw Status” link. Withdrawal of consent for online delivery of your 2013 W-2 can be done any time by midnight Central Standard Time January 12, 2014. If you withdraw after that time, the consent withdrawal will be effective for future tax years.
- The “Instructions” link is information about downloading the W-2 data into tax software
- Click “E-File my Tax Return” for filing information for non-itemized tax returns

When will your W-2 be available?

Your 2013 W-2 will be posted on a secure website around January 24, 2014, before you would normally receive it in your mailbox. You will receive notification when your online W-2 is available, along with instructions for retrieval. You will also receive a confirmation email when you enroll for online delivery as well as confirmations of any changes you make to your contact information.

- **For W-2 eXpress questions, contact:** The W-2 eXpress Service Center at 877-325-9239 weekdays from 7 a.m. – 8 p.m., Central time.
- **For more information or questions concerning the content of the Phillips 66 W-2, contact:** HR Connections at 855-480-6634 or 918-977-7905 weekdays from 8 a.m. – 6 p.m., Central time.