

Member Tax Forms Now Available Online

A Simple and Affordable Way to Add Value
for Members

Members will be able to access their tax forms online via It's Me 247, just like they do with regular member statements! For a small fee of \$500/year you can sign up with the CU*Answers Imaging Solutions team, who will put your members forms online, as well as make them available to staff in CU*BASE.

Q: How do members access their tax forms?

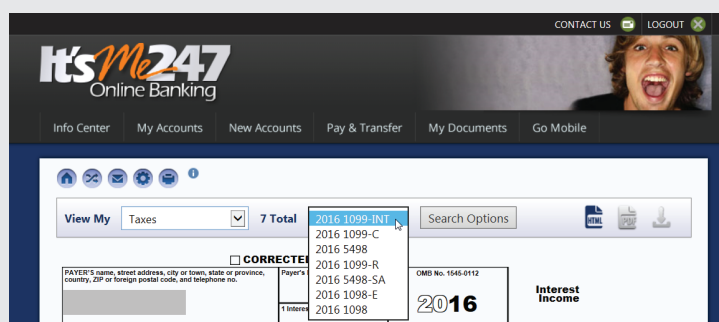
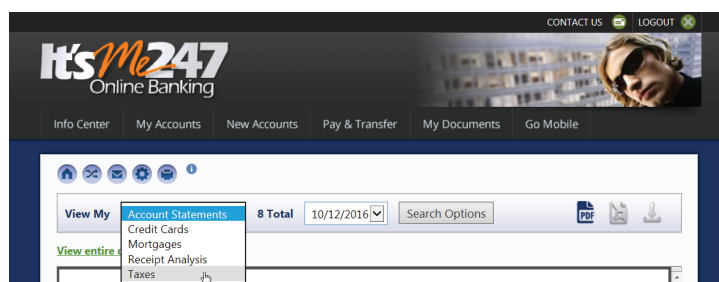
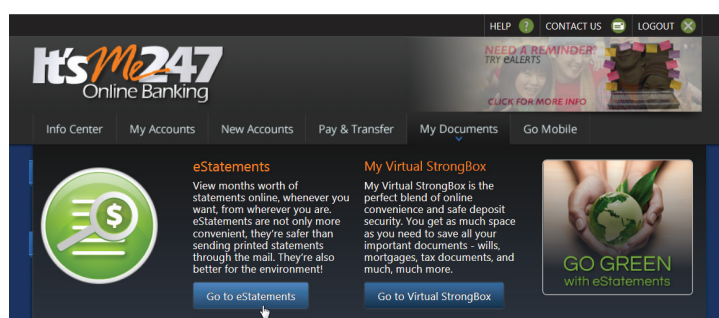
A: Once they are posted, members will find their tax statements under the new "Taxes" category in the "My Documents" area of **It's Me 247**. Members will be quick to adopt this new feature since eStatements are posted in the same area.

Q: Can staff access forms?

A: Staff will also find it easy to research members' tax forms since they will access them the way they access member's eStatements. Once the employee uses the "Statements" button in CU*BASE Member Inquiry, they will simply select the new "Taxes" tab to find the member's forms.

Q: When will tax forms be placed online?

A: When forms are available to send to the print vendors, they will also be placed online. This happens in late January with the exception of the 5498s, which are placed online at a later date. 1099MISC forms will not be available online.



Contact Information:

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Q: Who can use this and what is the cost?

A: Display of tax forms is available for all credit unions who use CU*Spy for their eStatements and in-house Release Managed Clients hosting their own in-house statements. A small fee of \$500 per year is charged by the CU*Answers Imaging Solutions team to display the forms online. This fee is charged to all clients using this feature.

Have an in-house imaging server, but are not a Release Managed client? Sign up for Release Management today and we will waive the fee for the first year! Other options are also available. Contact Imaging Solutions for details at imaging@cuanswers.com.

Q: I use eDOC to provide tax forms on my in-House server today. Can I use this instead?

A: Sure! There are many options available, contact Imaging Solutions to learn which option is right for you!

Q: How long will you retain the forms online?

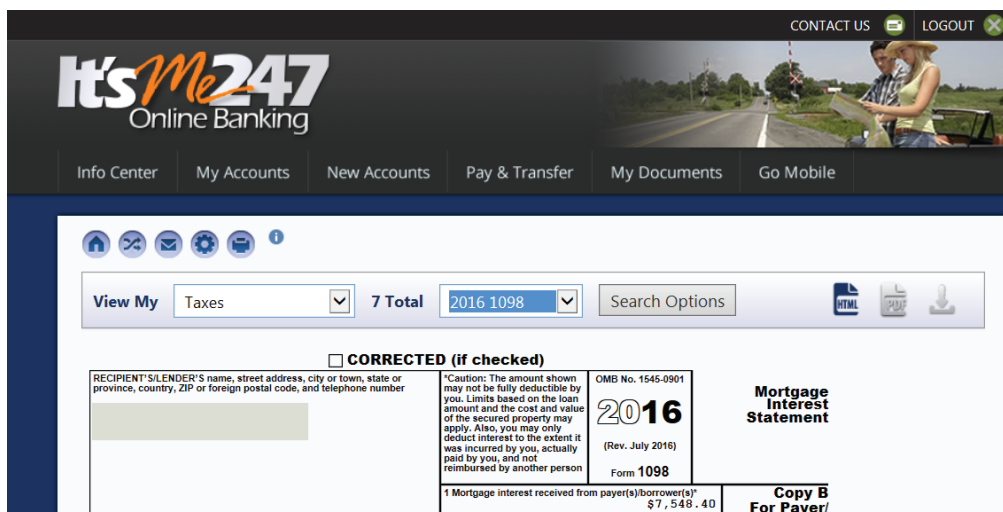
A: The forms will be accessible to staff and members for three years.

Q: What forms will be available?

A: Tax statements will be loaded before the end of January and include the following tax forms:

- 1098
- 1099-C
- 1099-R
- 5498
- 1098-E
- 1099-INT
- 1099-SA
- 5498-ESA
- 1099-A
- 1099-Q
- 5498-SA

NOTE: 1099-MISC forms will not be available online. You can elect to either display forms or not to display them, but it is not possible to display only certain forms. You cannot disable individual members from viewing their tax forms.



Ready to get started?

Activation is a snap! Simply fill out and submit the form on the "Member Tax Forms: Frequently Asked Questions" website: <https://www.cuanswers.com/products/imaging-solutions/member-tax-forms/>.

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