



## 5 SIMPLE STEPS TO COMPLETE YOUR PAYROLL YEAR-END

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Year-end is fast approaching. Here are five simple but important steps to help you have a smooth transition to the New Year.

### 1. PREVIEW YOUR EMPLOYEES' W2/1099 FORMS — BY NOVEMBER 30

Missing or inaccurate employer information.

- Company name and address.
- Federal identification number.
- State identification numbers.

Missing or inaccurate employee information.

- Employee name from Social Security card.
- Employee Social Security number from Social Security card.
- Employee address.

Employee wage and tax information.

- Employee earnings, deductions and taxes from the Year to Date report with your last check date before September 30.

*Check with your payroll service provider on how to make any changes in their system.*

### 2. PLAN FOR SPECIAL EXTRA PAYROLL RUNS — NOVEMBER 1 THROUGH DECEMBER 29

This time of year, we know that you may want to pay employees holiday/annual bonuses or additional checks before year-end.

Payroll service providers make it easy to run payrolls outside your normal schedule. Check with your provider on how to process extra payroll runs.

### 3. DON'T MISS YOUR LAST PAYROLL OF THE YEAR — BY DECEMBER 29

Year-end is a busy time for everyone. To ensure you don't miss your last payroll of the year, please take a moment now to check your payroll schedule and make note of your final payroll's "Approve By" date and check date.

Your last payroll must be approved by December 29 and must have a check date on or before December 31. Payrolls with a check date in the next calendar year will be included in next year's W-2's/1099's.

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**4. REVIEW NEXT YEAR'S PAYROLL SCHEDULE — BY DECEMBER 31**

Please verify the accuracy of your payroll schedule for the next calendar year and make note of upcoming bank holidays and weekends. Check with your payroll service provider to make sure you have a schedule of your 2017 payroll dates.

**5. PRINT YOUR EMPLOYEES' W-2/1099 FORMS — BY JANUARY 31**

You should receive an email notification when your employees' W-2/1099 forms are available for you to review and print through your payroll service provider. Make sure they are either handed out or in the mail by January 31, 2017

***IMPORTANT:*** Most W-2s, 1099s and W-3s will not be mailed. Check your payroll service providers services to see which forms can be filed electronically.