Employee End of the Year Checklist

Don't wait till tax season, make sure your employee's files are up to date by following these processes.



Confirm Employees' Identifying Information (and that it's correct)

- [ ] Legal name
- [ ] Social Security number
- [ ] Address

Prepare For Your Form W-2 Responsibilities

- [ ] Order forms
- [ ] Review records
- [ ] Pay attention to nuances (changes due to life events)
- [ ] Fill out forms
- [ ] Distribute to employees
- [ ] File Forms W-2 (and W-3) with the SSA and any state and local governments

Check Employment Tax Rates And Wage Bases

- [ ] Keep an eye out for your new SUTA tax rate (your state will likely send this to you) and any wage base changes
- [ ] Pay attention to the new Social Security wage base

- [ ] Sneak a peek at the IRS's federal income tax withholding tables

Review Employee Benefits

- [ ] Accrued time off
- [ ] Retirement plan eligibility
- [ ] Insurance

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