

Payroll Year End Guidelines

Verify all Checks are Entered for the Year:

Before processing your W-2s and year-end reports, make sure all payroll checks that need to be included for the year are completed so they are accurately reflected in the W-2/W-3 totals. These include but aren't limited to: final checks of the year, third party checks, bonus checks, Owners Health Insurance checks.

- **Third Party Check Processing:**
 - Add any applicable Third Party Sick Pay and any applicable Owner Wages/Bonuses that are not cash payments.
 - Auto/Mate Payroll Processing & Check Printing: Payroll - Third Party Check Processing
- **Owner's Health Insurance**
 - Auto/Mate End Of Year Process: Adding Owners Health Insurance on W-2s (VIDEO)
 - Health Insurance Payments.
- **Correction Checks/Bonus'**
 - If you are already in the new year and have already processed payroll for that year, you can still go back to the prior year and add checks if needed. Crossing years is the only time you can date a check for a date prior to the last payroll. This check needs to be dated after the last prior year check still.

Processing and Printing W-2s:

We recommend these should always be printed on plain paper and verified first before printing the Final Form.

Two form types are available- 2 Per Page or 4 Per Page Horizontal.

- Auto/Mate End Of Year Process: Payroll - W2 and W3 Printing User Guide
- Auto/Mate End Of Year Process: Printing Employee W-2s (VIDEO)
- Auto/Mate End Of Year Process: Printing W3 Forms and Printer Adjustments (VIDEO)

Export W2 for Accountability or Yearli:

If you need to electronically transmit W2 information, integrations is only available with Accountability. Contact www.idmsinc.com or call (888)436-7462. Once you have Accountability, you can follow the steps below to create the file to export. We also have a file that can be created to use with Yearli through the Custom Extract option in payroll.

- Auto/Mate Payroll Processing & Check Printing: Payroll - Integration to Export Account Ability
- Auto/Mate End Of Year Process: Yearly W2 Extract Instructions

- Auto/Mate State Specific Payroll Information: North Carolina DOR W2 Extract Instructions

Affordable Care Act (ACA) Processing:

Determine whether you will need to produce the Affordable Care Act 1094C/1095C Forms. If so, if you wish to use the print function through automate, you will need to subscribe to the print function.

- Auto/Mate End Of Year Process: Affordable Care Act Processing

The only situation that we **don't** support with our ACA print program:

- The 3rd Part of the Form - Self Insured businesses

Update Tax Tables:

Be sure to update the SUTA Tax Rate and any custom taxes in Payroll Program 29: Tax Definition.

- Auto/Mate End Of Year Process: Payroll - How to Update Tax Tables in the Payroll Module Tax Definition
- Auto/Mate End Of Year Process: How to Update the SUTA Tax Rate (VIDEO) v5