

Client Year-End Reminder Checklist

Please utilize this checklist to ensure that you have taken all necessary steps for successful 2024 Year-End Filing

Employee demographic information reviewed and updated as applicable

- Run the W2 Edit List located in the Reporting Module > Reporting > Custom Reports
- Contact Client Support to have this uploaded to your report vault
- Utilize the forms in the year-end guide resource section to collect the data from employees

Confirmed employer address is correct for the delivery of W2s

- Employers with P.O. Boxes as their regular delivery address will be sent US Mail
- We encourage you to update your delivery address to a physical address so these packages can be tracked!

Sent Checkwriters year-to-date Third-Party Sick Payments

- This includes Short Term Disability, Long Term Disability, and payments to employees if you have a private plan for state family/medical leave
- If you have employees out in December 2024, please notify Checkwriters by 12/20/2024!

All Fringe posted and/or sent to Client Support Specialist

- Including but not limited to S-Corp health insurance, auto allowances, group term life, deferred compensation payments, moving expenses, etc.

Notified Checkwriters of any state paid family medical leave plan changes by 12/13/24

Reviewed and updated applicable employees for 2025 minimum wage increases

All manual checks/postings recorded

Any applicable checks/postings have been voided

Confirmed all tax registrations (if applicable) have been sent to Checkwriters

- Please send tax registration information to TaxDepartment@Checkwriters.com

Employer Health Care Costs (ERHCC) have posted

- Only applicable for employers who had 250+ employees in 2023
- This can be imported! Contact Client Support for more information

Employer & Employee Health Savings Account (HSA) contributions posted

- This can be imported! Contact Client Support for more information

1099's payments posted

- Contact Checkwriters if you would like us to prepare and process your 1099 filings

Affordable Care Act (ACA) records have been reviewed and submitted

- Utilize this [guide](#) for steps on how to complete your ACA reporting
- Required for applicable large employers (ALEs) with at least 50 full-time or full-time equivalent employees in 2023
- For ACA questions and help please contact ACAteam@Checkwriters.com

Reviewed your Earning/Deduction Codes W2 boxes

- Please see this [knowledge base article](#) for guidance on how to review your earning and deduction codes and which boxes they will appear in on the W-2 form.

Added your Holidays for the upcoming year (if you utilize the time off calendar)

- Please see this [knowledge base article](#) for maintaining your holidays for the upcoming year