2018 Year End Client Checklist

During Year End processing payroll can get quite busy. We want to provide you with a handy checklist to help streamline some important items. Please feel free to use this as your reference.

This is not required to be returned to Payroll Partners.

- [ ] Complete Payroll Partners Year End Authorization online by Nov 30, 2018.
- [ ] Receive W2/1099 Edit Reports in November and inform us of any corrections ASAP.
- [ ] Receive W2/1099 Preview Reports in mid-December and inform us of any corrections before submitting last payroll for 2018.
- [ ] Inform Payroll Partners about 1095 processing and complete updates by 12/21/2018 (If applicable, see Year End Guide for more information)
- [ ] Verify all voided or manual checks have been accounted for in the payroll system before submitting last payroll for 2018.
- [ ] Complete a Bonus Payroll Worksheet for bonus payrolls one week prior to the bonus checkdate.
- [ ] Verify all 1099/Contractor's information/payments are turned in or made in the payroll system before submitting last payroll for 2018.
- [ ] Verify all additional fringe benefits (i.e. auto allowance, Third Party Sick Pay, gift cards, etc) are included in payroll system before submitting last payroll for 2018.
- [ ] Update Clergy Salary/Housing and Employee Salary/Hourly Pay Rate Changes for 2019.
- [ ] Update Benefit Rate Changes, Medical, Dental, and Vision for 2019 prior to start of benefit year. (If using a benefit table in Evolution, please send information ASAP.)
- [ ] Receive W2/1099/1095 forms on or after January 15th from Payroll Partners.
- [ ] Distribute W2/1099/1095 forms to employees by January 31,2019.
- [ ] Get new 2019 Federal W-4 Forms from Exempt employees (non-clergy) by Feb. 15,2019.
- [ ] Relax and celebrate another successful year end!!