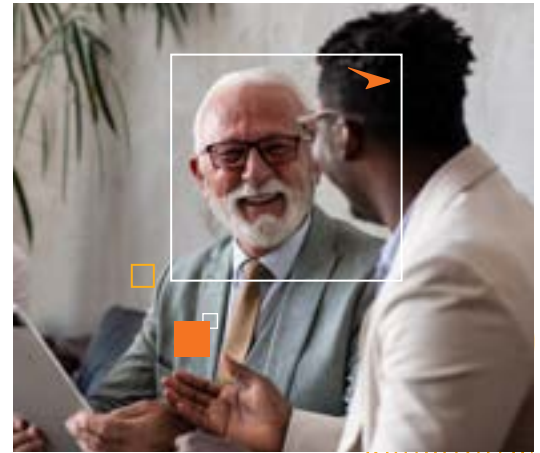


Streamlined CPA Year-End Kit

As part of Paycor's ongoing effort to make payroll and HR as painless as possible, we have streamlined the year-end kit to make it consistent for you and our mutual clients. For instance, you will notice the hold form and year-end website will be the same for clients and CPAs.

We pride ourselves on providing superior service to both our clients and their CPAs, especially during this critical time of year.



INCLUDED IN THE KIT

1. A list of important Paycor dates and deadlines
2. Instructions for electronically completing and submitting the hold form

YEAR-END WEBSITE

[Paycor.com/Year-End](https://www.paycor.com/Year-End)

- | | |
|--|--|
| <input type="checkbox"/> Electronic "Hold Books Open" form | <input type="checkbox"/> Client year-end Interactive PDF |
| <input type="checkbox"/> Important dates and deadlines | <input type="checkbox"/> Form to request online reporting access |
| <input type="checkbox"/> Educational year-end webinars | <input type="checkbox"/> Other important documents and resources |

PARTNER CARE YEAR-END SERVICES

Access to client database

- Client needs to complete CPA authorization form found on the year end website

Variety of standard reports

- Expanded year-to-date summary
- Customized general ledger

Online Reporting

- | | |
|--|--|
| <ul style="list-style-type: none">• Access to mutual client data anytime, anywhere• Single sign-on for access to all mutual clients | <ul style="list-style-type: none">• Departmental summaries• FICA tip detail |
|--|--|



Questions?

Email PartnerCare@Paycor.com



Your Paycor Service Team

At Paycor, we want to help you serve your clients better. Our responsive support specialists are here to assist. If you or your clients have questions about Paycor, please reference this list of contacts.

If your clients have questions or need support:

One of our guiding principles is “**Take Care of Customers First**,” and our Support Center delivers a responsive, omnichannel customer service experience built for convenience.

- **Visit our Support Center** at [Support.Paycor.com](https://support.paycor.com) for FAQs, knowledge base articles, training resources and more.
- **Log in to the Paycor platform and create/open a support case.**
- **Live chat with a Support Advocate** by logging into the Paycor platform and selecting “**Get Help**.” (*HINT: This method has the fastest response times.*)
- **Call Customer Support: 855-565-3285**

If you have questions or need support, contact Partner Care:

For general inquiries including year-end support, reporting, or access to your clients’ HR and payroll data.

- **For concerns or general support, email:**
PartnerCare@Paycor.com
- **Call Partner Care Support: 855-565-3298**



Important Year-End Dates:



Before last payroll dated in 2023 verify and update all employee information.

November 23-24	Paycor is closed.
December 8	Deadline to make year-end verification changes and alert Paycor to hold books open until 12/29/23.
December 14	Deadline to opt-in to paperless Form W-2
December 25	Paycor is closed.
December 27	Deadline to process last payroll check of the year
January 1	Paycor is closed.
January 2	Due Date for W-2 Opt-Out Waivers
February 9	Deadline to submit ACA/1095C forms (<i>Important note: If you have employees in California, the deadline to submit is January 12.</i>)



DECEMBER 2023				
Mo	Tu	We	Th	Fr
27	28	29	30	1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	29

JANUARY 2024				
Mo	Tu	We	Th	Fr
1	2	3	4	5
8	9	10	11	12
15	16	17	18	19
22	23	24	25	26
29	30	31	1	2

Questions?

Email PartnerCare@Paycor.com

DUE DEC. 8, 2023

Should Paycor Hold My Books Open Until December 29, 2023?



Your payroll records will be closed after processing the last scheduled payroll run of the year to accelerate the processing of W-2s and tax filings, unless they have items that require additional payrolls or adjustments. **If your books are not held open and a payroll is needed after the last scheduled payroll run of the year, we may have to reopen books, correct W-2s, and amend returns and the fees associated with each instance.**

If one or more of the items in the box below applies, please submit the "Hold Books Open" form electronically at [Paycor.com/Year-End](https://www.paycor.com/Year-End).

Key Dates:

December 8, 2023 – "Hold Books Open" Form Deadline*

December 29, 2023 – Books will be held open until this date if form is submitted.



If you answer "**Yes**" to any of the following questions, you will need to request for Paycor to hold your books open until **December 29, 2023**.



- Do you provide any of your employees with a company car that also can be used for non-work related purposes?
- Are you an S-Corporation and do you provide health insurance on behalf of the 2% shareholders?
- Will you be paying any year-end bonuses that will not be included in a regularly scheduled payroll?
- Do you pay group-term life insurance premiums for employees with coverage over \$50,000?
- Do you have employer-paid health savings account (HSA) contributions that have not been previously reported?
- Do you have additional 1099 information (contracted labor) to send to Paycor?
- Have any of your employees taken advantage of the company's third party sick pay plan? If yes, your books will be held open until January 12, 2024. Any processing of payrolls after the paycheck date may result in late payments/filing with the agency. Associated penalties and interest will be the responsibility of your company.



For more information

visit [Paycor.com/Year-End](https://www.paycor.com/Year-End) to learn more.