



End-of-Year Tax Checklist

Complete this **End-of-Year Tax Checklist** to make sure you haven't missed a step or have any discrepancies and find answers to commonly asked year-end questions.

- If necessary, request to have Paycor hold your books open by **December 8, 2023**.
- Reconcile all four quarters of 941s.
- Report all independent contractors' earnings for 1099s.
- Make sure 1099 earnings are 1099 NEC Earnings and NOT Regular Earnings
- To ensure your payroll filings and tax account number(s) are correct, **click here** to validate your payroll tax information.
- Use our **Employee Change Management Toolkit** to communicate the value of switching to paperless W-2s to your employees.
- Verify your mailing address** for any printed W-2s.
- Confirm that employee W-2 information is correct by verifying employee addresses and legal names are correct.
- Verify state unemployment rates and **update for next year if necessary**.
- Generate Your W-2 Preview Report and **access your completed tax documents** online.
- Check that **all 1099 employees** have correct earnings/wages/taxes.
- Check your **tax document creation status tracker** in Paycor.

Want more information?
Visit [Paycor.com/year-end](https://www.paycor.com/year-end) to learn more.