

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 5, 2025**.
- ☐ Reconcile all four quarters of **941**.
- ☐ Report all independent contractors' earnings for **1099**.
- ☐ Make sure **1099 earnings are 1099 NEC Earnings** and NOT Regular Earnings. And check that **all 1099 workers** have correct earnings/wages.
- ☐ To ensure payroll filings and tax account number(s) are correct, follow this click path in Paycor: **Global Navigation > Pay > Pay Settings > Taxes**
- ☐ Generate your W-2 Preview Report before your last payroll of the year and **access your completed tax documents** online.
- ☐ **Verify your mailing address** for any printed W-2s.
- ☐ Confirm that employee W-2 information is correct by verifying employee, addresses, social security numbers, and legal names are correct.
- ☐ Verify state unemployment rates and **update for next year if necessary**.
- ☐ Check your **tax document creation status tracker** in Paycor.



Want more information?

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