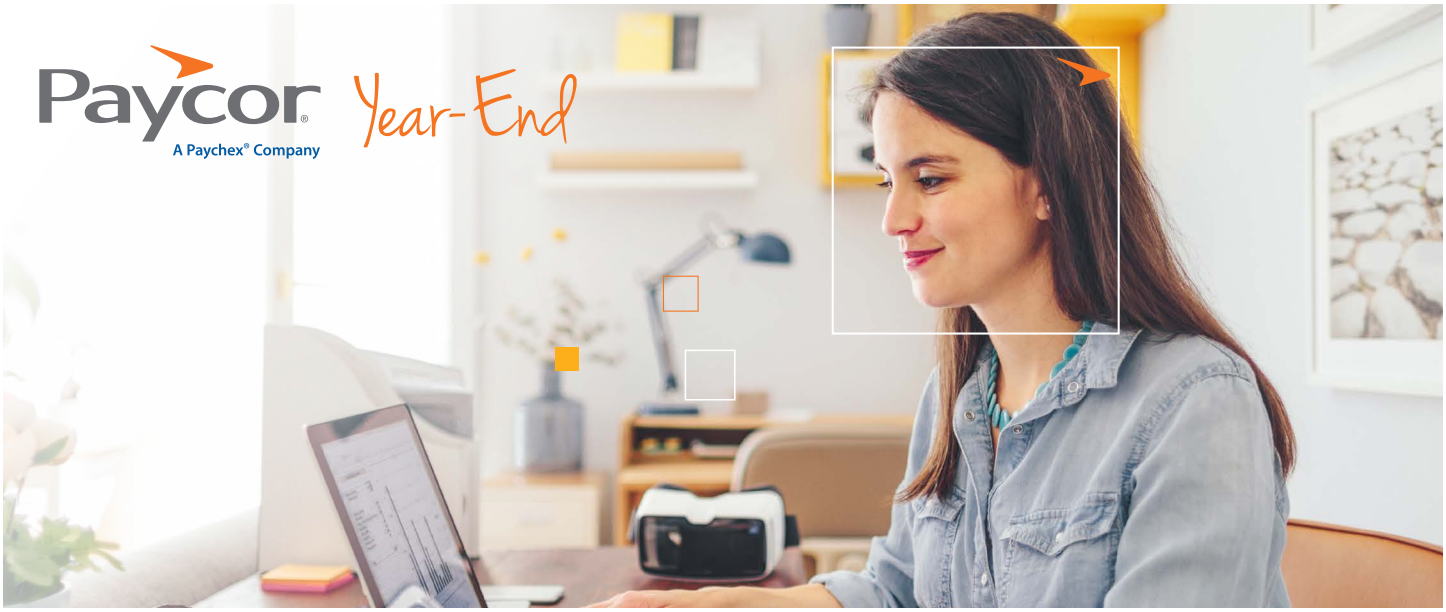
Paycor
A Paychex® Company

Year-End



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.

- ☐ 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 and **access your completed tax documents online** any time.
- ☐ Verify state unemployment rates and **update for next year if necessary.**
- ☐ **Verify your mailing address** for any printed W-2s.
- ☐ Confirm that all employee W-2 information is correct by verifying employee addresses, social security numbers, and legal names are correct.
- ☐ Check your **tax document creation status tracker** in Paycor.

Special Earnings to Report

- ☐ **Third-party sick pay.**
- ☐ Premiums for health and accident insurance paid by an S corporation on behalf of **2% shareholder-employees.**
- ☐ **Taxable cash and non-cash fringe benefits** (for example, personal use of a company car).

Want more information?

Visit **Paycor.com/Year-End-Embedded** to learn more.