

# Employee End of the Year Checklist

Don't wait till tax season, make sure your employee's files are up to date by following these processes.

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## Confirm Employees' Identifying Information (and that it's correct)

- Legal name
- Social Security number
- Address

## Prepare For Your Form W-2 Responsibilities

- Order forms
- Review records
- Pay attention to nuances (changes due to life events)
- Fill out forms
- Distribute to employees
- File Forms W-2 (and W-3) with the SSA and any state and local governments

## Check Employment Tax Rates And Wage Bases

- Keep an eye out for your new SUTA tax rate (your state will likely send this to you) and any wage base changes
- Pay attention to the new Social Security wage base
- Sneak a peek at the IRS's federal income tax withholding tables

## Review Employee Benefits

- Accrued time off
- Retirement plan eligibility
- Insurance