

Heartland

To help prepare for a successful Year-end, please review this checklist to ensure a smooth transition into the new year. Your Client Year-end Guide also provides additional helpful information.

We truly appreciate your business and look forward to continuing to service your payroll needs!

Year-end Employer Checklist

Verify Information and Streamline Year-end

- Add your employees' email addresses in their profiles and enable Employee Self-Service (ESS) so they can access pay stubs and W-2s 24/7. (No additional cost!) [Click here for more info](#) or here for the [client guide](#).
- Provide the [Employee Year-end Verification Checklist](#) to your employees via print or email to check the accuracy of their info using [Employee Self-Service](#) or their most recent pay stub. Updating employee information timely is essential to ensure accurate tax returns.
- Verify FEIN, State, Local ID, and unemployment tax rates are correct; found on your *Payroll Summary* report.
- Forward all Federal, State, and local tax agency rates/notices for 2025 as soon as received.

Wage and Information Reporting

- Verify all employee compensation is reported for the current tax year, including Bonuses, Fringe Benefits, and Third-Party Sick Pay (disability).

By Friday 12/27/24

- Gather and report Fringe Benefit information (Group Term Life, S-Corp Insurance, personal use of company car, etc.) by Friday, 12/27/24.
- Report any manual (in-house) payments and voided checks by 12/27/24.

By Wednesday 1/15/25

- Send Third-Party Sick Pay (disability) reports as soon as received, by 1/15/25.

If applicable: Tuesday 1/7/25

- [Affordable Care Act \(ACA\)](#): Gather information if applicable; validation opens on 1/7/25.