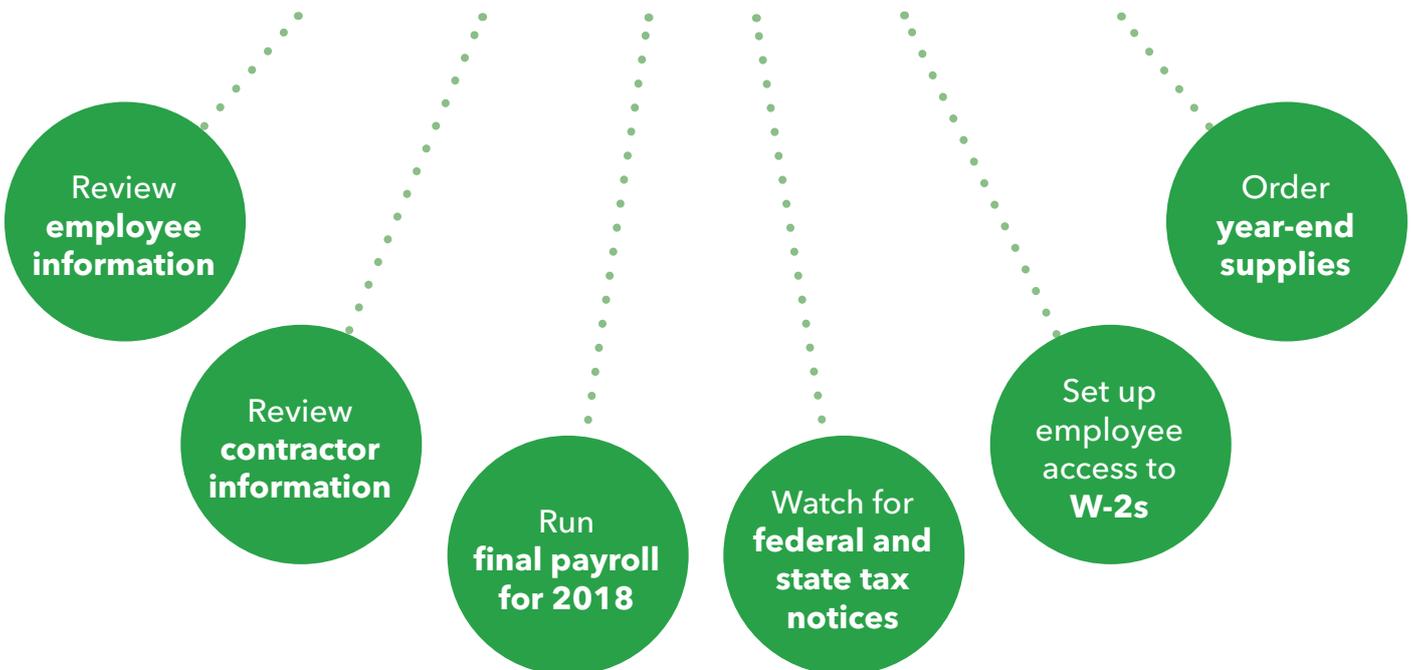




QuickBooks Payroll Year-end checklist



This is an overview of employee and payroll related tasks (with links to additional, product-specific resources) you should complete for a smooth year-end.

Review and update employee information

* This includes inactive or terminated employees that are no longer with the company

- Navigate to the employee section and review the following:
 - Legal name
 - Social Security numbers
 - Current address for all employees who received paychecks in 2018 from your business

- Review employee wage information
- Review your local tax rates and settings
- Review benefit information for each employee
 - S-Corp
 - 401(k)
 - Health insurance and other contributions
 - Commission
 - Fringe benefits

- Review general sick and vacation settings
- Check time off hours used per employee
- Make sure all employee paychecks have been reported (handwritten, commission, termination, and bonus checks)

If you're using QuickBooks Desktop Payroll, make sure to install the latest payroll update by going to Employees > Get Payroll Updates. Select Download Entire Payroll Update and select the Update button.

Review and update contractor information

- Confirm each contractors' name, address and Taxpayer Identification Number (TIN)
- Request a W-9 as needed
- A 1099-misc form is required for independent contractors or businesses that were paid at least \$600 in 2018

Run final payroll for 2018

- Create any year-end bonuses
- Include final payments for fringe benefits, commissions, and contributions

The last day a paycheck can be dated for is 12/31/2018.

However, if paychecks are direct deposit, the holidays may impact processing times. Make sure direct deposits are approved/sent by 12/27/2018 before 5PM PT*.

- *If you have QuickBooks Online Payroll Enhanced, send it by 12/28/2018 before 5PM PT
- *If you have QuickBooks Online Payroll Full Service, send it by 12/31/2018 by 7AM PT

Please visit "[How will federal holidays affect my payroll processing?](#)" for more information on when to send direct deposit payroll during a holiday

Keep an eye out for federal and state tax rate notices

- State agencies may assign a new state unemployment insurance (SUI) rate for the new year. If you get a rate notice, you'll need to update your SUI rate in your payroll account before your first payroll in 2019.
 - Federal and state agencies may assign a new tax deposit schedule for your business. If you receive this notice, you will need to update this in your payroll system.
-

Set up employee access to W-2s

- Through QuickBooks Workforce, whether you're using QuickBooks Desktop Payroll or QuickBooks Online Payroll, you can allow your employees to view and manage their pay stubs and W-2s online. See the [QuickBooks Workforce FAQ](#) to learn more.

* Remember, your regular employees get W-2s, independent contractors get 1099s

File 1099 MISC Forms for independent contractors

- If you have independent contract workers, you may need to prepare 1099-MISC forms if you paid at least \$600 to a contractor or business during 2018
-

Order year-end supplies

- If you are printing your W-2s for your regular employees, [order W-2 perforated forms and envelopes](#)
- Order [labor law compliance posters](#)



Success!

Based on the service you use, visit our Year-End Centers for more in-depth guidance, including important year-end dates, to wrap up your year worry free!

- [QuickBooks Online Payroll Enhanced Payroll \(QBOP\)](#)
 - [QuickBooks Online Payroll Full Service Payroll \(QBFSP\)](#)
 - [QuickBooks Desktop Basic, Standard, Enhanced Payroll](#)
 - [QuickBooks Desktop Assisted Payroll](#)
 - [Intuit Online Payroll Enhanced \(IOP\)](#)
 - [Intuit Online Payroll Full Service \(IFSP\)](#)
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