



## 2018 Year-End Checklist

Use this checklist to ensure your PayPath plan is ready for year-end. **Please email completed forms to [paypath@tasconline.com](mailto:paypath@tasconline.com) or fax to 608-661-9600.** If you have questions, please contact PayPath Support.

- Verify SSNs, names and addresses** using SSN Verification Report available in Online Employer or by contacting PayPath Support. Clients should validate this information against HR/employment files.
- To save you time and ensure forms are mailed according to the IRS timeline, all W-2s will be mailed directly to employees' home addresses this year. Standard postage rates will apply. **Please notify us no later than December 31** if you require special mailing, or wish to opt out. *(If you elect not to use this service, there will be a handling fee of \$25 applied to your account.)*
- Review status of active and inactive employees.** Help keep the database clean and working efficiently by updating/terminating former employees. For terminated employees, remember to delete deductions and direct deposits so that employee's information is purged in the new year.
- Payroll and bonus checks should never clear prior to check date. If you plan to disburse manual checks to employees, such as a holiday or annual bonus, **ensure employees understand not to cash checks early.** *(A \$25 fee is assessed for each check cashed early.)*
- Review federal and state ID numbers, deposit frequencies and rates for 2019.** You can verify your company's tax rates and tax IDs on the Tax Liability Report included with your payroll reports.
- Report any voided checks and in-house checks prior to year-end deadlines.** TASC will not be responsible for penalties and interest incurred from 2018 payrolls reported after the deadline.
- Submit Fringe Benefit Worksheet** for processing.
- Review payroll schedule for 2019** (available online under Web Reports or by contacting PayPath Support).
- Review all salary deferral deductions for 2019** to ensure catch up eligible employees will have deferrals taken concurrently all year. If unmonitored, deferral deductions will reset in the calendar year resulting in possible excess deductions.

<input type="checkbox"/>	Vacation, sick, PTO, etc. balances can be set to carry over or zero out. If applicable, <b>indicate what each balance should do</b> on the first payroll of 2019.	<i>(select one)</i>	Carry Over	Zero Out
		Vacation		
		Sick		
		PTO		
		Other		

- Do you have deductions that need limit changes? **Please specify below.** Limits for retirement plans will be automatically changed. Limits for individual deductions such as garnishments do not apply.
  - Forward third-party sick pay reports
  - Forward all 2019 unemployment rates
  - Employer reporting of healthcare costs

Name:	Phone:
Company Name:	Company Code:
Signature:	