

2022 Year End Checklist – PART I

Review all sections that apply to your payroll

* *Details and instructions for each section can be found on the pages listed*

1. EMPLOYEE INFORMATION REVIEW - page 2

- *To be completed by ALL companies*

2. EMPLOYEE PAPER PAYCHECK REVIEW - page 2

- *Complete if you issue physical (paper) paychecks*

3. BONUS/ALTERNATIVE PAY REVIEW - page 3

- *Complete if you provided bonuses/alternative pay (i.e. gift cards, physical gifts, cash bonuses, etc.) that were not recorded in payroll*

4. BENEFITS DEDUCTIONS/CONTRIBUTIONS REVIEW - page 3

- *Complete if you offer benefits that could reflect on employee W-2s*

5. LABOR LAW POSTERS - page 3

- *Information on Labor Law Posters and Easytrack's offerings*



6. TAX CREDITS - page 4

- *Details on credits for which your company may qualify*


1. EMPLOYEE INFORMATION REVIEW

a) Review and update Names, Emails, Addresses, Social Security Numbers, etc.

▪ How to Review:

- i. Click the **Reports** icon in the menu on the right side of the screen 
- ii. Under the **Employee** column, select **Employee Details**
 - Next to **Status**, select **All**
 - **UNCHECK** the box for **Mask SSN**
- iii. Click the **Printer** icon at the bottom of the page in the dark gray bar 
 - *Review all employees who worked in 2022.* Each person will receive a W-2.

▪ How to Update:

- i. Click the **Employees** icon in the menu on the right side of the screen 
- ii. If updating an Inactive employee, check the box for **Show Inactive**
- iii. Select the Employee from the dropdown menu
- iv. Update information where applicable and click **Save** in the dark gray bar at the bottom of the screen

IMPORTANT:



▪ **Social Security Number corrections:**

- i. If you find an *incorrect Social Security Number*, please [notify Easytrack](#) so that we can correct any prior filings that may have included the incorrect number
- ii. Any corrections will be billed at Easytrack's hourly rate of \$120/hr

2. EMPLOYEE (PAPER) PAYCHECKS

a) If you give employees physical checks, review all employee paychecks to ensure everything has been recorded *and* there are no duplicate checks

▪ How to Review:



- i. Click the **Reports** icon in the menu on the right side of the screen 
- ii. Under the **Employee** column, select **Employee Payroll**
- iii. Select **This Year** for the Period
- iv. Select **Detail** for the Mode
- v. Click the **Printer** icon at the bottom of the page in the dark gray bar 
- vi. Review *all checks* recorded this year

IMPORTANT: If you migrated from another payroll system, you will see 0 in the Check # column for any payroll done *prior* to when you started with Easytrack.

3. BONUSES/ALTERNATIVE PAY

a) **If you provided employees with cash, gift cards, physical gifts, etc. and you didn't record this in payroll, [contact us](#) so we can ensure everything is recorded properly**



▪ **How to Review:**

- i. Click the **Reports** icon in the menu on the right side of the screen 
- ii. Under the **Employee** column, select **Employee Earnings by Type**
- iii. Select **This Year** for the Period
- iv. Make sure (All Employees) is selected for the Employee Filter
- v. Click the **Printer** icon at the bottom of the page in the dark gray bar 
- vi. Review everything recorded in the payroll system for each employee

4. BENEFITS DEDUCTIONS/CONTRIBUTIONS

a) **Reconcile benefits recorded in the payroll system for *January 1, 2022* through *September 30, 2022***

▪ **How to Reconcile:**

- i. Click the **Reports** icon in the menu on the right side of the screen 
- ii. Under the **Management** column, select **Deductions Summary**
- iii. Enter *1/1/2022* to *9/30/2022* in the Dates boxes
- iv. Make sure (All Employees) is selected for the Employee Filter
- v. Click the **Printer** icon in the dark gray bar at the bottom of the screen 
 - Reconcile the benefits recorded in Easytrack to your accounting records (QuickBooks if you use it)
 - Reconcile the benefits recorded in Easytrack to statements/invoices from your Insurance Carrier/Benefits Broker
 - [Contact us immediately](#) if you notice a discrepancy or have any questions.

This is very important. All corrections and adjustments must be made prior to December 22.

5. LABOR LAW POSTERS

a) **If you are already enrolled in our Labor Law Posters Automated Service, you do not have to do anything.**

b) **If you are not enrolled in a poster service, there WILL be new posters in the near future, and there have been several updates in recent months.**

Please call or email us to enroll so you don't have to think about it later.

6. TAX CREDITS

* *Click the links below for more information on these credits*

a) Small Business Health Care Tax Credit for Small Employers

b) Section 45S Employer Credit for Paid Family and Medical Leave

- Check with your CPA to see if your business qualifies for either of these tax credits.
- You do NOT need to communicate anything about this with Easytrack.