

Year-end payroll checklist

Start the year-end conversation with organized employee information, payroll records, and a clear list of questions.

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- ☐ **Verify employee information securely**
Ask employees to review their legal names and mailing addresses. Resolve identifier discrepancies through your provider's secure process.
- ☐ **Review year-to-date payroll**
Compare payroll totals with your records. Flag missing payrolls, voids, corrections, or payments processed outside your regular payroll.
- ☐ **Gather final adjustments**
Discuss bonuses, taxable benefits, third-party sick pay, and other applicable adjustments with your payroll and tax advisers.
- ☐ **Plan the final payroll**
Confirm the final submission date, payday, funding, and holiday processing schedule. Ask how late corrections will be handled.
- ☐ **Agree on forms and responsibilities**
Confirm who prepares, reviews, files, and distributes W-2s and any other required forms. Check official deadlines and employee delivery arrangements.
- ☐ **Prepare for the next year**
Review the upcoming pay calendar, agency notices, rate changes, and record storage. Keep a list of unresolved questions for your provider.

Preparation guidance only. Filing and deposit responsibilities vary by employer. Confirm current deadlines, form requirements, and tax treatment with your provider and official agency guidance.

Official sources and online guide

Cal Payroll / resources / year-end-checklist