



Payroll Year-End Checklist



DYNAMICS GP PAYROLL

- Get the latest 2024 tax tables (Do this now!)
- Install the year-end update
- Create the year-end file as a test
- Verify W-2 and 1099-R information
- Remove year-end file
- Complete all pay runs for 2024
- Make a backup
- Create the year-end file
- Make a backup
- Verify W-2 and 1099-R information
- Print/ e-mail* the W-2/W-3
- Create electronic W-2* for over 10
- Print the 1099-R/1096
- Archive inactive employees (GP HR Only)**
- Setup 2025 fiscal periods
- Close 2024 fiscal periods**
- Update 2025 payroll tax tables
- Start processing 2025 payrolls

*W-2 Only /**Optional





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If upgrading to Dec. 2024, ensure you upgrade your Integrity Data products to Dec. 2024

INTEGRITY DATA GP PAYROLL MODULES

Employee Accounts & Splits / FTE Manager

- Copy employee positions

Enhanced Retirement Plans

- Review retirement catch-up contribution limit and update shared maximums for deduction and benefit code groups

50+ = \$7,500

60 – 63 = \$11,250

64+ = \$7,500

Life Insurance Tax Calculator

- Verify IRS rates (no changes)

2024 Publication 15-B

- Comprehensive Leave Manager / PTO Manager

- Apply carry over limits

Create lump sum posting dates (year-end wage work file)

INTEGRITY DATA SELF-SERVE OPTIONS

Employee Email Suite

- Install the year-end update prior to sending out your W-2s to ensure your employees get the correct form

HR for GP Employee Self-Serve Customers

- Before Efilng – Check that the File location is set in the HRP Setup window (Setup>Payroll>HRP Setup)
- Change the Reporting Year in the Upload Window(Routines>Payroll>Upload W-2 to HR)