

2025 Integrity Data Year-End Payroll and Human Resources Checklist

1. General Year-End Best Practices

- Finish all payrolls for 2025.
- Finalize all employee adjustments (gross-ups, fringe benefits, GTL, PUCC, 3PSP).
- Reconcile payroll summaries with W-2s and 941s.
- Review manual checks, TSA changes, and business expense pay codes.

2. Integrity Data Product-Specific Guidance

Dynamics GP Payroll

- 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 2025
- Make a back up
- Create the year-end file
- Make a back up
- Verify W-2 and 1099-R information
- Print / email the W-2/W-3
- Create electronic W-2 for over 10 employees
- Print the 1099-R/1096
- Archive inactive employees (GP HR Only)**
- Setup 2026 fiscal periods
- Close 2025 fiscal periods
- Update 2026 payroll tax tables (Do not load these until you have completed your last 2025 payroll).
- Start processing 2026 payrolls

Integrity Data GP Payroll Modules

- **Employee Accounts & Splits / FTE Manager**
 - Copy employee positions

- **Enhanced Retirement Plans**
 - Review retirement catch-up contributions 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 Changes [IRS Releases 2025 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 E-mail Suite**
 - Install the year-end update prior to sending out W2's to ensure your employees get the correct form

HR for GP Employee Self-Serve Customers

- Before E-Filing, Check 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)

3. IRS & State Regulatory Deadlines

- W-2 Distribution to Employees: Due by January 31, 2026.
- ACA 1095-C Distribution: Due by March 2, 2026.
- ACA E-Filing to IRS: Due by April 1, 2026.
- Form 941 Q4 Filing: Due by January 31, 2026.
- State SUI Rate Updates: Must be completed before first payroll of 2026.

4. System & Configuration Updates

- Update payroll tax tables and verify mapping.
- Create new pay cycles and confirm holiday calendars.
- Refresh workers' comp rates and benefit configurations.

5. Reference Links

IRS Website: <https://www.irs.gov/>

Social Security Administration: <https://www.ssa.gov/>

MDGP Year-End Update: Payroll (+) [Microsoft Dynamics GP Year-End Update 2022: U.S. Payroll - Microsoft Dynamics GP Community](#)

MDGP Year-End Update 2022: W-2 and W-3 information, common questions and answers (+) [Microsoft Dynamics GP Year-End 2022 W-2 and W-3 information, common questions and answers - Microsoft Dynamics GP Community](#)

MDGP Year-End Update 2022: Electronic W-2 filing (EFW2) (+) [Microsoft Dynamics GP Year-End 2022 Electronic W-2 Filing \(EFW2\) - Microsoft Dynamics GP Community](#)