



GP Webinar

Go for Gold
Win the Year-End Olympics



WEBINAR OVERVIEW

Webinar Overview

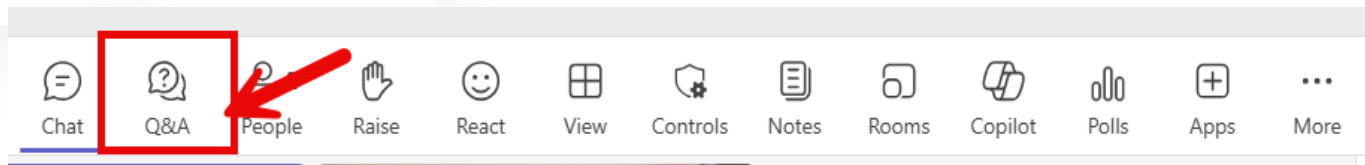
This webinar provides a comprehensive overview of year-end payroll processes and vital updates for professionals.

Key Topics Covered

Focus includes Integrity Data updates, W2 distribution, ACA reporting, and compliance requirements for year-end.

Expert Support

Expert team available throughout the session to answer questions and provide guidance for attendees.





Topics



- 2025 Year-end schedule
- The One Big Beautiful Bill
- Year-end check lists
- ACA updates and year-end
- Helpful links
- And more..
- Q & A



INTRODUCTION



Margi Jandro
HRP Consultant



Jill Lister
Dynamics GP Quality
Engineer

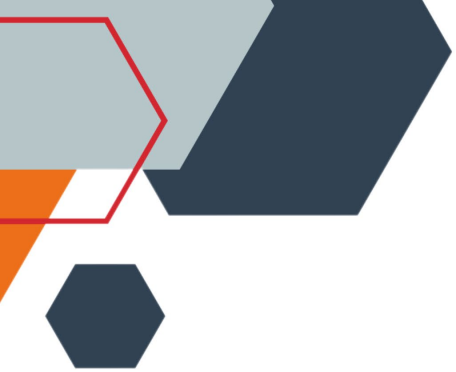


Dawn Blue
Professional Services
Engineer & Lead



Shellie Austin
Service Manager





2025 YEAR-END SCHEDULE OVERVIEW

November 2025 Release: The 2025 Features Update was released by Microsoft and Integrity Data.

December 4, 2025 - Microsoft released the year-end update.

December 15, 2025 – Integrity Data anticipates year-end update release. NO REGISTRATION KEYS REQUIRED.

Mid-December 2025 - U.S. Payroll tax table update is typically scheduled to be released mid to December each year **Do not install this tax table update until ALL pay runs for the 2025 year are completed.**

Mid-January 2026 – Microsoft releases 2025 Round 2 tax update(details not yet available)

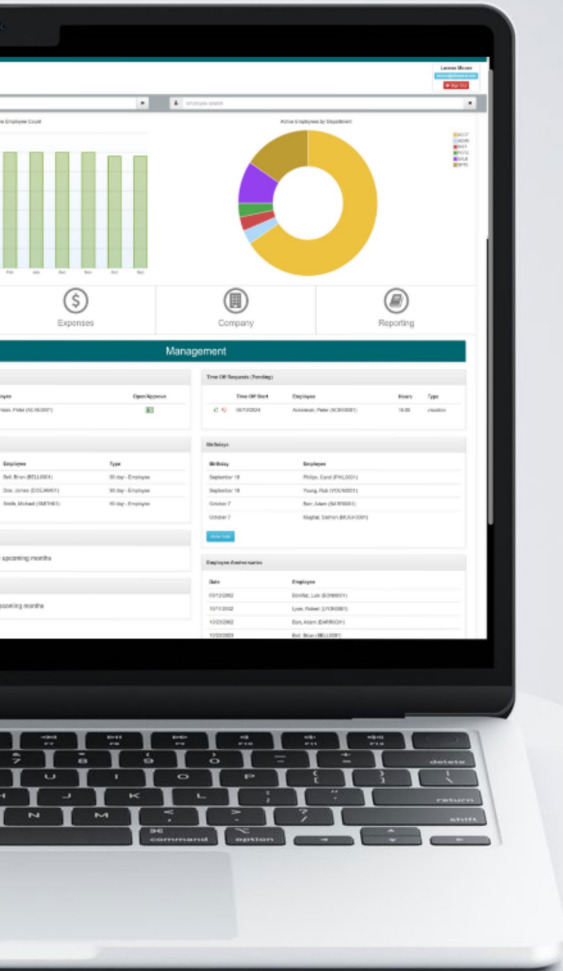
February 2, 2026 – Distribute forms W-2's, EFW2

March 2, 2026 – Distribute forms 1095-C to employees

March 31, 2026 – ACA 1095-C & 1094-C E-filing deadline to IRS



RELEASE FEATURES AND IMPORTANT LINKS



2025 Microsoft Year-End Changes - RELEASED

- No IRS changes for Payroll W-2 & W-3, or ACA 1095-C forms.
- No changes to electronic W-2 filing for 2025.
- No updates related to Payroll Secure Act or W-2 overtime premium.

Microsoft Payroll US Year End Update

- [US year-end update - Dynamics GP | Microsoft Learn](#)

Microsoft Dynamics GP 2026 upgrade blog series

- [Microsoft Dynamics GP 2025 Upgrade Blog Series Schedule](#)

Microsoft Dynamics GP YE release

- [U.S. Year-End Update for Microsoft Dynamics GP | Microsoft Learn](#)

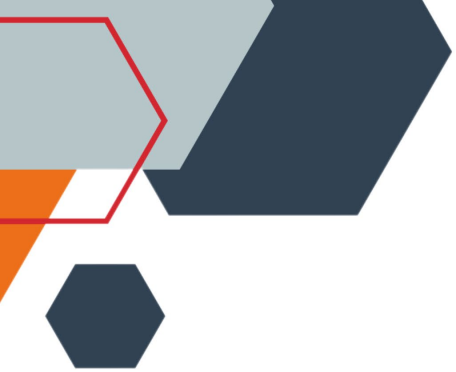
GP U.S. Year-End Update 2025 RELEASED

- [Microsoft Dynamics GP U.S. Year-End Update 2025 RELEASED!!](#)

Integrity Data Year-End Update – Release date December 15

- [Download Software Solutions - Integrity Data](#)





IRS Maximum Wage Limits

- 401(k) plans: The contribution limit has increased to \$24,500 from \$23,500 in 2025
- IRA Plans Contributions: The contribution increased to \$7,500 up from \$7,000 in 2025
- Catch-Up Contributions: For those eligible, and additional \$1,000 catch-up contribution is allowed for IRAs.
- These limits reflect the adjustments made by the IRS for inflation and other factors
- 401(k) limit increases to \$24,500 for 2026, IRA limit increases to \$7,500 | Internal Revenue Service
- FICA Wage limit: 2026 is \$184,500 up from 2025 limit of \$176,100



GP Year End Checklist

- ☐ Install the year-end update (if needed)
- ☐ 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 backup
- ☐ Create the year-end file
- ☐ Make a backup

2025 Year-End Checklist [2025 Integrity Data Year-End GP Payroll and Human Resources Checklist - Integrity Data](#)

Note: You can start processing 2026 payrolls once you have created the Year-end file (***Backup! & get new tax tables first!***)

Note: If you are processing the 1st payroll of 2026 in the year 2025, be sure the GP user date is set to 2026.



GP Year End Checklist cont.

- ☐ Verify W-2 and 1099-R information
- ☐ Verify W-2/W-3's
- ☐ Create electronic W-2 for over 10
- ☐ Print the 1099-R/1096
- ☐ Archive inactive employees (GP HR Only)** - Optional
- ☐ Setup 2026 fiscal periods
- ☐ Close 2025 fiscal periods
- ☐ Update 2026 payroll tax tables (only after completing 2025 payrolls)
- ☐ Update SUI rates & wage limits
- ☐ Update local tax and wage limits
- ☐ Start processing 2026 payrolls



Integrity Data YE checklist

☐ Employee Accounts & Splits / FTE Manager

- ☐ Copy employee positions

Enhanced Retirement Plans

- ☐ Review retirement catch-up contribution limit and update shared maximums

Life Insurance Tax Calculator

- ☐ Verify IRS rates for changes

Comprehensive Leave Manager / PTO Manager

- ☐ Apply carry over limits
- ☐ Create lump sum posting dates (year-end wage work file)

If upgrading GP October or YE releases, ensure you upgrade your Integrity Data products!



Integrity Data YE Checklist for Self Service

☐ Employee E-Mail 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 E-filing – 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)



Secure Act 2.0

Here is the link to Terry Heley's Year-End blog page which contains information on Secure Act 2.0
[Microsoft Dynamics GP Year-End 2025: Payroll Secure Act 2.0 Considerations](#)

Terry Heley has a link that has SQL views to create SmartLists. Click on this link [created some new simple SmartList to help you identify employees](#) This smartlist will give you the over the threshold amount and a SmartList for calculating employee age.

Below is the Payroll Year-End Wage view from the above link, once you have it installed, you can restrict by year and sort by the Social Security Wages to identify High Income earners

NOTE: You may need to enlist your Partner or IT department to load the SQL view(s).

ROTH HIGH INCOME												
RPTNGYR	LASTNAME	FRSTNAME	EMPLOYID	WGTPCOMP	FEDITXWH	SSECWGS	SSTXWHLD	MCRWGTPS	MDCRTXWH	STATECD	STATEWGS	STATINTX
2025	Kahn	Wendy	KAHN0001	359395.49000	191622.37000	176100.00000	10918.20000	359335.49000	6644.38000	IL	350079.21000	17329.41000
2025	Barbariol	Angela	BARB0001	369150.60000	192165.39000	176100.00000	10918.20000	369090.60000	6873.63000	IN	352245.96000	10566.83000
2025	quick	quick	QUICK	205079.22000	0.00000	176100.00000	10918.20000	205104.22000	3019.95000		0.00000	0.00000
2025	smith	smith	SMITH	218890.15000	115201.84000	176100.00000	10918.20000	218890.15000	3343.92000		0.00000	0.00000
2025	SS	SS	SS	395197.84000	207995.58000	176100.00000	10918.20000	395197.84000	7487.15000	IL	160000.00000	7920.00000
2025	Tiano	Mike	TIAN0001	361859.86000	192015.87000	176100.00000	10918.20000	361799.86000	6702.30000	MO	145000.00000	6810.00000
2025	Barr	Adam	BARR0001	387531.58000	198056.12000	176100.00000	10918.20000	387471.58000	7305.58000	WI	369886.90000	28188.36000
2025	bb	bb	BB	217940.15000	115102.71000	176100.00000	10918.20000	217940.15000	3321.59000	SC	200000.00000	2412.58000
2025	Bonifaz	Luis	BONI0001	242583.24000	120103.79000	176100.00000	10918.20000	242548.24000	3899.88000	IL	227342.85000	11251.01000
2025	Buchanan	Nancy	BUCH0001	64709.34000	15716.44000	64649.34000	4008.26000					
2025	West	Paul	WEST0001	60217.07000	13559.04000	59581.67000	3694.06000	59581.67000	863.93000	IL	34540.15000	1693.77000
2025	Martinez	Sandra	MART0001	57758.60000	12666.71000	57638.60000	3573.59000	57638.60000	835.76000	MN	33080.15000	2751.23000



Secure Act 2.0 cont.

Here is another sample SQL script you can create to a SQL View that will create a Smartlist showing you the age of the employees.

```
CREATE VIEW vw_EmployeeAgeDetails AS SELECT EMPLOYID, LASTNAME, FRSTNAME, DEMPINAC, INACTIVE, BRTHDATE, DATEDIFF(YEAR, BRTHDATE, GETDATE()) - CASE WHEN MONTH(GETDATE()) < MONTH(BRTHDATE) OR (MONTH(GETDATE()) = MONTH(BRTHDATE) AND DAY(GETDATE()) < DAY(BRTHDATE)) THEN 1 ELSE 0 END AS EmployeeAge FROM UPR00100;
```

NOTE: You may need to enlist your Partner or IT department to load the SQL view(s).

EMPLOYEE AGE						
EMPLOYID	LASTNAME	FRSTNAME	DEMPINAC	INACTIVE	BRTHDATE	EmployeeAge
12	12	12	1/1/1900	No	1/1/1944	81
ACA	ACA	ACA	1/1/1900	No	1/1/1949	76
01MINNIE	test	test	1/1/1900	No	1/1/1950	75
122	122	2	1/1/1900	No	1/1/1965	60
13	12345678923456...	13456789	1/1/1900	No	1/1/1965	60
2673	test	test	1/1/1900	No	1/1/1965	60
941TON	ton	ton	1/1/1900	No	1/1/1965	60
ABC	aa	a	1/1/1900	No	1/1/1965	60



Payroll Overtime Premium

For this new regulation Terry Heley has created a wonderful blog [Microsoft Dynamics GP Year-End 2025: Payroll Overtime Premium](#) .

She has created a link where you can find an SQL view which will [created a simple SmartList to help compile overtime premium](#) under the Payroll US section install the OVERPREM25 view. This view will create Smartlist you can use.

NOTE: You may need to enlist your Partner or IT department to load the SQL view(s).

< GPUGPREM											
Company	Employee_ID	Employee_Name	Pay_Run_ID	Pay_Code	Pay_Amount	Hours_Worked	Pay_Date	Rate_of_Pay	Amount	RegAmt	OVERPREM
AB	OTT	A A	OVER	OVER	75.00000	5.00000	5/6/2027	15.00000	10.00000	50.00000	25.00000
abc	OTT	A A	OVER	OVER	75.00000	5.00000	4/12/2027	15.00000	10.00000	50.00000	25.00000
absss	OTT	A A	OVER	OVER	75.00000	5.00000	1/1/2025	15.00000	10.00000	50.00000	25.00000
dependentclaim	ACKE0001	Pilar Ackerman	OVER	OVER	200.10000	6.67000	4/12/2027	30.00000	20.00000	133.40000	66.70000
EMPLOYEE AGE	BONI0001	Luis Bonifaz	OVER	OVER	250.13000	6.67000	4/12/2027	37.50000	25.00000	166.75000	83.38000
GPUGPREM	BONI0001	Luis Bonifaz	OVER	OVER	250.13000	6.67000	1/1/2040	37.50000	25.00000	166.75000	83.38000
NEWSMARTLIST	OT	OT OT	OVER	OVER	300.00000	10.00000	1/1/2025	30.00000	20.00000	200.00000	100.00000



ACA REPORTING



ACA EMPLOYER MANDATE

All Applicable Large Employers (ALE) must comply with the ACA

Applicable Large Employer (ALE)

A U.S. employer with 50 or more full-time employees, including equivalents, in the previous tax year



WHAT'S NEW FOR ACA REPORTING IN 2025

- Alternative Furnishing Method
- Electronic Distribution Allowed
- Missing SSN Flexibility
- Extended IRS Penalty Letter Response Time
- Statute of Limitations for ACA Penalties
- Mandatory E-filing Requirements



ACA PENALTIES & COMPLIANCE TIPS

IRS Penalties Amounts Include

- Charges for Not Offering Coverage: (Penalty A): \$2,970 per full-time employee (minus the first 30 employees)
- Charges for Unaffordable Plans: (Penalty B): \$4,460 per affected employee
- Charges for Incorrect Reporting: \$330 per return or \$660 per return for non-filing
- Charges for Lack of Essential Coverage Compliance: \$100 per day per affected employee

Avoiding IRS Penalties

- Confirm ALE status
- Track hours & eligibility
- Offer affordable coverage
- Audit benefits data
- Respond to IRS letters timely
- Automate reporting



ACA DEADLINES

DATE	ACTION	NOTES
Feb 28, 2026	Paper filing of Forms 1094-C and 1095-C	Allowed only for employers filing fewer than 10 aggregated returns
Mar 2, 2026	Furnish Form 1095-C to employees or post a clear notice on website	Notice must remain posted until Oct 15, 2026
Mar 31, 2026	Electronic filing of Forms 1094-C and 1095-C	Mandatory for employers with 10 or more forms via IRS AIR system
Apr 17, 2026	Final corrections due	Submit corrections to compliance service provider before IRS enforcement actions begin





CUSTOMER RESOURCES

[Resource Center - Integrity Data \(integrity-data.com\)](https://integrity-data.com)



[Resource Center](#)

[Partner Login](#)

Click Your
**Microsoft
Dynamics
Platform**
to Get Started



Microsoft
Dynamics 365
Business Central



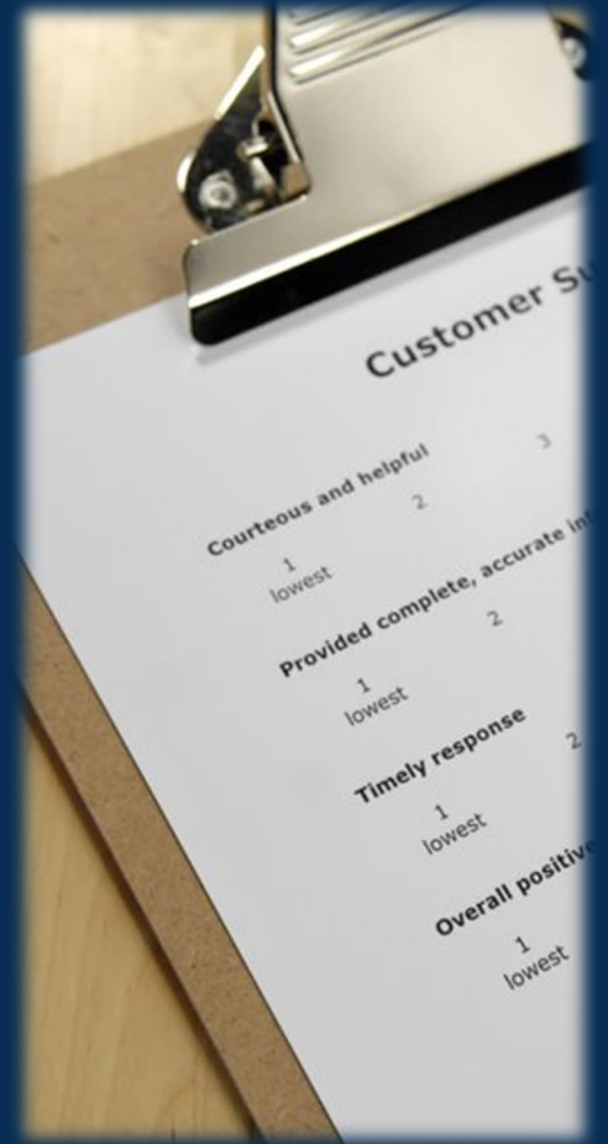
Microsoft
Dynamics GP



ACA
Compliance



QUESTIONS & ANSWERS



Thank You!

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