


Year End Process / Closing the Year

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Year End processing details the necessary steps in order to complete closing the year in TempWorks. This involves the completion of Data Integrity Checks, generating and printing any W2s, 1099s and 1095s, and creating state and federal electronic W2 files.

Note Please utilize the following resources when preparing for Year End processes:

1. To schedule your Year End calls, please navigate [here](#).
2. Review the TempWorks Year End calendar, including start and end dates of all Year End services, [here](#) .
3. We highly recommend completing the related TempWorks University courses:
 - [Data Integrity Checks 101](#)
 - [Closing the Year 101](#)
 - [1094/1095 Recorded Webinar](#)

How do I Close the Year?

To navigate through your Year End processing and successfully close the year, navigate to pay/bill > other > Year End. Please note that you should be at the highest level of your hierarchy to encompass all entities while running through this process. Once the Year End form is opened, you will see a list of years to select from. If you do not see the current year, select the plus icon in the upper right-hand corner to add it.

Search for Employees, Customers, Orders, etc. SHANNA.HARTZELL: System

No tasks to display for your current filter settings

Currently viewing 0 of 1295 tasks. View more...

tasks appointments social email

year selection

Drag a column header here to group by that column.

Year	EINC	Status	Date Started	Date Completed
2019	System	Open		2/6/2019 11:18 AM
2018	System	Completed	1/8/2019 2:25 PM	1/18/2019 5:00 PM
2017	System	Completed	8/14/2018 8:10 A...	1/18/2019 5:00 PM
2016	System	InProgress	1/12/2017 3:07 P...	
2015	System	InProgress	1/6/2016 1:57 PM	
2014	System	InProgress	12/18/2014 8:11...	
2013	System	Completed	1/23/2014 3:26 P...	1/27/2014 11:35 AM
2012	System	InProgress	1/18/2013 9:37 A...	
2011	System	InProgress	2/6/2012 9:11 AM	
2010	System	InProgress	6/2/2011 3:39 PM	
2009	System	Open		
2008	System	Open		
2007	System	Open		
2006	System	Open		
2005	System	Open		
2004	System	Open		
2003	System	Open		
2002	System	Open		
2001	System	Open		
2000	System	Open		
1999	System	Open		
1998	System	Open		
1997	System	Open		
1996	System	InProgress	12/11/2002 10:0...	

payroll and invoicing
time entry
check register
incomplete transactions
invoice register
other
ap bill register
ap check register
commission calculation
payroll holds
po setup
timecard import
year end
worksheet
1094-c/1095-c
tax recalculation

employee
customer
order
assignment
contact
pay / bill
calendar
all options

If the current year is there, or if you've completed adding it, you can double click the row to bring you into the Year End worksheet and begin the steps to close the year.

2022 Year End Worksheet (EINC: System)

Step 1	Recalculate YTD Tax Totals	Recalculate
	Run Integrity Check	Run Check
	<input type="checkbox"/> Integrity check addressed Not Started	Check Finished
Step 2	<input type="checkbox"/> Initialize New Year Not Started	Step 1 must be completed
Step 3	<input type="checkbox"/> Generate W2 Data Not Started	more options ▼ Step 2 must be completed
	<input type="checkbox"/> Generate 1099 Data Not Started	Step 2 must be completed
	<input type="checkbox"/> Verify Data Not Started	Step 2 must be completed
	<input type="checkbox"/> W2 and 1099 Verified Not Started	Step 2 must be completed
Step 4	Download W2 Data	Step 3 must be completed
	Activate WebCenter W2 Not Started	Step 3 must be completed
	Send WebCenter W2 Notifications Not Started	Step 3 must be completed
	Download 1099 Data	Step 3 must be completed
	Print Employer W2 Forms	Step 3 must be completed
	Print W2C Forms	Step 3 must be completed
Step 5	<input type="checkbox"/> Pass Electronic W-2 File Check Not Started	Step 4 must be completed
Step 6	<input type="checkbox"/> Download Federal Electronic W-2 File Not Started	more options ▼ Step 5 must be completed
	<input type="checkbox"/> Download State Electronic W-2 File Not Started	more options ▼ Step 5 must be completed
	<input type="checkbox"/> Download Local Electronic W-2 File Not Started	more options ▼ Step 5 must be completed
	<input type="checkbox"/> Download Electronic 1099 File Not Started	more options ▼ Step 5 must be completed

Closing the year in Enterprise requires the following 6 steps:

1. Run Integrity Check
2. Initialize New Year
3. Generating W2 and 1099 Data
4. Downloading W2s, 1099s, and Employer W2s
5. Pass Electronic W2 Check
6. Downloading Electronic Files

Check out this video and follow along with the steps below:

Your browser does not support HTML5 video.

Step 1: Run Integrity Check

For instructions on how to run your Integrity Check, please see the following [Knowledge Base article](#).

Step 2: Initialize New Year

Initializing the New Year is essentially the point of no return. You should closely review the Data Integrity Check, Tax Deposit or Payroll Journal and ensure all of your items are accurate.

Initializing the year takes all current year information, saves it off, and sets the system up for the New Year. Any corrections or voids that need to take place after this step has been completed will need to be done with the assistance of TempWorks and may result in billable time.

Step 3: Generating W2 and 1099 Data

Note Generating, regenerating and refreshing W2 and 1099 data must be done at System level.

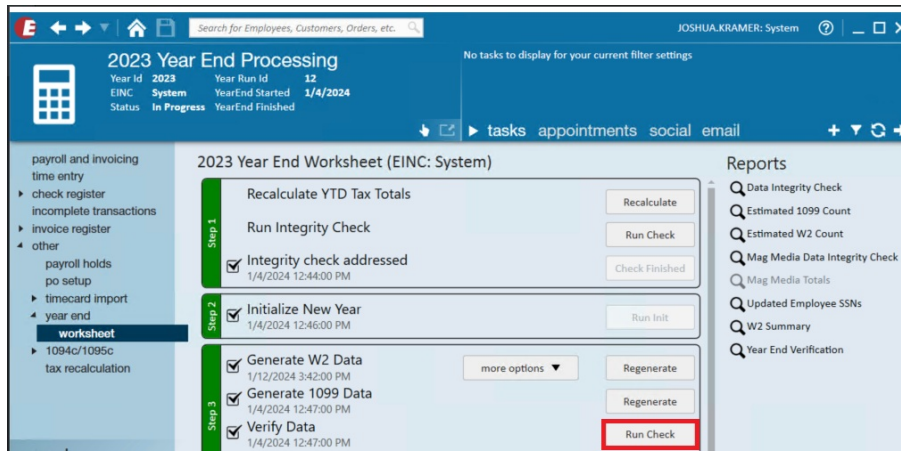
Use the Generate buttons on the right side of the worksheet to generate the W2 and 1099 data. Review the W2 Summary report for accuracy. This report can be ran to generate the summary for Federal, Local and State.

- **Federal W2 Summary:** This report breaks out the wages and tax withheld amounts shown on the W2s for Federal taxes. This can be expanded to see the detail per employee.
- **State W2 Summary:** This report breaks out the wages and tax withheld amounts shown on the W2s for State taxes. It summarizes by state and can be expanded to see the detail per employee.
- **Local W2 Summary:** This breaks out the wages and tax withheld amounts shown on the W2s for Local taxes. It summarizes by state and can be expanded to see the detail per local and employee.

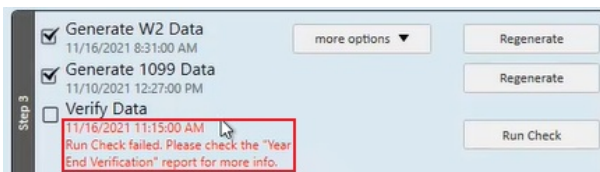
Note If necessary you can refresh employer and employee data by using the regenerate options in the “more options” drop-down.

Once the W2 and 1099 data has been generated, the data will need to be verified.

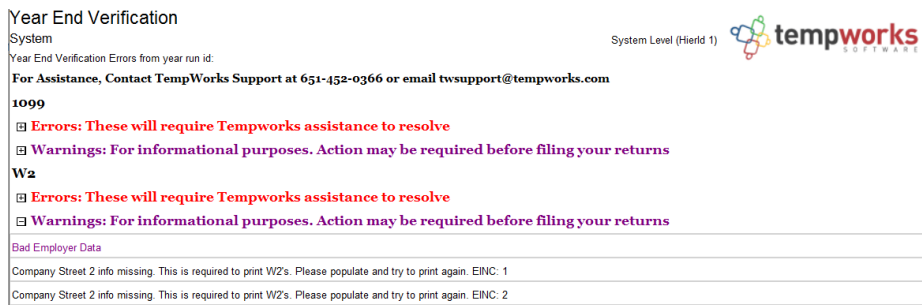
Within Step 3, select the "Run Check" option to the right of "Verify Data":



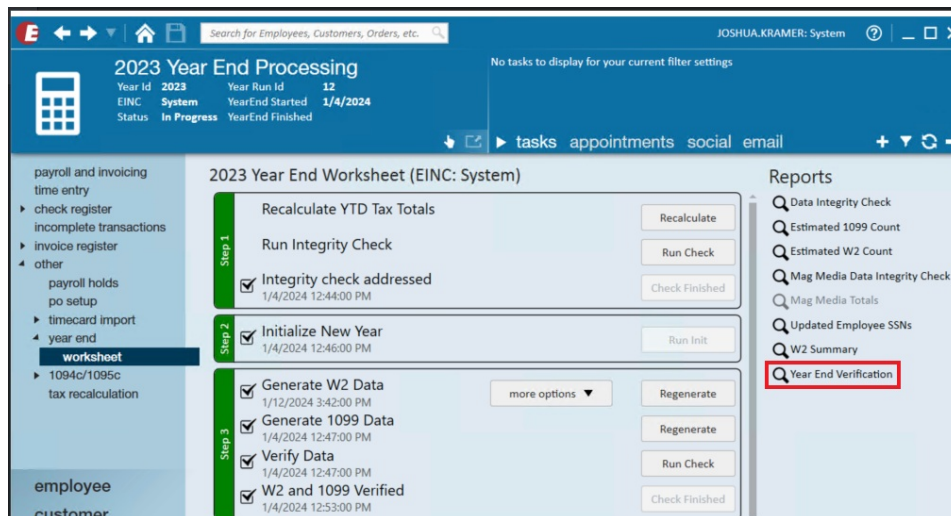
In the event the verification of the data has resulted in errors, you will see a prompt within the Year End Worksheet under the "Verify Data" section:



The "Year End Verification" report will also automatically generate:



Once the "Run Check" has been completed, you are able to select the "Year End Verification" report within the "Reports" section to the right:

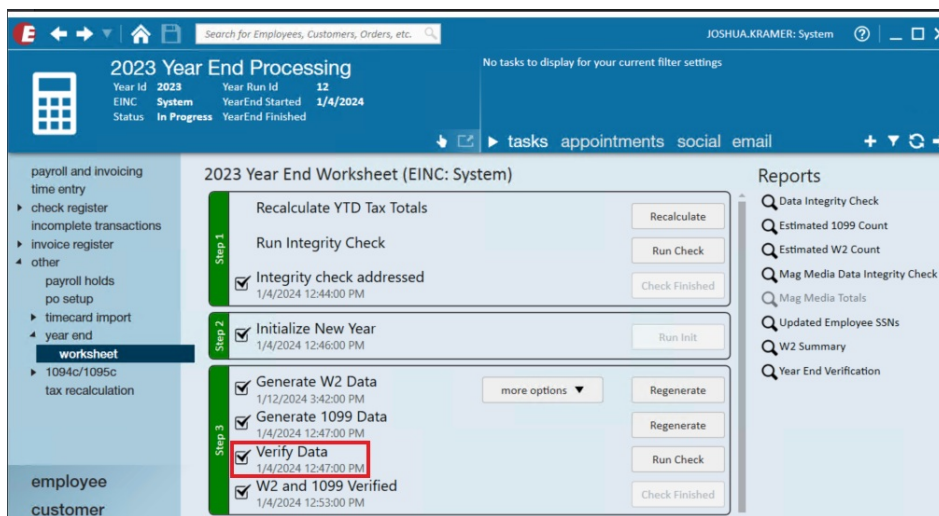


Note The "Year End Verification" report is unavailable to be generated until the "Run Check" has been


completed for the "Verify Data" step.

Note All errors presented within the "Year End Verification" report will need to be resolved before being able to continue within the Year End Worksheet. If you have any questions about the errors being received within the report, please contact a [TempWorks Year End Support Representative](#).

In the event the verification of data resulted in no errors, the "Verify Data" section will be automatically checked as completed:



With no errors being presented, the "Year End Verification" report will also automatically generate:

Year End Verification		System Level (Hierid 1) 
System		
Year End Verification Errors from year run id:		
For Assistance, Contact TempWorks Support at 651-452-0366 or email twsupport@tempworks.com		
1099		
<input type="checkbox"/> Errors: These will require Tempworks assistance to resolve		
No 1099 Errors for Year ID 2023		
<input type="checkbox"/> Warnings: For informational purposes. Action may be required before filing your returns		
No 1099 Warnings for Year ID 2023		
W2		
<input type="checkbox"/> Errors: These will require Tempworks assistance to resolve		
No W2 Errors for Year ID 2023		
<input type="checkbox"/> Warnings: For informational purposes. Action may be required before filing your returns		
No W2 Warnings for Year ID 2023		

Step 4: Downloading W2s, 1099s, and Employer W2s

Once you have generated the data and are ready click 'Download' to open the following screen:

Note If downloading W2 data: It is considered best practice to leave the "Print two states of local jurises per W2" unchecked. This will result in only one state and one local juris per W2.

Once you've selected your desired sorting and filter options, click 'Download' located in the lower right. This will result in a CSV with the information requested.

If your company utilizes WebCenter, you have the option to make W2s, 1099s, and 1095s accessible for employees via the Employee Portal. This can be enabled by using the "Activate" button:

Note If changes to tax forms need to be made, select the "Deactivate" button to temporarily disable WebCenter forms.

Enable them again once the changes have been made.

Step 5: Pass Electronic W2 Check

TempWorks will not generate Electronic W2 files unless this step has been completed. After this is completed the Data Integrity Check report will be displayed. If the check didn't pass use this report to review the errors and contact Year End Support if applicable.

Note All errors must be fixed before moving past this step.

Step 6: Downloading Electronic Files

Once the Electronic W2 check has been completed, you can download the Federal, State and Local Electronic W2 Files. Click on 'Download' next to each option to generate and download the data. Once generated you can use the 'Electronic W2 Totals' report. These files can be uploaded to their respective government agencies.

Note If necessary you can refresh data by using the regenerate options in the "more options" drop-down.

Once you have downloaded the Federal W-2 file you will want to run it through the AccuWage Software that is provided by the Social Security Administration. As of 2017, the SSA no longer offers a downloadable version of AccuWage. Instead, you will need to access AccuWage Online by doing the following:

1. Log on to Business Services Online (BSO) and go to the Employer Wage Reporting webpage.
2. Log in with your BSO username and password.
3. Access AccuWage Online (fourth tab).

Note The Federal Mag Media information is required to be submitted online; they are no longer accepting diskettes. Please note that the TempWorks W2 service does not include the Mag Media filing.

Completing the Year

Once all of the above steps have been completed, the year will automatically be marked as complete.

Related Articles