


# Year End Checklist

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## Year End Checklist and Important Deadlines

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

**\*Note\*** Ready to start your Year End processing? Use this [checklist](#)  to make sure you don't miss a thing.

### Important Deadlines to Note:

Milestone	Deadline
Complete Your Data Integrity Check	<ul style="list-style-type: none"><li>• By the end of the 2nd week in December</li><li>• Year End hot rates start 3rd week in December</li></ul>
Enroll in Year End Services (W2 and/or 1094/5 processing)  <b>*Note*</b> Lone Oak Payroll clients are automatically enrolled in W2 processing, but they <b>do</b> need to enroll/opt in for 1094/5 processing.  <b>*Note*</b> If you were enrolled in year end services last year, you are automatically enrolled for future years.	<ul style="list-style-type: none"><li>• By 1st Monday in December</li></ul>
Close the Year	<ul style="list-style-type: none"><li>• By the end of the 2nd week of January</li><li>• Year End hot rates start 3rd week in January</li></ul>

<p><b>Post W-2s in WebCenter &amp; Postmark W-2s</b></p> <p><b>*Note*</b> No action is required to postmark W-2s when you are enrolled in TempWorks Year End Services.</p>	<ul style="list-style-type: none"> <li>• By January 31st</li> </ul>
<p><b>Submit Electronic W-2s to SSA</b></p> <p><b>*Note*</b> TempWorks submits electronic files for all Lone Oak Payroll clients, as well as all Tax Processing clients. If this is a service you are interested in, please contact your Account Manager.</p>	<ul style="list-style-type: none"> <li>• By January 31st</li> </ul>
<p><b>Submit Electronic W-2s to States</b></p>	<ul style="list-style-type: none"> <li>• N/A to states without income tax <ul style="list-style-type: none"> <li>◦ January 31st 🇺🇸 (for most)</li> </ul> </li> <li>• February 15th (Iowa + New Jersey) <ul style="list-style-type: none"> <li>◦ February 28th 🇺🇸 (Hawaii + Ohio)</li> </ul> </li> </ul>

Check out the full checklist of important dates [here](#) 📎.

Schedule your Data Integrity check calls [here](#).

New to Closing the Year? Check out our Free eLearning Courses for more information:

- [Data Integrity Checks 101](#)
- [Closing the Year](#)
- [1095-C & 1094-C](#)

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