

Year-End FAQs



Your Guide to a Streamlined Year-End

This guide answers your questions about key dates and deadlines, W-2s, going paperless, year-end packages, and more.

Before Year-End FAQs

Q: What are the key dates and deadlines for Year-End?

December 19, 2025

Item Due:

Last day to update the quarterly delivery service (UPS or Mail to Home) and/or opt into the print delivery option for shipping W-2/1099/1095C tax forms directly to employees (Mail to Home)

Disclaimers and Fees: [Mail Year End Tax Forms to Employee Home Address](#)

Find the **quarterly** delivery service by navigating to **HR & Payroll > Configuration > Client Options > Payroll Printing & Delivery > Delivery Locations**.

There is a charge of \$1.95 per form, with a minimum of \$22.00, in addition to the standard processing fees. If employees opt in to paperless, they will incur no printing & shipping charges.

December 31, 2025

Item Due:

Submit final payrolls for the current calendar year

Disclaimers and Fees:

Submitting by **6:30 PM CT** on this day ensures the timely filing of tax forms.

December 31, 2025

Item Due:

Last day to update 1099 Form filing settings in HR & Payroll

Disclaimers and Fees: [Enable or Disable 1099 Form Electronic Filing](#)

January 2, 2026

Item Due:

Last day for employees to opt in/out of paperless tax forms

Disclaimers and Fees:

If employee paperless elections change after this date, the tax forms might arrive differently than expected. A PDF report of current paperless employees is available on the Year-End Dashboard.

January 2, 2026

Item Due:

Last day to make filing preference adjustments (Terminated clients must advise if we should/should not file by EOD.)

Disclaimers and Fees:

Filing changes made after this date will result in late original filings/amendments.

See [Amendment Fees](#) and [Late Original Return Filing Fees](#).

January 2, 2026

Item Due:

Last day to submit payroll for the calendar year

Disclaimers and Fees:

Submitting payrolls after this date will require amendments/late original filings.

January 2, 2026

Item Due:

Last day for address changes for both the employees' personal addresses and the quarterly delivery address location

Disclaimers and Fees:

If addresses change after this date, then tax forms might go to an incorrect location.

Tax forms arrive at a company's legal address listed in **Company Demographics**.

To confirm a company address is correct, navigate to **HR & Payroll > Configuration > Company Setup > General > Demographics**.

January 5, 2026

Item Due:

Last day to request changes to tax codes to Account Maintenance for 2025 Tax updates

Example: EINs

Disclaimers and Fees:

Requests submitted after this date require an amendment.

January 5, 2026

Item Due:

Last day to make changes to the ACA Dashboard and ACA forms before printing and shipping of forms to the company's mailing address begins

Disclaimers and Fees:

Any changes made after this date may require the reprinting of forms (if not set up for Paperless) and may result in additional fees.

January 8, 2026

Item Due:

1095-C Original First Print and Delivery begins

Disclaimers and Fees:

Reprints of forms are only available after the originals have been printed and shipped.

Once originals are printed and shipped, previews can no longer be created.

To avoid ACA reprints, which are **\$100.00** per package plus delivery fees, consider [opting into Paperless](#).

Beginning January 16, 2026

Item Due:

W-2s and 1095-Cs available online to employees

W-2C requests available

Disclaimers and Fees:

Employees can access W-2s, 1095-Cs, and other tax forms via [Employee Self Service](#) / [Home](#).

Reasons that may result in W-2s displaying in Home later in January:

- Changes made after January 2
- Employers with at least one employee in a USA Commonwealth or Territory.
- Changes such as Social Security Numbers or required delivery address verifications.
- Common Pay Agent Employers.

January 19, 2026

Item Due:

Last day to fund the company's account before Paylocity pulls Quarterly liabilities

Disclaimers and Fees:

Quarterly packages will be available online on **January 16, 2026**. Review and ensure funding of the company's account.

January 31, 2026

Item Due:

All tax forms available in the Self-Service Portal must be mailed and postmarked by this date

Disclaimers and Fees:

Companies comply with the IRS furnish requirement if the form is properly addressed and mailed on or before the due date.

Q: How do I set up our company as paperless?

You can easily switch your company to paperless delivery by navigating to **HR & Payroll > Configuration > Client Options > Print Set Up & Sort**. For step-by-step guidance, check out the PEAK article titled [**"Set Up a Company as Paperless."**](#)

Q: How do I update my company's delivery address and contact information?

To keep your delivery details up to date, navigate to **HR & Payroll > Configuration > Client Options > Delivery Locations**. This ensures your Year-End forms arrive at the correct location.

Q: Can I set up the sort order of my W-2s?

Yes! You can customize how your W-2s are sorted by navigating to **Configuration > Client Options > Print Set Up & Sort**, then select **Set Up**. Use the sort setting at the bottom of the page to organize your results.

Q: How do terminated employees get their W-2?

To make sure terminated employees receive their W-2s, start by reviewing your print options in **HR & Payroll > Client Options > Print Set Up & Sort > Set Up**. Then, set the system access end date to extend beyond the upcoming tax season. For more help, refer to the PEAK article [**"Print Year-End Forms for Inactive Employees."**](#)

Q: When will my Year-End forms be delivered? How do I track my Year-End Package?

We will begin sending out Year-End forms in mid-January. To track delivery status and stay informed, visit your Year-End Dashboard by navigating to **HR & Payroll > Reports & Analytics > YE Dashboard**.

Q: Can I set up and track Year-End forms sent directly to employees?

To track mail-to-home packages, refer to the PEAK article [**"Track Mail to Home Year-End Packages."**](#) To set up direct delivery, check out [**"Mail Year-End Tax Forms to Employee Home Address."**](#)

Q: How do I update my 1099 filing preferences?

To update your company's 1099 filing preferences, navigate to **HR & Payroll > Configuration > Client Options > Payroll Printing & Delivery > Tax Forms Print Setup**. This ensures your filing settings are accurate before the deadline.

After Year-End FAQs

Q: Why is my terminated employee missing their W-2?

Check your company settings under **HR & Payroll > Company Options > Print Set Up & Sort**. Ensure that you have selected to print the Year-End forms for terminated employees. If the employee selects the paperless W-2 option, ensure they can access their tax forms by navigating to **HR & Payroll > User Access > User Accounts**. Refer to the PEAK knowledge base article [**"Manage User Accounts"**](#) for more details.

Q: Why did the company owner/contractor receive a W-2?

Verify that the owner or contractor is set up as a K-1 or 1099 employee. Review the PEAK knowledge base article [**"Set Up a K-1 Employee"**](#) for details.

Q: How can I see which employees are paperless? Is there a report?

Navigate to **Reports & Analytics > Year-End Dashboard > Paperless Report** to see your employees' print selections.

Q: Where do my employees find and print their W-2s online?

Navigate to **HR & Payroll > Employees > Employee Payroll File Select Employee Pay > Tax Forms**. To print their W-2s, employees can navigate to **Self-Service Portal > Pay > Tax Forms**.

***Note:** Employees can bypass the password to view or download the document for personal use.

Q: Where do I get electronic copies of all my employees' W-2s?

Navigate to **HR & Payroll > Reports & Analytics > Year-End Dashboard** to find all your company's Year-End Reports.

Q: Why did an employee receive multiple W-2s?

Your employees may receive multiple W-2s if they worked for multiple companies or earned wages in multiple states during the calendar year. View the PEAK knowledge base article [**"W-2s Can Be Multiple Pages"**](#) for additional examples.

Q: Why does Box 1 not match Gross Wages?

Box 1 on the W-2 shows the employee's taxable wages, not gross wages. Refer to PEAK knowledge base article [**"W-2 and W-3 Reconciliation"**](#) to understand what is included in each box.

Q: Do I have to add postage to the envelopes when I send W-2s to my employees?

If you are mailing W-2s to your employees, you'll need to add postage to the envelopes. In the future, you can choose to have Paylocity mail year-end forms directly to your employees. Contact your Paylocity representative to set this up for the future.

Q: What do I do if any W-2 or 1099 information is incorrect?

Please contact a Paylocity representative if you need to correct information on your employees' W-2s.

Q: What should I do if Box 12DD on the summary sheet of my W-2 is empty or incorrect?

Verify that you have Box 12DD set up correctly by reviewing the setup of the Earning Code for Employer Cost of Medical Coverage (ERMED). Create (or edit) the code by following the directions in the PEAK knowledge base article [**"Create an Earning Code for ERMED."**](#)