Year-End FAQs

paylocity
HR | Finance | IT

Your Guide to a Streamlined Year-End

This guide answers your questions about key dates and deadlines, W-2s, paperless, Year-End packages, and more. **For instant answers 24/7, try asking the AI Assistant!**

Before Year-End FAQs

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

You can review all critical Year-End dates in the **Year End Key Dates and Deadlines** PEAK article. You can also find all deadlines conveniently listed in the **Help** menu and the Year-End newsletter.

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 > Payroll Printing & Delivery > Print Setup & Sort.** For step-by-step guidance, review the PEAK article **Enable Employees to Elect Paperless**.

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

To verify your company's delivery address, navigate to **HR & Payroll > Configuration > Client Options > Payroll Printing & Delivery > Delivery Locations**.

If the address is incorrect, you must contact your account manager to update it and ensure your Year-End package arrives at the correct location.

Q: How do I customize how W-2s are sorted in the Year-End delivery?

You can customize how W-2s are sorted by navigating to **HR & Payroll > Configuration > Client Options > Payroll Printing & Delivery > Print Setup & Sort**. Select **Setup**, and then select your preferred **Print Sort** option from the dropdown menu.

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

To make sure terminated employees receive a paper copy of their W-2s, start by reviewing your print options in **HR & Payroll > Client Options > Print Setup & Sort > Setup**. Confirm that you've enabled the **Always Print Terminated** setting and selected the applicable statuses from the **Always Print Custom Status** dropdown. For additional information, review the PEAK article **Print Year-End Forms for Inactive Employees**.

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

We will begin sending Year-End packages in mid-January 2027. To track delivery status and stay informed, visit your Year-End Dashboard by navigating to **HR & Payroll > Reports & Analytics > Year End Dashboard**.

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

Yes, you will be able to track the scanned locations from the United States Postal Service (USPS) for each tax form sent directly to employees on the Year-End Dashboard. This confirms that the tax forms are on their way to your employees' home addresses. Note: The dashboard doesn't display individual USPS tracking numbers.

- For individual companies, navigate to **HR & Payroll > Reports & Analytics > Year End Dashboard**.
- For company sets, navigate **HR & Payroll > Company Set > Reports & Analytics > Year End Dashboard**.

Refer to the PEAK article **Track Mail to Home Year End Forms** for additional details.

Q: How do I enable Paylocity to e-file 1099 forms?

To update your company's 1099 electronic filing preferences, navigate to **HR & Payroll > Configuration > Client Options > Payroll Printing & Delivery > Tax Forms Print Setup** to ensure your filing settings are accurate before December 31, 2026. For more information, see the PEAK article **Enable or Disable 1099 Form Electronic Filing**.

Q: What resources do you offer to help prepare for the One Big Beautiful Bill Act (OBBBA) reporting requirements?

Please see the PEAK article **One Big Beautiful Bill Act Overtime Premium Reporting Solution**.

Use this guide for more information: **One Big Beautiful Bill Act (OBBBA) 2026 Readiness and Resource Guide**.

After Year-End FAQs

Q: Why are my employees missing their W-2s?

There are multiple reasons employees might not receive W-2s.

1. First, if an employee opted in to paperless, they won't receive a paper copy of their tax form. To access and download their tax forms, review the **W-2 Forms** PEAK article.

2. Next, determine whether the employee is active or terminated.

   - **For an active employee (W-2 or 1099):**
     All active employees with taxable wages will receive a W-2; they will receive a 1099 only if their wages meet your company's 1099 threshold settings in HR & Payroll. To print a copy of their tax forms, if needed, administrators can navigate to **People > People Search > Employee Last Name > Pay > Tax Forms**.

   - **For a terminated employee:**
     Review your company's print options to confirm whether the employee's tax forms should have been printed. For instructions, refer to the PEAK article **Print Year-End Forms for Inactive Employees**.

     - If needed, toggle the **Always Print Terminated** setting **on**, select the applicable terminated status from the **Always Print Custom Status** dropdown, and select **Save**. If a reprint is still needed, navigate to **Reports & Analytics > Year End Dashboard** to request it.

For additional troubleshooting, contact your account manager.

Q: Why is my terminated employee unable to log in to access their W-2s?

Access to Paylocity typically ends for terminated employees after their employee status is updated to terminated. The company administrator would need to temporarily restore their Paylocity access to view their tax forms. To review the terminated employee's access:

- Type **User Accounts** in the Paylocity Search bar.
- Select the employee's **Last Name**.
- Select **Edit Account Details** and update the **Deactivation Date** if needed.
- Select **Save**.

For more details, refer to the **Update Deactivate Date** section in the PEAK article **Terminate Employee in HR & Payroll**.

Q: My employee received the incorrect tax form. What should I do?

Please contact your account manager if your employee received the incorrect tax form. For more details, see the **Correct Employees Assigned Incorrect Tax Form** PEAK article.

Q: Is there a report I can view to confirm which employees opted for paperless?

Yes, you can review the **Paperless Report** to confirm which of your employees opted for paperless. Navigate to **HR & Payroll > Reports & Analytics > Year End Dashboard > Paperless Report**.

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

Employees can access their tax forms from their **Person Record**: type **Person Record** in the Paylocity Search bar, select the **Pay** tab, and then select **Tax Forms**. From there, employees can view, print, or even directly import their tax forms to three major tax preparation providers.

Q: Where do company administrators access employee W-2s in Paylocity?

You can find all your company's Year-End reports, including your employee W-2s, in the **Year End Dashboard**: type **Year End Dashboard** in the Paylocity Search bar to get there.

Q: Why did my 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. Refer to the **W-2s Can Be Multiple Pages** PEAK article for additional information.

Q: Why does the amount in Box 1 on my employee's tax form not match their gross wages?

Box 1 on the W-2 shows the employee's taxable wages, not their gross wages. Refer to the **W-2 and W-3 Reconciliation** PEAK article to understand what each box includes.

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 tax forms directly to your employees. Review the PEAK article **Mail Year-End Tax Forms to Employee Home Address**, and contact your account manager to enable this for the future.

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

Please contact your account manager if you need to correct the information on your employees' W-2 or 1099 forms.

Q: What should I do if Box 12DD on the summary sheet of my employee's 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 article **Create an Earning Code for ERMED**.

Also, review that your organization has mapped medical deduction codes correctly. Refer to the PEAK article **Add or Edit a Company Deduction Code** for more information.