Year-End Frequently Asked Questions

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.

Before Year-End FAQs

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

You can review all the critical Year-End dates in the Year-End Key Dates and Deadlines PEAK knowledge base article.

2 - 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 knowledge base article Enable Employees to Elect Paperless.

3 - 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 the delivery address and ensure your Year-End forms arrive at the correct location.

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

Yes, you can customize how the 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.

5 - How do terminated employees get their W-2s?

To make sure terminated employees receive their W-2s, start by reviewing your print options in **HR & Payroll > Client Options > Print Setup & Sort > Setup**. Enable the **Always Print Terminated** setting to ensure all terminated employees receive a paper copy of their W-2s. For additional information, review the PEAK knowledge base article Print Year-End Forms for Inactive Employees.

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

We will begin sending Year-End packages to companies in mid-January 2026. To track delivery status and stay informed, visit your Year-End Dashboard by navigating to **HR & Payroll > Reports & Analytics > Year End Dashboard**.

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

Yes, you will be able to track all the scanned locations from the USPS for each tax form sent directly to employees on the Year-End Dashboard. It confirms that the tax forms are en route 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 knowledge base article Track Mail to Home Year End Forms for additional details.

8 - How do I update my 1099 filing preferences?

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, 2025. For more information, see the PEAK knowledge base article Enable or Disable 1099 Form Electronic Filing.

After Year-End FAQs

1 - Why are my employees missing their W-2s?

There are multiple reasons employees might not receive W-2s. First, determine whether the employee is active or terminated.

- ·If this is for an active employee:
  - Confirm if the employee had taxable wages, is a W-2 or 1099 employee, and if they opted in for paperless. To locate a digital copy of their tax forms, review the W-2 Forms PEAK article.

- ·If this is for a terminated employee:
  - Review your company's print options by following the steps in the PEAK article Print Year-End Forms for Inactive Employees. If the Always Print Terminated setting is turned off, update it, and navigate to **Reports & Analytics > Year-End Dashboard** to request a reprint.

For additional troubleshooting, contact your account manager.

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

Terminated employees typically lose access to Paylocity after their employee status history is updated to terminated. The company administrator would need to temporarily restore their access to Paylocity to allow them to view their tax forms.

Review the terminated employee's access by navigating to **HR & Payroll > User Access > User Accounts**. Select the ellipses icon (…) in the Action column for the employee and select Edit. In the Employee User Account Details, update the Account Deactivation Date if needed.

For more details on this, refer to the PEAK article Manage Terminated Users.

3 – Why did my contracted employee receive a W-2?

The contracted employee may have been incorrectly set up as a W-2 employee. To confirm if the contractor is set up as a K-1 or 1099 employee, follow the steps in the PEAK knowledge base article Set Up a K-1 Employee for additional details.

For additional troubleshooting, contact your account manager.

4 - 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**.

5 – Where do my employees find and print their W-2s online?

Employees can find and print their tax forms by following one of the subsequent paths.

· If your employees have the new Home experience:
Go to **Employees > Person Record**. Select the **Pay tab**, and then select **Tax Forms**.

· If your employees have access to the Employee Self-Service portal:
Go to **Pay Tile > More > Tax Forms >** Select **Tax Form.**

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

Navigate to **HR & Payroll > Reports & Analytics > Year End Dashboard** to find all your company's Year-End reports, including your employee W-2s.

7 - 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 PEAK knowledge base article W-2s Can Be Multiple Pages for additional information.

8 - 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 PEAK knowledge base article W-2 and W-3 Reconciliation to understand what is included in each box.

9 – 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 knowledge base article Mail Year-End Tax Forms to Employee Home Address, and contact your account manager to enable this for the future.

10 - 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.

11 - 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 knowledge base article Create an Earning Code for ERMED.

Also, review that the medical deduction codes are mapped correctly. Refer to the PEAK knowledge base article Add or Edit a Company Deduction Code for more information.