



Preparing for Year End

Help Video Companion Guide

The purpose of this guide is to provide you with valuable tools and resources to prepare for Year End.

Key Dates to Remember

December 25 – BenefitMall is closed.

December 28 – All adjustments must be processed by this date. Adjustments may include: voided checks, manual checks, fringe benefits, etc.

December 31 – Last business day of the year. Any changes or adjustments after the end of the year must be accompanied by a signed Potential Tax Waiver absolving BenefitMall of responsibility for any potential penalties and/or interest.

January 1 - BenefitMall is closed.

Verify All Employee Data

The following employee information must be correct to avoid penalties from the IRS:

- Names
- Addresses
- Social security numbers

We recommend www.socialsecurity.gov/employer/ssnv.htm for the fastest SSN verification.

Verify All Employer Data

Review your employer information for the following items so your documents will route correctly and not be rejected by the IRS:

- Corporate address to be used on the W-2 forms
- Delivery address for the Year End package
- Correct Federal Employer ID numbers

Validate Payroll Totals

Review the following items:

- Employee History Report
- Excess contributions to retirement or deferred compensation plans, paying special attention to highly compensated employees



Need assistance?

Your support contact information is located on the Home Screen.