



## 2018 YEAR END INSTRUCTIONS AND REPLY FORM

Please refer to the Year End Calendar on page 3 of this document for important dates impacting accurate reporting and timely delivery of your 2018 W-2s

If you have year-end adjustments to report to BenePAY LLC, please e-mail the completed reply form "Should BenePAY Hold My Books Open?" found on page 4 of this document to [taxdept@benepayonline.com](mailto:taxdept@benepayonline.com) or fax to (616) 575-8709

FORM MUST BE RETURNED TO BENEPAY ON OR BEFORE  
FRIDAY, DECEMBER 14, 2018

You do not need to return the Hold My Books Open form if the answers to **ALL** questions are **NO!**

## VERIFY W-2 INFORMATION

To reduce the possibility of printing incorrect W-2s/1099s and to avoid penalties for invalid or missing data, you must verify critical information.

- W-2 - Employee name and social security number (SSN) match the social security card, mailing addresses are up to date and the employee is coded to the correct state/local taxing jurisdictions.
- 1099 - Contractor name/entity matches the proper tax identification number

If you use Payentry, please run the W-2 Edit Report to obtain your employee demographics, review and make any corrections on-line **before submitting your final payroll of 2018**. Please click the link below for instructions to run the report. Please notify the tax dept ([taxdept@benepayonline.com](mailto:taxdept@benepayonline.com)) or your CSR if you make any SSN changes online as we may have to amend prior quarters filings.

<http://www.benepayonline.com/files/instructions-for-w2-verification.pdf>

If you call, fax or e-mail your payroll and do not have access on-line, please contact your CSR as soon as possible, request the W-2 Edit Report, review and report all corrections **no later than your last 2018 scheduled payroll**.

## 2019 STATE RATE/FREQUENCY CHANGES

State unemployment rate and withholding deposit frequency changes will be mailed to you by the taxing jurisdictions around the end of 2018 or beginning of 2019. Many states have already released their 2019 data. Please e-mail ([taxdept@benepayonline.com](mailto:taxdept@benepayonline.com)) or fax (616-575-8709) a copy as soon as you receive it.

## W-2 REPRINT/CHANGES/AMENDMENT PRICING STRUCTURE

PDF reprint (no changes) via secure e-mail	No charge
Hard copy reprint (no changes) on W-2 stock	\$25.00 per W-2
PDF reprint involving an employee demographic change	\$25.00 per W-2
Hard copy reprint involving an employee demographic change	\$35.00 per W-2
*Amended returns (any SSN, wage or tax adjustment)	\$75.00 per W-2-C/Impacted return

\*Any SSN, wage or tax adjustment requested after Wednesday, January 9, 2019 will be considered amended return(s) and processed during the month of February.

Please note that any requested W-2 or 1099 reprints will not be addressed until the month of **February** to allow us to meet aggressive federal and state mandated filing deadlines. Remember that if you subscribe to Shugo (secure e-mail service) through BenePAY, you can print a PDF copy in-house.

**YEAR END BILLING WILL BE INCLUDED ON YOUR LAST PAYROLL INVOICE OF 2018**

**W-2S/1099S WILL BE SHIPPED DURING THE THIRD AND FOURTH WEEKS OF JANUARY  
(THOSE NOT BEING PLACED ON A REQUESTED HOLD WILL BE PROCESSED FIRST)**

## YEAR END CALENDAR – CRUCIAL PAYROLL DATES

The Social Security Administration has changed the W-2 and 1099 filing deadline from March 31<sup>st</sup> to January 31<sup>st</sup>. Most states have now followed suit. Due to this requirement, it is crucial that all deadlines on the calendar below are recognized and observed.

**Batch 1 = If you do NOT have year-end adjustments and do NOT require a YE hold**

**Batch 2 = If you DO have year-end adjustments to report and DO require a YE hold**

December 2018/January 2019						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
Dec 9	10	11	12	13	14 Deadline to return the Hold My Books Open Form - If not received, company will be marked as final and included with <b>batch 1</b> processing	15
16	17	18	19	20	21	22
23	24	25	26	27 Last day to submit a 12/31/18 payroll for timely tax depositing, excluding third party sick pay (3PSP) reporting	28	29
30	31	1 HAPPY NEW YEAR!!!	2	3	4	5 Batch 1 QE/YE returns calculated/audited
6 Batch 1 W-2/1099s calculated/audited	7	8	9 Last day to submit YE adjustments for <b>batch 2</b> clients (those who submitted Hold My Books Open Forms), excluding 3PSP	10	11 Batch 2 QE/YE returns calculated/audited	12 Batch 2 W-2/1099s calculated/audited
13	14 Batch 1 W-2/1099 packages to arrive through this week	15 Deadline for 3PSP administrators to report final 2018 figures to employer –Submit to us ASAP	16	17	18 Deadline to submit 3PSP to BenePAY for processing	19 All QE/YE returns & W-2/1099s processed for clients on 3PSP hold
20	21 Batch 2 W-2/1099 packages to arrive through this week, including 3PSP	22	23	24	25	26

## Should BenePAY Hold My Books Open?

Please complete and return no later than Friday, December 14, 2018 if any of the following apply. There is no need to return if you will have no year-end adjustments. **If this form is not returned by Friday, December 14, 2018, your quarter/year end returns and W-2s/1099s will be considered final and will be sent to print starting Saturday, January 5, 2019.**

YES      NO

- \_\_\_\_      \_\_\_\_      Do you provide any of your employees with a **company car** that also can be used for non-work related purposes (PUC) that have not yet been reported to BenePAY?
- \_\_\_\_      \_\_\_\_      Are you an **S-Corporation** and provide health insurance on behalf of your **2% shareholders** that have not yet been reported to BenePAY?
- \_\_\_\_      \_\_\_\_      Have any of your employees been issued **third party sick pay (3PSP)** in 2018 that have not yet been reported to BenePAY?
- \_\_\_\_      \_\_\_\_      Will you be paying any year-end **bonuses** outside of payroll?
- \_\_\_\_      \_\_\_\_      Do you pay **group term life insurance** premiums on behalf of your employees for coverage over \$50,000 that have not yet been reported to BenePAY?
- \_\_\_\_      \_\_\_\_      Do you have any employer-paid health savings account (**HSA**) contributions that have not yet been reported to BenePAY?
- \_\_\_\_      \_\_\_\_      Did you reimburse any employees in 2018 for **moving expenses** that have not been reported?
- \_\_\_\_      \_\_\_\_      Do you have **additional 1099M** information (contracted labor) over \$600 to report?
- \_\_\_\_      \_\_\_\_      Did you issue **over 250 W-2s in 2018** and need to report employer/employee health insurance contributions on the W-2 (Box 12DD)?
- \_\_\_\_      \_\_\_\_      Other (excluding ACA Reporting)?

Answering "yes" to **any** of these questions will result in BenePAY holding your books open for W-2 and year end return processing. Failure to report year-end adjustments you have notated on this form by January 9, 2019, will result in your company(ies) being sent to print as is. The best method to provide these figures to us is via a secure email with a spreadsheet containing the adjustment type, employee ID and dollar figure to be reported. Once W-2s are spooled, additional adjustments will be considered amendments and applicable charges will be assessed.

Please complete the below & e-mail to [taxdept@benepayonline.com](mailto:taxdept@benepayonline.com) or fax to (616) 575-8709

Company Name \_\_\_\_\_

Client Number \_\_\_\_\_

Contact Name \_\_\_\_\_

Contact Phone \_\_\_\_\_

Client Service Rep \_\_\_\_\_