



Employee Managed Services

US AND CANADA YEAR-END

Readiness Checklist

What to confirm before year-end balances, forms, and filings are finalized.

Year-end is smoother when balances, responsibilities and deadlines are visible. Work through the four areas below for both the US and Canada. Any open item should become a dated action with an accountable owner before final payrolls and statutory reporting.

The year-end readiness checklist

Calendar and Ownership

- ✓ Final payroll and adjustment dates agreed.
- ✓ US and Canada deadlines documented.
- ✓ Owners and review points assigned.
- ✓ Vendor and agency contacts confirmed.

Data and Configuration

- ✓ Employee identity and address data validated.
- ✓ Tax jurisdictions and registrations confirmed.
- ✓ Earnings and deduction mappings reviewed.
- ✓ Year-end system updates assessed.

Reconciliation and Compliance

- ✓ Quarter-to-date and year-to-date balances reconcile.
- ✓ Taxable wages and taxes validated.
- ✓ US, federal, state and local items reviewed.
- ✓ Canada federal and provincial items reviewed.

Forms and Communications

- ✓ W-2 and required US forms prepared.
- ✓ T4, T4A and RL-1 requirements confirmed.
- ✓ Funding, filing and delivery methods agreed.
- ✓ Employee communication and support ready.

You are ready when



Balances Agree

Payroll, tax, and finance totals reconcile.



Forms are Ready

Required outputs are reviewed and approved.



Owners are Aligned

Every deadline and exception has an owner.

Not sure what is still open? EMS can run a US and Canada year-end readiness review and turn gaps into a focused action plan.

Payroll, Your Way.