

Preparing Your Payroll Records for Year-End Reports

First, scrub your data

- Avoid special characters in employee names such as dashes and apostrophes. Mize runs a special character audit before printing W2s and 1095s to assist with this task.
- Verify Social Security Numbers
 - Run the SSN Audit report – select the hamburger menu and then select My Info>My Reports>My Saved Reports. Turn on the toggle for Others' Setting to see reports created by Mize. Search in the Saved As Name filter with the filter option set to "starts with" and enter SSN in the filter box.



- Run the report. Change the Tax Year to 2025
- Start by filtering the SS# column in the below formats. If your return results an incorrect Social Security number, please contact us immediately. This will prevent incorrect filing and potential need for W2C's.
- In the SS# column change the filter option to "starts with" and in the filter box enter one of the below numbers and then hit enter.
 - Social Security numbers cannot start with the numbers below so you will be running the audit for each by changing the filter and running the report for each one:
 - 000
 - 666
 - 900-999 (For these number filter for "Starts with" and enter 9 in the box below)
- Social Security Numbers also cannot be one of the following – change the filter option to "=" and enter the exact numbers below. Or use the filter option for "in" and enter all these number combinations separated by a comma to search for them all at once.
 - 123-45-6789
 - 111-11-1111, 222-22-2222, etc.

- Social Security Numbers also cannot have the below format, to audit for these formats you can change the drop-down filter to "Like" and in the box below enter 00, this will pull any SS# that has 00 within it, so you will have to look through these manually to verify.
 - ***-00-****
 - ***-**-0000
- Verify addresses. On the Employee basic tab, use the Recommend feature when inputting new addresses to verify accuracy

The image shows a screenshot of an address verification form. The form is titled "Address" and contains the following fields:

- Country:** A dropdown menu with "United States" selected.
- Street:** A text input field containing "534 S Kansas".
- Zip:** A text input field containing "66605".
- City:** A dropdown menu with "Topeka" selected.
- State:** A dropdown menu with "Kansas" selected.

 Below the fields is a blue button labeled "Recommend".

Second, encourage your employees to electronically consent W2 and 1095.

This will provide self-service access to year end forms. Plus, it saves printing and mailing costs. To understand how many of your employees have electronically consented, run the W2 Electronic Consent report and the 1095 Electronic Consent report. You can find these as well in My Saved Reports. Run the reports and use the drop-down filters on the W2 and 1095 Consent Given columns and run for both Yes and No to get a current estimate.

Use the Communicate function to email a reminder to employees from Payroll 2.0 on how to provide their electronic consent. Mize can help build a template you can use to send out explaining this process.

Finally, create a Personal Information Verification packet and send it to employees to verify current payroll information.

This will reduce incorrect filings and reduce the number of returned year-end documents that are mailed.

Reach out to your Mize payroll processor if you need assistance with these year-end tasks!