



## 2024 Year End Process Form

**Please note that APS will begin processing W2's on January 2nd, 2025**

**Client ID:**

**Company:**

Please answer the questions on the back of this form. Sign and return it along with any adjustments to [aps@apswfm.com](mailto:aps@apswfm.com) (or via fax 765-463-0588) by Friday **December 13th, 2024**. If the form is not received by December 13th, APS will proceed with generating your W2's beginning January 2nd, 2025.

If your 4<sup>th</sup> Quarter returns or W2's needs to be redone, due to the delayed or inaccurate submission of year-end adjustments, additional fees will be incurred. If you are unsure of the answer to any of these questions, please contact your accountant.

Any additional 2024 year-end adjustments dated December 31st, 2024, that will increase the taxes owed to any government jurisdiction must be sent to APS **no later than January 2nd at 10:00 a.m.** to ensure timely payment and filing. If you owe more than \$100,000 in Federal Taxes, the payment will be due January 2nd, 2025. Federal and state W2 filings are due **January 31st, 2024**.

**\*\*PLEASE NOTE: If you have any handbook policy changes, custom form updates or accrual policy changes that need to be updated effective for January 2025, APS will need those updates by December 1st, 2024, MP this amin order to have them re-configured and in place by January 1st.\*\***

<b>Generate W2's &amp; 1095's</b>		
APS create/generate W2's & 1095's with ESS Access and/or you print all forms		\$5/form, minimum of \$50
<b>Generate &amp; Print W2's &amp; 1095's</b>		
APS create/generate and print copies on W2 and 1095 paper		\$6/form
<b>Shipping (in addition to the cost to generate forms)</b>		
APS Ship packages of all printed W2's & 1095's to employer address via National Carrier with tracking:	1-150 forms	\$12
	151-250 forms	\$25
	251+ forms	\$40
APS to mail each W2 & 1095 to the employee's address		\$1.15/form

Client ID            Company

**1. Pick one option for your ACTIVE employees:**

- \_\_\_\_\_ **ESS:** We want ESS Access and/or We will print **ALL** W2's & 1095's after APS generates them.  
\_\_\_\_\_ **PRINT:** We want APS to generate and print W2's & 1095's for my active employees who did not give ESS Consent.

**Shipping preference:**

Ship via national carrier with tracking to the Company address below \_\_\_\_\_  
Mail directly to Employee Address \_\_\_\_\_ (\$1.15 ea.)

**2. Pick one option for your TERMINATED employees:**

- \_\_\_\_\_ **ESS:** We have ESS Access and We will print W2's & 1095's for Terminated employees after APS generates them.  
\_\_\_\_\_ **PRINT & Mail:** We want APS to print W2's & 1095's and mail directly to Employee Address. (\$1.15 ea.)  
\_\_\_\_\_ **PRINT & SHIP:** We want APS to print W2's & 1095's and send to Company Address listed below via National Carrier.

If the delivery address listed below is not where you want us to deliver your tax forms or the delivery address is a PO Box, please provide the correct address. **(National carrier will not deliver to a PO Box)**

Address on File

Updated Delivery Address

**Your 2023 adjustment history is shown. Please circle YES or NO for 2024 Calendar Year**

<u>2023</u>	<u>2024</u>	
NO	YES/NO	Our Company has 1099's for 2024 that need to be generated by APS
NO	YES/NO	Our company <b>HAS</b> turned in and already processed all EOY adjustments through payroll and do not expect any additional amounts or adjustments needed. If you answered yes to this question, please proceed directly to the signature line below.
NO	YES/NO	We have Company-paid Group Term Life Insurance (GTL) coverage for employees over \$50,000 that <u>is not</u> reflected in payroll (box 12C) that still needs to be recorded for this year.
NO	YES/NO	We have Officer's Insurance that <u>is not</u> reflected in payroll (any individual that owns more than 2% of the company) (box 14A) that still needs to be recorded for this year.
NO	YES/NO	We have business vehicles that are used by employees for personal use that still need to be recorded for this year.
NO	YES/NO	We have gift cards or other prizes that have been distributed to employees for bonuses, incentives, awards, etc. that still need to be recorded for this year.
NO	YES/NO	We have retirement plan contributions that <u>are not</u> reflected in payroll (SEP, IRA, Profit Sharing, etc.) that still need to be recorded for this year.
NO	YES/NO	We have employee or employer contributions to HSA's that still need to be recorded in payroll (box12W) for this year.
NO	YES/NO	We have additional fringe benefits that <u>are not</u> reflected in payroll (housing allowances, country club memberships, etc.) that still need to be recorded for this year.
NO	YES/NO	We have Qualified Small Employer HRA (QSEHRA) that still needs to be recorded for this year.
	YES/NO	We have Third Party Sick Pay that <u>is not</u> reflected in payroll that still needs to be recorded for this year and will not be reported on a W2 provided by the 3 <sup>rd</sup> Party Sick Pay carrier.
	YES/NO	We have other year-end adjustments that need to be made - please indicate remaining items below and email details separately to <a href="mailto:aps@apswfm.com">aps@apswfm.com</a>

Client Signature \_\_\_\_\_ Date \_\_\_\_\_

Please take a moment to verify that we still have up-to-date company contacts, telephone numbers and email addresses. We are unable to assist anyone that is not listed as an authorized contact. Any request that comes from an unauthorized contact will be redirected back to the company's primary contact.

Please provide/ Update a **Pin#** for each authorized contact. We will use these for verification purposes when you or the other contacts call in.

**Current Company Contact      New Company Contact**

<b>Primary Contact</b> Pin # _____		
<b>Technical (Help/Support) Contact</b> Pin # _____		
<b>Business (Sales/Marketing) Contact</b> Pin # _____		
<b>Admin (Billing/Accounting) Contact</b> Pin # _____		
<b>HR Contact</b> Pin # _____		
<b>Payroll Contact</b> Pin # _____		
<b>New Hire Reporting Contact</b> Pin # _____		

If there are any other company contacts that you would like to have for your company that are not currently listed here, please list them below along with the access they can have. This could be a CPA or accountant, or someone who is able to pick up payroll but does not have full system access.

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