

Year-End Tax Guide

A comprehensive guide on wrapping up payroll
and benefits for the new year.



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What is year-end? What happens? What do I have to do? What are my deadlines?

Year-end takes place from December to January, when it's time to compile everything from the past year in preparation for the new year.

We made this guide to answer all your questions and to provide you with a clear list of tasks to ensure your filings are accurate. This is important for you and your employees and/or contractors. We'll explain what we do, how we do it, why, and when, as well as steps we recommend you take.

Let's get started!



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Here's a breakdown of important year-end events. Sign in to [Payroll](#) in Square Dashboard to review and update your account.

Now

Begin reviewing draft Form W-2s

Draft Form W-2s are available year-round. You can review these by going to Payroll > [Tax Forms](#) in Square Dashboard. See [FAQ 4.2 to 4.7](#) for more.

December

Update your 2023 federal and state tax information

If you received any notices related to your 2023 withholding tax filing frequencies and/or 2023 state unemployment insurance (SUI) tax rate, you may need to update this tax information by going to Payroll > [Tax Info](#) or by contacting Square Payroll directly. See [FAQs 3.2 to 3.4](#) for more.

December

Update benefits and time off for 2023

Review [sick and/or time off balances](#) and [benefit contribution limits](#) before you run your first payroll for 2023. See [FAQ 3.5 and 3.6](#) for more.

12/19/2022

Begin reviewing draft Form 1099-NECs

We'll start processing draft Form 1099-NECs on December 19, 2022. As soon as these forms are ready, you'll be able to view them by going to Payroll > [Tax Forms](#). See [FAQ 4.2 to 4.7](#) for more.

1/5/2023

Last day to run an off-cycle and/or contractor payment with a 2022 pay date

This is your last chance to [run an off-cycle payment](#) to include in your 2022 tax filings. See [FAQ 2.3](#) for more.

Deadline to update team information on draft Form W-2s and/or Form 1099-NECs

This is the final day to [update your team members' legal names, Social Security Numbers \(SSN\), and addresses](#) before we file Form W-2s and/or Form 1099-NECs. We recommend starting to review the draft forms in December. See [FAQ 4.4](#) for more.

Deadline to update paper mail settings for Form W-2s and/or Form 1099-NECs

Square Payroll defaults to delivering Form W-2s and/or Form 1099-NECs to your team electronically via their online Square account or Team App. If you prefer that Square mails your team paper copies of their tax forms, you need to opt-in from Payroll > Settings > [Payroll Settings](#).

1/31/2023

Tax filings are completed

You'll be able to view your completed annual and quarterly tax filings — including Form W-2s and/or Form 1099-NECs — by going to Payroll > [Tax Forms](#) in Square Dashboard. Form W-2s and/or Form 1099-NECs will be made available electronically to your team members and if you have opted to mail the tax forms through Square Payroll, they will be mailed by this date. See [FAQ 1.4](#) for more.

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Sign in to [Payroll](#) in Square Dashboard to confirm the following information so your tax filings are accurate.

- 01. Confirm company address**

Go to Payroll > Settings > [Business Info](#) to confirm that your company's address is accurate. Please update accordingly if you have moved.
- 02. Verify active employees' and/or contractors' information**

Go to Payroll > [Payroll Team](#) to verify that your employees' and/or contractors' information is accurate and up to date to ensure we file their Form W-2s and/or Form 1099-NECs correctly. This includes full names, Social Security Numbers (SSNs), and addresses.
- 03. Add former employees' and/or contractors' information**

If you haven't yet, go to Payroll > [Payroll Team](#) to add any former employees who worked for you in 2022. You'll need to add their information so we can accurately file their Form W-2s and/or Form 1099-NECs. This includes full names, SSNs, and addresses.
- 04. Run final payroll for the year**

Go to [Payroll](#) to make your final pay run for 2022. Any payments with a 2023 pay date will be reported on 2023 Form W-2s and/or Form 1099-NECs. For example, if you're paying employees for hours worked December 16–31, 2022, on January 6, 2023, those wages will be included in your 2023 tax filings. If you need the wages to be reported in 2022, you have until January 5, 2023, to [run an off-cycle payment](#) to include in your 2022 tax filings.
- 05. Process final off-cycle and contractor payments for the year**

Go to [Payroll](#) to make an off-cycle payment, pay bonuses, or make any outstanding 2022 payments no later than January 5, 2023. Be sure to confirm the pay date is on or before December 30 to ensure the wages are reported on 2022 tax filings. We recommend doing this as early as possible.
- 06. Update Form W-2s and/or Form 1099-NECs paper mailing setting**

Square Payroll defaults to electronically delivering Form W-2s and/or Form 1099-NECs to your team via their online Square account or Team App. If you would like Square Payroll to mail paper tax forms to your team, go to Payroll > Settings > [Payroll Settings](#) by January 5, 2023, to opt in to paper mail.
- 07. Set paid and/or sick time off limits**

If you're tracking paid time off and/or sick leave for your employees, you may want to update your employees' Current Balance at the start of the year by going to Payroll > [Payroll Team](#). If you don't change this, each employee's balance will automatically roll over to 2023.
- 08. Set benefit contribution limits**

If you have benefits set up for your employees, you may want to set deduction and contribution limits for the new year by going to Payroll > [Payroll Team](#). Otherwise, existing limits will remain the same.

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1.0 Tax Filings for 2022

1.1 What does Square Payroll file at year-end?

Square Payroll completes all federal and state tax filings and payments on your behalf at no additional charge. Here's a list of the taxes Square Payroll files on your behalf:

For W-2 Employees:

Federal Filings

IRS Quarterly: Form 941

IRS Annually: Form 940 and/or Form 944

SSA Annually: Form W-2, Form W-3

State & Local Filings

Visit the [Support Center](#) for a list of each state filing we handle at year-end.

For 1099 Contractors:

Federal Filings

IRS Annually: Form 1099-NEC

1.2 When does Square Payroll file my year-end taxes for me?

Square Payroll will file your federal and state tax filings by January 31, 2023. Once your tax filings are completed, you'll be able to access and download a copy of them by going to Payroll > [Tax Forms](#). If there are any issues with your tax filings or payments, you will receive an email or notifications in your Payroll dashboard.

If you are in AR, IA, MI, NJ, or OH, you will have additional state tax filings due in February. Those will be available in Payroll > [Tax Forms](#) by the end of February.

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1.3 What information do you need me to provide?

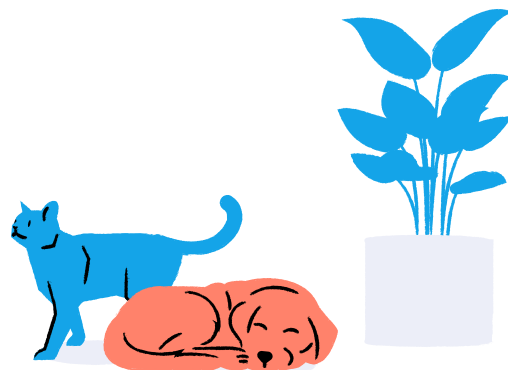
Make sure to provide Square Payroll with the most up-to-date business, employee, and/or contractor information on file. We recommend reviewing your team information in early December to ensure the information is up to date. We'll notify you of any issues via email or notifications in your Payroll dashboard.

1.4 Where can I check the status of my tax filings?

View the status of your federal and state tax filings by going to Payroll > [Tax Forms](#). Your Q4 2022 and 2022 annual filings will be completed before the January 31, 2023 deadline. Filings will appear in Payroll > [Tax Forms](#) as they are completed. We'll also send you a confirmation email once all filings are complete and available.

1.5 I'm a 2% shareholder of an S-Corporation. How do I report my health insurance premiums?

If health and accident insurance premiums were paid for by an S-Corporation, shareholders with at least 2% ownership are required to report premiums as wages on their W-2s (subject to income tax withholding). If your business type is set as an S-Corporation on Square Payroll, we'll send you an email requesting a list of names and annual premium amounts. If this applies to your business, information must be emailed by January 5, 2023. Refer to your tax professional or the IRS website for more.



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2.0 Final 2022 Payments

2.1 How do I pay year-end bonuses?

You can pay year-end bonuses by going to [Payroll](#) and processing an off-cycle payment. Select **Bonus and other Supplemental Pay** under **Payment Type**, and enter the bonus amount in **Additional Pay**. Taxes will be calculated using the supplemental federal withholding rate of 22% and the applicable state withholding rates. If you want bonuses to count towards 2022 wages, submit this off-cycle payment by January 5, 2023. Note that off-cycle payments processed in 2023 may result in late tax payments and potential tax penalties, so we recommend doing this as early as possible.

2.2 How do I determine my final pay period of 2022 and my first pay period of 2023?

Your last pay period of 2022 and first pay period of 2023 are determined by the pay date, not the dates employees actually worked. Any wages earned with a pay date in 2023, regardless of the actual pay period, will be included in the 2023 wages for tax purposes (and annual W-2s and/or 1099-NECs).

For example, if you have a pay period from December 16–31, 2022, with a pay date of January 6, 2023, this will be reported on your 2023 Form W-2s and/or Form 1099-NECs. If you would like to report these wages in 2022, you will have an option to process an off-cycle payment and backdate the pay date to 2022. See below for more.

2.3 Is it possible to backdate a W-2 or 1099 payment from 2023 so it has a 2022 pay date?

Yes. If you have additional payments to process from 2022, you can run an off-cycle or a contractor payment by January 5, 2023. Off-cycle and contractor payments can be processed by going to [Payroll](#). When the backdate feature is available, you will be prompted to select the “tax year” since wages are reported based on the pay date. If you would like these wages to be reported on 2022 Form W-2s and/or Form 1099-NECs, check the pay date to ensure it is recorded on or before December 30, 2022.

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2.4 How do I pay myself in December for the entire year?

If you are an owner who receives a Form W-2 through Square Payroll, you may want to process an off-cycle payment for the entire year or a specific period of time. The federal payroll taxes are calculated based on the length of the pay period, payment type, gross pay, and W-4 information. We recommend you discuss this option with a tax professional or accountant beforehand to ensure the wages and withholding declarations on your W-4 are correct. If your accountant is advising you to withhold a custom amount of federal and/or state income tax, please contact us directly. See page 16 for contact details. Please note, flat rate taxes such as Social Security and Medicare cannot be changed.

2.5 Do holidays affect payroll?

Pay dates through Square Payroll are only affected by federal banking holidays (for example, Thanksgiving, Christmas, New Year's, Martin Luther King Jr. Day) if you are paying your team using two-day payroll or 1099 contractors using four-day payroll. For runs using two-day payroll or contractor payments, you will need to process the payment one day early (except Saturday) if the holiday is on a weekday and falls on the pay date or between the day payroll is run and the pay date. We'll send you a reminder to do so.

If you are paying W-2 employees using four-day payroll or Instant Payments, your due dates for submitting payroll will not be impacted by holidays and there is no need to process payroll early. Your employees will be paid on their expected pay date or the pay date will be moved one business day earlier if the pay

2.6 What if I missed the deadline for processing final 2022 payments?

The deadline for processing final 2022 payments and making edits to draft Form W-2s and Form 1099-NECs is January 5, 2023. If you miss the deadline, you may need to file an amendment to correct any tax filings with inaccurate wages or team member info. If you'd like to work with Square to file an amendment, please contact us for a quote for our Amendment Services. You can also update and make these [amendments](#) directly with the tax agencies yourself.

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3.1 How do I view annual payroll reports for my business?

You can create a custom report by going to Payroll > [History & Reports](#). When creating a custom report you will be prompted to select a date range and the report type. You have the option to create a report with company totals, per-employee totals, or paycheck details. If you would like to download a report for the entire year, select the date range: January 1, 2022 (1/1/2022) to December 31, 2022 (12/31/2022).

3.2 How do I update my state unemployment insurance (SUI) rate?

Most states update their SUI rates for the upcoming tax year and send out notices between November and January. You can also view your SUI rates by logging into your online state SUI account. If you receive a new SUI rate, you can update it by going to Payroll > Settings > [Tax Info](#). For rates that go into effect in 2023, we recommend updating your SUI rate before you process your first payroll of 2023. If the rate is updated in the middle of the quarter, Square Payroll will recalculate your UI taxes and credit or debit your account based on the SUI rate at the end of the quarter.

If you're in CA, NY, VA, PA, WA, or WI, we will automatically update this rate for you and there is no action required by you.

3.3 How do I update my federal and/or state withholding filing frequency?

You may receive 2023 IRS and/or state withholding filing frequency notices between November and January. Square Payroll will submit your withholding tax filings and/or payments based off of the filing frequency you indicate under the Payroll > Settings > [Tax Info](#) section of your dashboard. If you need to update your federal and/or state filing frequency, please contact us. See page 16 for contact details.

3.4 How do I update my federal deposit frequency?

The IRS has two deposit schedules for employment taxes, monthly or semi-weekly. To ensure timeliness of your tax payments, Square Payroll sends payments for all employers to the IRS on the more frequent semi-weekly tax payment schedule. Semi-weekly tax payments are made within three days of your pay date. No action is required if you received a notice from the IRS regarding a change in your federal deposit frequency.



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3.5 When can I reset pre-tax benefit contribution and deduction limits?

Benefit limits apply to each calendar year. For benefits managed outside of Square Payroll, you can set up and adjust annual contribution limits for each benefit by going to Payroll > [Payroll Team](#). We recommend setting up your 2023 contribution limits after you send your final W-2 pay run for 2022 and prior to sending your first pay run in 2023. If no pre-tax benefit or post-tax contribution limit is set, we will set your 2023 limit to match your 2022 limit.

This does not apply to employers using benefits through our SimplyInsured or Guideline partnerships. This information is automatically transferred for you.

3.6 When should I reset paid time off (PTO) and/or sick leave balances?

Employee PTO and sick leave balances automatically roll over to the new calendar year. If you would like to reset your employees' PTO and/or sick leave balances for 2023, we recommend doing so after you send your final W-2 pay run for 2022 and prior to sending your first pay run in 2023. Please note, you may be required by law to carry over accrued and unused paid sick time to the new year, depending on your state. To update these balances, go to Payroll > [Payroll Team](#).

3.7 When can I reset post-tax deduction and garnishment deduction limits?

Post-tax deductions and garnishments automatically roll over to the new calendar year. If you would like to reset the deduction limits or create a new deduction type for 2023, we recommend doing so after you send your final W-2 pay run for 2022 and prior to sending your first pay run in 2023. To update these deductions, go to Payroll > [Payroll Team](#).

3.8 How do I update my team members' pay rates?

You can update your team's pay rates by going to Payroll > [Payroll Team](#). Wage increases will be reflected on the following pay run. If you would like to change the pay rate in the middle of a pay period, you can set up multiple pay rates for your team members or you can pay your team members for hours worked at the second hourly rate by using the **Additional** column in the **Run Payroll** screen. The amount added to the **Additional** column will be included in your team member's gross wages.

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4.0 W-2s & 1099-NECs

4.1 Does Square Payroll file Form W-2s and/or Form 1099-NECs?

Yes. Square Payroll generates and files Form W-2 and/or Form 1099-NEC for each team member you paid in 2022, including former team members who no longer work for you. Your team will receive electronic copies of their Form W-2 and/or Form 1099-NEC by January 31, 2023. You can access completed forms by going to Payroll > [Tax Forms](#). We'll also email you when the completed forms are published and filed with the corresponding agencies.

4.2 Does Square Payroll mail Form W-2s and/or Form 1099-NECs?

Square Payroll defaults to delivering Form W-2s and/or Form 1099-NECs to your team electronically via their online Square account or Team App. You will still need to provide your team with a physical copy of their tax forms by downloading and printing them from Payroll > [Tax Forms](#), unless your team consents to receive an electronic copy. Team members with online accounts can view, download, or print a copy of their form at any time by logging into their Square Payroll account or Square Team App. If you would like Square Payroll to mail paper copies of Form W-2s and/or Form 1099-NECs to your team members, you must update your paper mail preference by January 5, 2023, through Payroll > Settings > [Payroll Settings](#).

4.3 Can I opt out of Form W-2 and/or Form 1099-NEC filings?

Yes. You can opt out of filing Form 1099-NECs for contractors until January 5, 2023, by going to Payroll > [Payroll Team](#). In the contractor's profile, uncheck the box that says "Automatically file Form 1099-NEC for this contractor."

If you would like to opt out of filing Form W-2 for employees, please contact us as soon as possible and by January 5, 2023. See page 16 for contact details. Square Payroll only has the ability to cancel federal and state Form W-2s. This applies to all employees and we cannot cancel partial filings for Form W-2s.

4.4 How do I make sure Form W-2s and/or Form 1099-NECs are accurate?

Draft Form W-2s are available all year for review in Payroll > [Tax Forms](#) and draft Form-1099-NECs will start to be generated on December 19, 2022. We'll notify you via email when the draft Form 1099-NECs are ready to be reviewed.

You can review and make changes to your employees' and/or contractors' full names, SSNs, and home addresses at any time by going to Payroll > [Payroll Team](#). Avoid common errors such as incorrect or misspelled names, nicknames, shortened names, titles before or after a name, changes not reported to the SSA, and mismatched SSNs.

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4.5 What if a name, address, and/or SSN is wrong on a Form W-2 or Form 1099-NEC?

You will have until January 5, 2023, to review and update your employees' and/or contractors' full names, SSNs, and home addresses. If any personal information is inaccurate, you can update the information by going to Payroll > [Payroll Team](#). You can also update your business address by going Payroll > Settings > [Business Info](#). Any changes you make to the draft Form W-2s will be reflected immediately upon downloading the forms again. Changes to the draft Form 1099-NECs generate each evening and will be reflected the next day. Changes made by January 5, 2023 will be reflected in the final tax forms we file.

4.6 What if I need to correct the wages on the draft Form W-2s?

If the wages are inaccurate on the draft Form W-2s, you may be able to process an off-cycle payment by January 5, 2023, for a period of time in which you were processing payroll through Square. If you switched to Square Payroll from another provider in 2022, wages processed through the previous provider should have been transferred to Square Payroll shortly after switching. Please contact us as soon as possible if you still need to transfer previous W-2 payroll history and we will work with you toward a resolution (see page 16 for contact details). In some cases, you may be required to file an amended tax form. Amendments can be filed directly with tax agencies or you can request a quote for Square Payroll's Amendment Services.

4.7 How do correct wages on draft Form 1099-NEC and record historical contractor payments?

You can transfer historical contractor payments for 2022 by going to [Payroll](#) and making a New Contractor Payment. Choose the pay period and set the payment method to Pay All by Check to ensure the contractor is not paid an additional time. Add the contractors and paid amounts, then confirm the pay run. Payments made by January 5, 2023, will be reported on their 2022 Form 1099-NECs.

4.8 How are wages reported on Form W-2 and/or Form 1099-NEC?

The total taxable wages, tips, and other compensation are reported in Box 1 on Form W-2, excluding pre-tax benefits, retirement plans, and deductions. Pre-tax benefits are reported in Boxes 12 and 13. Visit the [Support Center](#) to see how the information from Square Payroll is reported on each Box of Form W-2, including the codes used in Boxes 12, 13, and 14.

Non-employee compensation, such as contractor payments, are reported in Box 1 of Form-1099-NEC.

4.9 How do employees and/or contractors receive their Form W-2s and/or Form 1099-NECs?

Square Payroll defaults to delivering Form W-2s and/or Form 1099-NECs to your team members electronically via their online Square account or Team App. In addition, you are required to provide your team members with a physical copy of their tax forms unless they consent to electronic-only delivery. If you would like Square Payroll to mail paper copies to your team members, you must update your paper mail settings by January 5, 2023, by going to Payroll > Settings > [Payroll Settings](#).

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4.10 What if my team didn't receive Form W-2s and/or Form 1099-NECs in the mail?

If you did not enable paper mail delivery or if a team member does not receive their Form W-2 and/or Form 1099-NEC in the mail by January 31, 2023, you can download and print a copy for them from Payroll > [Tax Forms](#). If you obtain employee consent to electronic-only delivery, it is also sufficient for your team members to access their tax forms online. Any team member (current or former) who has an online account can also access their tax forms online or via the Team App.

4.11 Does Square Payroll file taxes for former/terminated employees and/or contractors?

Yes. Square Payroll generates and files Form W-2s and/or Form 1099-NECs for all team members you paid in 2022, including former employees and contractors. If you haven't already, go to Payroll > [Payroll Team](#) and make sure their information is complete, including legal name, SSN, and address.

4.12 I'm no longer in business. Will Square still file my employees' Form W-2s and/or contractors' Form 1099-NECs?

Yes. Your employees' Form W-2s will be available in Payroll > [Tax Forms](#) by January 31, 2023. In addition to your Form W-2s and/or Form 1099-NECs, we'll also file applicable year-end tax filings. See FAQ 1.1 for a list of tax forms. If you do not want us to continue filing your payroll taxes for 2022, please contact us by December 21, 2022. See page 16 for contact details.

4.13 What's the difference between Form 1099-NEC, Form 1099-MISC, and Form 1099-K?

Starting with the tax year 2020, businesses must now report nonemployee compensation, such as payments to independent contractors, on Box 1 on Form 1099-NEC. Form 1099-MISC has been redesigned and is no longer used to report contractor payments.

Form 1099-Ks are issued by credit card processing companies — including Square — to customers who meet certain state-specific thresholds of transactions in the calendar year. If you have questions about Form 1099-K, contact the Square Point of Sale team. See page 16 for contact details.



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Features we've built and expanded on this year.

We're always working to make Square Payroll even better for your business.



Faster payroll options

Two-Day Payroll and Instant Payments are available options to pay your team sooner than four days. Coming soon for employers using Two-Day Payroll, when you process a run, you will be able to select "Fastest Available" to pay your team two days after payroll is processed, or select "Regular Pay Day" to give yourself more time to process payroll. Visit [Payroll Settings](#) to set up Two-Day Payroll or Instant Payments.



2-Step Verification

2-Step Verification is a tool that provides an extra layer of security for your Square account and protects your account from unauthorized access. All you need is a U.S. mobile phone number or an authentication app such as Google Authenticator. Once enabled for yourself, you can choose to require it for your team, protecting their accounts as well. To set up 2-step verification, go to Settings > Account & Settings > [Sign-in & security](#) in your dashboard.



On-Demand Pay for employees

On-Demand Pay (ODP) offers certain W-2 employees access to a portion of their earned income (max \$200 per pay period) as they work. If an employee takes ODP and then gets paid by manual check, as an employer you will have separate debits to ensure that the employee is paid the correct amount via check and you are debited the correct amount as well. You can update the On-Demand Pay option at any time through the [Payroll Settings](#).



Time tracking and scheduling with Square Shifts

Square Shifts is a new, separate product that includes features such as scheduling, time tracking, tip pooling, labor reports, and commission tracking. With full service Square Payroll, you'll have access to Shifts basic functionality, giving your team the ability to clock in and import their hours to payroll at no extra cost. You can also subscribe to Shifts Plus for advanced labor management features such as tip pooling, commissions tracking, cash tip tracking, and labor vs. sales reporting.

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Love Square Payroll? Refer your friends and get a \$100 Amazon gift card.

Spreading the word about Square Payroll can be especially rewarding. You get a \$100 Amazon gift card every time you refer a friend to Square Payroll and they run payroll. Let's get 2023 off to a good start!

To refer your friends:

1. Sign in to Payroll > [Earn \\$100](#) in Square Dashboard.
2. Get your unique referral link and share with your friends.
3. You'll receive a \$100 Amazon gift card once they use your code to sign up and run payroll.

Thanks for spreading the word!

New employers must sign up using your referral link. Pay run must include payment to a W-2 employee. Learn more about the [Square Payroll Referral Program](#).

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Our payroll specialist team is here to support you! You can reach our team by **email** or **phone** by signing in to your account through the [Contact Square](#) portal. The payroll support phone line is open Monday – Friday from 6 a.m. – 6 p.m. PT. For non-urgent issues, we suggest sending us an email through the [Contact Square](#) portal.

