

Year End Key Dates

Diocese Year End & ACA Training

- January 6, 2026-Amendments / Amended Returns (ARs) begin
- January 16, 2026-Quarterly packages posted
- Beginning January 16, 2026- W-2s and 1095-Cs available online to employees W-2C requests available
- January 20, 2026- Quarterly variance collected
- January 27, 2026- Reprints available
- January 31, 2026- All tax forms available in Self-Service Portal and mailed and postmarked by this date

Reports for Reconciling W-2s

Diocese Year End & ACA Training

There are several Standard Reports available to reconcile the amounts shown on employees' W-2s. To access these reports, navigate to **Reports & Analytics > Reporting**.

Paylocity recommends using the following reports when reconciling W-2s:

Quarterly Wage and Tax Summary: This report provides a summary of taxable wages and tax amounts. This report also breaks down wages for each employee, showing both Gross and Taxable wages, and amount of taxes withheld for various tax types (including Federal Income Tax, Social Security, and Medicare).

Year to Date Report: This report provides a detailed summary of earnings, taxes, and deductions year to date (YTD) by employee.

Labor Distribution Report This report groups and sorts amounts according to the department to allocation.