

Yearly Checklist

- **940** _____
 - Form 940 is due 01/31/20XX
- **941** _____
 - Create W2's and W3 online at www.ssa.gov/bsowelcome.htm
 - Forms are due to employees 01/31/20XX
- **PA-W3** _____
File annual reconciliation (W2 Transmittal) on e-tides
- **Berkheimer: Employer Withholding** _____
 - File the W-2R:
 - https://cp-efile.hab-inc.com/Employer/EmployerUpload_W2REC.aspx
- **LST – NO ANNUAL RECONCILIATION**