



## Unlocking Greatness

Through Your Dedication and Commitment

# Year-End Retirement Reporting Checklist

**W**e know you have many responsibilities to take care of each day. But accurate, timely retirement reporting is every bit as important as paying your employees on time. The information you provide us is essential for the prompt and accurate payment of retirement benefits. So, to help you make sure it all gets done on time, we have created a Year-End Retirement Reporting Checklist for your reference.

- ☐ **Verify Membership Eligibility for Summer School Employees**  
If summer school extends into July, you must verify that employees are still eligible for membership for the upcoming school year.
- ☐ **Reconcile Your Payroll Records with Your Audit Report**  
Make sure salary, insurance and hours reported for all your employees match your payroll records. Make necessary adjustments, if applicable.
- ☐ **Report All Salary for the School Year, Add Termination Dates and Report Final Pay for Employees**  
For employees who plan to retire July 1, this information must be reported by **July 10**. For all other employees, this information must be reported as soon as possible, but no later than **August 15**.  
**Note:** Do not report final pay for employees until all salary has been reported.
- ☐ **Report Final Pay for the School Year**  
In EWP, you must report final pay for the school year from the *Home* page after your final payroll has **posted**.  
**Note:** Upon reporting final pay for the school year, you will receive an email notifying you that you have a secure message to view. That message will include directions on how to access your *Less Than One Year of Service Report* and explain how to complete it.
- ☐ **Check Your Statement of Account and Pay Any Open Invoices**  
Your *Statement of Account* screen in EWP will show you any open invoices, available credit memos and your balance due. Apply any available credit memos to open invoices and pay the balance due.
- ☐ **Get Prepared to Start the New School Year Strong**  
Check your supply of *Right For You, Right Now* brochures. We request you hand these out to each new employee at enrollment. You can order more online at any time. And don't forget to share the onboarding video with your new employees. Find it on your EWP login screen.