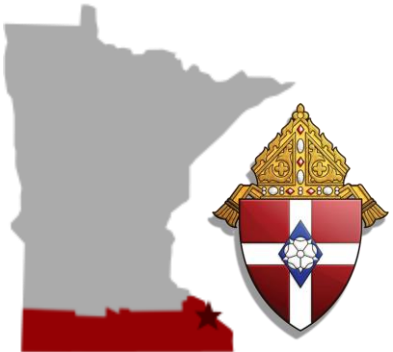




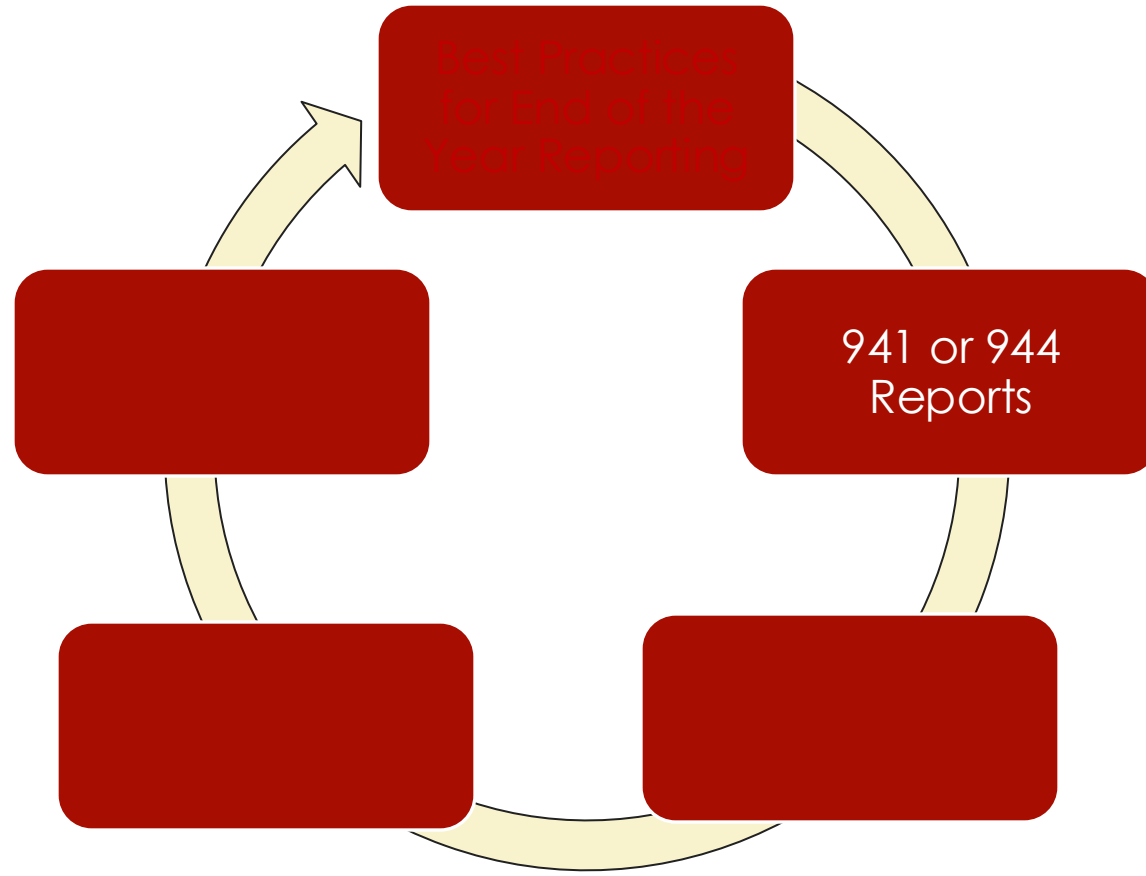
2025 Employment Reporting



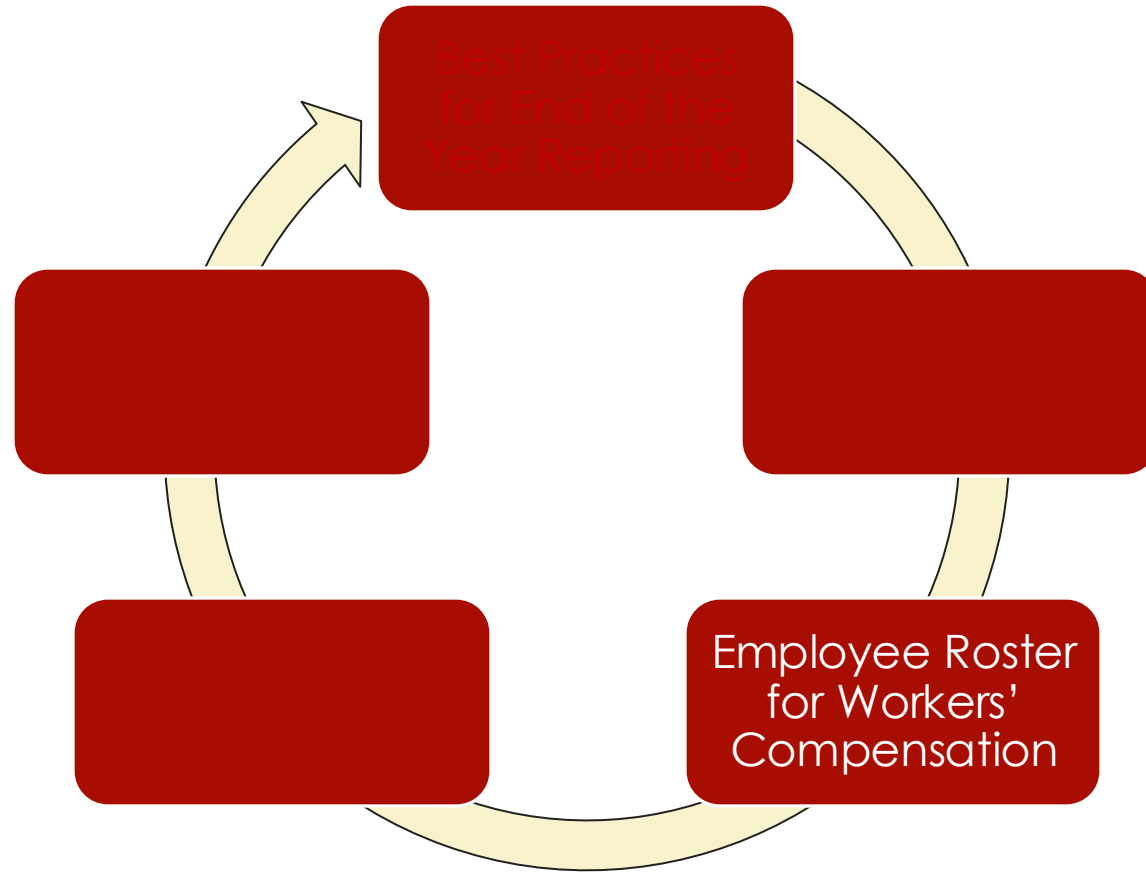
Today's Agenda.....



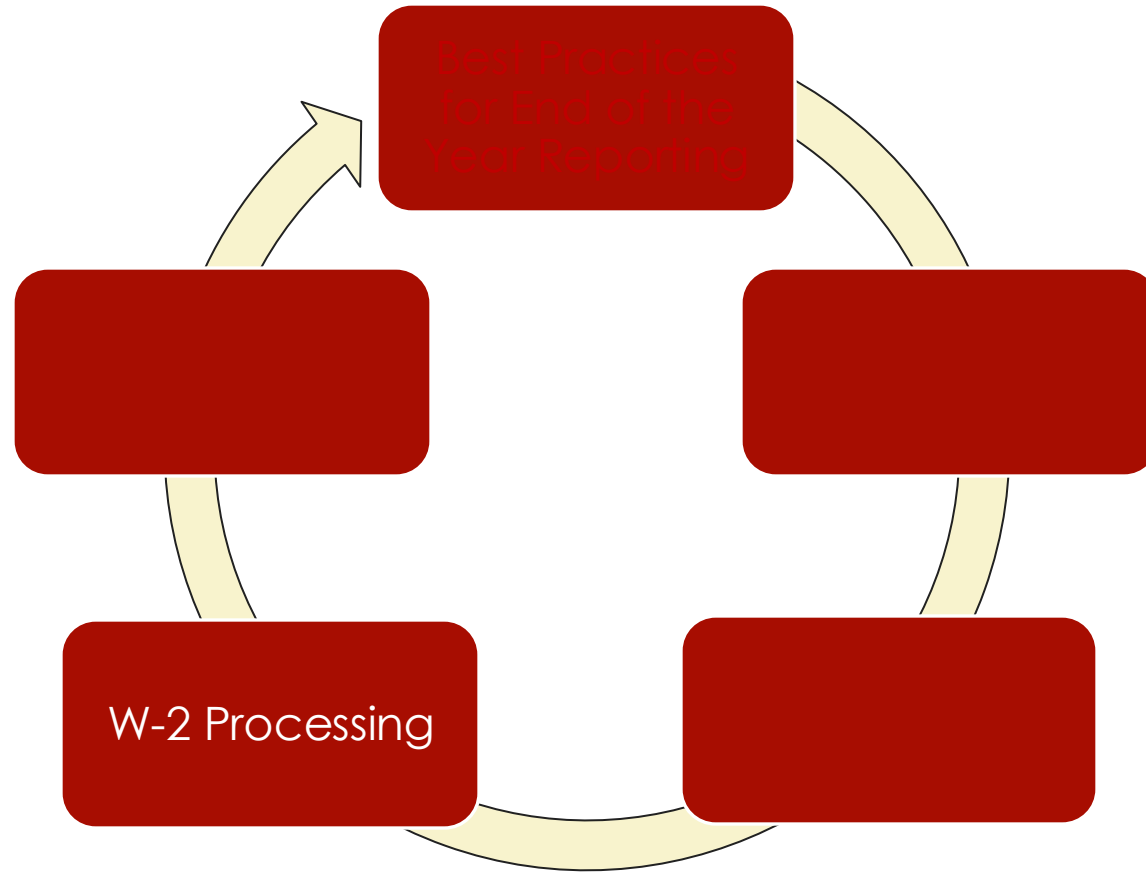
Today's Agenda.....



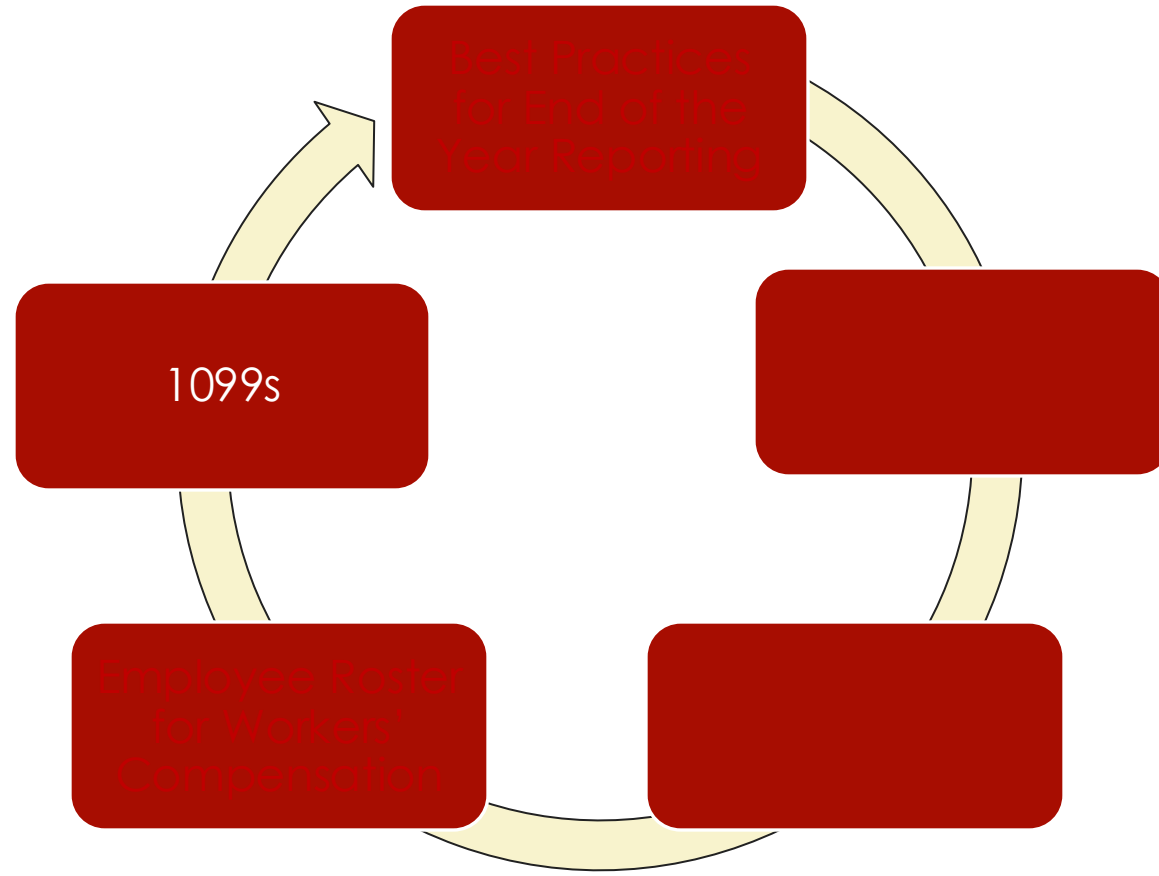
Today's Agenda.....



Today's Agenda.....



Today's Agenda.....



Best Practices for End of Year Reporting

- Verify your information before the last payroll (in case you need to make corrections)
 - Run a Taxable Wage Report (Reports, End of Period, Taxable Pay & Withheld) and look for the following :
 - Select all payrolls for the calendar year
 - Do your FICA and Medicare wage amounts match for each employee? (there should be no FICA or Medicare wages for any priest or paid deacon)
 - Are the State and Federal wage amounts the same for each employee? Every employee should have State and Federal wages.

W a g e s		Withholding	Wages	Withholding	Wages	Withholding	Wages	Withholding
Gross	SS Gross	Soc. Sec.	Med Gross	Medicare	Fed Gross	Federal	State Gross	State
179.03	179.03	11.10	179.03	2.60	179.03	0.00	179.03	0.00
541.42	541.42	33.57	541.42	7.85	541.42	0.00	541.42	0.00
32,452.95	30,802.95	1,909.78	30,802.95	446.67	29,829.37	1,656.00	29,829.37	2,010.00
33,981.62	0.00	0.00	0.00	0.00	33,981.62	0.00	33,981.62	0.00
2,547.99	2,547.99	157.98	2,547.99	36.95	2,547.99	0.00	2,547.99	0.00
591.15	591.15	36.64	591.15	8.58	591.15	0.00	591.15	0.00
40,029.28	39,570.91	2,453.41	39,570.91	573.79	39,570.91	2,930.00	39,570.91	1,157.00
1,427.10	1,427.10	88.50	1,427.10	20.69	1,427.10	220.00	1,427.10	0.00
4,621.28	4,621.28	286.53	4,621.28	67.02	4,621.28	141.00	4,621.28	188.00
21,281.25	21,281.25	1,319.44	21,281.25	308.59	20,848.29	591.00	20,848.29	429.00
33,742.80	31,492.72	1,952.55	31,492.72	456.66	14,621.32	918.00	14,621.32	0.00
341.54	341.54	21.18	341.54	4.96	341.54	0.00	341.54	0.00
1,102.99	1,102.99	68.38	1,102.99	15.99	1,102.99	0.00	1,102.99	0.00
172,840.40	134,500.33	8,339.06	134,500.33	1,950.35	150,204.01	6,456.00	150,204.01	3,784.00

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 - Are the State and Federal wage amounts the same for each employee? Every employee should have State and Federal wages.
- **Verify SSNs for any new employees**
- Verify mailing addresses
- Make sure all your payrolls for 2025 are closed!
- You do not have to order preprinted forms but you may order the special perforated paper with the official W-2 wording on the back if you plan to print the W-2s right out of ParishSOFT accounting. If you E-File or use SSA Business Services, you do not need to order the special paper.

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941/944 Returns

941/944 Return Reminders

If you file quarterly 941 returns

- Select 4th Quarter on the 941 return

If you file the annual 944 return

- Select 2025

941/944 Return Reminders

If you file quarterly 941 returns

- Select 4th Quarter on the 941 return
- Preview the report

If you file the annual 944 return

- Select 2025
- Preview the report

941/944 Return Reminders

If you file quarterly 941 returns

- Select 4th Quarter on the 941 return
- Preview the report
- Verify that your tax deposit receipts match the amount shown on the return

If you file the annual 944 return

- Select 2025
- Preview the Report
- Verify that your tax deposit receipt(s) match the amount shown on the return

941/944 Return Reminders

If you file quarterly 941 returns

- Select 4th Quarter on the 941 return
- Preview the report
- Verify that your tax deposit receipts match the amount shown on the return
- Verify that the rounding is only a few cents – if it is a larger amount there is probably something wrong-Contact Cindy Olson

If you file the annual 944 return

- Select 2025
- Preview the Report
- Verify that your tax deposit receipt(s) match the amount shown on the return
- Verify that the rounding is only a few cents – if it is a larger amount there is probably something wrong-Contact Cindy Olson

941/944 Return Reminders

If you file quarterly 941 returns

- Select 4th Quarter on the 941 return
- Preview the report
- Verify that your tax deposit receipts match the amount shown on the return
- Verify that the rounding is only a few cents – if it is a larger amount there is probably something wrong-Contact Cindy Olson
- Be sure to print Schedule B if you are required (semi-monthly depositor)

If you file the annual 944 return

- Select 2025
- Preview the Report
- Verify that your tax deposit receipt(s) match the amount shown on the return
- Verify that the rounding is only a few cents – if it is a larger amount there is probably something wrong-Contact Cindy Olson

Employee Roster for Workers' Compensation

NOW IS A GREAT TIME TO GET THE EMPLOYEE ROSTER
READY FOR THE WORKERS' COMPENSATION AUDIT

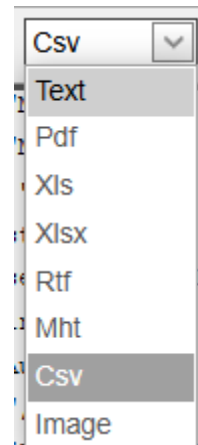
Using the Payroll Information Export

Select all 2025 payrolls

Choose the information shown to the right:

Submit the report

Change the file type to CSV

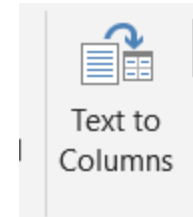
A screenshot of a payroll information export form. It contains several sections with dropdown menus for selecting specific information to include in the export. The sections are: 'Marital Status - Choose Custom Text Field' (with options Custom Text 1, 2, 3, 4), 'Job Type - Choose Custom Text Field' (with options Custom Text 1, 2, 3, 4), 'Life Insurance Deduction(s)' (with options 12 - 403(b) Employee Deduction- Traditional, 13 - Health Insurance Employee Deduction, 15 - Flex Plan Medical Deduction, 17 - Shamrock Zone, 18 - UCSF Donation, 19 - Flex Plan Dependent Care Deduction), 'Long Term Disability Deduction(s)' (with the same options as Life Insurance), 'Health Insurance Deduction(s)' (with the same options), and 'Dental Insurance Deduction(s)' (with the same options). Each dropdown menu has a small 'x' icon in the top right corner.

Export the Report

Highlight Column A

A
"11222024
"11222024
"11222024
"11222024
"11222024
"11222024
"11222024
"11222024
"11222024
"11222024
"11222024
"11222024

Click on Data, Text to Columns



Choose Delimited

Convert Text to Columns Wizard - Step 1 of 3

The Text Wizard has determined that your data is Delimited.

If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

☒ Delimited - Characters such as commas or tabs separate each field.

☐ Fixed width - Fields are aligned in columns with spaces between each field.

Employee Roster continued

Select Next

Next >

Select Comma

Delimiters

- ☒ Tab
- ☐ Semicolon
- ☒ Comma
- ☐ Space
- ☐ Other:

Select Finish

Now, add some lines at the top for headings
Put these headings in their respective columns:

C	D	H	U	V	X	Y	Z	AA	AB
Last Name	First Name	Job Title	Workers' Code	Gross Wages	Middle Initial	Flex Dep	Flex Medical	Health Insurance	403b Pension

Delete any column without a heading (in the example, that would be A-B, E-G, I-T, W and AC-AD).

Employee Roster (Continued)

The Middle Initial column should be cut and pasted next to the First Name column.

Insert a column – and put Social Security Gross Wages as the heading and add W-2 Wages as a heading to the column after 403b Pension.

A	B	C	D	E	F	G	H	I	J	K	L
Last Name	First Name	Middle Initial	Job Title	Workers' Code	Gross Wages	Flex Dep	Flex Medical	Health Insurance	Social Security Wages	403b Pension	W-2 Wages

Employee Roster (Continued)

1. Put a formula into the Social Security Wage field that takes the gross wages and subtracts Flex Dep, Flex Medical and Health Insurance and drag it down (or copy it) to all of the rows. =F5-SUM(G5:I5)
2. Put a formula into the W-2 wage fields that takes the Social Security Wages and subtracts 403B Pension and drag it down (or copy it) to all of the rows. =J5-K5
3. Add subtotals to your report.
4. Remember to remove the calculation for Social Security wages for any priests or deacons and put their total gross wages in the W-2 column.

W-2 Preparation

Step 1

W-2 Setup and Recalculation

Under the payroll tab, click on Forms



Forms

Select W-2 Setup



W-2 Setup

Make sure that the various deductions are properly linked and submit.

W-2 Setup

Deductions/Benefits

#	Code	Type	Description	W-2 Box	W-2 Code
1	11	Benefit	403(b) Employer Benefit-Discretionary		
2	12	Deduction	403(b) Employee Deduction-Traditional	Box 12	E
3	13	Deduction	Health Insurance Employee Deduction	Box 12	DD
4	14	Benefit	Church Health Insurance Employer Benefit	Box 12	DD
5	14	Benefit	School Health Insurance Employer Benefit	Box 12	DD
6	15	Deduction	Flex Plan Medical Deduction		
7	16	Benefit	Life, LTD, AD&D Employer Benefit		
8	17	Deduction	Priest Pension Deduction	Box 14	
9	19	Deduction	Flex Plan Dependent Care Deduction	Box 10	
10	20	Deduction	Garnishment		
11	24	Deduction	Supplemental Life Insurance Deduction		
12	25	Benefit	403(b) Employer Benefit-Match		
13	27	Deduction	403(b) Employee Deduction-Roth	Box 12	BB

Step 1 (Continued)

Click on Edit Employee's W-2 Information



[Edit Employee's W-2 Information](#)

Make sure the year is 2025

2025 ▼

Show Year

Click on Reprocess All

Submit

Cancel

Reprocess All

Click OK and you will see the W-2s have been reprocessed message.

winona.parishsoftaccounting.com says

This process will replace all W-2s with original data. Do not perform this process if you wish to retain changes you made to W-2 information. Continue?

OK

Cancel

✓ W-2s have been reprocessed! 12/1/2025 3:06:58 PM

Step 2

Review W-2 forms

Click on Forms again.



Click on W-2s / W-3



[941](#)



[W-2s / W-3](#)



[W-2 Electronic Filing](#)



[944](#)

Click on OK

winona.parishsoftaccounting.com says

If you have posted additional payroll changes since the last time you printed or reviewed W2's, you should reprocess the W2's before printing by choosing Forms | Edit Employee's W-2 Information, then click the 'Reprocess All' button.

OK

Step 2 (Continued)

Select W-3 Blank Paper and Preview Report

- **** Form Name** _____

- ☐ W-2 Review Report
- ☐ W-2 Copy A, 2-Up Blank Paper
- ☐ W-2 Copy D, 2-Up Blank Paper
- ☐ W-2 Copy 1, 2-Up Blank Paper
- ☐ W-2 Employee Copies B & C, 4-Up Blank Paper
- ☐ W-2 2-Up Pre-Printed
- ☒ W-3 Blank Paper
- ☐ W-3 Preprinted

Step 2 (Continued)

Compare the totals in boxes 1, 3/5 and 16 with your employee roster totals.

1 Wages, tips, other compensation 142703.36	16 State wages, tips, etc. 142703.36
3 Social security wages 126959.07	
5 Medicare wages and tips 126959.07	2 Federal income tax withheld 5538.00

Total up your 941 return information for:

Line 2 Federal Wages

Line 5a/5C Taxable Social Security and Medicare Wages

Line 3 Income tax withheld

Compare with the W-3

Step 2 (Continued)

Total up the State wages and withheld taxes reported on your MN Employment Tax returns for 2025 and compare to the totals to the W-3

16 State wages, tips, etc.	17 State income tax
142703.36	3483.00

Investigate any differences for any of these comparisons.

Do not proceed until you are sure your data is correct!

Step 3 Print and File

Once you have everything reconciled, you are ready to file.

The easiest choices for this process are:

- SSA Business Services online entry and filing.
 - Free
 - Up to 50 W-2s are able to be entered and submitted
 - Automatically files electronically with the SSA
 - You would need to manually file with State

Step 3 (Continued)

- E-File through ParishSOFT Accounting

- Variety of options for form submission

In the **Services** box, select from the e-filing offerings, and note the options selected next to each employee's name:

- **Package 1** includes Federal and State E-filing and will print and mail each employee their W-2. The church would only have to print the Employer's copy for their records from ParishSOFT Payroll.
- **Package 2** includes Federal E-filing and will print and mail each employee their W-2. The church would have to submit to the State on paper and print only the Employer's copy for their records from ParishSOFT Payroll.
- **Federal E-filing** includes only E-filing to the Federal Government. The church would have to submit to the State on Paper and print and distribute the Employee's W-2 and print the Employer's copy for their records.
- **State Filing** includes only E-filing to the State. The church would have to submit to the Federal Government on Paper and print and distribute the Employee's W-2 and print the Employer's copy for their records.
- **Recipient Mailing** includes only the employee's W-2's printed and mailed to each employee. The church would have to submit to the Federal and State on Paper and print the Employer's copy for their records.

Step 3 (Continued)

Minimal cost for the services (credit card required).

Ease of transmission.

Choose your method and you will be done!

Be sure to print and keep a copy of the W-3 and W-2s for the files.

1099 – NEC Forms

Who should get a 1099-NEC form?

Generally each person who in the course of your business to whom you have paid the following during the year:

1099 – NEC Forms

Who should get a 1099-NEC form?

Generally each person who in the course of your business to whom you have paid the following during the year:

- At least \$600 in:
 - Services performed by someone who is not your employee (including labor, parts and materials)
 - Payments to an attorney (box 1)

1099 – NEC Forms

Who should get a 1099-NEC form?

Generally each person who in the course of your business to whom you have paid the following during the year:

- At least \$600 in:
 - Services performed by someone who is not your employee (including labor, parts and materials)
 - Payments to an attorney (box 1)
- W-9 3a boxes checked:
 - Individual/Sole Proprietor
 - Partnership
 - LLC organized as a partnership

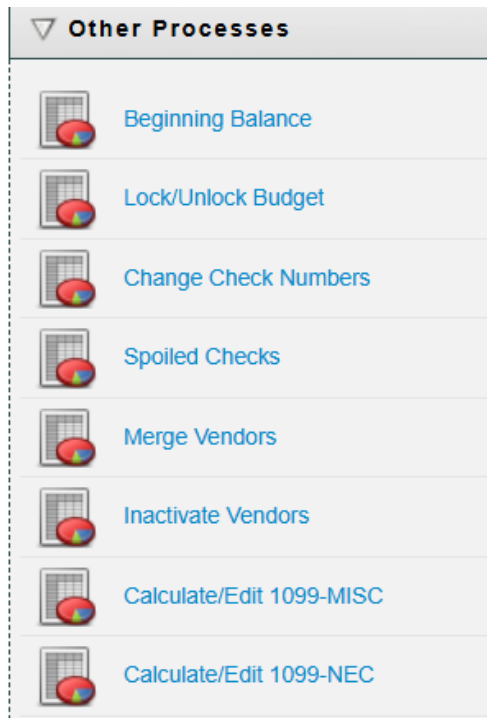
3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.

- ☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate
- ☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership)
- Note:** Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.
- ☐ Other (see instructions)

Step 1

Reprocess Vendors for 2025

From the Ledgers and Payables tab, click on Process
Select Other Processes and Calculate/Edit 1099-NEC



Step 1 (Continued)

Make sure 2025 is selected for the year

Select Reprocess All

Click OK

winona.parishsoftaccounting.com says

This process will replace all 1099-NECs with original data. Do not perform this process if you wish to retain changes you made to 1099-NEC information. Continue?

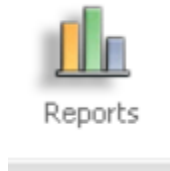
Look for the confirmation notice.

✔ 1099-NECs have been reprocessed! 12/1/2025 4:12:21 PM

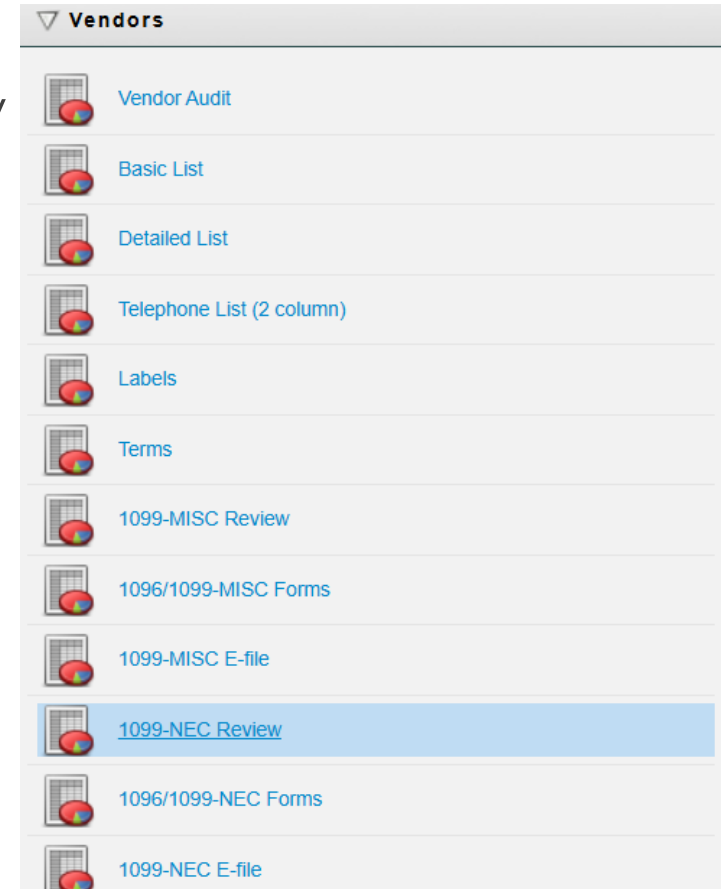
Step 2

Verify the tax identification numbers

Click on Reports



Click on Vendors and
select 1099-NEC review



Step 2 (Continued)

Preview the report and make sure every 1099-NEC has a Recipient TIN number.

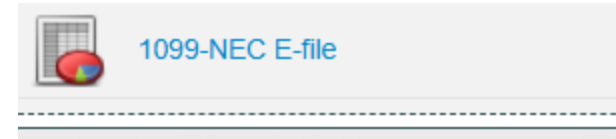
Verify the amounts for Non-Employee Compensation (make sure there are no mileage reimbursements included in the amount).

Step 3

Print and File/E-file

Once everything has been confirmed, you are ready to print and e-file your 1099s.

From the vendor report list, choose 1099 e-file.



Log in using the same logins as you use for W-2s or create an account.

The menu options are similar to the options for W-2s.

Please note: you do not need to submit 1099-NEC forms to the state of Minnesota unless you have withheld income taxes. There is no need to pay for submission to the state.

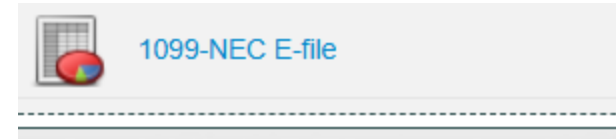
Make sure you keep a copy of the 1099-NEC forms and the 1096 summary form for the files.

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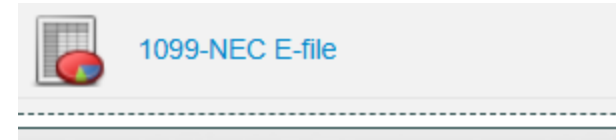
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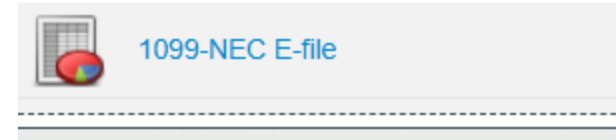
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X. Recap and Q&A Session

- Verify!
 - Names
 - Addresses
 - Tax ID Numbers
- Don't forget to recalculate/reprocess!
- Relax, you'll get this done!

End of Year Contribution Statements

When To Deduct-only in the year the contribution is actually made.

Usually, you make a contribution at the time of its unconditional delivery.

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Checks. A check you mail to a charity is considered delivered on the **date you mail it**.

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Text message. Contributions made by text message are deductible in the year you send the text message if the contribution is charged to your telephone or wireless account.

End of Year Contribution Statements

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Text message. Contributions made by text message are deductible in the year you send the text message if the contribution is charged to your telephone or wireless account.

Credit card. Contributions charged on your bank credit card are deductible in the year you make the charge.

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Credit card. Contributions charged on your bank credit card are deductible in the year you make the charge.

Pay-by-phone account. Contributions made through a pay-by-phone account are considered delivered on the date the financial institution pays the amount. This date should be shown on the statement the financial institution sends you.

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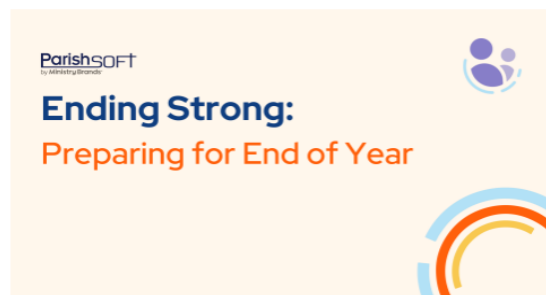
Stock certificate. A properly endorsed stock certificate is considered delivered on the date of mailing or other delivery to the charity or to the charity's agent. However, if you give a stock certificate to your agent or to the issuing corporation for transfer to the name of the charity, your contribution isn't delivered until the date the stock is transferred on the books of the corporation.

End of Year Contribution Statements

Go to <https://www.parishsoft.com/success-labs>

Scroll to All Success Labs and select “Families” and search for “End of Year” and/or “Contribution Statements”.

Choose one or both of these pre-recorded trainings:



RECORDING

Success Labs – Ending Strong Preparing for your End of Year

What do I need to do before the end of the year to be set up for success? This Success Lab will prepare you to do your EOY tasks within ParishSOFT Family Suite so that your EOY is a breeze. This webinar will cover recording gifts, closing open batches, generating your contribution statements, and overcoming common challenges you may face.



RECORDING

Success Labs – Contribution Statements

This Success Lab will give you all the tools necessary to create great-looking and accurate statements. We will not only cover how to set up your printer contribution statements, but will also look at reasons you want to create and send contribution statements, giving parishioners electronic access to statements, final reminders to avoid common mistakes, and a sample timeline for creating and sending statements.

Get ready to send out those contribution statements!

IX. Thank you and Conclusion

- Questions?
- Thank you for Participating!

Invitation to Stay Connected and Continue the Conversation

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