




Deltek

Deltek Vantagepoint

Year-End Payroll Checklist

December 1, 2020



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Payroll Checklist

At year-end, there are certain steps that need to be performed in Payroll, as outlined below. Refer to the following checklist to ensure that you perform all required Payroll activities in the recommended order.

Step	Description	Done?
1.	Deltek recommends that you complete all Payroll year-end payment processing and adjustments for the current year; however, this is not required.	
2.	Create a backup of the database.	
3.	Install Vantagepoint Year-End Update. <i>For Deltek First Vantagepoint Essentials SaaS customers, the Year-End Update is scheduled and installed by Deltek Cloud Operations. The timing and specifics of this update will be communicated to the SaaS Administrators within Deltek First Vantagepoint Essentials SaaS organizations.</i>	
4.	Verify withholdings and contributions that will be reset for new W-2 year, as applicable.	
5.	Run the Open New W-2 Quarter utility. Since you are in the 4 th quarter, Vantagepoint automatically opens a new W-2 Quarter/Year.	
6.	Run Form W-2 Processing.	
7.	Confirm W-2 totals in Vantagepoint.	
8.	Print W-2s and, if applicable, generate the Electronic Filing file.	
9.	Generate the W-3 Worksheet to fill out the W-3 form manually.	

Appendix: If You Need Assistance

If you need assistance installing, implementing, or using Vantagepoint, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to <https://deltek.custhelp.com>.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

Note: If you forget your username or password, you can click the **Need Help?** button on the login screen for help.



About Deltek

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