

USER GROUP SESSION SUMMARY

Year-end Activities for UKG Pro

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OVERVIEW:

This User Group session focused on how to best prepare for a successful year-end with UKG Pro. Our presenter, Sability's Anne Holly, shared monthly tasks, balancing best practices, tax rates and filing dates, and how to manage extra pay periods.

SUMMARY:

As a best practice, organizations should complete key tasks in the months leading up to year-end to ensure a smooth and compliant close. In November, teams can verify company configuration and create the payroll calendar for the upcoming year. December is an ideal time to process adjustments and review reporting information, while January focuses on preparing and distributing year-end forms. Conducting regular payroll, W-2, and tax balancing allows organizations to identify issues and refine processes to ensure ongoing compliance. To navigate year-end effectively, assemble your internal team early, participate in year-end trainings, leverage checklists, and order necessary tax forms if not using UKG Pro print services.

YEAR-END BEST PRACTICES:

- Balance payrolls at least quarterly, ideally after every payroll, to identify and mitigate risks early
- Prepare for 27 or 53 pay periods in 2026 for Weekly and Bi-Weekly Payrolls
- Stay up to date with legislative changes
- Don't wait until the last minute. Year-end preparation begins on January 1st!



PRESENTER



ANNE HOLLY

Sability Payroll Specialist

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USER GROUP:

If you're interested in participating in our next User Group session, join our LinkedIn Group "Sability UKG User Group" or reach us at customersuccess@sability.com