

Speaker 1: Welcome to PayTalk, the podcast for payroll professionals with your host, Nina Talley. In the podcast, we explore the human side of payroll by speaking with global industry leaders who provide their unique insights to help listeners better understand the issues important to them and their careers.

Nina Talley: Hey, everyone, thanks for joining us for PayTalk, the podcast that brings you payroll's human side. I'm your host, Nina Talley, and today we have a special episode focusing on the distinct methods used by both corporate and consultant professionals in tackling those much dreaded but much needed year-end payroll tasks.

We're thrilled to have our two experts with us today, Luanne Brown, CPP, Principal Team Lead of the Payroll Center of Excellence at a privately held national company, and Valery Noakes, CPP, Owner and Payroll Consultant at MHP Consulting Services and PayrollOrg's Vice President.

Luanne and Valery bring an absolute wealth of experience from both the corporate and consulting worlds, and today we're going to be sharing their insights on the unique challenges and advantages that each perspective offers, especially when it comes to handling year-end payroll tasks.

Before we dive into today's discussion, Luanne, Valery, could you please take a moment to introduce yourselves and share a little bit of your background with our listeners?

Luanne Brown: Thank you, Nina. It is a pleasure to be here. I first heard the sirens' call to payroll very early in my career. My first thought when presented with the opportunity to handle payroll was, "Sure, it's payroll. How hard can it be?" That was the first and last time I ever asked that question.

I have had the honor of being a payroll professional for almost 30 years now. It kind of hurts when I call out the years. I have worked in different industries, including working with professional athletes, manufacturing, advertising agency, and before starting with my current employer, I spent 16 years as a director of payroll services in the higher ed world working for two universities. I learned so much while working there.

I am part of the National Speakers Bureau for PayrollOrg, and one of my favorite classes to teach is Preparing for Year-End. I am so excited to be part of this podcast with my friend and payroll colleague, Valery.

Nina Talley: Valery, could you give us a little bit of your background as well?

Valery Noakes: My pleasure. Thank you, Nina, for inviting me to speak on this because much like Luanne just said, my passion for payroll was something that was learned over 30 years ago, and yes, Luanne, it is difficult to say that.

Luanne Brown: I have to gulp a little when I say it.

Valery Noakes: Yeah. Like so many of us, I fell into payroll by way of having a project that I was assigned to from a totally different role in accounting. I was assigned to a project that was to implement a mainframe payroll system, and at the end of the implementation, I worked with the payroll manager to get the training and everything else up to speed for the first year, and then she retired 15 days before the first year-end on a brand-new system and I was promoted.

And like you said, Luanne, I knew nothing. I thought, "How hard can it be?" And it definitely is, although a very challenging, complex area, it is also very rewarding because you learn so much about not just payroll, but legal, HR, communications, IT. It goes, it spans the breadth of what you need to know. So that's why I found it so very, very fulfilling.

I've also had a range of industries that I've worked in, large corporations that range from retail, grocery to vision, different types of manufacturing and distribution at an oil and gas marketing and refining company, and different softwares that I've used over the years through that.

And now during the pandemic, I kind of thought back on my career and said, "I want to fulfill my passion for payroll and educating other payroll professionals," and as part of the National Speakers Bureau through PayrollOrg, I've been able to fulfill that, and the Preparing for Year-End class is my absolute favorite class that sustained me throughout my career and that's why I wanted to give back.

Nina Talley: I love that. Thank you both for sharing that information for us, and what I'm so excited about with this conversation in particular is that we get to really showcase the two different worlds of payroll here where we have the more corporate world and then we have a consultant.

And with year-end coming up, there's so many tasks that need to be done. There can be so much stress that's added onto you or to your team. And so to our listeners, I'd ask that as we go through this, just keep a keen ear out. We're going to be doing some pretty interesting comparisons about how things are handled at year-end.

So Luanne, I want to get right into it. When you're preparing for year-end payroll, what are your top three specific tasks that you and your team do to maybe avoid any last-minute stress or just make things easier and how do you make sure that these things are performed efficiently and to standard?

Luanne Brown: Sure. That is a great question, Nina. When I think back over all of the year-ends that I have survived, there are so many different little tips and tricks and things that you learn along the way, but I believe that three specific tasks that I would like to highlight are start thinking about year-end on January 1st. Year-end is all year.

Review your checklists. Are they current? And always keep the end game in mind, which is producing a correct W-2. Every new earn code and deduction code you set up and have a checklist, that includes the mapping to the W-2 and taxable wages.

Another task I would say is assemble a year-end team that includes others from outside your immediate area.

Nina Talley: Oh, yes!

Luanne Brown: Like benefits, accounts payable, HR, legal, IT, even looping in the mail room if you process your W-2s in-house. Make sure that you have assembled the team that will help you be successful in delivering W-2s, year-end tax filings. Then with this team, have a check-in quarterly throughout the year. It could be just a half hour. Then organize and meet more often, probably starting in October.

And of course, I would be a failure if I didn't say this, attend Preparing for Year-End classes. You want-

Nina Talley: Yes!

Luanne Brown: Yes! I'm biased. I loved PayrollOrg. So attend those classes, watch out for regulations, stay up to date. Are there new reporting requirements? Anything you are not aware of that will impact your year-end processing? Do not be complacent. Don't assume that everything is okay. Right? Do not assume. I've been burned by that before and from my pain points.

Then to ensure that we complete the task efficiently, we always use our year-end checklist and assign tasks to the team. Each member is responsible for their item, and in the year-end meetings that you will have, they will report on their tasks. So everybody has their own responsibility and ownership and when your team feels like they have ownership in year-end, they're going to take that to the next level. Instead of telling them everything they need to do, help them develop what needs to be done for the year-end.

Nina Talley: Those are some really great points and I think that developing that team early and keeping the touch-bases is so important because I think at that point what you're doing is you're creating buy-in from other members of the team and it goes from being the weight of year-end payroll on your shoulders to something that can be spread out a little bit more, which also helps to keep you accountable because you're not the only one there expecting answers.

Luanne Brown: Absolutely. And I think as a payroll professional, we sometimes think, "I can fix this on my own. I can do this on my own. I've got this. I don't need to ask for input or for others' advice." And over my career, I've had to put my ego aside, and when I haven't, it hasn't gone well. So I've learned that developing those relationships and asking for input help me and my team succeed in year-end.

Nina Talley: I think that's a wonderful point. There's no room for ego at year-end payroll. There's no room for it.

Luanne Brown: No.

Nina Talley: Valery, from a consultant's perspective, how do you approach those, sort of these year-end tasking? Do you have any three specific tasks that you bring to your year-end as a consultant?

Valery Noakes: Not really what I would call different than what Luanne touched on, they were all critical to the success of year-end payroll, but I find that the communication is so absolutely critical, which is why that year-end committee, having a checklist, understanding the why a piece of information or a specific task is important is absolutely critical because so often, you come into a team and they don't know why they're doing an action, which would help in their growth as well as the accuracy as well as just overall efficiency of the process. I found that to be critical.

And then of course, reconciliation and balancing I can't say enough because as I told you in my first year-end, I inherited a new system. Guess what was lacking on that first year-end was a true process of reconciliation and balancing. So that's absolutely essential that when you've got a consulting input, that you focus on the importance of that.

And as Luanne mentioned, that Preparing for Year-End was always one of my essential classes and one I wanted to teach and give back. And as she mentioned, not only do you get a good idea of what happened during the year from a legislative standpoint and other changes, but it's a good refresher to make sure you haven't missed anything, as well as to be prepared for new year changes and challenges because as we know, often everything seems to change. We know the annual limits change or probably will change, but what else from a legislative standpoint might be upcoming that you need to prepare for?

So all of those areas come in and are absolutely critical, whether it's a professional relationship or a consulting relationship. Those needs really don't change all that much.

Nina Talley: That's a really good point. I think the big difference for me, from my perspective as an outsider, from the consultant and actually working in the business in the corporate world, the difference seems to be that as a consultant, maybe you are not necessarily as hands-on throughout the year all the time.

So Valery, I have a question for you. How do you advise your clients to sort of take steps to ensure a smooth process for year-end because you're not there day to day?

Valery Noakes: Exactly. And the checklist is one of the most critical things. Having a well-thought-out project plan, I find that to be absolutely essential to making sure that all of the expected processes and deliverables are given and are handled timely and efficiently and accurately, and how everyone knows what they are supposed to be doing, and then explaining the why. Often that comes in, especially in clients' standpoint. They need to know the why they're doing something instead of just being told, "You need to do this."

And so having that checklist also allows you to be prepared to handle those last-minute challenges that we weren't told would be coming down the path or were totally unexpected or just something went wrong and you need to be able to handle it.

Luanne Brown: Valery, I love that you mentioned project management because I know for me, my strong point is not project management. So on the teams, I always look for someone who has that project management skill, and they're put in that position of making sure we stay on task with our year-end checklists to make sure that everybody's checking in and to organize that. I do not need to be that person because I know that's not my strong point.

So I think also identifying who is going to own this as a project, not just looking at it as that checklist. I'm so glad you brought that up.

Valery Noakes: Right. Because from a consultant's standpoint, I may not be there when they're needing to take certain actions, and if they don't have a checklist or a project plan, then it may falter, and that's not what my desire is.

Luanne Brown: And having that person on your team designated as, from the corporate side, as the project manager eliminates the team going, "I don't know who's doing what. Did you do that? Did I do that? Where are we?" But they're owning that project and helping you stay on track.

Valery Noakes: Exactly, exactly. And in all aspects, it's helping that individual grow as well.

Luanne Brown: Oh, yeah.

Nina Talley: Absolutely. And I think that that is one of those things where it's if you are setting up your year-end practices appropriately, and as you're building your coalition of the willing for year-end, that by building these efficient sort of processes and these teams that are communicating and supporting each other, you're not just making year-end payroll go well, though that is obviously the goal. You are creating the foundation for your team to build their careers, to build their experience. You're essentially creating year-end payroll for years to come by training and working with your teams and absorbing these processes as they come through.

There's something really powerful here about being able to set your team and the payroll department up well so that they can expand their knowledge set and continue to grow.

Valery Noakes: Exactly, exactly.

Nina Talley: Well-run year-end payroll just makes everybody look good on the team.

Luanne Brown: We want it to be as quiet and smooth as possible, like just that it's magic that happens in the background.

Nina Talley: Do you want to learn more about year-end? PayrollOrg can get you ready with one of many of PayrollOrg's educational year-end programs, either virtually or in person. Be sure you are aware of the complex compliance issues of year-end, including the latest changes in legislation and regulations that affect the close of one year and the beginning of the next. Choose from four specialty year-end classes to get you and your organization through 2024 and prepared for 2025.

Find out more at [www.payroll.org](http://www.payroll.org) and visit PayrollOrg's Preparing for Year-End webpage.

Something that we've touched on already is the checklist, but are there any other tools or technologies that either of you use as you go through your year-end prep?

Luanne Brown: We've looked at leveraging some of our third-party vendor technology. We've looked into Smartsheets or how better to use a project management tool that we can incorporate into our checklist instead of it just being check boxes that we check off, that maybe reminders are automatically sent. We're exploring and seeing how we can develop those more efficient, technology-driven reminders.

Nina Talley: I think that that is sort of a little bit of the missing piece is almost like the push notification on your phone of, "You need to do this step now."

Luanne Brown: Right.

Nina Talley: I think that it's really interesting how the shape of our lives and how our personal lives and how we engage with technology and processes there, how much that's influencing the efficiency of corporate processes as well.

Luanne Brown: Yes. You know, I'm excited to see where AI will take us. How will we be leveraging AI technology to help us with year-end tasks?

Nina Talley: Exactly.

Luanne Brown: To help in reconciliations?

Nina Talley: Yes!

Luanne Brown: I mean, I'm excited about where this can go. A little scared, but more excited than scared.

Nina Talley: It's a little scary, it's a little scary. And something that we had touched on in a past episode was sort of the ethical applications of AI, and there are some really interesting things about pay equity that AI can help us with. If you completely scrub it, if you scrub your data so that there's nothing identifiable in there and just let the AI go through everything, it will make you such a more equitable company. That is my true, like where I'm really excited about the application of AI, is where these sort of hidden biases that it can help us eliminate.

Luanne Brown: Yeah. It's interesting. In Congress, when we were talking about AI and one of the speakers talked about AI can also be biased by how you train it-

Nina Talley: 100%.

Luanne Brown: ... so I thought, "Wow. Okay, so how are we training AI?"

Nina Talley: It's very important.

Luanne Brown: Yeah. No, I'm excited. I'm excited to see how it's going to impact the payroll industry, payroll profession as I start looking towards retirement, just from where I started to where, as I wind out my career, it'll be.

Nina Talley: That's a great thought and I am going to put a pin in that for another episode because I love that.

So something that I did want to sort of dive into, outside of just the technology, is a little bit of the people management, and Luanne, I think that this is going to be really important for you, but Valery, obviously as a consultant, it's important for you as well.

With year-end being so stressful, what are the specific strategies that you're using to maybe mitigate some of the people management issues or even some of the risk that comes with some unexpected kerfuffles or unexpected issues that might pop up?

Luanne Brown: I love that word, kerfuffles. I'm going to use that.

Nina Talley: I love kerfuffles.

Luanne Brown: I'm going to use that in my next meeting.

You know, it is never boring in payroll, and that includes year-end. We try to prepare our teams to really expect the unexpected and to not freak out, right?

So as we prepare for year-end, we revisit previous years. What went well? What didn't go well? What does the team feel were those stress points? Where can we lean in to alleviate some of those?

But now, we know that those unexpected issues will pop up, and when that happens, I want the team to first step back and breathe. Do not immediately go to freaking out, right? That's not going to help any of us.

Nina Talley: Panic doesn't help?

Luanne Brown: I know, right?

Valery Noakes: Not in payroll.

Luanne Brown: Right, throw the stress ball against the wall if you need to, but breathe. Just breathe. And then just step back and evaluate the situation. What happened to cause it? Who do you need to call in for support? Who do you need to let know that you are facing an issue? I tell my team that I'd rather know upfront than have it pop up 12 hours later and we're up against a deadline and I didn't know about it, so communicate.

Again, going back to what I mentioned before, try not to be that superhero and do it all on your own. You're on a team. We're here to help you. We're on cross-functional teams, IT, HR, legal. We are here to support. Reach out and ask for their input and guidance on how to fix the situation.

And then I think as a leader, as a manager of a team, remember to thank your team. Remember to celebrate small wins along the way. Add some fun in there. You got to have humor. Things are going to go wrong. That's life. Human errors are going to happen, right? We're human. But how do you handle that and get through it without causing more stress? So there's a little bit of that emotional intelligence that you have to leverage too.

Valery Noakes: Very true, Luanne, very true. And you can plan for and communicate, but what about those instances where no one expected it? I'm thinking of the pandemic. What if it had happened at year-end? How would it have affected?

Nina Talley: Oh my goodness.

Valery Noakes: And what are your equipment needs? Internet needs? Can you work from home? What does it take? So having that ability to have the forethought of thinking beyond the possible now into, "What might we need to make a transition, like we all had to make in 2020, to working from home?" The weather, some sort of natural disaster. You never know.

So that's why you really have to have fun, but you have to think about all the possibilities and take that deep breath and think. Even though you may want to



go out to, as I told one of my team members, "Maybe we should just go out to the parking garage and just let out a good primal scream and that'll help us," but that really gives you the ability to let the stress go and then come back in and plan effectively.

Nina Talley: I love that. A little bit of scream therapy can help everybody during year-end payroll.

Valery Noakes: We did get some odd looks, I have to admit.

Luanne Brown: I thought about, after year-end, going to one of those smash rooms where you smash plates. When else are you allowed to smash plates on purpose? And just to let it out, let that stress go.

Valery Noakes: Exactly, exactly. Because even though you may be the leader, you're feeling different levels, and what you're feeling is going down to your team, and everyone needs to understand we're all part of it together. This is not just a one-time, it's over, it's done. Year-end is really all the time starting with day one.

Nina Talley: You pick right back up.

Well, other than scream therapy, Valery, I really wanted to see if you have sort of developed any techniques as a consultant to handling last minute year-end payroll issues. Because like we had talked about, as the consultant, you're not always there. So it might be that you would set things up, you gave everybody their tasking, you communicated, and then you show up again, and nothing has been done. What sort of problem-solving techniques have you had to adapt?

Valery Noakes: Really the ability to think quickly on your feet of the different possibilities and then engage the team that you're working with is absolutely essential.

I had an example of a commission file that was submitted to payroll. The numbers on it were duplicated, it was on the very last pay cycle, and of course, it wasn't caught until after the payroll was finalized and we were into the new year. And so now we also had to figure out, well, what are our next steps on handling the overpayment recovery, the impact to the W-2s, the dreaded W-2 Cs, et cetera, and make sure that we recovered the funds as timely as possible where we could.

So it really takes a lot of, I hate to use the word creativity, but that's really what it is because there isn't just one type of problem-solving technique you can use. You have to use whatever may best fit the situation.

Nina Talley: Yes. And that makes sense that as a consultant, your problem-solving techniques would need to be sort of molded to the specific business that you're serving as well. And so that does make sense.

And I think that this is where staying on top of that education aspect of it helps you stay sharp because essentially you're just refreshing the knowledge playbook. You're giving yourself new plays that you can take when encountering these types of issues. And I think that it's very important from the corporate world, obviously, to have all of your ducks aligned through this type of education and making sure that all of the legalese of it is handled. And in payroll, we all know that there's a lot of that, but from a consultant point of view, it can also help you stay fresh and nimble and dynamic.

Valery Noakes: Exactly. And I've also been able to stay, as you mentioned, dynamic because of the courses that I attend, the local chapter topics that they teach. Those are all very essential to ensuring that I stay up to date on what's out there.

And like Luanne, I'm excited about AI. I'm also a little scared about AI, ChatGPT. All these different things can be very helpful to being part of the problem solving technique that we want to use, but on the other hand, you have to make sure that you're using it wisely and that you're aware of the different risks because there are risks on everything we do.

Nina Talley: So I think that my sort of last question here is going to be for both of you, and it's a little bit of a pointed one, but I would love to hear what are your three actionable tips, so things that our listeners could take and apply after they're done listening to this episode, but what are some three tips that you would give to our listeners who are gearing up for year-end? It's time. We're in September, October. What should they start doing right now to prepare effectively?

Luanne Brown: Nina, I think it's important to recognize if you don't have a year-end checklist, develop one now. Don't wait. If you attend a PAYO year-end course, we share checklists and reconciliation examples that you could start off using then modify for your company. You can reach out to your network and other payroll professionals and ask if they will share their checklists.

Valery mentioned reconciliations. Do a reconciliation as soon as possible if you haven't, even pull where your W-2 balances are right now and reconcile into them. That way, you lessen your chances of unexpected surprises at year-end that you're trying to do manual corrections for on January 28th to try to get W-2s delivered on January 31st.

Be active, be proactive, identify who should be on your year-end team and start building those relationships now.

Nina Talley: Yes!

Luanne Brown: Communicate and go meet people across your company that maybe you haven't worked with before, but they have a significant impact on payroll and your year-end processes.

Valery Noakes: Thank you, Luanne. I think the only things I can totally add to that from my history is the planning's essential, but asking the right questions often are the key to success or failure. For example, if you have new benefits coming in, new processes, when they start up, who they affect, those are all very key parts of it. And that communication you mentioned is critical to making sure that we are talking to the right people.

And then finally, my last one, and I've learned this one through the school of hard knocks, testing. Test everything. Not only do you want to make sure that any reconciliation or balancing adjustments you may have had to make, that they are okay, but test for the W-2s, but test for the new year. Make sure that changes, and again, this is one of my stories from years past, if you have new pre-tax deductions, make sure that they are tested not only from a taxation standpoint, but all the way to the pay stub, and even their effect on the next W-2 because that can be critical. 401(k), also test that to make sure the limits are in place. Social security, all of those.

Anything you can think of that is a process that's changing, test it, and even test what has been customized to make sure that, with the year-end rollover, that nothing is breaking, especially if you've gone through an upgrade, or heaven forbid, changed systems or anything like that throughout the year. You need to really make no assumptions and test everything.

Nina Talley: I just want to say I can really feel the weight of both of your experiences with those tips because it is, it's about being proactive on behalf of future you.

Valery Noakes: Exactly, exactly. Future me does not want to have anyone else experience the pain of some of the oopses that have happened in my career, opportunities, kerfuffles, whichever you want to call it.

Luanne Brown: I've learned so much from those kerfuffles though.

Valery Noakes: Exactly.

Luanne Brown: Sometimes those pain points have taught me invaluable lessons, and expanded my knowledge, and kept me humble.

Valery Noakes: Exactly.

Nina Talley: No one understands paychecks better than the payroll professionals. That's why PayrollOrg needs you to help educate and empower America's youth as a volunteer for its Money Matters program. When you volunteer, you are committing to sharing your knowledge by teaching paycheck basics to young adults in your community. Help arm teens with valuable financial knowledge and skills.

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I think that that is a perfect transition for the next section of our podcast, which we like to call Payroll Nightmares. And I'm sure that navigating year-end payroll can bring about some real nightmares, as we've already discussed, but I would love to hear from either of you about a specific year-end nightmare that you could share with us and maybe how you handled it or how you would prevent it in the future.

Valery Noakes: Okay. Can I start, Luanne?

Luanne Brown: Sure, go ahead.

Valery Noakes: I've already shared a few of the nightmares I've seen, but I have one more story that I like to tell, especially when I'm teaching Preparing for Year-End, is in the days where we had printed W-2s, the company I worked for, we had about 50,000 W-2s. They had all been printed, we were on time according to the checklist, we were ready to go, start doing one final review before they were released. Unfortunately, and this was back before you were able to do electronic W-2s, when I turned them over to look at the back of the W-2s, and these were prepared in-house, there was one line missing on the back of the W-2. It was critical. It had to do with the earned income tax credit.

And I just looked at it, and of course I went to some others, maybe it skipped when it was printing, but no, all of them were bad.

Nina Talley: Oh, no!

Valery Noakes: And luckily, they were still sitting in my office. I contacted, worked with my peers in IT. We were able to regenerate them after making the modification so that we basically lost one day. But that goes to that reviewing everything, make no assumption because if I had not looked at the back of it, then they might've gone out the door and we would've had to reissue them all. And it would've been very, publicly for our company, discrediting to the payroll team if we'd had to do that.

Luckily, we caught them before they were released. They were reprinted. The only people that knew were my team and IT and everything went fine, and then I looked at doing electronic in the next year.

Luanne Brown: Well, I have so many payroll nightmare stories, but two quick ones. The first one is serious, the second one is kind of a little chuckle.

So the first one in my early years in higher ed, I had started in August of the year that the university went live with a new system, implemented a new software, so I was coming in on the tail end. I did not go back and double-check that

everything was pulling correctly onto the W-2. Yeah. So thought everything was correct, tied out all my numbers to a W-2 file, which did balance, but there wasn't that check of the actual printed W-2. W-2s were printed and mailed. I then started getting calls from employees asking about local city taxes. Their taxable earnings and withholdings were not reported on the W-2.

So we processed, I think it was close to 1,500, W-2 Cs to fix that problem. A very humbling moment.

Nina Talley: Wow. I love that those are sort of like it's the same experience but with the double-check versus the no double-check.

Luanne Brown: Right, right. And I think that was Valery's experience at that point in time and knowing what to catch versus my inexperience at that moment and not fully looking at everything that I should of, out of not knowing, inexperience, but that was on the earlier end of my career. So I think that's something to take away for if you're just entering the payroll profession, you're just getting your feet wet on all the processes, those are the kind of things that a checklist could have helped with, attending year-end classes could have helped with.

Now, on a lighter note, we were in the middle of processing and our printing W-2s, we were doing them in-house, and our printer stopped, just stopped, ended, stopped. Couldn't figure out what happened. We spent four hours trying to figure out why the printer wasn't printing. We checked the toner cartridge, we checked the trays, we checked with IT to make sure that we didn't lose a network connection. When finally, we moved something and looked at the plug in the wall, and it had pulled just far enough out.

Nina Talley: Oh, it's always the plug!

Luanne Brown: I know! There was connection there, but not all the way.

Nina Talley: Not enough, not enough!

Luanne Brown: Right, right, right. And we just stood there and had to laugh. We had this panic moment, trying to figure out how are we going to print these forms? And it was literally double-checking the power cord. So moving forward, guess what's on the checklist? Check the power power cord.

Nina Talley: The power cord, exactly! That's such a good lesson-

Luanne Brown: Check the toner, check the paper.

Nina Talley: ... in getting really granular with it. You know? Because there's always something you can miss. If you don't get incredibly myopic with it, you'll miss the plug.

Luanne Brown: Yeah, and that's the handing it down to the next generation, the next group that comes in after that. Keep those little things on that checklist so you don't have to feel our pain that we went through. It may look like it, like, "Of course it's plugged in," and it's like, "Yeah, that's what we thought too." Right?

Nina Talley: Maybe wiggle the plug just to triple-check.

Luanne Brown: Exactly. It's like double-checking your door after you leave home that it's locked. Yeah.

Nina Talley: Exactly, exactly.

Valery Noakes: I have one additional little story too that also has to do with W-2s, but as Luanne mentioned earlier, contacting the mail room. One company that I was working with, we included them on all the communications about year-end, they were part of the initial year-end, but what happened was we had all the W-2s ready to go, and they were being delivered to the mail room. We'd done all of our double-checks and made sure that everything looked right.

And I contacted the mail room and said, "The W-2s will be delivered on such-and-such day. They need to go out by the 31st postmark." And I was told, "Well, we don't have money for the postage meter, so it'll have to wait for a couple of weeks." And I'm like, "Oh. Okay. What about the deadline did I not stress enough?"

So like Luanne said, I added to the checklist, "Here's what we need to ensure that day one, here's about what we think we're going to have as far as numbers, here's the dollar amount that we need you to have in the postage meter."

Nina Talley: Wow!

Valery Noakes: Because, you know, the option was not, "Well, we'll just wait." "No. It'll happen," and we go-

Luanne Brown: That's a moment where you go like, "Oh, you're so cute. Yeah, that's not going to work."

Valery Noakes: Yeah, or that was actually a parking garage moment, but...

Nina Talley: It's always interesting when you encounter people who are just like, "Yeah, that's not my problem." Is this not everyone's problem right now?

Valery Noakes: Right now, it is.

Nina Talley: Do you want to hear how our expert guests would handle a payroll nightmare that you're familiar with? Send an email to [podcasts@payroll.org](mailto:podcasts@payroll.org) or leave us a comment on PAYO's Facebook page to get involved in the conversation.

So although we did leave it on a little bit of a fun note there on our nightmares, we really don't like to leave things on that sort of negative place of nightmare dreams, and so we're going to go with positivity here and I have one final question for the both of you. What is the best piece of payroll advice that you've ever been given, or what is the piece of advice that you wish somebody had given you?

Valery Noakes: I have a great one. My first year in, remember when I was a neophyte payroll manager with a brand-new system? My responsibilities in-house was also the completion of the payroll tax reporting. And I remember at the end of January, just basically being a mess because number one, I'd never seen a 941 before, much less knew how to fill them out. It wasn't something that our system was generating, so I had to take that on. And the company's corporate treasurer at the time gave me this piece of advice. He says, "Do the best job you can. Everything can be fixed."

Nina Talley: Ooh, I love that.

Valery Noakes: It's resonated with me through a lot of difficult situations over the years.

Nina Talley: Do the best you can. Everything can be fixed.

Luanne Brown: For me, I had an incredible mentor back before I was in higher education, and as I was struggling on my payroll journey, he was encouraging me all the way, and he asked me a question and said, "Do you want to embrace being a payroll professional? If you do, then go all in, keep learning and growing."

I like to share that your knowledge and education and experiences are something you own. It's yours. No one can take it away from you. So lean in and pursue taking your payroll knowledge to the next level. If you have found that you love payroll, that you have found a passion for payroll, just really lean all the way in and embrace your career.

I think all too often we look at, "Is this the right choice? Is this the right path? Should I stay in payroll? Should I go into more financial?" But if you love it, embrace it, and then reach out. Reach out to Valery or I or other payroll professionals that are a little bit more seasoned and ask for advice. We love to share and we love to help incoming payroll professionals grow and learn.

Valery Noakes: Most definitely.

Nina Talley: I love that. Well, thank you both for the warmth and the insight and the joy that you brought to the podcast. I know that year-end payroll is incredibly stressful, and so I think that us being able to find the levity and the joy within it together is something that's a real highlight for me is that payroll is such a people-first practice, and there is so much joy and levity to be found in the work and with your team, and it's just a matter of exploring it and building out that network.

And so I just want to thank you both for bringing the energy and the insights. I know that it's a critical time and everything that you shared with our listeners today is going to make an actual difference in how they manage and apply their year-end processes, so thank you so much.

Valery Noakes: My pleasure.

Luanne Brown: Thank you. It's been a pleasure being here with you. Hope to see you in year-end classes!

Nina Talley: Oh, yeah.

Valery Noakes: Yes!

Luanne Brown: Bring your questions.

Valery Noakes: We have more stories. We have more stories.

Luanne Brown: Yes, yes.

Nina Talley: I also want to take a moment to thank all of our loyal listeners out there. Without you, PayTalk would not be possible. So please make sure that you rate, review, and subscribe on your preferred podcast streaming service because that really is the best way to support this podcast so that we can continue to bring you the human stories that make payroll so personal.

Until next time, folks, this has been your host Nina Talley with PayTalk.

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We'll talk with you next month.