

End of the Year HR Checklist

COMPLIANCE

- Ensure employee classification compliance
- Update employee handbook
- Audit personnel files for compliance
- Verify updated labor laws are properly posted
 - Order updated posters
- Research new city, state, or federal labor laws
- Update OSHA logs
- Distribute annual notices to employees, e.g. ERISA
- Ensure that anti-harassment training is complete
- Last minute ACA Reporting Prep:
Distribute written statements about the new 1095C form to your employees

PAYROLL

- Confirm new year payroll schedule

GENERAL HR

- Set up annual performance review process
- Remind employees to update information (addresses, tax documents, etc.)
- Review vendor contracts and set up renewal details

HIRING

- Review hiring processes, including: Recruiting process, onboarding, mentor/mentee programs, etc.
- Check departmental staffing needs to plan for new hires
- Create and update succession plans
- Update job descriptions according to department needs

*Payroll requirements vary by vendor, and many should have already been taken care of. Check with your vendor to double check.