

YEAR-END HR CHECKLIST

HR-Related Tasks to Help Small Businesses Prepare for the New Year.

New laws, regulations and ever-changing filing deadlines can make year-end a challenge. We've made it easy with a checklist of a few important HR tasks.

PAYROLL

01 **Audit Employee Records.**
 Review and update employee records, including Form I-9, and make sure inactive employees are terminated in your system and full-time employees (FTEs) are correctly classified.

02 **Prepare W-2 & W-3 Forms.**
 Review employee records and remind employees to update their information by December 31. W-2 and W-3 are due January 31, 2019.

03 **Prepare Forms 1096 and 1099-MISC.**
 If your business paid independent contractors or freelancers in 2018, you must file Forms 1096 and 1099-MISC by January 31, 2019.

04 **Prepare FUTA Form 940.**
 Federal Unemployment Insurance (FUTA) tax must be filed by January 31, 2019.

GENERAL HR

05 **Complete Performance Reviews.**
 Conduct or schedule employee performance reviews according to your company's policies.

06 **Develop a 2019 Calendar.**
 Create and distribute a calendar of vacation days and company-observed holidays for the coming year.

07 **Share Company Performance with Employees.**
 Hold an employee meeting to share accomplishments, financial performance, and to announce goals for 2019.

COMPLIANCE

08 **Check OSHA Reporting Requirements.**
 Check if your company meets the Occupational Health and Safety Administration (OSHA) requirements for recording and posting work-related injuries and illnesses.

09 **Update Employee Handbook.**
 Ensure your company is in compliance with new laws. Review policies for conduct, performance reviews, social media, benefits, holidays, procedures for inclement weather, termination, and workplace safety.

10 **Prepare EEO-1 Report.**
 The Equal Employment Opportunity Commission (EEOC) requires applicable employers to submit an EEO-1 Report by March 31, 2019.

11 **Review Labor Laws.**
 Review local and federal employment laws, including laws for overtime and filing requirements for contract workers and remote workers located in other states.

12 **Update Required Workplace Posters.**
 Check with federal and local authorities about specific labor law notices your company may be required to post in your workplace.

13 **Schedule Required Training.**
 Schedule employee training as required by federal and state laws and update required industry-specific certifications.

14 **Update New Hire Paperwork.**
 Update information for new employees for 2019, including a W-4 and any state withholding tax documents.

BENEFITS

15 **Calculate FTEs and Prepare ACA Reporting.**
 Under the Affordable Care Act (ACA), the responsibility for health coverage is shared and reporting requirements depend on the number of FTEs.

16 **Prepare Forms 1094-C and 1095-C.**
 Prepare Forms 1094-C and 1095-C for each FTE and provide 1095-C statements to employees. 2018 returns will not be accepted without health coverage information.

17 **Prepare a Health Plan Summary.**
 Prepare and distribute a summary of your health plan to employees and offer to new employees within 90 days of initial coverage.

18 **Prepare an Employee Health Benefits Report.**
 Employers must file Form 5500 if on the first day of an ERISA plan year, which is different than the policy year, 100 or more participants are enrolled in coverage.

Need Help?
Depending on your business and industry, your year-end checklist may be different and even more complex. As a certified Professional Employer Organization (PEO), Propel HR can save you both time and money, as well as protect your company from potential compliance violations. Let us show you how.



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