

Year-End HR Checklist

Use our handy checklist to track and manage your year-end HR leads



October+November

- ☐ Start updating employee contact information to avoid penalties
- ☐ Prepare for benefits renewal and open enrollment.
- ☐ Start preparing for affordable care act (ACA) renewal reporting.
- ☐ Renewal employee classification
- ☐ Renewal medicare part D reporting.
- ☐ Conduct budget planning for the next year

December

- ☐ Review and update files for compliance
- ☐ Finish updating employee contact information to avoid penalties
- ☐ Review your information for ACA annual reporting
- ☐ Review your record retention standards
- ☐ Review retirement plan contributions
- ☐ Prepare for forms w-2 and 1099-MISC distribution

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