

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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