

The end of the calendar year is usually a busy time for everyone, but it's also a good time to make sure all your ducks are in a row. To ensure you start off the new year with the right energy and momentum to be successful, and ensuring your organization remains compliant where needed, we recommend building an “**End of Year Checklist**” that touches all parts of your company, and aims to keep everything running smoothly.

Here are a few **HR** items to add to your checklist:

1. **Review Employee Records:** Take time to review employee records to make sure all important information is up to date. This includes addresses, benefit deductions, direct deposit info etc. This will help save time and catch errors right from the beginning of the new year.
2. **Update W-2 and W-3 information:** If you utilize contractors, spend time reviewing for compliance. Though the deadline to file Forms 1096 and 1099 MISC are in March, the deadline to get them to recipients is January 31st.
3. **Review New Benefit Enrollments:** Open Enrollment is one of the busiest times for HR departments. Whether you switch providers or stay with your current carriers, checking for deadlines and new updates to make sure all requirements have been met is crucial for a smooth transition to the new year. Many organizations hold Open Enrollment in November, so keep a look out for renewal information from your providers now! Also take a few moments to remind your employees to spend their FSA dollars so they don't risk forfeiture.
4. **Review Best Practices:** Which processes should you evaluate and update? Any shortcomings? Anything new that you can incorporate to make things flow easier? Any policies that are out-of-date? These are all important questions to consider. We all know there is always room for improvement!
5. **Plan for Next Year:** Create a calendar of vacation time and company-observed holidays. Include time for important meetings to share what was accomplished last year and to announce goals for the upcoming year. This is also a great time to gather data on retention/turnover rates, training costs and any other reports that will help you plan for what's in store for the upcoming year. It might even help to identify organizational pain points that need addressing.
6. **Get a Temperature Check on Employee Engagement:** Check in with your employees! Are they happy? Engaged? Any grievances to air? You cannot have a well-oiled machine if the people doing the work are not taken care of. Schedule performance reviews and team check-ins. Engagement surveys are a great tool to utilize as well.

Use the next couple months as your planning time to make sure you end the year organized and ready to take on 2021 with everything in order. HRD is here to help you with your yearend checklist and planning! For more information please contact us at 770-857-0002 or on our website at www.hrdracc.com