2024 Year-End HR Prep Checklist

1. HR Certification and Professional Development
- Confirm current HR certification status and plan for recertification if necessary.
- Explore growth opportunities, such as training sessions, seminars, or skill-building activities.

2. Technology Optimization
- Implement digital posters for compliance notices.
- Utilize predictive people analytics for workforce planning.
- Review or adopt Applicant Tracking Systems (ATS).
- Transition to paperless onboarding.
- Assess Learning Management Systems (LMS) for employee training.
- Integrate AI solutions where possible for enhanced HR processes.

3. Reports and Notices
- Complete OSHA record-keeping requirements.
- Conduct an EEO-1 data audit.
- Ensure ACA (Affordable Care Act) notices are up to date.
- Verify compliance with W-2 forms and required state notices.

4. Pre-Hire Processes
- Review and update job sourcing strategies and pay ranges.
- Ensure career page and screening processes are current.
- Confirm communication protocols during recruitment.
- Conduct pre-hire audits, especially for compliance with application processes.

5. Forms and Policies
- Conduct a thorough review and update of the employee handbook.
- Use the latest I-9 form (effective 8/1/23) and plan updates if necessary.
- Refresh job descriptions.
- Update pre-hire and new-hire forms.
- Ensure the performance management toolkit is comprehensive.
- Review and revise employment agreements, including non-competes.
- Provide updated benefits summaries to employees.

6. Compliance Checks
- Confirm multi-state requirements, including minimum wage adjustments.
- Review leave policies (FMLA, ADA, WC) and ensure compliance.
- Update job posting requirements, ensuring salary transparency where required.
- Check training requirements for managers and employees.
- Conduct I-9 and E-Verify audits.
- Schedule Thread audits, if applicable.

7. Wage and Hour Compliance
- Prepare for the next salary level increase deadline (1/1/25).
- Review job classifications for exempt vs. non-exempt status.
- Update pay practices and policies for auto-deducts, breaks, and comp time.
- Verify independent contractor classifications.
- Ensure accurate time tracking and overtime calculation practices.
- Check final pay requirements for compliance.
- Review benefits eligibility criteria for compliance.

8. Organization and Document Management
- Organize email inbox with subfolders for year-end.
- Archive old folders, emails, and files as needed.
- Move toward paperless document management.
- Plan budget for the upcoming year.
- Ensure vendor contract renewals are in place.
- Review status of employees on leave.
- Complete licensing renewals.

9. Payroll Preparation
- Update pay ranges for all roles.
- Plan for year-end deadlines and blackout periods.
- Verify tax elections with employees.
- Update emergency contacts.
- Review PTO/vacation balances and carry-over policies.
- Publish the holiday schedule.
- Prepare pay calendar for the upcoming year.

10. Employee Training and Development

- Plan new employee onboarding sessions.
- Schedule mandatory training for harassment and discrimination prevention.
- Verify compliance with wage and hour regulations for training.
- Conduct management skills training.
- Use a Learning Management System for tracking and management training.

11. Culture and Brand Building

- Update social media presence to reflect company culture.
- Plan events to engage employees.
- Conduct stay surveys or employee voice feedback sessions.
- Review candidate feedback and adjust processes if necessary.
- Align internal messaging to support brand and culture.

12. Data Analysis and Planning

- Analyze turnover and incident rates.
- Review benefits plan design for employee satisfaction and cost efficiency.
- Assess and address wage compression issues.
- Align HR strategies with overall company goals.
- Track key HR metrics and leading indicators for planning.

13. Goal Setting for the New Year

- Define growth strategy, including new roles and opportunities.
- Identify and address any compliance gaps.
- Set goals for skill and knowledge development within the HR team.
- Review and document processes for efficiency improvements.
- Explore technology options for improved efficiency.
- Ensure proper documentation and organization for year-end.

Remember, above all else, **YOU FIRST**! Take time to relax, have fun, and pursue your own passions.