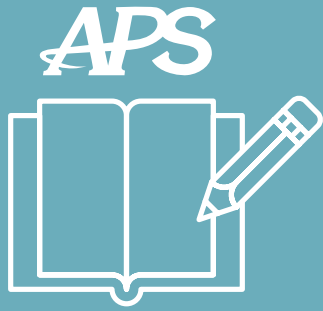




APS

Year-End HR Checklist

2017



Year-End HR Checklist

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

October + November

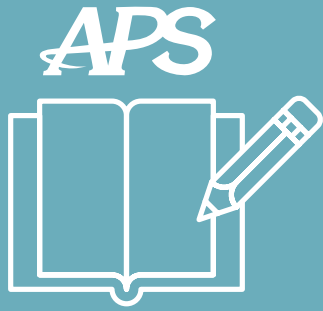
- ☐ Start Updating Employee Contact Information to Avoid Penalties
- ☐ Prepare for Benefits Renewal and Open Enrollment
- ☐ Start Preparing for Affordable Care Act (ACA) Annual Reporting
- ☐ Review Employee Classifications
- ☐ Review Medicare Part D Reporting
- ☐ Conduct Budget Planning for the Next 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

Questions? Call or Click!

855.945.7921 | [apspayroll.com](https://www.apspayroll.com)



Year-End HR Checklist

Thru the End of January

January + February

- ☐ Conduct Strategic Planning
- ☐ Review OSHA Form 300A for Annual Reporting
- ☐ Post Updated Federal and State Compliance Posters
- ☐ Conduct Forecasting for Future Hiring Needs

Before Your First 2018 Payroll

- ☐ Review and Update Employee Deductions
- ☐ Review and Update Retirement Plan Catch-Up Contributions
- ☐ Finish ACA Reporting
- ☐ Review 2018 State Minimum Wage Changes

End of January 2018

- ☐ Communicate with Employees About Their W-2s
- ☐ Distribute W-2s and 1099s to Employees and Contractors
- ☐ Distribute Forms 1095-C to Employees
- ☐ File Your Forms W-2
- ☐ File Your Forms 1099-MISC

Year-End HR Checklist

End of February 2018

File Your Forms 1094-C and 1095-C