



# 2020 Payroll and HR Compliance Checklist

## Payroll

- ☐ Confirm the 2020 payroll schedule. This [Proliant Calendar](#) will help.
- ☐ Prepare for the first payroll run of the year.
- ☐ Meet with your payroll team and find out their needs, expectations, and anything they're worried about going into the new year.
- ☐ Make sure they are prepared and have the tools necessary to perform duties.

## Benefits

- ☐ Calculate your FTE number to determine if you are an Applicable Large Employer (ALE with 50+ full-time equivalent employees) in 2020.
- ☐ If you are an ALE: Prepare for ACA reporting requirements.
- ☐ Modify summary plan descriptions (if there are changes) and distribute to new participants. If no changes, distribute every 5-10 years or annually if any updates include:
  - ☐ Notice of special enrollment rights
  - ☐ Qualifying events (including the two marketplace exchange events)
  - ☐ Wellness program disclosure
  - ☐ Medical child support order written procedures are in place
- ☐ Consider a wrap plan document when a certificate of insurance or plan document doesn't contain all of the required eligibility rules and federal notice language that is needed
- ☐ Audits for post annual enrollment
  - ☐ Ensure elections are correctly loaded with plan carriers
  - ☐ Life insurance audit to identify any elections requiring evidence of insurability

## HR

- ☐ Review budget and allocations for accuracy to prevent overspending.
- ☐ Schedule any remaining performance reviews.
- ☐ Review and update all company policies.
- ☐ Remind employees to update their personal information for benefits cards, tax documents, etc.
- ☐ These are the main things employees should review to ensure accuracy:
  - ☐ Home address/Mailing address
  - ☐ Phone number
  - ☐ The beneficiary for life insurance
  - ☐ Name change
  - ☐ Emergency contacts
  - ☐ Dependent information

## Compliance

- ☐ Double-check your employee classifications. This [IRS Classification checklist](#) is awesome.
- ☐ Update all internal resources for an employee handbook and company policies. Check out our employee handbook checklist [here](#).
- ☐ Issue updated employee handbook to employees
- ☐ Verify that labor law posters are current

### We are here to help...

We have helped many clients over the years make sure they move into the new year without any compliance headaches. Contact us at [PeopleFirst@Proliant.com](mailto:PeopleFirst@Proliant.com)



We deliver fully integrated, cloud-based People Tools that simplify payroll and all HR processes while improving accuracy and ensuring full industry compliance for over 5000 customers in multiple industries in all 50 states.