

# End of Year HR Checklist



As we approach the end of 2021, now is a good time to review your HR policies and practices to ensure compliance with labor laws, regulations, and trends. Below are a few areas we recommend you review before the end of the year.

- ✓ **Vacation and PTO Balances.** Remind your employees to check their paid time off balances and schedule any remaining time before the end of the year. Remind employees of your carry over or “use it or lose it” policy, if any, so there are no surprises in the new year.
- ✓ **Employee Record Review.** Review your employee records, I-9 files, and record retention guidelines. Dispose of outdated employment paperwork properly.
- ✓ **Audit FTEs for Labor Law Compliance.** Audit the number of FTEs in your organization to determine if you have reached a new threshold of employees and are required to comply with any new employment regulations. For example, 15+ employees ADA, 20+ COBRA, 50+ FMLA and ACA.
- ✓ **Review your Employee Benefit Package.** The way we work has changed dramatically. Review your benefit package and make any adjustments to meet the current needs of your organization.
- ✓ **Employee Personal Information.** Remind employees to update their personal information in your HRIS/files including their mailing address for W2 mailing at the beginning of next year.
- ✓ **Employee Handbook and Policies.** January is the best time to introduce changes to your employment policies. Over the past 18 months as a result of the COVID-19 pandemic, many companies have changed the way employees work and policies may need to be added or revised including remote working and return to work protocols.
- ✓ **Employee Classifications.** It is important to properly classify employees as exempt and non-exempt. Ensure your job descriptions are updated and employees are properly classified in accordance with FLSA regulations.

As you complete your reviews, Blueprint HRM is here for support. Reach out to us at any time with questions or for further guidance.