



From payroll and compliance requirements to strategic initiatives that will move your organization forward, our team wants to make sure your team stays on track all year long. Look ahead to what's in store for your organization and reach out to Abdo's HR & Payroll advisors to discuss your questions and challenges.

JANUARY

- W-2 and 1099 Distribution
- Quarterly and annual payroll tax filings due
- Check accruals and rollovers of HSA, PTO and 401K for eligible employees
- Audit open enrollment elections/payroll for calendar year benefit plans
- Review leadership succession plans

FEBRUARY

- CMS reporting for calendar year health plans with prescription drug coverage
- Prepare and post OSHA Form 300A for covered employers
- Forms 1095/1094 for ACA
- Complete PERA reporting requirements for government employers
- Review staffing and recruitment initiatives and processes

MARCH

- OSHA electronic reporting for covered employers
- Don't forget: Employee Appreciation Day is always the first Friday in March
- Schedule lunches or check-ins with important vendors
- Review of diversity, equity, and inclusion initiatives

APRIL

- EEO-1 report data collection starts for covered employers
- Quarterly payroll tax filings due
- Review training programs (goals/ROI, outcomes, gaps, future needs)

MAY

- Employee file audit/file destruction
- Review handbook for updates
- Mental health awareness initiatives

JUNE

- Mid year benefit review for calendar year plans
- Plan summer employee event
- Review summer vacation plans to identify any staffing gaps

JULY

- Quarterly payroll tax filings due
- File Form 5500 for covered employers with calendar year benefit plans
- Review workplace safety and wellness policies, trainings and programs
- Review employee turnover and retention

AUGUST

- Review paid time off accrual balances and encourage employee usage
- Start planning for open enrollment

SEPTEMBER

- Summary Annual Reports (SAR) for ERISA Compliance due for calendar year benefit plans
- Review current technology for efficiency and improvement opportunities

OCTOBER

- Medicare Part D notices due
- Quarterly payroll filings due
- Confirm completed W-9's on file for all Independent Contractors
- Confirm beneficiary, mailing addresses and emergency contact information is up to date for employees
- Emotional Wellness Month initiatives

NOVEMBER

- Determine payroll adjustments for taxable fringe benefits
- FSA balance and carryover reminders to employees
- Evaluate performance review process and plan for next year
- Review HR Budget for current year and set for next year

DECEMBER

- Confirm retirement plan notice and reporting requirements
- Compliance Audit (I-9, records retention, state/local minimum wage, state/local leave requirements, postings/notices)

Strategic tasks - the timeline for strategic tasks is recommended, but can change to fit your needs

Compliance tasks with specific requirement deadlines

Click this icon for additional insights on this topic from our HR & Payroll advisors

click to learn more!

HR & PAYROLL

Annual Cycle of Payroll & HR Best Practices

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info@abdosolutions.com
abdosolutions.com