



**2017**

New Year HR  
Compliance Checklist

# New Year HR Compliance Checklist

## Human Resources

- 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
  - Beneficiary for life insurance
  - Name change
  - Emergency contacts
  - Dependent information

# Compliance

- Double check your [employee classifications](#)
- Update all internal resources for [employee handbook and company policies](#)
- Issue updated employee handbook to employees
- Verify that labor law posters are current

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compliance services.

# Payroll

- Confirm 2017 payroll schedule
- Prepare for 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

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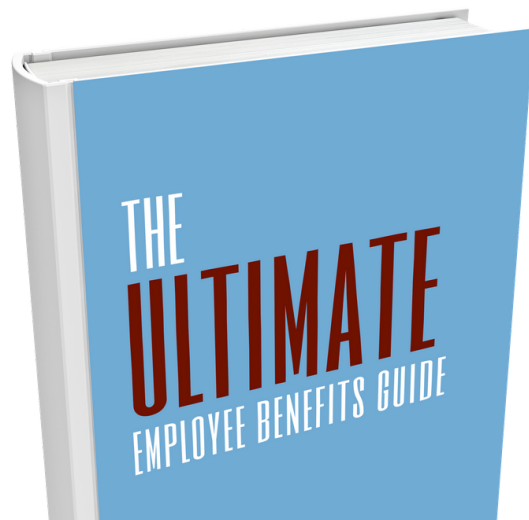
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# Benefits

- [Calculate your FTE number](#) to determine if you are an ALE (with 50+ full-time equivalent employees) in 2017
- [If 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 required
- Audits for post annual enrollment
  - Ensure elections are correctly loaded with plan carriers
  - Life insurance audit to identify any elections requiring evidence of insurability

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**HAVE A GREAT 2017!**



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