

Calendar of Critical HR Dates



	JANUARY	<ul style="list-style-type: none"> ✓ Prepare OSHA 300A ✓ Gather Data for 5500 reporting; check with broker on requirement ✓ Advise employees of increase allowed in retirement plan, HSA, dependent care and flexible spending accounts if allowed by law ✓ Send W2s and 1099s as appropriate ✓ Be sure to change benefit deductions in payroll ✓ Download new W4 with current year for new hires
	FEBRUARY	<ul style="list-style-type: none"> ✓ February 1st – Post OSHA 300A log ✓ Consider total compensation statements for previous year ✓ Black History Month
	MARCH	<ul style="list-style-type: none"> ✓ March 1st – Medicare Part D reporting due ✓ First Friday – National Employee Appreciation day ✓ EEO-1 (over 100 employees) and VETS 4212 (federal contractors) reports due
	APRIL	<ul style="list-style-type: none"> ✓ April 1st – H-1B filing begins ✓ April 30th – Take down OSHA 300A and retain for 5 years
	JULY	<ul style="list-style-type: none"> ✓ File 5500 for Retirement plan and other benefits if required
	AUGUST	<ul style="list-style-type: none"> ✓ Send Summary Plan Description of retirement plan if required
	SEPTEMBER	<ul style="list-style-type: none"> ✓ Consider your holiday schedule for payroll and time off and publish to employees
	OCTOBER	<ul style="list-style-type: none"> ✓ Medicare Part D credible coverage notices to employees ✓ October 16 – National Boss' Day
	NOVEMBER	<ul style="list-style-type: none"> ✓ Receipt of unemployment rate – verify accuracy ✓ Remind employees to use FSA dollars
	DECEMBER	<ul style="list-style-type: none"> ✓ Calculate imputed income for life insurance, personal use of auto, etc. ✓ Subchapter S corps: Calculate tax implications and reimburse accordingly
	ANNUALLY	<ul style="list-style-type: none"> ✓ Review employee handbook for necessary updates ✓ Determine if your current employment posters are up to date ✓ Remove all I-9's for terminated employees that are no longer required ✓ Communicate with employees regarding lack of tolerance for harassment and discrimination ✓ Complete HR Audit provided as part of HR Hacks

Each organization will have specific deadlines based on size, industry and location. This is not all inclusive or to be taken as legal advice.

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lori@hrtopics.com