

2018 HR CHECKLIST

1ST QUARTER

- New Year's Day - Jan. 1
- Martin Luther King Jr. Day - Jan. 15
- Distribute Form W2's and 1099's - Jan. 31
 - File 1099's by paper - Feb. 28
 - File 1099's electronically - Apr. 2
- Form 1095-C distributed to employees - Jan. 31
- File Form 941 (Employer tax return) - Jan. 31
- President's Day - Feb. 19
- Medicare Disclosure form submitted* - Mar. 1
 - *Due 60 days after beginning of plan year
- Daylight Savings Time - Mar. 11
- EEO-1 reporting deadline - Mar. 31
- Post OSHA 300A Form by Apr. 30
- File Form 941 (Employer tax return) - Apr. 30
- Distribute 401K notices*
 - *90-30 days before beginning of plan year
- Confirm internal systems are updated to reflect
- 2018 limits and reporting requirements
- Post new compliance posters
- Update required pamphlets and wage orders

2ND QUARTER

- Distribute 401K notices*
 - *90-30 days before beginning of plan year
- Review employee handbooks for compliance
- Review succession and performance plans
- Review training budgets and calendar
- Review HR compliance policies
- Review changes to employment policies
- Audit I-9 Forms for compliance
- Memorial Day - May 28

Notes: _____

3RD QUARTER

- Electronically submit OSHA Form 300A - July 1
- Independence Day - July 4
- Deadline for Form 5500* - July 31
 - *Due on last day of 7th month after plan ends
- File Form 941 (Employer tax return) - July 31
- PCORI fee due - July 31
- National Payroll Week - Sep. 3 - 7
- Labor Day - Sep. 3
- Vets-100A Reporting (Fed. Contractors) - Sep. 30
- Distribute 401K notices*
 - *90-30 days before beginning of plan year
- Audit personnel files and reports

Notes: _____

4TH QUARTER

- 2018 HC Insurance plan enrollment through marketplace begins - Oct. 1 - 16
- Columbus Day - Oct. 8
- Medicare Part D notices - Oct. 15
- File Form 941 (Employer tax return) - Oct. 31
- Daylight Savings Ends - Nov. 4
- Veteran's Day - Nov. 11 (Observed Nov. 12)
- Thanksgiving - Nov. 22
- EEs submit new Form W4 if withholding allowances have/will change next year - Dec. 1
- Christmas Day - Dec. 25
- Distribute 401K notices*
 - *90-30 days before beginning of plan year
- Plan next year's budget and staffing needs
- Test and verify reasonableness of employer match
- Verify employer/employee indicative data, and wage, tax, and benefits data for payroll
- Review time off rules and accruals
- Prepare ACA 1095-C reporting tax forms

January

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