

HR Q4 Checklist



THE JOB BLOG

Holiday/Year End

- Manage time-off requests
- Organize holiday parties
- Purchase holiday gifts

Compliance

- Review/update employee handbook
- Verify employee information & worker classification
- Review any changes in local, state, and federal employment laws
- Backup HR & employee data

Payroll/Taxes

- Review tax rates and base wage limits
- Confirm 2025 payroll schedule
- Q4 payroll
- Set tasks/reminders for filing deadlines

Benefits

- Review/update benefits packages; communicate any changes to employees
- Assist employees with open enrollment
- Prepare 1095-C forms
- Remind employees to use up ancillary benefits
- Obtain receipts from employees for reimbursable expenses

Performance Reviews

- Conduct annual performance reviews
- Administer employee satisfaction & engagement surveys

2025 HR Strategy

- Review HR budget & resources
- Review organizational goals
- Establish HR policies including legal changes, compensation, benefits, PTO
- Review contracts with current service vendors

2025 Workforce Planning

- Obtain staffing proposals from departments
- Review/update job descriptions, pay rates
- Review EVP
- Set employee orientation dates for new hires
- Review employee onboarding process
- Develop training & development strategy

