

# NEW YEAR CHECKLIST

## What should be on your New Year Checklist?

### BENEFITS

- Notify or remind employees of benefit changes:
  - Change in carriers
  - Change in premiums
  - Change in plans
- Send out Summary Plan Descriptions (SPDs) to employees if there are plan changes.
- Distribute annual notices you receive from your brokers to employees (401k, benefits plan documents, ERISA, etc.).
- Ensure employees receive their new insurance cards.
- Share a 2023 Company Paid Holiday list with employees.
- Ensure accurate PTO/Vacation/Sick/Compensatory Time Off carryovers are reflected in payroll system.
- Prepare for ACA compliance responsibilities (if applicable) – *DUE 2/28/2023*.
  - [Information Reporting by Applicable Large Employers | Internal Revenue Service \(irs.gov\)](#)

### PAYROLL

- Confirm and share 2023 payroll schedule with employees.
- 2023 new hire W-4 forms:
  - Federal: [Forms & Instructions | Internal Revenue Service \(irs.gov\)](#)
  - State: [Income Tax Withholding Forms | Nebraska Department of Revenue](#)
- W-2s – *DUE 1/31/2023*:
  - Ensure W-2s have been delivered to all current employees and any terminated employees in 2022.

### PERSONNEL/MISCELLANEOUS

- Audit/organize personnel files:
  - Ensure open enrollment documents are in separate medical file (if applicable).
  - [Complying with Employment Record Requirements \(shrm.org\)](#)
  - [What should, and should not, be included in the personnel file? \(shrm.org\)](#)
- Audit I-9s and dispose of according to USCIS guidelines.
  - [9.0 Retaining Form I-9 | USCIS](#)
- Prepare for OSHA filing (if applicable) – *FILING DUE 3/2/2023, FORM 300-A POSTING DATES 2/1/2023 – 4/30/2023*.
- Verify that correct federal and state labor law posters are properly posted.
  - [Workplace Posters | U.S. Department of Labor \(dol.gov\)](#)
- Current federal mileage rate reminder: *65.5 cents / mile*.

**Needing assistance with your New Year Checklist items? Get connected with Zelle Human Resource Solutions to find out how we can help!**

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