

## 2020 Payroll and HR Compliance Checklist

### Payroll

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- Confirm the 2020 payroll schedule. This [Proliant Calendar](#) will help.
- Prepare for the 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.

### Benefits

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- Calculate your FTE number to determine if you are an Applicable Large Employer (ALE with 50+ full-time equivalent employees) in 2020.
- If you are 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 needed
- Audits for post annual enrollment
  - Ensure elections are correctly loaded with plan carriers
  - Life insurance audit to identify any elections requiring evidence of insurability

### HR

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- 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
  - The beneficiary for life insurance
  - Name change
  - Emergency contacts
  - Dependent information

### Compliance

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- Double-check your employee classifications. This [IRS Classification checklist](#) is awesome.
- Update all internal resources for an employee handbook and company policies. Check out our employee handbook checklist [here](#).
- Issue updated employee handbook to employees
- Verify that labor law posters are current

#### We are here to help...

We have helped many clients over the years make sure they move into the new year without any compliance headaches. Contact us at [PeopleFirst@Proliant.com](mailto:PeopleFirst@Proliant.com)