

# Year-End Doesn't Have to Be Chaos!

The Checklist You Need to  
Get Ready for 2024



**Lori Kleiman**  
SPHR, SHRM-SCP

# Where are we going today.....

Issues  
Impacting HR

Year end  
administration  
and January  
2024

Staying focused!

*Meet*  
**Lori  
Kleiman**

SPHR, SHRM-SCP





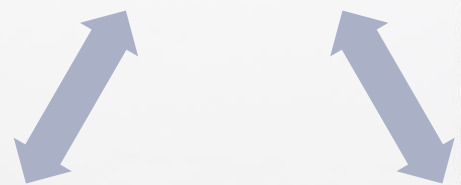
# Issues impacting HR

Staying  
focused!

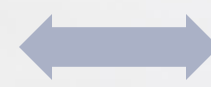
Year end  
administration  
and January  
2023



Great  
Resignation



Essential  
Attraction



Quiet  
Quitting



Remote  
Work is  
here to  
stay...  
but we've  
learned



Pay  
compression



**Mental Health is impacting all of us**





# Your HR Experience

- a) Below 1 Year
- b) 1-3 Years
- c) 4-7 Years
- d) 7-14 Years
- e) 15+Years

# Year end administration and January 2023

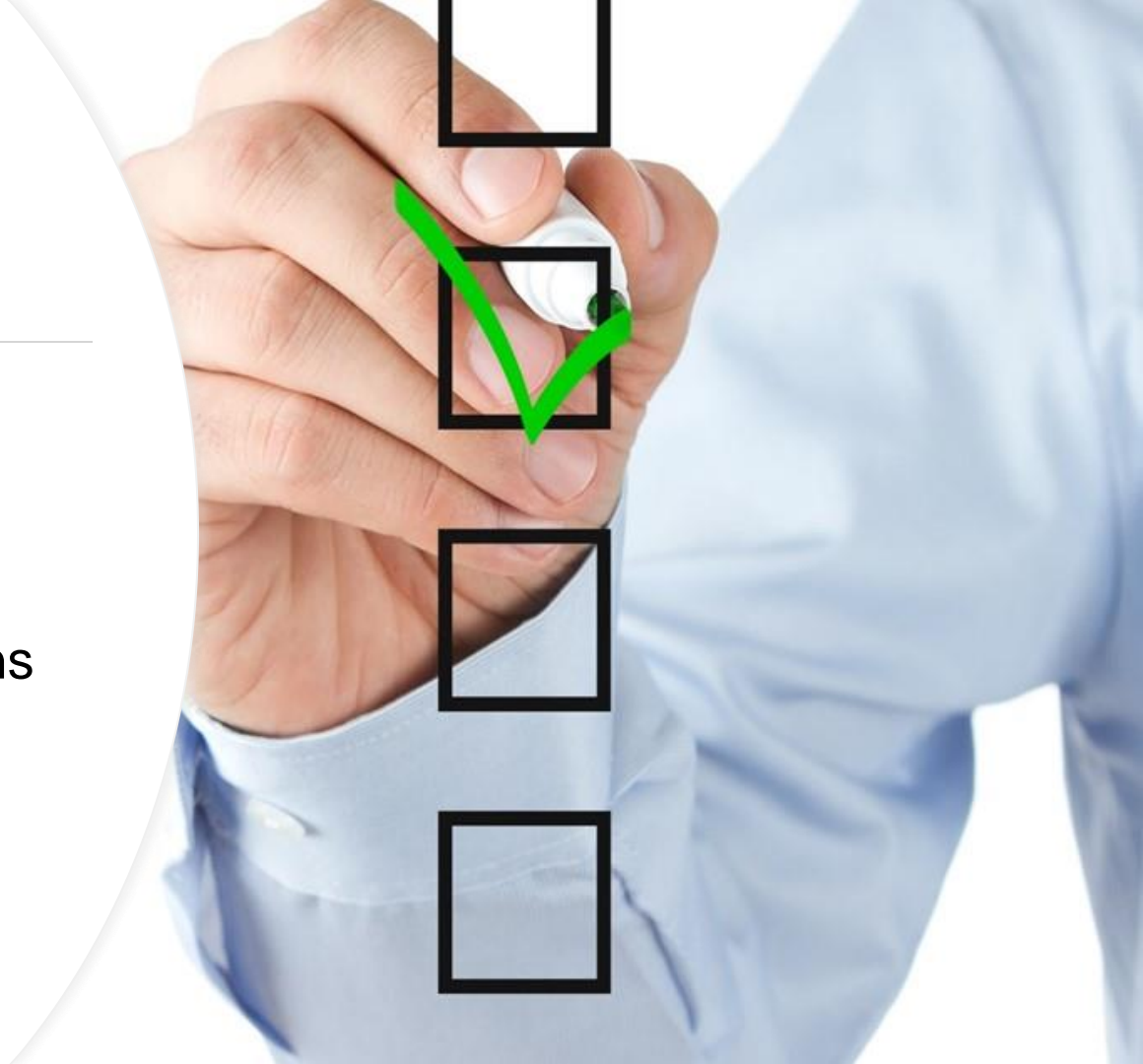
Issues  
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focused!



# End of Year Payroll Checklist

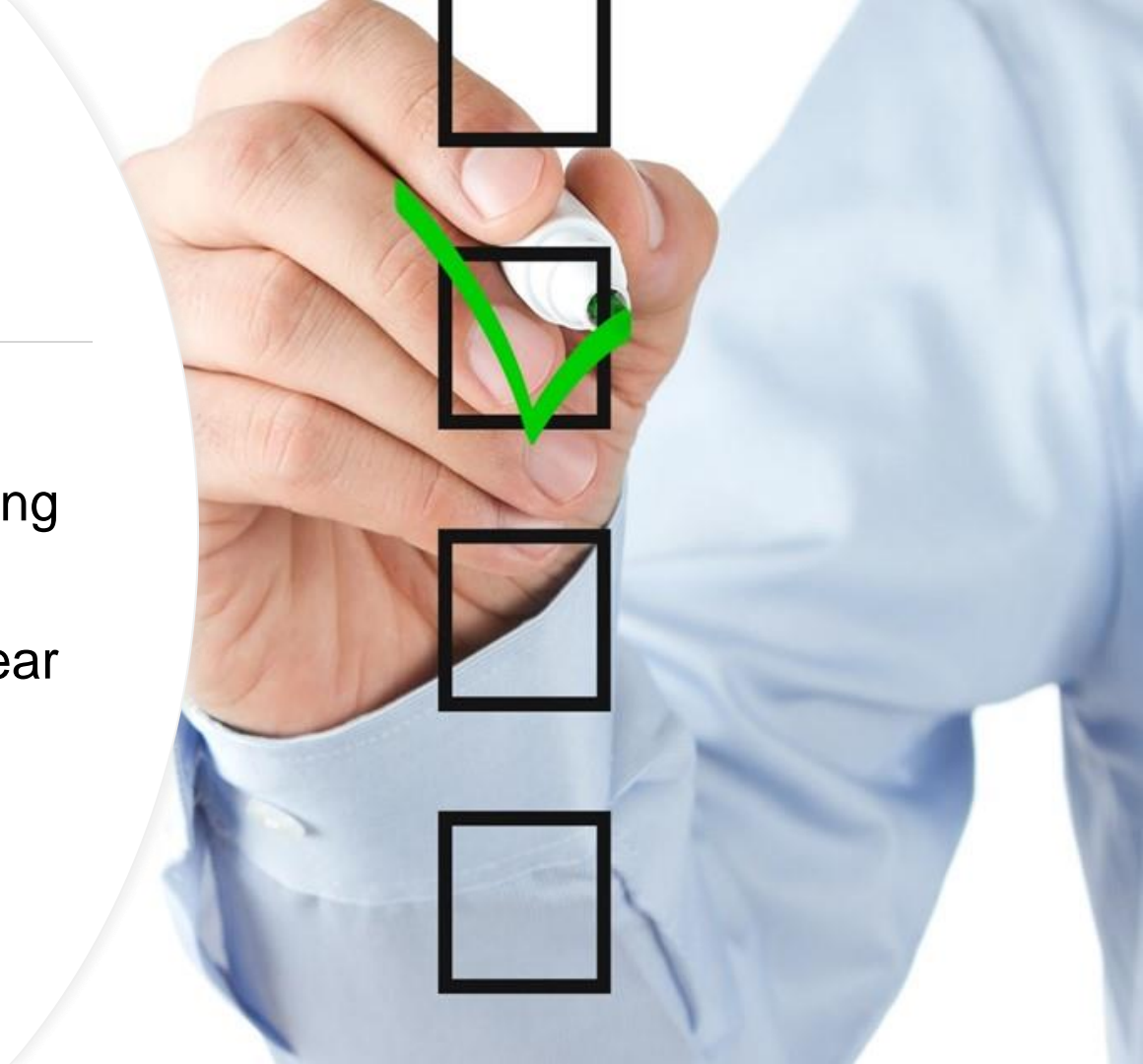
- Verify W2's
- Determine excess 401(k) contributions
- Imputed income calculations
- Year end bonus
- Owner tax calculations
- If bi-weekly – 27 checks?



# Kick off 2023 Payroll Checklist

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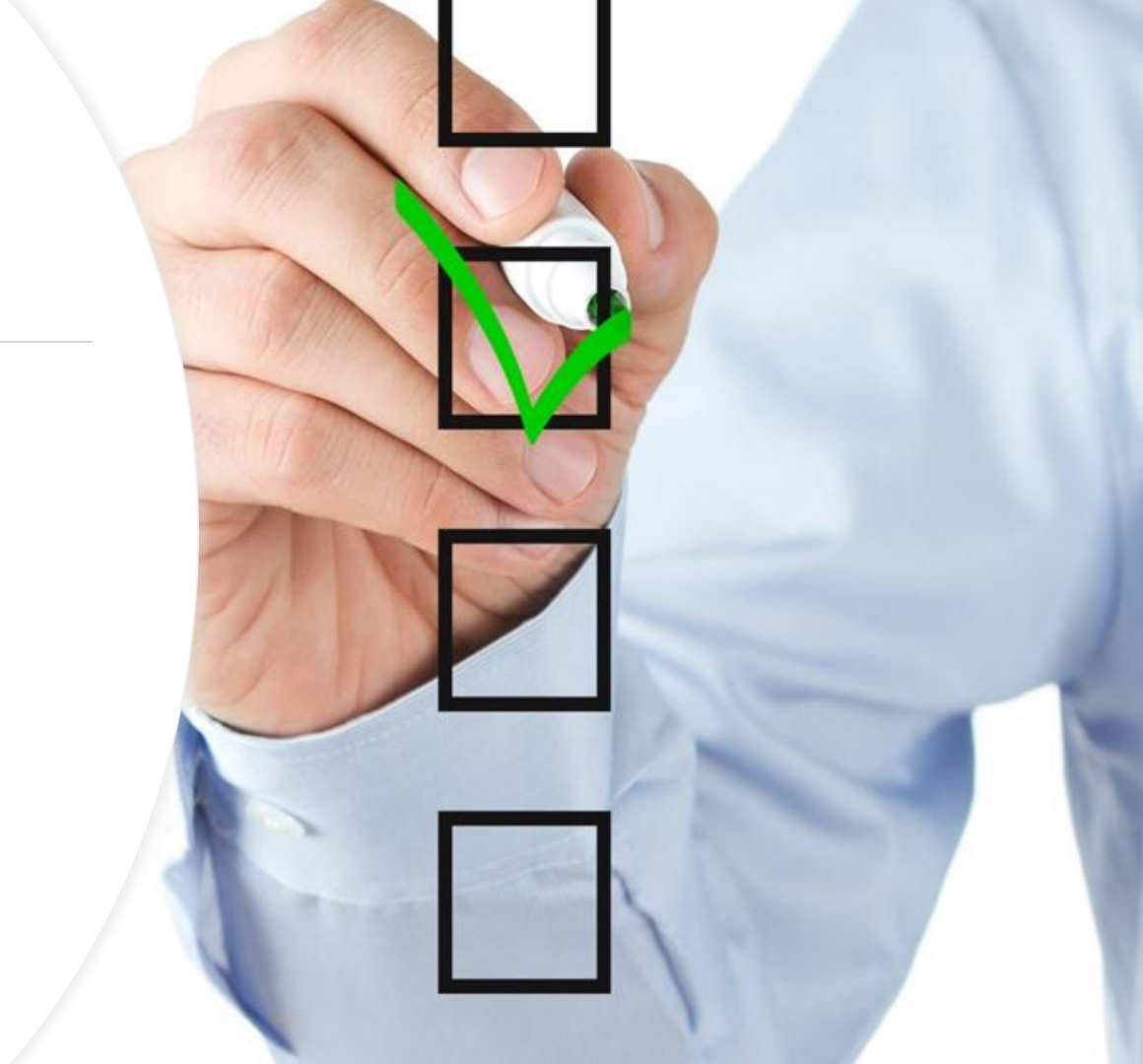
- Review 401(k) new limits
- Enter Flex and HSA spending elections; and new limits
- Payroll schedule for next year
- Update benefit costs if appropriate
- Reset PTO per policy



# January 2023 Checklist

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- Prepare for 401(k) audit
- Complete OSHA 300A
- Train managers on new regulations
- Conduct I9 Audit
- 2024 holiday and payroll schedule
- Posters



# Lets Stay Connected!

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premium tools

HR  
Assessment

Bibliography

Calendar of  
HR dates

Blog to try  
out!

Scan the  
QR code



OR



Send an Email to:

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# Are you HR Certified?

- a) aPHR
- b) PHR or SHRM-CP
- c) SPHR or SHRM-SCP
- d) Not certified yet
- e) Not interested in HR certification

# Updating employee handbooks



- State/local Law changes
- DEI awareness
- Policy review and update
- At-will employment
- Handbook supersedes all others
- Anti-harassment and discrimination....bullying policy



# January Checklist

## *New State Law*

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- Minimum wage
- Salary history ban
- Paid time off requirements
- Personal use of devices
- Anti-harassment training/Policy
- Posters





# Options for Anti-harassment training

# Your HR Role

- a) Admin/Coordinator
- b) Generalist
- c) Manager
- d) Director or above
- e) Other

# Staying focused!

Issues  
Impacting HR

Year end  
administration and  
January 2023



Only so  
many  
hours in  
the day



Put on  
your  
facemask  
first!



# Payroll Systems and Small Offices

Electronic  
timekeeping

Workers  
Comp  
calculations

Employee  
self service

PTO  
tracking

Virtual  
Employee  
Files



Employment  
Practices  
Liability  
Insurance







**Give**

an employee a healthcare ID card  
they have it for the day;

**Teach**

a them to print their own ID  
card, they have it for life

# Lets Stay Connected!

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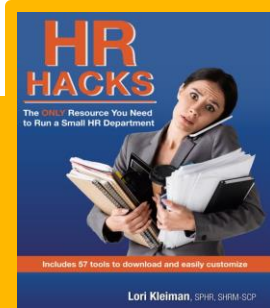


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