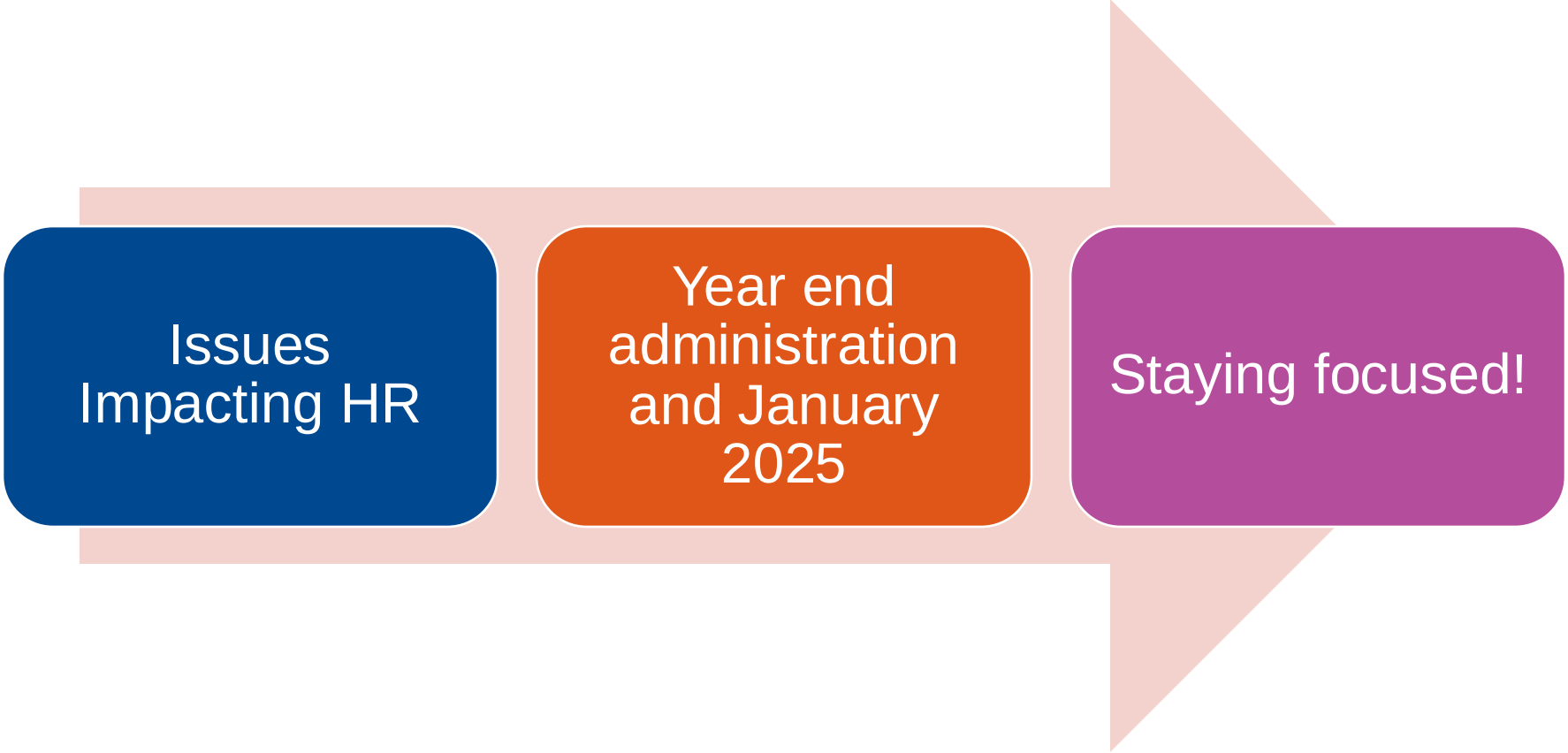
Lori Kleiman
SPHR, SHRM-SCP

Year-End Doesn't Have to Be Chaos!

The Tools You Need to Get Ready for 2025

HR Topics
Practical Solutions for Profitable Business

Where are we going today…….

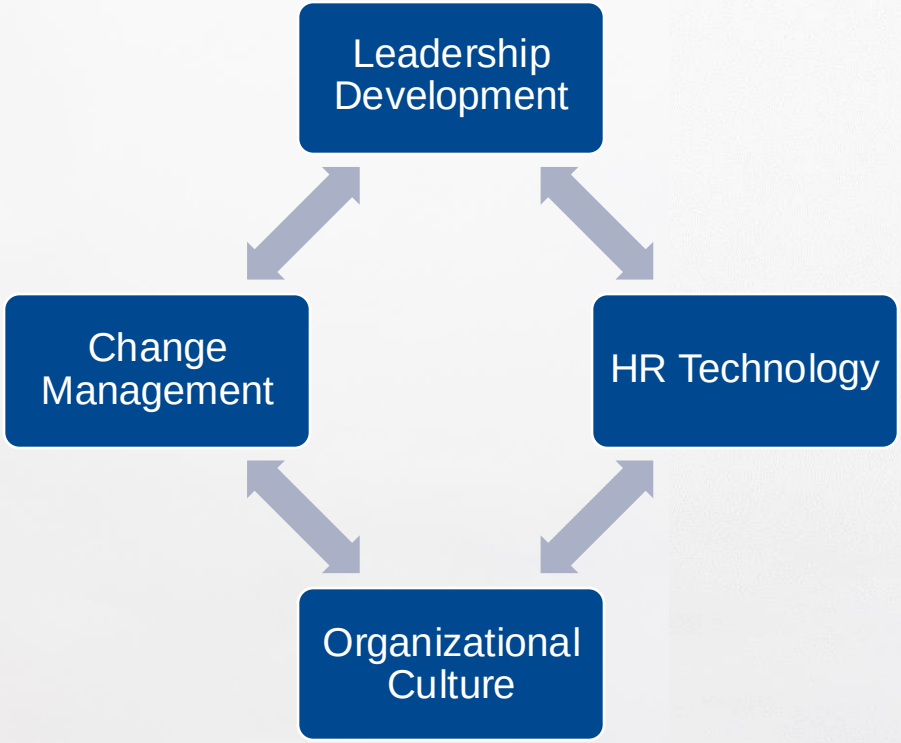


Meet

Lori Kleiman

SPHR, SHRM-SCP

Issues impacting HR
Staying focused!
Year end administration and January 2025


Leadership Development
HR Technology
Organizational Culture
Change Management

Hybrid Work is here to stay… but we've learned

Inflation and Salaries

Big Picture of Employee Wellbeing

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 2025

Issues Impacting HR

Staying focused!

Use Your Technology to Help!

End of Year Payroll Checklist

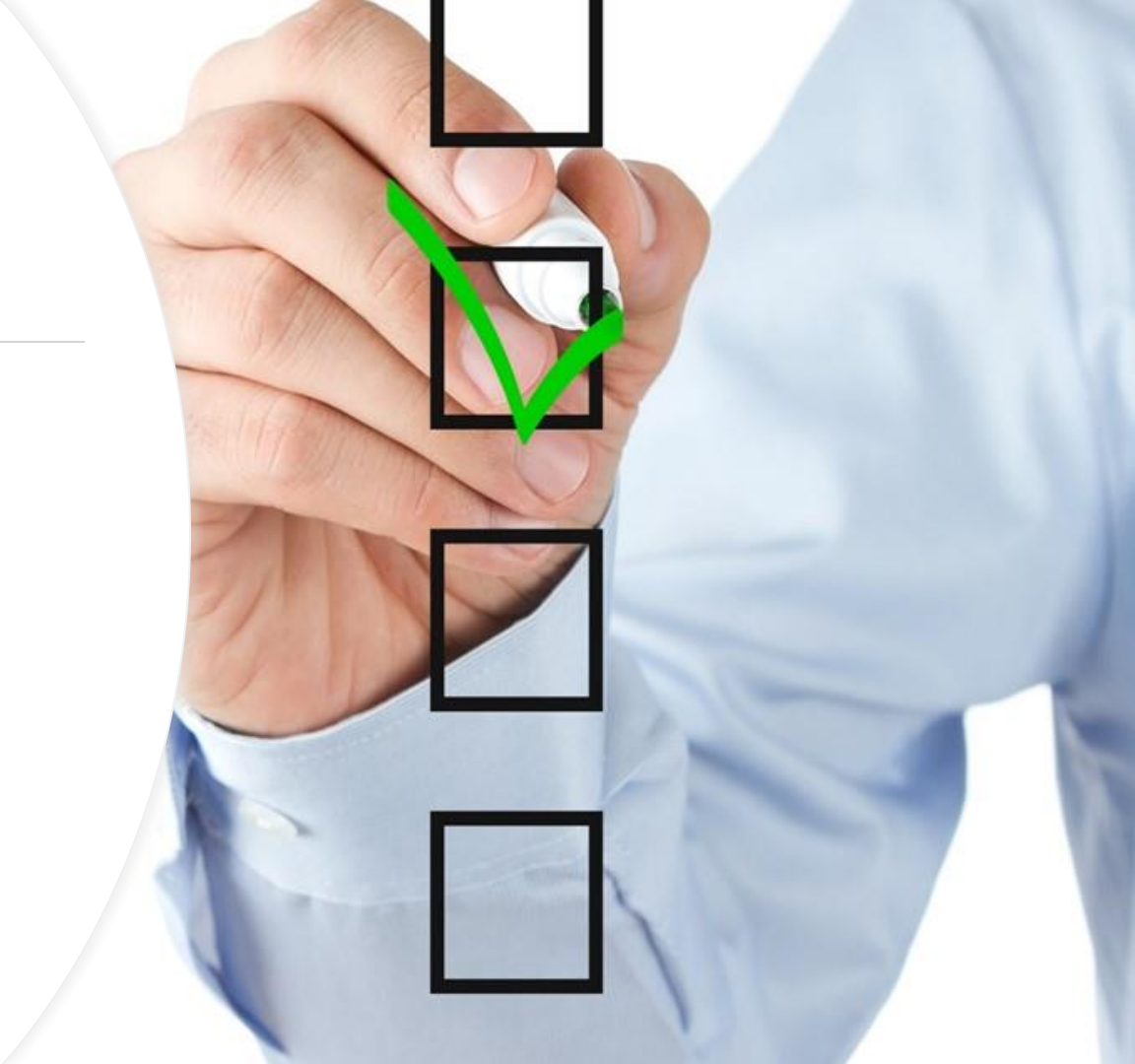
- Verify W2’s
- Determine excess 401(k) contributions
- Imputed income calculations
- Year end bonus
- Owner tax calculations
- If bi-weekly – 27 checks?

Kick off 2025 Payroll Checklist

- 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 2025 Checklist

- Prepare for 401(k) audit
- Complete OSHA 300A
- Train managers on new regulations
- Conduct I9 Audit
- 2025 holiday and payroll schedule
- Posters



Are you HR Certified?

a) aPHR

b) PHR or SHRM-CP

c) SPHR or SHRM-SCP

d) Getting certified in 2025

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 Laws

- 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!

Year end administration and January 2025

Issues Impacting HR

Only so many hours in the day

Put on your facemask first!

Electronic timekeeping

Workers Comp calculations

Payroll Systems and Small Offices

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

Lets Stay Connected!

Send an email to

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