



2025

HR Year-End Checklist

As the year comes to a close, HR teams are busier than ever preparing for deadlines, compliance updates, and employee needs. With this checklist, you'll stay on top of important year-end tasks, from validating employee information to distributing tax forms, ensuring a smooth transition into the new year.



Note important dates and deadlines and complete necessary forms.

Stay ahead of key deadlines by preparing necessary forms, paying bonuses, and ensuring all adjustments are completed before January 5, 2026.

Validate employee personal and contact information.

Encourage employees to update personal details like addresses, ensuring they receive important documents on time and that all data is accurate for reporting purposes.

Prepare communication plans.

Proactively notify employees about how to access year-end documents and promote the benefits of opting for paperless forms, such as convenience and reduced waste.

Review benefits and prepare for open enrollment.

Assess and adjust benefit plans, prepare open enrollment materials, and review Affordable Care Act requirements to ensure compliance for the upcoming year.

Review compliance requirements.

Audit your timekeeping and payroll systems to ensure they meet the latest Department of Labor and Fair Labor Standards Act requirements.

Prepare final payroll.

Process any bonus payments separately before January 5, 2026, to take full advantage of tax efficiencies and accurate calculations.

Check tax rates and wage bases.

Review and update tax rates and wage bases, ensuring the correct limits are set for Social Security, unemployment, and other relevant taxes for the new year.

Distribute tax forms if not paperless.

Ensure Form W-2s, Form 1099s, and other tax documents are distributed to employees by January 31, 2026, if they haven't opted for paperless forms.

Update employee handbook and policies.

Review and revise your employee handbook to reflect any policy changes for the new year and distribute it to employees via internal communication tools.

Evaluate your year-end program and ask for feedback.

After the year-end process is complete, send a survey to gather feedback from employees and stakeholders, identifying areas for improvement next year.