

Namely Year-End HR Checklist



The Ultimate Year-End HR Checklist: Preparing for the New Year

At Namely, we understand that closing out the year is pivotal for every HR team. Our Year-End HR Checklist is designed to simplify your year-end process, so you can confidently tackle critical tasks and move into the new year with a solid foundation. For each of the major areas HR typically manages, we've provided a list of items to be sure you review, verify and update.

1. Download your Year-End HR Checklist

Look at you, already crushing it!

2. Labor Compliance

- Review incoming federal, state and local labor laws (including minimum wage); update your systems accordingly
- Verify that you have all required labor law posters for the upcoming year
- Review your employee handbook and make policy updates as needed
- Confirm state-specific compliance updates effective January 1, such as pay transparency, paid leave, or harassment training

3. Performance Evaluations

- Conduct and document year-end performance reviews
- Recognize top performers and achievements
- Update review process for 2026 as needed

4. Benefits Renewal & Compensation Review

- Consider conducting a compensation review and adjusting salaries, when necessary, to remain competitive
- Review employees' PTO status to:
 - Encourage employees to use expiring PTO
 - Ensure proper year-end PTO carryover or employee payouts
- Finalize employee benefits plans and coverage, if benefits renewal date is January 1
 - Confirm all employees received their health insurance ID cards
 - Verify that your Flexible Savings Account (FSA) and Health Savings Account (HSA) plan limits are updated for the new year per IRS regulations
 - Update payroll and plan systems with 2025 401(k) contribution limits
- Check state retirement plan mandates for compliance

5. Payroll Processing

- Review/reconcile this year's payroll processing records
- If you find uncashed pay checks, follow your state mandates regarding unclaimed pay
- Verify year-end/holiday bonuses, if you provide them
- Update your payroll system to reflect the FICA taxable wage base effective January 1
- Confirm that benefit contributions will be factored into payroll processing
- Confirm carryover of benefit deductions (health, retirement, etc.) into 2026 payroll
- Establish your new year payroll schedule/calendar and communicate to employees
- Remind employees to complete updated IRS W-4 tax documentation forms, if needed

6. Payroll Tax Documentation

- Audit employee records for accuracy to:
 - Validate employee addresses and Social Security numbers
 - Check records for employees who terminated employment mid-year
- Prepare employee year-end tax documentation (due by January 31), including:
 - W-2 forms for employees
 - 1099 forms for independent contractors
- Prepare Form W-3 (due to the IRS by January 31, along with W-2s)
- Confirm e-file access and credentials for IRS and state portals are current before January deadlines

7. Professional Development

- Run year-end training reports and identify skills gaps
- Create and document goals for 2026
- Plan and schedule 2026 mandated training, such as:
 - State-mandated training (e.g., anti-harassment)
 - Industry-specific OSHA safety training
- Identify professional development opportunities to provide in 2026
- Review and update new hire onboarding/orientation processes

8. New Year HR Calendar

- Distribute your updated 2026 company holidays to employees

For your HR team's calendar, don't forget these important dates:

- ACA forms:
 - 1095-C forms - due to employees March 1
 - 1094-C and 1095-C forms - due to the IRS April 1
- Quarterly payroll forms:
 - IRS Form 941 (FICA) – due April 30, July 31, October 31 and January 31
 - State payroll reports, if required
 - Local payroll reports, if required
- Annual payroll forms:
 - IRS Form 940 (FUTA) – due by January 31

Note: If a due date falls on a Saturday, Sunday, or legal holiday, you may file on the next business day.

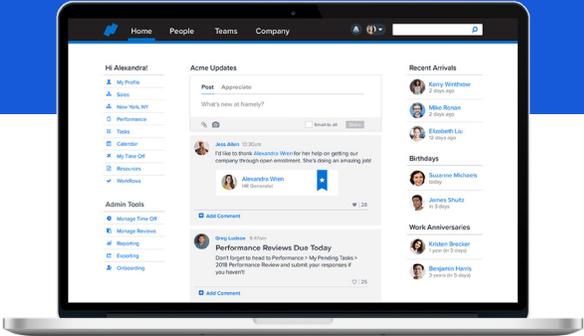


Get the New Year Off to a Great Start!

As you wrap up 2025, we hope you'll take time to recharge and reset—so you and your team are ready to thrive in 2026. At Namely, we're here to help you stay ahead every step of the way, from compliance to payroll to year-end reporting.



Request a Call



About Namely

Namely helps businesses simplify processes, reduce risk, and improve the employee experience through our Human Capital Management (HCM) platform built for today's dynamic and diverse workforces. Designed to meet your company's needs now and in the future, Namely combines HR, Payroll, Time, Benefits & Talent software in a single platform to help you handle critical business functions faster, easier and more accurately.

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