HR Health Check Up

Tips for Wrapping Up the Year and Getting Ahead of the Next One

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You First

HR Certification Status
Health Check Up
Growth Opportunities

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Technology for a Better Life

Applicant Tracking
Paperless Onboarding
Orientation
Learning Management System
Performance Management

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Reports and Notices
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OSHA Record Keeping
EEO-1 Experience and Info
Affordable Care Act Notices
Posters
W2s

5

Benefits Related

401k Notices
Summary Plan Descriptions
Flex Spending Account Updates
HIPAA Notices
Medicare

6

Forms & Policies

Handbook Review and Update

Job Descriptions Update

Pre-hire and New-hire forms

Travel & Expense Policy

Performance Reviews

Employment Agreements

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Identify Compliance Gaps

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Processes

Pay Equity

Employment Filing System

I-9 and Everify

Record Retention

Wage and Hour Compliance

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Fair Labor Standards Act
Salary Level Increase for 2020

Job Classifications
Pay Practices
Auto-deducts, Breaks, Comp-Time
Independent Contractors
Time tracking
Overtime bonus calculation
Final Pay Requirements
Benefits Eligibility

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Get Organized

Email inbox subfolders
Move toward paperless
Files and binders
Vendor contract renewals
Drug Free Recertification
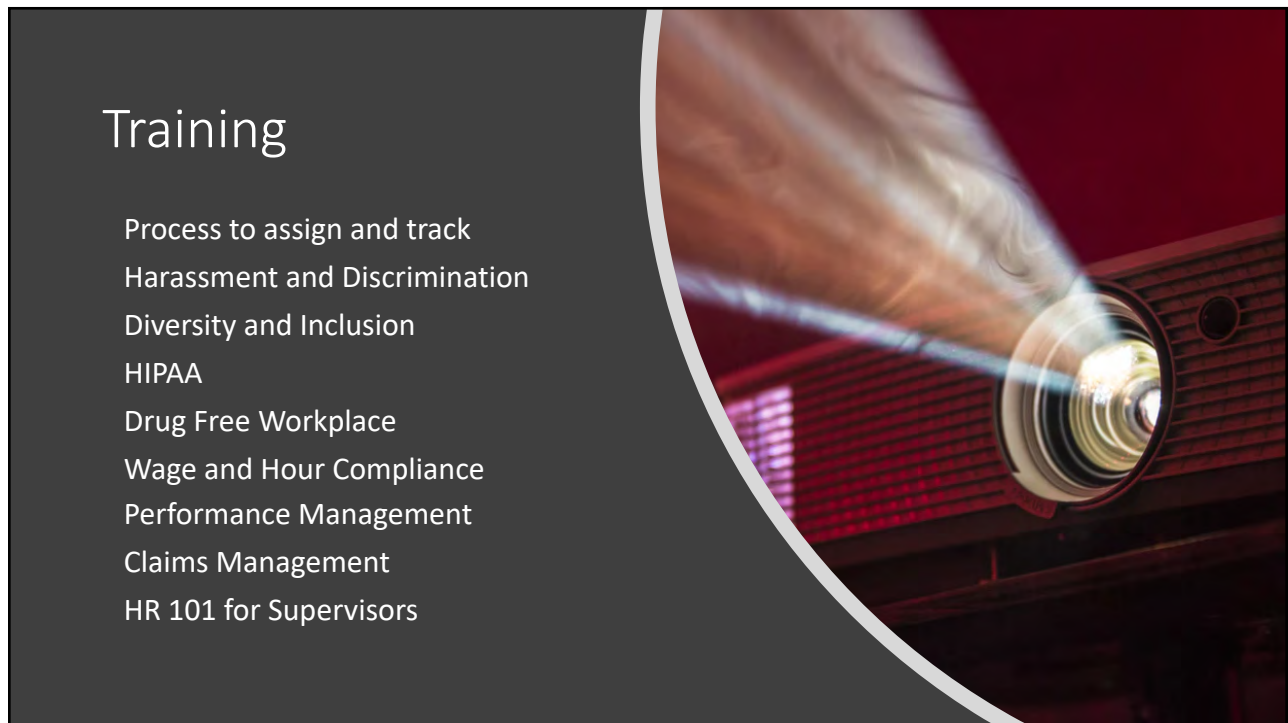Employees on Leave
Licensing Tracking and Updating

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Payroll Data

Addresses

Tax elections

Emergency contacts

PTO/vacation balances & Carry-over

Holiday schedule

Pay calendar for next year (leap year)

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Training

Process to assign and track

Harassment and Discrimination

Diversity and Inclusion

HIPAA

Drug Free Workplace

Wage and Hour Compliance

Performance Management

Claims Management

HR 101 for Supervisors

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Culture/Brand

Social Media
Events
Stay Surveys/Employee Voices
Changes to policies or practices
Candidate feedback
Intentional Messaging

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Analyze and Plan

Turnover
Incident Rates
Benefits Plan Design
Budgets
Alignment with Company
Leading Indicators

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GOALS

Compliance Gaps

Skills and Knowledge

Processes

Technology for Efficiency

Documentation/Organization

Engagement

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