FOR EMPLOYERS · OCTOBER THROUGH JANUARY

The Year-End Readiness Checklist

Open enrollment, minimum wage changes, posted pay ranges and year-end reviews all land in the same eleven weeks — and they are the same problem wearing four hats. Ten steps, in the order I would do them.

By **Erin Glover, SHRM-SCP** — an HR director with thirteen years in-house, now advising owner-run businesses. Written for any employer; check your own state and local rules where noted.

- [ ] 1 **Confirm your open enrollment dates and communicate them early** — If your plan year starts January 1, elections usually close in November. Build in a reminder week — the people who miss the window are always the ones who most needed the coverage.
  Every year, someone swears they never got the email.
- [ ] 2 **Find out whether your minimum wage changes on January 1** — Many states now adjust automatically each January, and some cities and counties set their own floor above the state. Check every state and municipality where you have someone working.
- [ ] 3 **Model the increase before it lands — including the people above the floor** — The cost you did not budget for is not the entry-level raise. It is the person a dollar above the new floor whose differential just disappeared.
  This is the one that surprises owners every single January.
- [ ] 4 **Check your posted wage ranges against the new rates** — A range published this fall on today's numbers can be wrong on January 1. If the bottom of a range sits near the floor, rebuild it with next year's figure before you post it.
- [ ] 5 **Refresh the benefits language in your job postings** — A growing number of states require a benefits description in the posting itself. If your plan changes at open enrollment, that language changes too.
- [ ] 6 **Brief your managers on year-end reviews in November, not December** — Give them the form, the timeline, and two examples of what good looks like. A manager writing reviews in the last week of December writes worse ones.
- [ ] 7 **Decide what happens with unused PTO before someone asks** — Carryover, payout, or use-it-or-lose-it — the rules vary by state and your policy needs to match what you actually intend to do.
- [ ] 8 **Confirm bonus and final payroll dates** — Know your last payroll of the year, when bonuses run, and how either affects the tax year. Payroll providers need this earlier than you would think.
- [ ] 9 **Enter the new rates in payroll before the first run of the year** — Set them in advance rather than correcting afterward. Retroactive fixes cost trust as well as time.
- [ ] 10 **Close out the year's paperwork and calendar next year's dates** — Handbook acknowledgments, I-9s, policy updates, and the recurring dates that will otherwise surprise you again in twelve months.