



# COMPLIANCE CALENDAR 2024

# Federal Holidays

## January

Mon 1st • New Year's Day  
 Mon 15th • Martin Luther King Jr. Day

## February

Mon 19th • President's Day

## May

Mon 27th • Memorial Day

## June

Wed 19th • Juneteenth

## July

Thu 4th • Independence Day

## September

Mon 2nd • Labor Day

## October

Mon 14th • Columbus Day  
*(Indigenous Peoples' Day)*

## November

Tue 5th • General Election Day\*  
 Mon 11th • Veterans Day  
 Thu 28th • Thanksgiving  
 Fri 29th • Day after Thanksgiving\*

## December

Tue 24th • Christmas Eve\*  
 Wed 25th • Christmas Day  
 Tue 31st • New Year's Eve\*

*\*recognized by the state of Michigan*

### January

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### April

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### July

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### August

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### September

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### October

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### November

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### December

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# Beginning of Year Checklist

- Verify **minimum wage requirements** and **compensation strategy**
- Meet deadlines for **benefit plan renewals**
- Schedule employee **annual training classes**
- Review **exempt status classifications salary threshold**
- Verify correct **employee classification**
- Review upcoming **bank holidays** to ensure **payroll processing** is not affected  
*If a date change is needed, communicate that to the staff and payroll vendor in a timely manner*
- Review **company observed holidays**, communicate any changes for the year
- Update **payroll provider** with new **unemployment rate** from the Unemployment Insurance Agency (UIA)
- Review **W-2s** for accuracy before distribution  
*Wages, retirement box, pre-tax deductions, ER HSA contributions, etc*
- Review birthdays for
  - [a]** Dependents who may be aging off plans
  - [b]** 50 and older for retirement catch up
  - [c]** 55 and older for HSA catch up
  - [d]** Age bands for group life insurance policy rates
- Update **labor law postings**
- Verify which states employees are working in to **ensure compliance**
- Plan **diversity initiatives** and **culture calendar** for the year

*This calendar was created as a resource to help you identify important holidays, payroll compliance deadlines, and benefit due dates. It may not be all-inclusive for every employer; some compliance dates are subject to change based on the benefit plan year.*

# January, February, March

# 2024

## January

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## March

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## Dates & Deadlines

<b>January 1</b>	Coverage begins for 2024 health insurance plans for individuals through the Marketplace Review and update payroll for annual limit for HSA, FSA, retirements plans and other health plans Ensure updated tax forms are used for new hires
<b>January 31</b>	Forms W-2 and 1099 due to employees 1095-B & 1095-C Forms delivered to employees
<b>February 1</b>	Deadline for OSHA 300A Log (Forms 300 and 300A) to be posted in all non-exempt workplaces through April 30, unless exempt industry
<b>February 28</b>	File ACA Forms (Paper Filing Deadline), including 1094-C, 1095-C, 1099-MISC without NEC to IRS
<b>March 1</b>	Submit disclosure to CMS of Medicare Part D coverage for plan years starting in January (or within 60 days of the start of the plan year if on a non-calendar year plan)
<b>March 2</b>	Electronically reporting OSHA Form 300A data for calendar year 2023
<b>March 31</b>	File ACA Forms 1094/1095 with the IRS if filing electronically EEO-1 Reporting and filing deadline for employers with 100 or more employees, or federal contractors with at least 50 employees.

## Monthly Themes & Holidays

### January

National Mentoring Month

#### Mon 1st

New Year's Day

#### Thu 11th

International Parity at Work Day

#### Mon 15th

Martin Luther King Jr. Day

### February

Black History Month

#### Mon 19th

President's Day

### March

Women's History Month

#### Fri 1st

National Employee Appreciation Day

#### Fri 8th

International Women's Day

#### Thu 21st

Collaborative Cafe: In-Person

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**Keep up to date on all our events**  
visit [hrcollaborative.com/events](https://hrcollaborative.com/events)

# April, May, June

2024

## April

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## June

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## Dates & Deadlines

<b>April 30</b>	Provide Summary Plan Descriptions to all participants of the health insurance plan if on a calendar year renewal (if not, provide SPDs within 120 days of new plan adoption)  <b>Review I-9 forms:</b> Destroy those that can be destroyed based on federal guidelines and review the expiration date of the form.
<b>May 1</b>	Remove OSHA posting
<b>June</b>	<b>Mid-Year Benefits Review:</b> Remind employees to take advantage of any eligible voluntary benefits

## Monthly Themes & Holidays

### April

**Mon 1st - Sun 7th**  
National Public Health Week

**Wed 10th**  
Michigan HR Day

**Mon 22nd**  
Earth Day

### May

- Employee Health and Fitness Month
- Mental Health Month

**Wed 1st**  
Collaborative Cafe: Elevate & Engage

**Mon 27th**  
Memorial Day

### June

LGBT Pride Month

**Wed 19th**  
Juneteenth

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# July, August, September

2024

## July

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## September

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## Dates & Deadlines

### July 31

Deadline to file Form 5500 or 5500-EZ for group plans with 100 or more participants

**Compliance Check:** Ensure benefits notices were or will be issued as required

### August

**School Physicals:** Remind employees about dependent benefits before school begins

### September 30

Deadline to provide employees with the Summary Annual Report (SAR) for employers who filed a 5500

## Monthly Themes & Holidays

### July

Disability Pride Month

#### Thu 4th

Independence Day

### August

- National Eye-Exam Month
- National Wellness Month
- South Asian Heritage Month

### September

Suicide Awareness Month

#### Wed 4th

Global Talent Acquisition Day

#### Sept, Sun 15 - Oct, Tue 15

National Hispanic Heritage Month

#### Mon 16th - Fri 20

Tech Week

#### Thu 26th

HR Professional Day

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# October, November, December 2024

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## Dates & Deadlines

<b>October 14</b>	Medicare Part D Notice of Creditable Coverage Delivered to Plan Participants
<b>November</b>	<p>Enrollment begins for 2025 health insurance plans for individuals through the Marketplace</p> <p>Encourage employees to fill out new tax forms if they experienced any personal or financial changes. Per the IRS, examples of changes that could require a new Form W-4 include changing the filing status on a tax return, changing the number of jobs worked during the year, and other income, deductions, or credits</p> <p>Remind Employees to submit FSA receipts before the end of the year</p> <p><b>Prepare for year end payroll:</b> Fringe benefits like personal use of company car</p>
<b>December 15</b>	Open enrollment period ends for 2025 health insurance plans for individuals through the Marketplace
<b>December 31</b>	<b>Reminder:</b> Employers who offer 401(k) or flex spending accounts must conduct a non-discrimination testing as of the last day of the plan to ensure benefits are available to all eligible employees under the same terms

## Monthly Themes & Holidays

### October

- Disability Employment Awareness Month
- National Work and Family Month

#### Sept, Sun 15 - Oct, Tue 15

National Hispanic Heritage Month

#### Mon 14th

Columbus Day (Indigenous Peoples' Day)

#### Wed 16th

National Boss' Day

#### Wed 23rd

MISHRM Conference

#### Thu 31st

Halloween

### November

Native American Indian/Alaska Native Heritage Month

#### Tue 5th

General Election Day

#### Mon 11th

Veterans Day

#### Thu 28th

Thanksgiving

### December

#### Thu 12th

Collaborative Cafe: Virtual

#### Tue 24th

Christmas Eve

#### Wed 25th

Christmas Day

#### Tue 31st

New Year's Eve

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# End of Year Checklist

- Review and remind employees of **inclement weather policy** and **pay issues**
- Process **final bonuses** and all **fringe benefits** before the last check of the year
- Remind employees to review **personal information** and **taxes** for accuracy  
*This will ensure timely W-2 delivery and fewer filing errors*
- Confirm **PTO payout** and **rollover** policies
- Ensure all **distributed physical checks** are recorded for **YTD wage** purposes
- Review changes to the **federal mileage rate** and communicate to staff
- Confirm with **STD/LTD carrier** who will be creating **W-2s** and paying associated **payroll taxes**
- Cross-check **HSA, FSA, and retirement plans** to ensure employees have not exceeded limits

## First Day of Plan Year & Annual Notices

- ADA Wellness Program Notice
- CHIP Notice
- GINA Wellness Program Authorization
- Grandfathered Plan Notice
- Newborns' and Mothers' Health Protection Act Notice
- Notice to enrollees regarding Group Health Plan Opt-out
- Wellness Program Notice of Reasonable Alternatives
- Women's Health and Cancer Rights Act Notice
- 401k Annual Notices and/or Auto Enrollment Notices



# Department of Labor Major Laws

The **Fair Labor Standards Act** prescribes standards for wages and overtime pay, which affect most private and public employment. It requires employers to pay covered employees who are not otherwise exempt at least the federal minimum wage and overtime pay of one-and-one-half-times the regular rate of pay.

The **Occupational Safety and Health (OSH) Act** is administered by the **Occupational Safety and Health Administration (OSHA)**. Safety and health conditions in most private industries are regulated by OSHA or OSHA-approved state programs, which also cover public sector employers. Employers covered by the OSH Act must comply with OSHA's regulations and safety and health standards. Employers also have a general duty under the OSH Act to provide their employees with work and a workplace free from recognized, serious hazards. OSHA enforces the law through workplace inspections and investigations. Compliance assistance and other cooperative programs are also available.

Private company's need to carry workers compensation. See the **workers' compensation program website** for additional resources.

The **Employee Retirement Income Security Act (ERISA)** regulates employers who offer pension or welfare benefit plans for their employees. Title I of ERISA is administered by the **Employee Benefits Security Administration (EBSA)** and imposes a wide range of fiduciary, disclosure and reporting requirements on fiduciaries of pension and welfare benefit plans and on others having dealings with these plans.

Uniformed Services Employment and Reemployment Rights Act Certain persons who serve in the armed forces have a right to reemployment with the employer they were with when they entered service. This includes those called up from the reserves or National Guard. These rights are administered by the **Veterans' Employment and Training Service**.

Garnishment of employee wages by employers is regulated under the **Consumer Credit Protection Act** which is administered by the **Wage and Hour Division**.

**Family and Medical Leave Act (FMLA):** Administered by the **Wage and Hour Division**, the FMLA requires employers of 50 or more employees to give up to 12 weeks of unpaid, job-protected leave to eligible employees for the birth or adoption of a child or for the serious illness of the employee or a spouse, child or parent.

**Posters:** The **elaws Poster Advisor** can be used to determine which poster(s) employers are required to display at their place(s) of business.

## **Additional Resource:**

[Fair Labor Standards Act](#) • [Federal Employee Laws by Employer Size](#)

[Occupational Safety and Health \(OSH\) Act](#) • [Occupational Safety and Health Administration \(OSHA\) Workers' Compensation Program](#)

[Employee Retirement Income Security Act \(ERISA\)](#) • [Employee Benefits Security Administration \(EBSA\) Veterans' Employment and Training Service](#)

[Consumer Credit Protection Act](#) • [Wage and Hour Division](#)  
[elaws Poster Advisor](#)

# HR Core Areas

Providing a positive employee experience begins with ensuring the right tools, resources, and training are in place to support employees to reach for their full potential. Begin by evaluating your people operations within these core areas of Human Resources.

✓ **Culture**  
Company mission, vision values  
Handbook implementation and updates

✓ **Payroll**  
Exempt vs. non-exempt employees  
Overtime rules

✓ **HR Administration**  
Employee record keeping  
Job postings  
HR Compliance  
Federal & State Employment Posters

✓ **Timekeeping**  
Payroll administration

✓ **Health & Safety**  
Workplace injury process  
OSHA Compliance  
Anti-harassment training

✓ **Training and Development**  
Coaching  
Training  
Appraisals / Feedback loop

✓ **Benefits**  
Health insurance notices  
Benefit offerings  
Benefit administration

✓ **Engagement**  
Stay interviews  
Pulse surveys  
Communication

✓ **Hiring, Recruiting, Onboarding**  
Interviewing and selection  
Onboarding process  
New employee orientation

✓ **Time Off**  
Leave of absence (ADA, FMLA)  
Paid Time Off  
Paid medical leave

✓ **Compensation**  
Benchmarking

✓ **Separations**  
Separation process  
Offboarding

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